

# 1. Assessment Plan - Three Column

## PIE - Administrative Services: Purchasing, Printing Services, & Mail Services Unit

### 2. Where We Are Now: Year at a Glance

*2019-20*

**Contact Person:** Teresa Patterson

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**Summary of Notable Achievements:** 1. Over 300 contractor Pre-Qualification applications were processed in 2019-20 to qualify contractors to bid on the College's construction projects.

2. The current number of US Bank P-Cards issued to campus staff is 111. In 2019-20 there were 5,664 transactions totaling \$1,419,489.32. 263 purchases were made using the Purchasing Department credit card totaling \$321,047.58. This resulted in a rebate to the College in the amount of \$26,567.96.

3. Purchasing staff processed the following:

Purchase Orders: 3,834

Change Orders: 587

No. of Purchases made using the Purchasing Department Credit Card = 263 transactions totaling \$321,047.58

Bids/RFPs: 46

**Program Planning (Equity, Retention and Success):** NA

**External and Internal Conditions Analysis:** External: Due to COVID-19, processes were modified for Mail Services and the distribution of campus mail. Since this work cannot be done remotely we implemented a more limited Post Office pick-up and drop-off schedule for all mail, a quarantine system before mail is sorted, and set up a designated pick-up location for campus mail. We understand that mail is an essential area and have implemented new protocols to ensure the health and safety of our employees is a top priority.

Internal: The utilization of electronic signatures for purchase orders, pre-qualification packages, and agreements has allowed staff to complete nearly all work-related tasks remotely and improved efficiency in many areas. Planet Bids is also successfully being utilized for construction related bid activity, RFPs, commodity bids, and insurance certificates, which are all received electronically.

**Critical Decisions Made by Unit:** Purchasing, Risk Management, and Facilities have partnered to secure personal protective equipment items such as masks, hand sanitizer, and sanitizing wipes, for critical onsite workers currently on campus as well as planning for future needs for staff and students once campus reopens. This includes the purchase of portable hand washing stations, which will be utilized across campus for students and staff as additional sanitation, and furniture modifications, such as separation panels, to ensure appropriate social distancing in classrooms.

**Contributors to the Report:** Tiffany Chen

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<i>Unit Goals</i>	<i>Resources Needed</i>	<i>1. Where We Make an Impact: Closing the Loop on Goals and Resources</i>
<p><b>Staff Development</b> - Continue seeking staff development opportunities such as conferences and workshops to improve job skills and efficiencies for Purchasing staff.  <b>Status:</b> Active  <b>Goal Year(s):</b> 2015-16, 2016-17, 2017-18, 2018-19, 2019-20, 2020-21  <b>Goal Entered:</b> 06/26/2019</p>	<p><b>Report directly on Goal</b></p>	<p><b>Reporting Year:</b> 2019-20  <b>% Completed:</b> 100            Staff regularly attends meetings and workshops, when offered. Meetings and workshops are either held on or off-campus. These meetings have helped to increase staff's knowledge related to all areas of the Purchasing Department. (07/31/2020)</p>
<p><b>Customer Service</b> - Continue working towards providing excellent customer service and support to the campus staff.  <b>Status:</b> Active  <b>Goal Year(s):</b> 2015-16, 2016-17, 2017-18, 2019-20, 2020-21  <b>Goal Entered:</b> 06/26/2019</p>	<p><b>Report directly on Goal</b></p>	<p><b>Reporting Year:</b> 2019-20  <b>% Completed:</b> 100            Staff are continually working towards providing excellent customer service and support to the campus. Staff are extremely efficient in handling the many urgent requests received (sometimes multiple requests daily). (07/31/2020)</p>
<p><b>Cross Training</b> - Promote cross-training to enhance employee knowledge of other areas.  <b>Status:</b> Active  <b>Goal Year(s):</b> 2015-16, 2016-17, 2017-18, 2019-20, 2020-21  <b>Goal Entered:</b> 06/26/2019</p>	<p><b>Report directly on Goal</b></p>	<p><b>Reporting Year:</b> 2019-20  <b>% Completed:</b> 100            Cross training is done on a continual basis in order to enhance knowledge of other areas of the department. This has allowed Purchasing to continue providing needed services to the campus during an employee's absence. (07/31/2020)</p>
<p><b>Replace Faculty Walk-Up Copiers</b> - In order to maintain the existing 8 faculty walk-up copiers, it is recommended that we follow a replacement cycle of one per fiscal year. One copier will only be supported for 20-21 and will need to</p>	<p><b>Report directly on Goal</b></p>	<p><b>Reporting Year:</b> 2019-20  <b>% Completed:</b> 25            A new Canon IR8585i was received and was placed in Bldg. 26D. This is an ongoing goal as walk-up copiers throughout the campus that serve our students, faculty, and staff need to be replaced as they become outdated and are no longer able to be serviced. (08/11/2020)</p>

