Virginia Association of Counties
ACHIEVEMENT AWARDS

SUBMISSION FORM

All submission forms must include the following information. Separate submission forms must be turned in for each eligible program. **Deadline: July 1, 2021.** Please include this submission form with the electronic entry. If you do not receive an email confirming receipt of your entry within 3 days of submission, please contact Gage Harter.

PROGRAM INFORMATION

County: **Prince William County**

Program Title: **Procurement Office Workload Balance**

Program Category: **Procurement Services**

CONTACT INFORMATION

Name: **Michelle Attreed**

Title: **Finance Director**

Department: **Finance**

Telephone: **703-792-6752**   Website: **https://www.pwcva.gov/department/finance**

Email: **mattreed@pwcgov.org**

SIGNATURE OF COUNTY ADMINISTRATOR OR DEPUTY/ASSISTANT COUNTY ADMINISTRATOR

Name: **Christopher E. Martino**

Title: **County Executive**

Signature:

Program Overview

As the workloads increased and staff became overwhelmed, it became evident that a rebalance of workload for Procurement Officers was needed. To this end, the Assistant Director of Finance for Procurement Services, Adam Manne, and Erika Bukva, the Procurement Manager who oversees all non-capital procurements for Prince William County ("the County"), developed a method to measure current workload volume that incorporates both subjective/intangible factors and objective/measurable factors. This included measuring the procurement work volume of each department, independent of assigned individual Procurement Officers' efficiency/style/strengths. The goal was to identify unbalanced workloads and opportunities for improved Procurement Officer alignment among departments, so as to address the challenges felt by staff and provide excellent customer service to the departments.

Problem/Challenge/Situation Faced by Locality

The County currently has 32 independent departments that all require support from Procurement Services and its Procurement Officers. Over the past year, Procurement Services found that providing top tier service based on the old method of assigning a Procurement Officer to each department was on the edge of failure. As the County has grown and new agencies have been brought on board, procurement officers would be assigned by a completely subjective manner of grouping like departments together. For example, all public safety departments would be supported by a single procurement officer. This was causing internal and external strife, perceived delays in service and unneeded pressures.

How Program Fulfilled Award Criteria

The workload rebalancing project that was undertaken by the County's Procurement Office meets the VACO Criteria for Selection in several different ways. First, it is an innovative research and delivery solution to allow departments to do a deep dive on workloads of the individuals and the department. This allows for redistribution of workloads based on several factors of both a quantitative and subjective method. The process then allows for increased efficiencies of services to support departments, balances workload among peers and results in faster service that is of a higher quality, ultimately resulting in higher satisfaction by the department and employees. The processes used were done with inhouse tools that can be repeated in any County with minimal investment in cost.

How Program Was Carried Out

The program was carried out in distinct steps to ensure that not only was pertinent data collected, but that there was ownership and buy in by the procurement staff, as well. The steps were broken down as follows:

Step 1- Why Measure? What should be measured? What are Objective Measures by Department? What are Subjective Measures by Department?

To glean the answers for the above questions, a facilitated a discussion with Procurement Officers was held to identify the reasons why a workload rebalance was necessary.

The following discussion questions were provided prior to meeting:

- How do I define "workload"? What tasks or activities do I think of when I think of my workload?
- What factors differentiate a department that takes up a lot of my time, to one that does not?
- What is the difference between times when I feel like I am "busy" and times when I feel like I am "very busy/overwhelmed/inundated/can't take on another thing"?
- When I think of the department, division, or buyer that I most enjoy working with, what do they do well?
- When I think of the department, division, or buyer that I dread working with, why do I dread it?

In addition, it was suggested that each of the procurement officers look over the additional resources, listed below, prior to the meeting:

- Position Description Questionnaire from the Classification and Compensation Survey that the County performed in 2019,
- Resume,
- Job Description,
- Objective Measures by Department,
- Number of County contracts they managed,
- Number of cooperative contracts they managed,
- Number of initiators of purchase orders in each of the departments that they support,
- The supported departments total budget,
- The size of department by number of Programs/Activities in Chart of Accounts,
- Number of POs issued by each department on a monthly and annual basis,
- Number of IFBs issued,
- Number of RFPs issued, and
- Number of RFQs issued.

Reasons given for why the workload rebalance was needed included quality of service delivered, accurate measure of department volume, customer satisfaction, fairness, keep up with changing times, prioritization, allocation of resources, recognition, and supporting one another during exceptionally busy times. Procurement Officers were also asked to identify the factors that impact a department's procurement workload.

As the facilitated discussion progressed, the conversation turned to Subjective Measures by department, that could be then quantified as to show the human side of the departments. The subjective measures produced by the procurement officers included:

- procurement/project complexity,
- the research needs that the department expects procurement to assist them with or to perform,
- creativity of procurement solutions needed,
- coordination with outside policies required,
- health of department structure,
- internal competing priorities,
- staff availability/responsiveness,
- outside pressure/visibility of projects,

- staff turnover,
- seasonal high demand,
- purchasing expertise/acceptance, and
- the PO closeout process.

