

## Orange County Public Schools Innovation in the Procurement Process

### Title: Workflow Management

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Ocps is the eighth largest school district in the United States and fourth in Florida with approximately 215,000 students, 25,000 employees, and over 203 schools and facilities. Managing the processes related to purchasing for a broad, diverse customer base comes with inherent challenges, so the Procurement Services department is consistently looking for opportunities to create efficiency in processes and improve our user experience. The Procurement department has begun utilizing SmartSheet to automated and digitize many processes relating to task tracking and workload management. SmartSheet is a low cost, easy to use tool that allows us to create collaboration and management systems without the need to do a large, elaborate project plan that requires months of IT planning. SmartSheet has eliminated many of our formally paper based processes which led to inefficiencies and at times filling out forms multiple times if they were lost. In a short period of time, SmartSheet has grown from just being used in the Procurement Services department to now ten departments throughout the organization and is even the tool used to collect COVID-19 cases through an intake form. Procurement Services has provided demonstrations to numerous internal departments and several fellow school districts on our use of SmartSheet and how we have used the tool to improve our processes and management of tasks. We also have a dashboard that is customizable with different data points that are important; currently we have data on the number of expiring contracts and other data related to our scorecard metrics as shown in image 1.

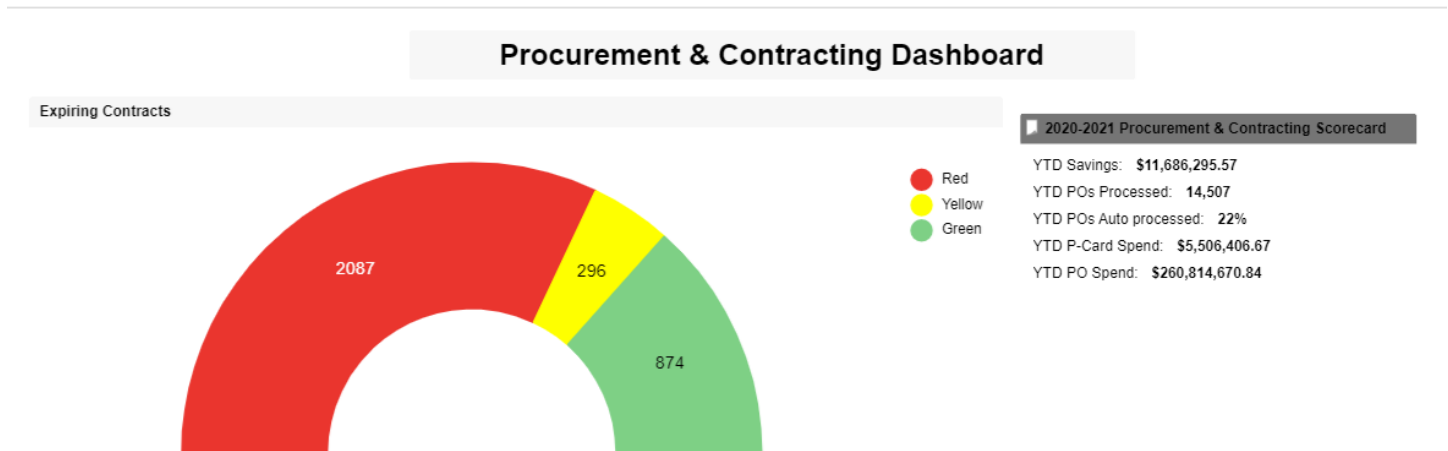


Image 1

### Contract Management

The use of SmartSheet originally began as a better means of tracking contract information. The previous method included a clunky Microsoft Access database that always seemed to crash and not save data correctly with multiple users working in it. In order to share bid and contract information with our internal departments, we uploaded a PDF to our Intranet page which only allowed 10 documents per page. With over 100 bench contracts that we needed to share the contract information, this created over 10 pages of documents users had to sift through to find what they needed. It also created manual work of procurement staff to continually manage the documents posted.

