



Smith County Purchasing Department



***Business Plan FY10
Performance Measurements
Accomplished Goals***

Table of Contents

Letter from Director	Page 3
Department Information	Page 4
FY10 Goals & Objectives/Detailed	Pages 5-10
Court Approval/Signature Page	Page 7
Performance Measures/Accomplished Goals	Pages 11-15
FY09 Budget Review	Pages 16-17
Department Workload FY09	Page 18
Work in Progress/Staff Training Progress	Pages 19-21



COUNTY OF SMITH

Purchasing

Kelli Davis, CPPB, Director
200 E. Ferguson, Suite 414
Tyler, Texas 75702
903-590-4720

June 22, 2009

Memorandum

To: Honorable Judge Baker and Smith County Commissioners

From: Kelli Davis, CPPB

Subject: Purchasing Department

Purchasing is dedicated to providing the best possible service for the Smith County Departments and Businesses by setting and achieving goals that will continue to help Smith County pave a positive road for the future. The goal of the 2010 Purchasing Business Plan is to further broaden our scope and vision so that Purchasing, the Court, and the citizens of Smith County can continue to know where we are, where we are going, and how we are going to get there. It is the duty of this office to continue to search for more efficient and cost effective ways of doing things in an attempt to better serve the departments of Smith County while continuing to save taxpayer money. It is through training and teamwork that we continue to move forward successfully. Purchasing has accomplished many goals; and with hard work and dedication we will continue to strive for excellence.

Thank you for your guidance; we look forward to another successful year.

Smith County Purchasing Department Information

Purchasing Staff:

Purchasing Director: Kelli Davis, CPPB
Buyer: Kim Gould, CPPB
Admin. Assistant: Theresa Adams
Part time/Receptionist: Betty Thomas/Katelyn Norris

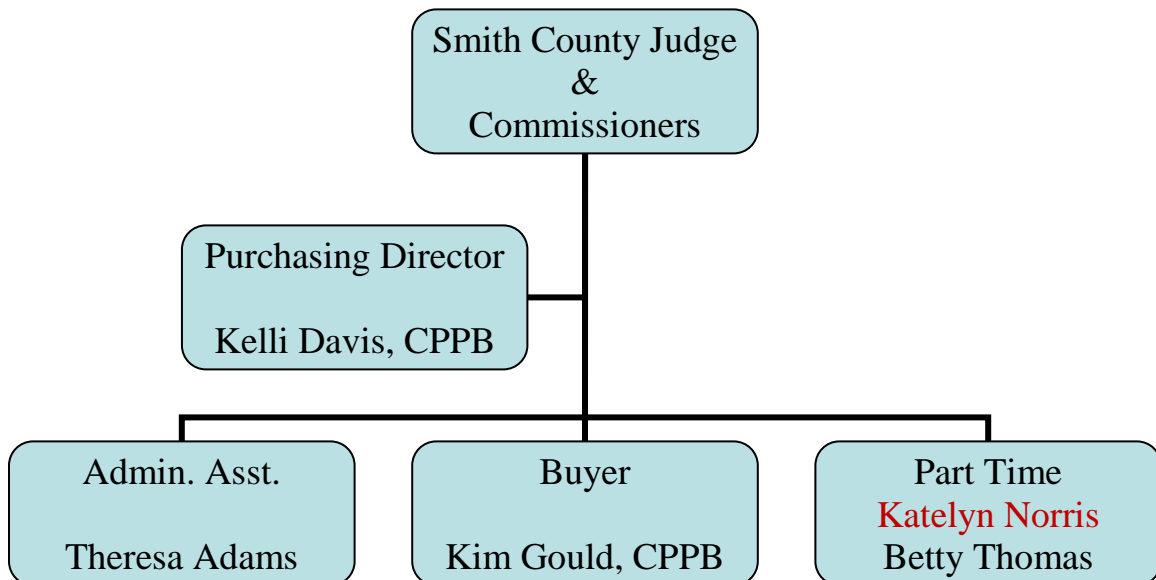
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Website: www.smith-county.com / Purchasing

Purchasing's Mission:

Smith County Purchasing Department exists to provide the best service possible to all County Departments in a fair and equitable manner and to protect the interests of the Smith County Taxpayers in all expenditures.