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<p>be replaced for 21-22. Estimated cost = \$12,000.  <b>Status:</b> Active  <b>Goal Year(s):</b> 2018-19, 2019-20, 2020-21  <b>Goal Entered:</b> 06/26/2019</p>	<p><b>Request - Full Funding Requested - 1</b>          faculty walk-up copier was replaced in 2018-19. In order to replace aging equipment, it is necessary to fund at least 1 faculty walk-up copier for 2019-20.  <b>Describe Plans &amp; Activities Supported (Justification of Need):</b>          To maintain necessary equipment to support faculty, staff, and students for all educational needs  <b>Lead:</b> Teresa Patterson  <b>Type of Request:</b> INSTRUCTIONAL SUPPORT PROGRAM FUNDING (INSTRUCTIONAL EQUIPMENT): Equipment, library material, or technology for classroom instruction, student instruction or demonstration, or in preparation of learning materials in an instructional program, equal or over \$500.  <b>Planning Unit Priority:</b> Medium  <b>One-Time Funding Requested (if applicable):</b> 12000</p>	
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<p><b>Additional Staff for Mail Services -</b>          Mail Services is requesting one additional 47.5% employee in order to improve efficiencies and deliveries to the growing campus. As the number of students, faculty, and staff have increased and new programs and buildings added, Mail Services staffing levels have remained the same. Services are currently provided by two full-time employees. Mail Services has been able to maintain service to the campus, however, they are unable to increase delivery schedules. Several departments have</p>	<p><b>Report directly on Goal</b></p> <hr/> <p><b>Request - Full Funding Requested -</b>          Hire one (1) 47.5% Mail Room Operator to augment the existing Mail Services staffing.  <b>Describe Plans &amp; Activities Supported (Justification of Need):</b>          Workloads and delivery locations have increased in the Mail Services Department over the past several years, but staff has remained at two</p>	<p><b>Reporting Year:</b> 2019-20  <b>% Completed:</b> 0          Approval was received to fund this position. However, the recruitment process has been put on hold, due to Covid-19. (07/31/2020)</p>
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<p>requested that deliveries be made to additional locations, but Mail Services is unable to fulfill those requests with the current staffing levels. Hiring one 47.5% employee will help improve efficiencies and will aid in providing additional customer service to the campus.</p> <p><b>Status:</b> Active</p> <p><b>Goal Year(s):</b> 2018-19, 2019-20, 2020-21</p> <p><b>Goal Entered:</b> 08/04/2020</p>	<p>(2) full-time employees. Hiring additional staff will help reduce workloads and provide faster sorting and deliveries of mail to the campus. In addition, mail services could add additional drop off locations to their current schedule as new programs come on line and additional staff hires. In addition, adding an additional employee would help ensure department coverage when staff are absent or on vacation.</p> <p><b>Lead:</b> Teresa Patterson</p> <p><b>Type of Request:</b> STAFFING: Requests for permanent employee positions or temporary/hourly employees.</p> <p><b>Planning Unit Priority:</b> High</p> <p><b>One-Time Funding Requested (if applicable):</b> 25000</p> <p><b>On-Going Funding Requested (if applicable):</b> 25000</p>	
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<p><b>Business Cards</b> - Increase in ongoing funding is needed for the purchase of Business Cards due to an increased number of new hires and increased printing costs. The amount requested is based on a three-year average in total spending.</p> <p><b>Status:</b> Archive</p> <p><b>Goal Year(s):</b> 2018-19, 2019-20</p> <p><b>Date Goal Archived/Inactivated:</b> 08/04/2020</p>	<p><b>Report directly on Goal</b></p> <p><b>Request - Full Funding Requested -</b> Ongoing Increase of \$5,000 to be added to current Budget for printing of Business Cards</p> <p><b>Describe Plans &amp; Activities Supported (Justification of Need):</b> The costs for printing business cards has increased as have the number of orders placed due to an increase of</p>	<p><b>Reporting Year:</b> 2019-20</p> <p><b>% Completed:</b> 100</p> <p>A institutional decision was made to not allocate any additional funding to the Business Card budget moving forward, which has resulted in changes to processes for business card orders. Once budget for campus has been expended, departments can choose to use their own funds for new card orders or wait until the next Fiscal year to request. (08/05/2020)</p>
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new employees.  
**Lead:** Teresa Patterson  
**Type of Request:** OTHER OPERATING EXPENSES AND SERVICES: Requests for contracted, legal/ audit, personal/ consultant, rent/ leases, repairs/ maintenance, and other misc. services. May also include request for travel and conference that does not require the assistance of POD.  
**Planning Unit Priority:** Medium  
**On-Going Funding Requested (if applicable):** 5000