As shown in image 2, key data points are tracked and the paperclip icon on the far left indicates attachments for that item that are easily dragged and dropped. This information is available both to our internal customers on our department's Intranet page and to our external customers on our public Internet page using a custom report and only shares information that is relevant to that audience since many data points tracked are used by the procurement office. The previous method to share contract information was time-consuming and clunky to manage and also for our users to find the information they needed.

Buyer	Type	Status	Request Date	PR Fully Approv...	Date Posted	Date Closed	Date Award...	Original Expire Date	Current Expirati... Date	Contract #	Contract Title	Vendor #	Name of Vendor	Term	Annual Rene...	Amount Awarded	Department	Division
Cassandra Palm	RFP	Awarded	11/29/18	11/15/18	02/06/19	02/28/19	04/09/19	06/30/22	06/30/22	RFP1811456	Marketing and Merchandising Services	1021414	Vimai LLC dba Vimail Staffing	3 Years	2	\$378,000	Food and Nutrition Services	Operations

Image 2

To help buyers manage their contracts that are approaching expiration, notifications are sent to the assigned buyer six months out from expiration, then another at 30 days, another at seven days, and a final at one day. The color of the contracts also changes to easily identify which ones should take priority through renewing the agreement or conducting a re-procurement activity. If a contract is within six months of expiration, it will turn yellow and when it is within 30 days of expiration it turns orange.

As information is updated by Procurement staff, the information is automatically updating on the reports available on our Intra and Internet sites. This eliminates the need to manually update information on our sites that was previously a time consuming task. We have also developed reports for specific departments, such as maintenance, so they only view contracts they will use. Image 3 shows an example of the public facing report that is pulled from data being entered and updating by Procurement staff.

Website Report (View Only) : smartsheet									
Buyer	Contract Number	Contract Title	Name of Vendor	Vendor #	Date Awarded	Current Expiration Date	Department	Division	
Gian Otero	EDX2008281	ICEV Health Science (Apopka Middle)	CEV Multimedia, Ltd.	115868	08/13/20	08/12/21	Chief of High Schools	Division of Teaching & Learning	

Image 3

**Workload Tracking**

Our use of SmartSheet has grown substantially in the last year to automate additional processes. One point that was another challenge for Procurement was to have a central place to see the status of our in progress work and projects. SmartSheet allows us to see the status of all of our team’s work. When a new procurement item is assigned to a team member on the SmartSheet, they are sent an automated email notifying them that a new task has been assigned to them so they can begin working on it. The team adds notes on the status; this is helpful for when staff is out of the office on vacation so we can stay up to date on the status of items and also for our team to have an overview of their in process assignments to keep them organized and on track so things don’t fall through the cracks. Image 4 shows how this is tracked and assigned.

Created	Modified	Buyer	Contract Number	Title / Description	Department	OCPS POC/Requestor	Notes	PR Created
10/21/20 8:16 AM	10/21/20 8:16 AM			Brandon Orofino				
12/13/19 12:27 PM	01/21/21 12:26 PM	Brandon Orofino	RFP2001022	Educational Support Materials	Teaching and Learning	Russo, James	Draft due to Cass 2/24 2/17 - sent IT technical requirement to Russell for review Opens 5/29 Evaluation meetings scheduled for week of 9/14 NOI ready to be posted; need ITS approval and need to draft contracts	01/29/20

Image 4

**Purchasing Card Program**

We have converted our previous paper based purchasing card application and change form to a SmartSheet intake form. The first section of the form is the agreement statement that cardholders are to abide as shown in image 5. The second section shown in image 6 is the application itself as is information required for Procurement to process the application. One of the requirements is an upload of their training certificate. In the past, applications would be held up

and we had to chase down people to get their certificate. Now, it is required to be uploaded or they will not even be able to submit the application.