Organizational Chart





Goals & Objectives FY10

FY2010 Goals & Objectives

Objective 1:

- Organize the approved Smith County Project/Building Schedule(s) so that all projects are completed on-time and under/or at budget targets.

Related service point from Smith County Business Plan:

- Accountability Service Point 1
- Services/Processes Service Point 5
- Long Range Budget Service Point 7
- Contract Services Mgt. Service Point 10

Objective 2:

- Broaden the Smith County Standardization Project by seeking approval from Commissioners Court to implement new standard purchasing policies and procedures in an effort to save time, money and create a more professional atmosphere among all County Facilities.

Related service point from Smith County Business Plan:

- Accountability Service Point 1
- Customer Service Service Point 4
- Services/Processes Service Point 5
- Intergovernmental Network Service Point 6
- Long Range Budget Service Point 7
- Task Forces Service Point 8

Objective 3:

- Prepare step by step procedure manuals for each position in the Smith County Purchasing Department to give each employee a clear and written description of their expected duties. (*LGMA suggestion*)

Related service point from Smith County Business Plan:

- Accountability Service Point 1
- Staffing & Workforce Service Point 3

Objective 4:

- Team up with Information Technology Department to mainstream forms for all Departments to reduce the number of stock and ordered forms for Smith County.

Related service point from Smith County Business Plan:

- Accountability Service Point 1
- Technology Service Point 2
- Services/Processes Service Point 5
- Long Range Budget Service Point 7
- Contract Services Mgt. Service Point 10

Signature/Date:

Signature/Date:

**Kelli Davis, CPPB
Purchasing Director**

Honorable Joel P. Baker, County Judge

**Honorable Jeff Warr,
Smith County Commissioner Pct. 1**

**Honorable William McGinnis,
Smith County Commissioner Pct. 2**

**Honorable Terry Phillips,
Smith County Commissioner Pct. 3**

**Honorable JoAnn Hampton,
Smith County Commissioner Pct. 4**

Detailed Goals & Objectives

Objective 1:

- **Organize the approved Smith County Project Schedule so that all projects are completed on-time and under/or at budget targets.**

Actions required:

- Weekly staff meetings.
- Weekly meeting with Physical Plant Director.
- Run weekly financial reports.
- Organize information for Commissioners Courts review and approval.

Resources needed:

- Project Schedule/Codes
- Computer reports
- Conference area/schedules
- Marker board/staff updates

Objective 1 Strategy Summary:

The approved FY10 project schedule is an extensive priority for Smith County. This project schedule will present a heavy increase to the Purchasing Department workload. Purchasing has organized regular weekly meetings to send out updates as to not only the progress of each project but as an increased effort to make sure all projects are completed timely and on budget. Meeting the deadlines and budget targets will allow Smith County to move forward and focus on new priorities.

Objective 1 Timetable:

Projects Start Date	Projected Completion Date	Objective Managers
10/01/08	09/30/10	Purchasing Staff
	(unless specified other)	

Objective 2:

- **Broaden the Smith County Standardization Project by seeking approval from Commissioners Court to implement new standard purchasing policies and procedures in an effort to save time, money and create a more professional atmosphere among all County Facilities.**

Actions required:

- Meet with County Officials/Department Heads to discuss standard options.
- Research standard initiatives and goals.
- Seek approval from Smith County Commissioners Court.
- Publish and implement new standards policies.
- Update Standardization Manuals.