<p><b>Staffing for Print Services</b> - Fill vacant part-time Print Services Technician.  <b>Status:</b> Active  <b>Goal Year(s):</b> 2019-20, 2020-21  <b>Goal Entered:</b> 08/04/2020</p>	<p><b>Report directly on Goal</b></p>	<p><b>Reporting Year:</b> 2019-20  <b>% Completed:</b> 50            This position was funded and approved and initial interviews took place however, due to Covid 19, the recruitment process has been put on hold as final interviews have not reconvened. (08/05/2020)</p>
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**Request - Full Funding Requested -**  
 Human Resources  
**Lead:** Teresa Patterson  
**Type of Request:** STAFFING: Requests for permanent employee positions or temporary/hourly employees.  
**Planning Unit Priority:** High

<p><b>Improve Efficiencies by expanding the use of OnBase, the College's document managements system -</b>            Expand OnBase training of campus Requisitioners to upload Requisition backup documents directly into the system. Also, installation of App Enabler. App Enabler will allow all requisitioners and related approvers to view the backup documents directly within Banner. This will eliminate the need to log in to a</p>	<p><b>Report directly on Goal</b></p>	<p><b>Reporting Year:</b> 2019-20  <b>% Completed:</b> 25            OnBase training for campus users continues to take place and funding was approved for App Enabler but installation is on hold due to other projects taking priority. (08/05/2020)</p>
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**Request - No Funding Requested -**  
 App Enabler has already been funded and purchased. IT support is needed to complete the installation.  
**Lead:** Teresa Patterson and Tiffany Chen

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separate system to view documents related to a particular Requisition/PO.  
**Status:** Active  
**Goal Year(s):** 2019-20, 2020-21  
**Goal Entered:** 06/26/2019

**What would success look like and how would you measure it?:** This would improve efficiencies by allowing staff to access Requisition backup from within Banner rather than signing into OnBase (a separate application) to view documents.  
**Type of Request:** IT SUPPORT: Requests for projects related to the implementation, integration, application, delivery, and support of information and instructional technologies.  
**Planning Unit Priority:** Medium  
**Total Funding Requested:** \$0.00