**smartsheet**

## Purchasing Card Application

### Agreement Statement

Participation in the OCPS Visa Purchasing Card Program is a convenience that carries responsibilities. Although the card is issued in the cardholder's name, it is considered district property and must be used with good judgment. The cardholder's submission of this application verifies that he/she has read, understands and will comply with the OCPS Purchasing Card Program Procedures Manual and Management Directive A-13.

1. Purchases shall be for official OCPS business only. Personal charges must not be made with the card.
2. The cardholder is the only person entitled to use the card and is responsible for all charges made on the card.
3. Improper use of the card will be considered misappropriation of district funds and may result in disciplinary action.
4. The cardholder must surrender his/her card upon termination of employment (voluntary or involuntary separation).

### Purchasing Card Agreement

Your participation in the Orange County Public Schools Visa Purchasing Program is a convenience with responsibility. Although the card is issued in your name, it should be considered OCPS property and should be used with good judgment. The Cardholder and Department Head signatures below verify that both have read and understand the Orange County Public Schools Purchasing Card Program Procedures Manual and agree to comply with the guidelines outlined below.

1. The Visa purchasing cards are provided to employees based on their need to purchase business-related goods and services. A card may be revoked at any time based on change of assignment or location. The cards are not an entitlement nor reflective of title or position.
2. The purchasing cards are for OCPS business-related purchases only. Personal charges are not to be charged to the card and may result in disciplinary action, up to, and including termination.
3. Both the Cardholder and the Principal/Department Head have reviewed and accepted the appropriate uses of the P-Card, T-Card and A-Card as outlined in the OCPS Purchasing Card Program Procedures Manual.
4. The Cardholder is the only person entitled to use the card and is responsible for all charges made against the card.
5. Improper use of the card can be considered misappropriation of District funds, which may result in disciplinary action, up to, and including termination.
6. All charges are billed directly to and paid directly by the company. Any personal charges on the card could be considered misappropriation of company funds since the cardholder can not pay the bank directly.
7. Cardholders are expected to comply with internal control procedures in order to protect company assets. This includes keeping receipts, and following proper card security measures.
8. Cardholders are responsible for reconciling their Visa Purchasing Monthly Memo Statement and resolving any discrepancies by contacting the supplier or the bank.
9. Each account is assigned a cost accounting code by management and purchases may be automatically charged to that code. The code can only be changed by management approval. If changed, a new accounting code does not affect past charges, only future charges.
10. A lost or stolen card should be reported immediately by telephone to Bank of America Customer Service at 1 (800) 300-3084.
11. A cardholder must surrender his or her card upon termination of employment (i.e. retirement or voluntary/involuntary termination). At this point, no further use of the account is authorized.

Image 5

**Card Type \***  
Select

**Card Requestor Email Address \***  
Include only the email address. Do NOT include any additional characters in this field.

**Personnel Number \***

**First Name \***

**Last Name \***

**Work Location # \***

**Work Location Name \***

**Cisco Extension \***

**Default Cost Center \***  
Include the function, location, fund  
Example: 510000-S111100000-1001000000

**Supervisor Email Address \***  
Include only the email address. Do NOT include any additional characters in this field.

**Training Certificate \***  
Please attach your training certificate from Canvas.

Drag and drop files here or [browse files](#)

Send me a copy of my responses

**Submit**

Image 6

Another benefit is that there are automations built into the form for approvals. The user inputs their supervisor's email address and once submitted, the supervisor immediately receives an email to approve or deny their application which can be done anywhere at any time. Previously, a supervisor could only sign off on the paper application when they were in the office. There are also additional approval workflows in the process if there are grant funds being used. This is done by using highly customizable workflows and additional approvals can be added as needed.