- Continue to meet with local governments to implement new cooperative purchasing standards

Resources needed:

- Conference area
- Schedule meeting dates
- Computers/printers
- Emails/networking
- General office supplies
- Commissioners Court Approval

Objective 2 Strategy Summary:

Implementation of Objective 2 will allow Smith County to save money through standardization of items and or processes. Working with local governments to volume and joint purchase approved standardized items and processes will allow for even greater savings and time management for all of Smith County. Standardization creates better time management for county departments and purchasing while also providing a more aesthetic atmosphere in all Smith County facilities.

Objective 2 Timetable:

Projected Start Date	Projected Completion Date	Objective Manager	Projected budget expenses
10/01/08	Continual project	Kelli Davis	Travel reimbursement

Objective 3:

- **Prepare step by step procedure manuals for each position in the Smith County Purchasing Department to give each employee a clear and written description of their expected duties. (LGMA suggestion)**

Actions required:

- Gather approved procedure/policy information.
- Narrow information to make user friendly.
- Create job manual with step by step instructions.
- Seek Commissioners Court approval.

Resources needed:

- Job Descriptions
- Purchasing Manual
- Computer/software
- Printer
- General office supplies

Objective 3 Strategy Summary:

Preparation of desk references will allow the employee to have written understanding of their expected performance. Manuals also allow for easy office cross training and a better understanding of job knowledge while eliminating confusion of what the job role is.

Objective 3 Timetable:

Projected Start Date	Projected Completion Date	Objective Manager	Projected budget expenses
02/01/10	09/30/10	Kelli Davis	Office supplies \$100.00

Objective 4:

- **Team up with the Information Technology Department to mainstream forms for all Departments to reduce the number of stock and ordered forms for Smith County.**

Actions required:

- Meet with departments.
- Gather forms that can be mainstreamed.
- Build forms in computers.
- Send computerized forms to departments.
- Remove forms from bid/stock.

Resources needed:

- Computer/network with all departments
- Calendar scheduling/email
- Printer

Objective 4 Strategy Summary:

Mainstreaming office forms will save Smith County Departments time and money. Time will be saved by utilizing computerized forms versus handwriting manual forms. Money will be saved as the departments utilize computerized forms instead of having them professionally printed. This project will also help eliminate stock forms and possibly in the future the need for a printed forms bid.

Objective 4 Timetable:

Projected Start Date	Projected Completion Date	Objective Manager	Projected budget expenses
10/01/09	09/30/10	Kelli Davis/Harvy Tanner	n/a



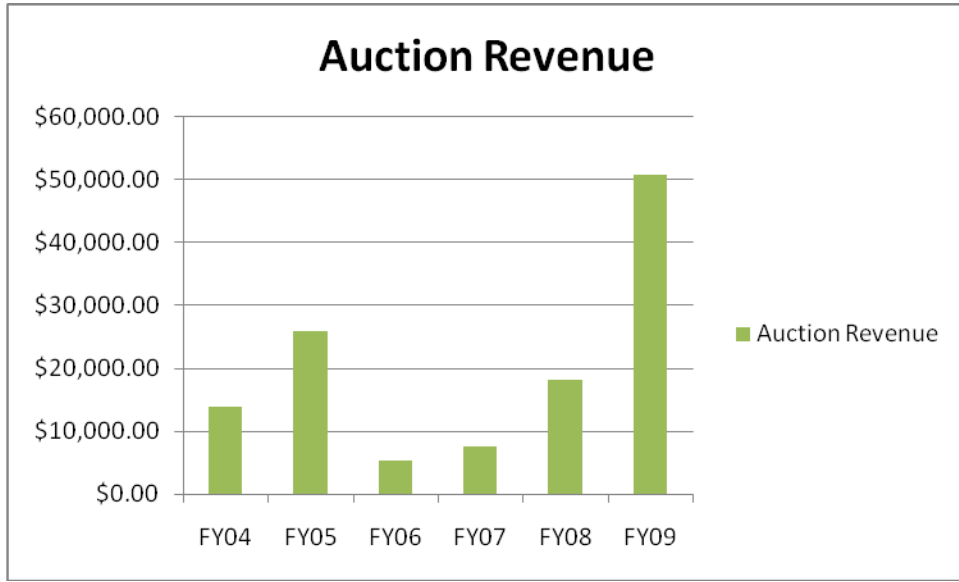
Performance Measures & Accomplished Goals

A better history of data of these new processes will allow purchasing to report all measures in statistical graphs and bar charts where possible.

