



Procurement Services Strategic Plan

Summary

The Procurement Services Department of Charlotte County Public Schools assessed the responsibilities under pursuant to the mission, vision and values pursuant to a strength, weakness, opportunity, threat analysis in order to identify the most significant opportunities to contribute to the enhancement of the Procurement Services over the next several years. As a result of this review, our Department determined that the primary focus would be the implementation of a strategic plan for the improvement of the Procurement Services Department.

Vision

"To invest in the future of our community through strategic support of student success!"

Mission

The Procurement Services primary role is to facilitate the procurement process obtaining the necessary equipment, materials, and services our customers require to support their instructional or administrative programs. Our department strives to maximize district resources by obtaining competitive quotes or bids.
"One Voice. One Team. One Message."

Values

Clear Communications. The key to our District's success. Procurement professionals take the lead, since we interface with all stakeholders. These values apply to all District employees.

Integrity. Act with integrity without regard to the entity being a supplier, elected official, member of the public or fellow employee. Each action and communication should be issued without impropriety (i.e., it could be published in a newspaper without reproach).

Practice the 7 Habits of Highly Effective People: Be proactive, begin with the end in mind, put first things first, think win-win, synergize, sharpen the saw and seek first to understand, then to be understood.

Identification of Issues and Opportunities for Change

Procurement Services with the collaboration of District end-users has developed a list of issues and improvement opportunities in the procurement processes.

Development of Objectives for Improvement

The Procurement Services Department has developed a series of specific objectives to address one, or more of the issues or problems identified. Throughout this process,

procurement staff understands the need to obtain input on issues and problems from all stakeholders in the procurement process.

Development of Recommendations

Procurement Services has identified best practices, and developed strategies and recommendations to meet defined objectives. The Procurement Services Department also used previous data gathered from our ongoing improvement process in developing recommendations specific to procurement services.

Together, these objectives and strategies form the Procurement Strategic Plan. In general, this strategic plan reflects the Procurement Department views that significant improvements in procurement processes, technology and innovation can result in a more responsive and streamlined procurement system which will benefit taxpayers, the business community, and District end users.

The Strategic Plan has three priority objectives aimed at improving the County procurement. The balance of the plan includes short and long term strategies aimed at implementing each of these objectives.

OBJECTIVES FOR IMPROVING PROCUREMENT

- I. Shorten the time from need identification to contract and delivery of actual product.
- II. Educate newly hired employees and the public about the District's e-procurement system.
- III. Recruit and retain certified procurement professionals.

OBJECTIVE I

Shorten the time from need identification to contract and delivery of actual product.

Strategy (1)

Promote procurement card use.

Rationale: Use of the procurement card reduces paperwork and total processing time because the total number of individual invoices to be separately processed is fewer.

Implementation: Determine why Departments are making only limited use of the procurement card and work to eliminate those barriers.

Strategy (2)

Examine steps in ITN and RFP methodology for streamlining opportunities.

Opportunity: The Invitation to Negotiate (ITN) or Request for Proposal (RFP) process can be long depending on the needed goods, or services. Requesting end-users do not understand the why the methodology may take months to complete.

Implementation: Publish estimated lead times to District end-users and share this with all key end-users and train annually in face-to-face meetings. Reinforce these long lead items with key District leaders.

Strategy (3)

Explore ways to help end-users communicate and clarify their needs.

Rationale: Clarification of specification and evaluation criteria would better equip the Procurement Services Department. Such clarification will allow for preparation and submission of more complete specification and evaluation criteria. Clarification of evaluation criteria would also benefit potential vendors.

Implementation: Design a procurement worksheet for requesting end-users of needed good/services to reveal detail information to clarify specification and evaluation criteria.

SMART Results: Annually measure procurement processing lead times for formal procurements against i) prior District performance and ii) the Council of Great City Schools. See the Processing Administrative Lead Time (PALT) for formal solicitations.

OBJECTIVE II

Educate newly hired County employees and the Public in the County's e-procurement system to prevent "maverick", non-competitive spending.

Strategy (1)

Educate newly hired County employees on County Procurement.

Rationale: Many newly hired County employees have never work in government and do not understand the purchasing process. Although the District's procurement system is centralized, departments are allowed to make "small purchases". However, newly hired employees are not educated on the legal process of obtaining these small goods/services needed such as securing three quotes before the purchase.