Once an application is submitted, Procurement now has visibility into where that application is in the form of a database which a sample is shown in image 7. The training certificate is attached and can be viewed by clicking the paperclip icon to the far left. Comments can also be added by the Procurement staff who handles the applications such as reasons why the application was rejected or if incorrect information was entered by the applicant. Not visible on the form, there are additional fields that Procurement staff can track show in image 8 such as when the application was sent to the bank, when the card is received in our office, the date it is sent to the applicant, and the date we receive confirmation the card was received by the applicant. This gives us visibility into the status of all applications that we previously did not have.

Created	Card Type	Card Requestor Email Address	Personnel Number	First Name	Last Name	Work Location #	Work Location Name	Cisco Extension	Default Cost Center	Supervisor Email Address	Supervisor Approval	Gr Ftr Ap
01/22/21 3:14 PM	Travel Card (T-Card)	vicki.feider@ocps.net	10388	Vicki-Elaine	Feider	9007	School Board	200-2915	710000-9007000000-1002009500	deborah.mogili@ocps.net	Approved	

Image 7

Applicati... sent to BOA	Card Received by PS	Date Sent to Requestor	Date Confirm... Received
01/22/21			
01/22/21			
01/22/21			
01/15/21	01/20/21	01/20/21	
01/15/21	01/20/21	01/20/21	
01/15/21	01/20/21	01/20/21	
01/12/21	01/15/21	01/15/21	01/21/21

Image 8

These same types of workflow and controls are also used in our purchasing card change form which is used when a cardholder needs to make a change such as a one time limit increase, a request to close the card, or change of cost center. The date on this form is different than the application and is shown in image 9. As with the application, if grant funds are used on the card, a workflow is triggered to the grants finance office for approval and all changes go to the supervisor for approval.

# Purchasing Card Change Form

This form is to be used by existing OCPS purchasing card holders when a change to the card is required.

Before the changed is processed by Procurement Services, the form will require approval by the cardholder's supervisor which will automatically be sent when this form is submitted.

**Card Type \***

Select

**Cardholder's Email Address \***

**Cardholder's First Name \***

**Cardholder's Last Name \***

**Cardholder's Cisco Ext. \***

**Supervisor's Email Address \***

**Work Location # \***

**Last 4 Digits of Card \***

**Requested Change \***

Select all that apply

Select

**Grant/Donation Fund?**

If a grant or donation fund will be used, additional approval will be routed to the Grants Finance Office for approval.

**File Upload**

Attach supporting files or documents as needed

Drag and drop files here or [browse files](#)

Send me a copy of my responses

Image 9

**Vendor Performance Reports**

Another area we have implemented SmartSheet is the collection of vendor performance issues. This was previously another paper based process that required printing, scanning, and emailing. Image 9 shows the form a user would enter when they are reporting an issue. They have the capability of attaching files such as emails or photos to support the poor performance. Once this is submitted, Procurement is emailed and the complaint is assigned to the appropriate buyer. As with the workload tracking sheet, the buyer receives an email notifying them they have been assigned something to follow up on. The report is also downloaded and saved in the contract file. This also creates a database of vendor issues to give Procurement visibility into who the vendors are that receive the most complaints and easily allows us to see a common thread of issues across the organization.

# Vendor Performance Report

**Prepared By \***

Name of the person submitting this performance report.

**Cisco Extension \***

**School/Department \***

Name of the school or department submitting the report

**Vendor Name \***

Provide the name of the vendor for this performance report.

**Vendor # \***

Provide the vendor's SAP vendor number

**Contract/Bid Number**

Provide the contract/bid number of the vendor if known.

**Purchase Order No. \***

**Type of Issue \***

**Date of Issue \***

Provide the date of the incident or issue being reported occurred.

**Description of Issue \***

Provide detailed information on the issue. Cite the specific paragraph from the vendor's contract that has been violated. Attach additional files as necessary.