Performance Measurements

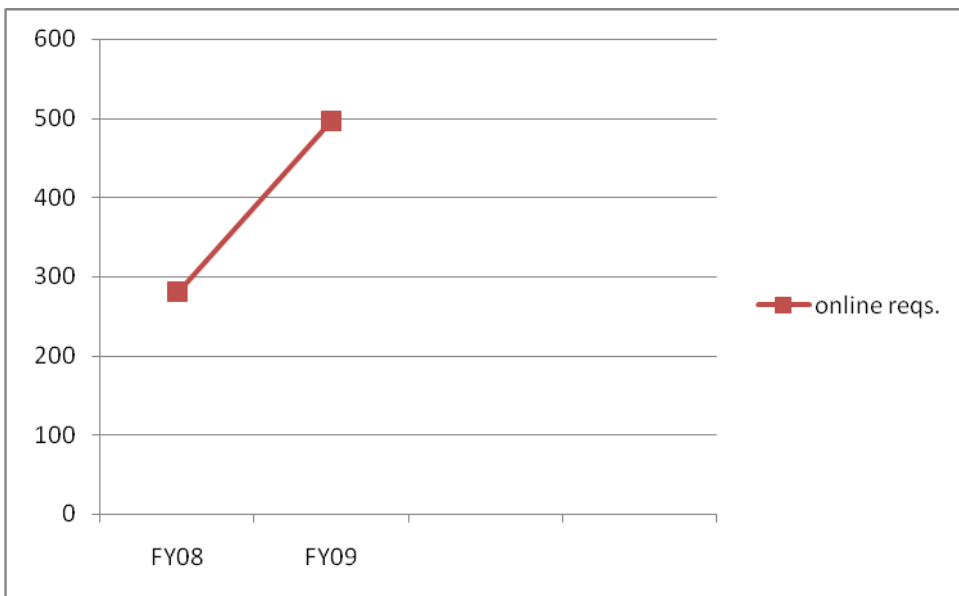
Objective 1:

- Analyze on-line governmental auctioning programs for Smith County to dispose of surplus property quickly and efficiently. (reporting FY09 thru 05/31/09)



Objective 2:

- Implement on-line requisition program on the Smith County Intranet to provide time savings and efficiency for all Smith County Departments. (reporting FY09 thru 05/31/09)



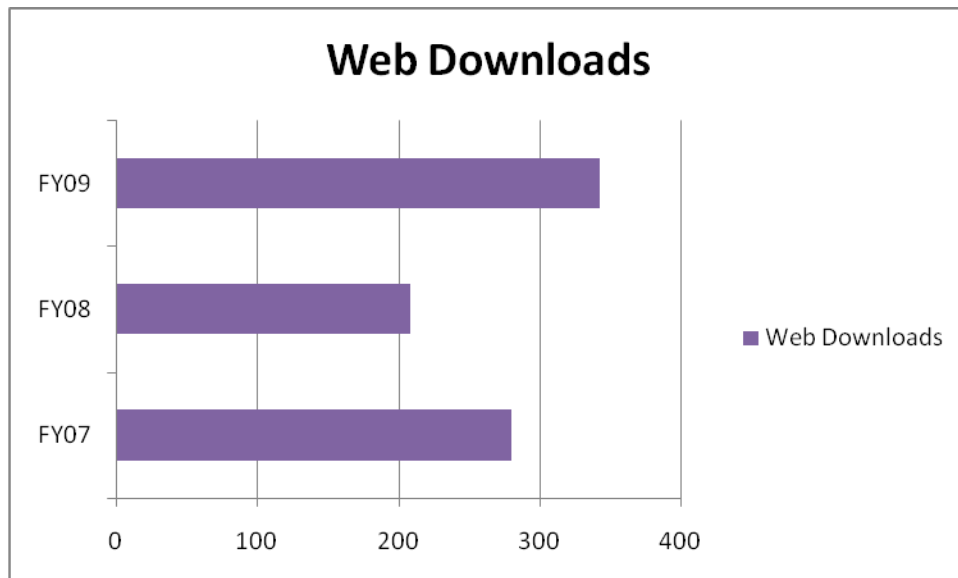
Objective 3:

