

Procurement Services Strategic Plan

Summary

The Procurement Services Department of Charlotte County Public Schools assessed the responsibilities underpursuant to the mission, vision and values pursuant to a strength, weakness, opportunity, threat analysis in order to identify the most significant opportunities to contribute

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 an 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's 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 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

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 staircase, 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 rather 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

Purchasing Department Benchmarks



Description	Metric	Goal	1. Benchmarking Project Oct 2020 2018/19 Median Scores	1. Benchmarking Project Oct 2021
Competitive Procurements Ratio			62.6%	65.5%
Cooperative Leadtime, over				