**File Attachments**

Add attachments as necessary to include photographs of damage or additional supporting documentation of the issue being reports

Drag and drop files here or [browse files](#)

Created	Status	Prepared By	School/Department	Cisco Extensi...	Vendor #	Vendor Name	Contract/Bid Number	Purchase Order No.	Type of Issue	Date of Issue	Description of Issue	Buyer	Date Sent to Vendor
01/14/21 10:47 AM	In Progress	JONATHAN EARLE	NORTHEAST AREA MAINTEN	212223	1021917	ADT/RED HAWK		n/a	Customer Sei	01/14/21	Service call for Fire Alarm panel in trouble submitted on	Aubree Parker	01/20/21
01/14/21 10:43 AM	In Progress	JONATHAN EARLE	NORTHEAST AREA MAINTEN	212223	1021917	ADT/RED HAWK		4521008330	Customer Sei	01/14/21	PO issued on 10/5/20. Still waiting on an invoice/confirm	Aubree Parker	01/20/21

Image 11

## Surplus Operations

SmartSheet has been implemented in assisting managing our surplus property that is available for redistribution internally to schools and work locations as shown in image 12. Internal departments now have visibility into what is in stock.






Surplus FFE Available for Reissue (View Only) :						
			Primary	Description of item requested	Image for reference only, actual items may vary	Quantity Available
1			1884	Table, Horse Shoe, Used		12
2			1927	Table, Science, 24" x 60", Used		47
3			1937	Desk, Teacher's, Double Pedestal, Used		122
4			10843	Bookcase, 36" x 48", Used		27
5			10844	Bookcase, 36" x 60", Used		129

Image 12



## Scorecards

The collection and rollup of data used in our Strategic Plan Scorecard is also managed within SmartSheet. Individual buyers enter their savings for items they manage and cycle times for solicitations into a SmartSheet (image 13) that then aggregates the data using formulas for the department. This is then fed automatically into a master scorecard for the entire department and is summed for the entire year (image 14). The previous process required each buyer to have their own Excel file which then had to be copied and pasted into a different file where it was summed and then that was then copied to another file. This has reduced the chances for human error in calculations and the need for data entry in multiple areas.

Modified	Buyer	Contract/ Shopping Cart #	Vendor Name	ITB Dollar Savings	RFP Dollar Savings	Other Savings	ITB Days from approved PR to advertise	ITB Days of advertising to open	ITB Days from close to award	RFP Days from approved P to advertise
10/01/20 2:50 PM		July		\$1,511,909.42	\$18,879.80	\$380,671.31	#DIVIDE BY	#DIVIDE BY	#DIVIDE BY	#DIVIDE BY
10/01/20 2:49 PM	MD Melissa Delgado	PBX2001010	School Speciality			\$111,559.30				

Image 13

Savings								
<b>Total Dollar Savings</b>	<b>\$11,686,295.57</b>	<b>\$1,916,025.53</b>	<b>\$4,175,993.31</b>	<b>\$2,295,633.26</b>	<b>\$1,992,539.59</b>	<b>\$414,860.74</b>	<b>\$891,243.14</b>	
Savings from Invitations for Bids	\$6,097,898.07	\$1,511,909.42	\$1,735,517.75	\$1,843,734.95	\$394,076.35	\$178,377.63	\$434,281.97	
Savings from Requests for Proposals	\$198,479.00	\$18,879.80	\$100,790.87	\$16,834.50	\$5,992.65	\$36,371.86	\$19,609.32	
Savings from informal solicitations (e.g., Requests for Quotes, not including secondary quotes)	\$5,318,380.82	\$380,671.31	\$2,323,299.78	\$427,258.98	\$1,588,933.02	\$197,229.74	\$400,987.99	
EqualLevel Savings from Replacement	\$29,866.08	\$4,565.00	\$12,996.00	\$5,886.00	\$3,537.57	\$2,881.51		
Cash Rebates	\$41,671.60	\$0.00	\$3,388.91	\$1,918.83	\$0.00	\$0.00	\$36,363.86	

Image 14