- Analyze state travel programs for Smith County to utilize in order to save money and seek approval of program by Smith County Commissioners Court. Based on number of tickets purchased for FY09, Smith County would have spent approximately \$775.00 on old plan.

FY08 Service Fees	\$2703.13
FY09 Service Fees	\$425.00

Objective 4:

- Reconstruct Smith County Purchasing Department Website to offer better customer service and information for all vendors and the general public and implement electronic bid returns. (reporting FY09 thru 05/31/09)



Accomplished Goals

Goal 1:

- Implement purchasing training program for staff including but not limited to incentive pay for acquiring certification to achieve total level of professionalism in department.

Goal 1 Performance Measurements

Purchasing Staff	Cert. Status	Training efficiencies	Dept. efficiencies
Kelli Davis	Certified CPPB	Purchasing laws	Less errors
Kim Gould	Certified CPPB	Research initiatives	Multi-tasking
Theresa White	Training only	Dept. professionalism	Dept. morale
		Personal development	Purch. knowledge

Goal 2:

- Join the Tyler Area Chamber of Commerce Annual Business Exposition to rebuild networks with local businesses that provide service for Smith County.

Goal 2 Performance Measurements

Vendor Awareness	12 new contacts
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Goal 3:

- Meet with Auditor to analyze reports and statistics to define performance measures for Purchasing.

Goal 3 Performance Measurements

Purch. efficiencies	County efficiencies
Dept. morale	Dept. satisfaction
Customer service	Vendor satisfaction
Performance measures	Taxpayer satisfaction
Organization	Organization
Time management	Time management

Goal 4:

- Analyze state contracted office supply programs for Smith County to utilize a direct departmental delivery service and just in time inventory program.

Goal 4 Performance Measurements

Customer efficiencies	Purch. efficiencies
Time management	Time management
liability issues	liability issues
Purch. satisfaction	Inv. Storage
Dept. mgt.	JIT satisfaction

Steps eliminated for County Departments:

**Time to walk/travel to purchasing to pick up supplies
Less liable for employee injuries to carry heavy supplies
Inmate labor**

Steps eliminated for Purchasing:

**Continual office interruption
Inventory storage/paperwork process
Time management**

Goal 5:

- Organize the approved FY09 Smith County Project Schedule so that all projects are completed on-time and under/or at budget targets.

(Project savings/measurements will be updated & reported at the end of FY09)

Goal 6:

- Prepare and publish approved purchasing procedures manuals for Smith County Departments and Smith County Vendors to educate all end users on processes required to utilize the Smith County Purchasing Department.

(Project savings/measurements will be updated & reported at the end of FY10)

Goal 7:

- Implement approved contract administration policies for all Smith County Contractual Relationships to prevent and correct issues during the contract period.

(Project savings/measurements will be updated & reported at the end of FY10)

Goal 8:

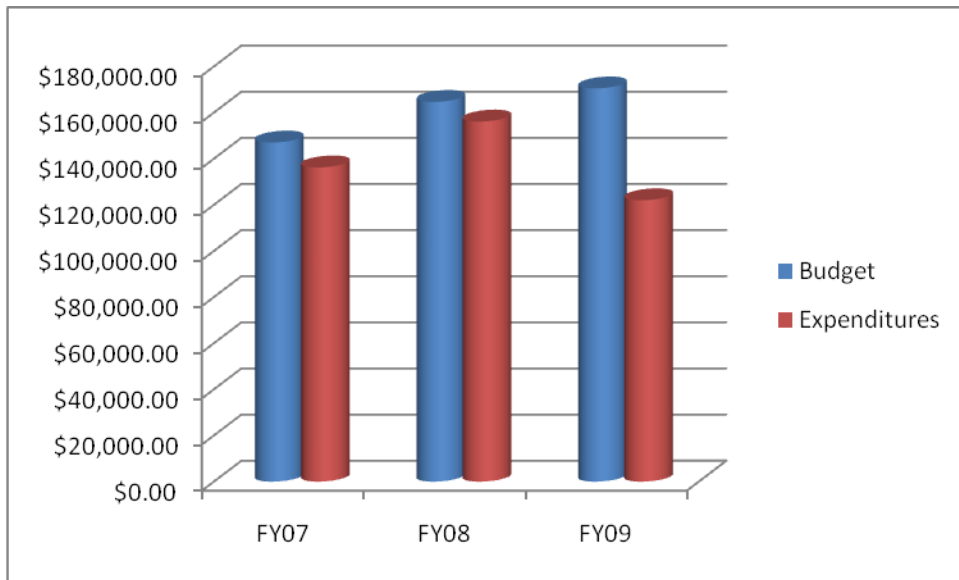
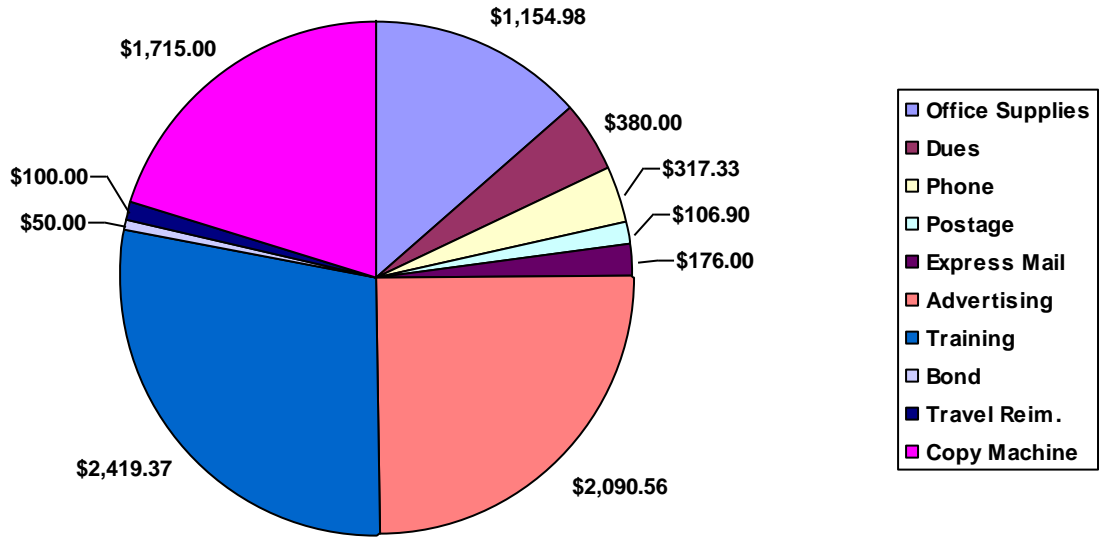
- Meet with Auditor to review and discuss options for new computer inventory program and procedures as recommended by Outside Auditor and have new plan available for review and approval for FY2009 Budget.