Implementation: Provide initial training with for new employees and recurring, annual training for current employees.

Strategy (2)

Promote and educate local vendors on the County's new e-Procurement Bidder's Notification System.

Rationale: The Procurement Department has implemented an electronic bidding platform. Many local vendors within the County do not know about this bidding platform. Although required by the State and District's Policy to advertise solicitations in publicly, many local potential vendors will not notice the opportunity.

Implementation: Educate the public by inviting vendors, contractors and consultants to the April 29, 2022 reverse trade show and demonstrating how to register, submit questions and upload proposals to this bidding platform.

SMART Results: Annually measure competitive procurements to total procurements as compared to i) prior District performance and ii) the Council of Great City Schools. See the attached Competitive Procurement Ratio.

OBJECTIVE III

Recruit and retain certified procurement professionals.

Strategy

Develop a stair-step, career progression for entry buyers to be promoted through demonstrating good performance and obtaining national procurement certification(s).

Rationale: This Objective promotes the technical knowledge of the District's procurement staff which directly affects processing time, negotiation, procedural controls, and strategies applied to maximize cost savings. The procurement function has evolved to require procurement professional staff to focus on—

- strategic issues versus transactional processing
- advanced business skills that look at agency supply chain, logistics optimization, total cost of ownership evaluations, make- versus- buy analysis, leveraging cooperative procurements, complex negotiations focusing on cost and other value-added factors, and agency spend analyses, and
- balance of service with internal controls and compliance.

Implementation: This will require the support and approval of both senior management and the HR Division. Studies demonstrate that initial good selection practices and excellent retention practices save a government agency time and money.

SMART Results: Annually measure the number of procurement staff with a professional certificate, divided by total number of procurement staff as compared to i) prior District performance and ii) the Council of Great City Schools. See the attached Procurement Staff with Professional Certificate.

Purchasing Department Benchmarks

Council of the Great City Schools							Charlotte County Public Schools				
Description	Metric	Goal	1. Benchmarking Project issued Oct 2020, 2018/19 Median Scores	1. Benchmarking Project issued Oct 2021 (latest report), 2019/20 Median Scores	Report Page #	pdf Page #	2015/16 Actual Scores	2016/17 Actual Scores	2017/18 Actual Scores	Atch #	BusPlus Report, 2071-18, page # or Other
Strategic Sourcing Ratio	Competitive Procurements/ Total \$	Increase %	14.5%	18.6%	51	59	63.8%	72.7%	78.2%	2	63
Competitive Procurements Ratio	Competitive Procurements/ Total \$ (includes construction)	Increase %	62.6%	65.5%	52	60	31.9%	75.2%	83.7%	3 3	63 Summary & CMAR Rpts
Cooperative Purchasing Ratio	Cooperative \$/Total \$	Increase %	7.0%	10.4%	53	61	29.6%	38.9%	46.4%	4	63
Procurement administrative leadtime (PALT), formal solicitations	Procurement Acquisition Leadtime, over \$50K. Average # of Days to award from receipt of request	Decrease # days	68.0	70.0	56	64	18.0	22.1	13.3	5	
Procurement administrative leadtime (PALT), informal solicitations	Procurement Acquisition Leadtime, equal/up to \$50K. Average # of Days to award from receipt of request	Decrease # days	7.0	7.0	57	65	7.2	6.7	7.1		
Procurement Staff with Professional Certificate	Certified Staff/Total Procurement Staff	Increase %	23.5%	16.7%	58	66	60.0%	75.0%	60.0%	6	See Summary
Warehouse Stock Turn Ratio	Total Warehouse Issues/12 month average	Increase Ratio	5.6	2.0	60	68	4.38	4.02	5.57	7	
Benchmarked by the National Institute of Government Procurement, "NIGP" (not benchmarked by the Council of Great City Schools)											
National Agency Recognition	Obtain NIGP's outstanding accreditation	<u>Outstanding</u> Agency Accreditation Achievement Award			n/a	n/a	Achievement of <u>Excellence</u> in Procurement	<u>Outstanding</u> Agency Accreditation Achievement Award (OA4)	OA4	8	n/a
*"Quality Public Procurement De											