(Project savings/measurements will be updated & reported at the end of FY09)



***FY2009 Budget Review
&
Department Workload***

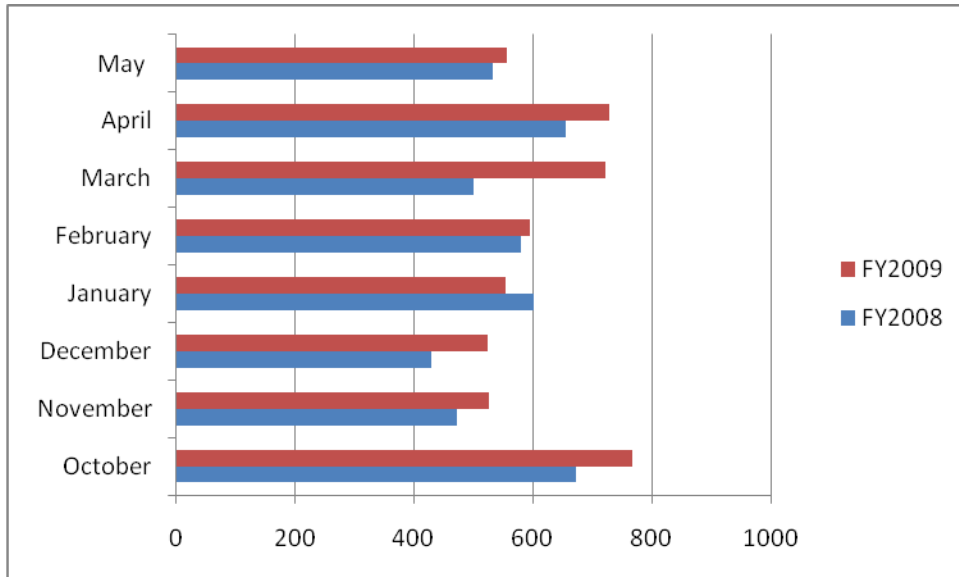
FY09 Budget Review *Where did the money go?*



Budget Comparisons (FY09 thru 5/31/09)

Purchasing Department Workload FY2009

Processed Purchase Orders



Performance Measurements	FY08	FY09 to current
Annual contracts awarded	34	32
RFP's awarded	5	12
Property items tagged	72	859
One time bids awarded	2	10
RFQ's awarded	9	1
Online requisitions processed	230	497
Leases executed	10	32



***Staff Training Update
&
Work in Progress***

Work in Progress

- Smith County Clean Up
- Physical inventory count of all County assets/new software
- Staff Training/Certification
- Cooperative initiatives
- GovPay Program
- Performance Measurement Team
- SO Administration Building Project
- Standardization

Staff Training Progress

Staff: Kelli Davis, CPPB, Director

- Completed and received certificate in “*Texas Public Purchasing Association Spring Seminar*”
- Completed and received certificate in *Project Management*/UTA
- Completed and received Bachelor’s Degree/UTT
- Completed and received certification “*Certified Professional Public Buyer*”/NIGP
- Completed and received certificate on “*Essential Skills of Public Purchasing*”/UTA
- Complete and received certificate for annual *Texas Purchasing Directors Conference* with TAC
- Completed and received certificate on “*Negotiation Skills*”/UTA
- Completed and received certificate on “*Advanced Public Purchasing*”/UTA
- Completed and received certificate on “*Basic Public Purchasing*”/UTA
- Conflict Resolution/Smith County HR
- Leadership Skill for Managers/Smith County HR
- Coaching/Smith County HR

Staff: Kim Gould, CPPB, Buyer

- Completed and received certificate in “*How to become a Better Communicator*”
- Completed and received certificate in *Project Management*/UTA
- Complete and received certificate in *Inventory Management*/UTA
- Completed and received certificate on “*How to process and evaluate Bids*”/NIGP
- Completed and received certificate on “*Fundamentals of governmental purchasing*”/UTA
- Completed and received certificate on “*Advanced Public Purchasing*”/UTA
- Completed and received certificate on “*Negotiation Skills*”/UTA
- Completed and received certificate on “*Cost Price Analysis*”/UTA
- Successfully completed Associates Degree in Business at Tyler Junior College
- Completed and received certification “*Certified Professional Public Buyer*”/NIGP

Staff: Theresa White, Assistant Buyer

- Completed and received certificate on “*Basic Public Purchasing*”/UTA
- Scheduled Basic Excel Training
- Completed and received certificate in “*Telephone Etiquette*”/SCHR