Below are pictures of the work product from the meeting.
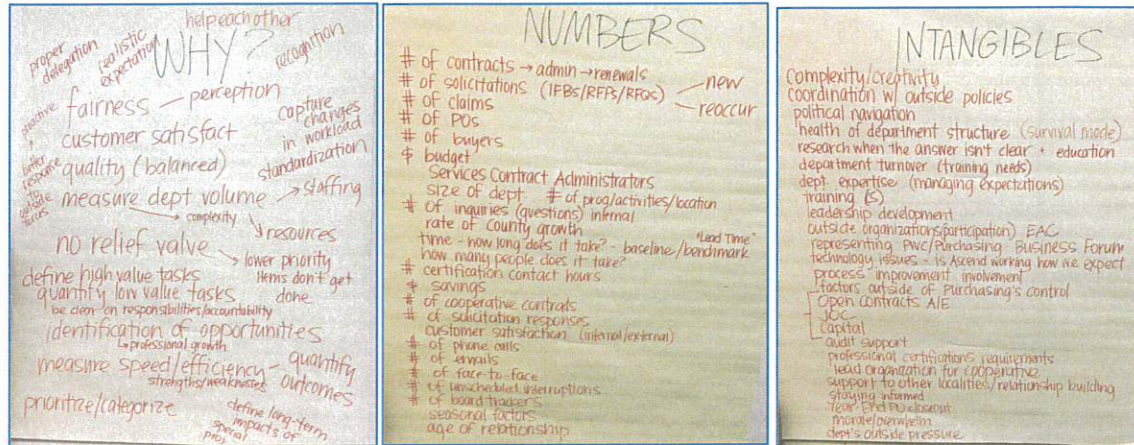
Step 2- Using the results of the identification of factors that impact a department's procurement workload, staff needed to identify which factors were more important than others, and therefore, which factors should have more weight.

A CardSort survey was sent to the Procurement Officers to sort the factors into three categories:

1. A huge factor in department workload
2. Somewhat factors into department workload
3. Does not factor into department workload

This was an important step in gaining support from the Procurement Officers, as they were involved with creating the measures and knew that they were relevant and valid, not arbitrary and meaningless.

Weights Assigned to Factor based on Influence:

- Majority "Huge" = 20%
- Split between "Huge" and "Somewhat" = 15%
- Majority "Somewhat" = 10%
- Split between "Somewhat" and "None" = 7%
- No consensus, majority "Somewhat" = 5%

OptimalSort

number of RFQs issued for a department	Does not factor into department workload	A huge factor in department workload	Somewhat factors into department workload
number of RFPs issued for a department			
Year-End PO closeout	0 items	0 items	0 items
number of Ascend buyers (PO initiators) in a department			
number of solicitations for renewing requirements issued for a department			
department customer satisfaction			
seasonal factors			
size of department (by Chart of Accounts program/activities/locations)			
% change in Department total budget from previous year			
number of solicitations for new requirements issued for a department			
political navigation (internal department)			
coordination with outside policies			
department turnover (training needs)			
number of County contracts			

Standardization grid

Total participants   0

7

Name	A huge fa...	Does not ...	Somewh...	Not standardized
health of department structure	6		3	
department expertise (manag	6		3	
number of RFPs issued for a d	5	1	3	
department turnover (training	5		4	
size of department (by Chart c	4	2	3	
number of solicitations for ren	4	1	4	
number of solicitations for nev	4		5	
number of POs issued by a de	4	1	4	
number of IFBs issued for a de	4	1	4	
number of Ascend buyers (PC	4	1	4	
factors outside of Purchasing'	4	2	3	
complexity	4	1	4	
number of cooperative contra	3	1	5	
number of Services Contract /	3		6	
department customer satisfac	3	1	5	
seasonal factors	2	3	4	
research is required because	2	2	5	
outside pressure a departmer	2	2	5	
number of claims received on	2	2	5	
number of RFQs issued for a c	2	1	6	
number of County contracts n	2	1	6	
Department total budget	2	3	4	

Step 3- Collecting data for objective measurements required polling the procurement officers on measurements that they felt would be valid and aid in the process. These items are all qualitative in nature and the information was able to be pulled directly from the County's financial management system.

Existing Financial Reports per Department:

- Number of County contracts managed
- Number of cooperative contracts managed
- Ad-Hoc Financial Reports
- Number of Financial PO initiators
- Number of POs issued
- Number of IFBs issued
- Number of RFPs issued
- Number of RFQs issued
- Data from OMB/Budget Book
- Department total budget
- Size of department by number of Programs/Activities in Chart of Accounts

Objective Measures by Department, with weight:

- Number of RFPs issued – 20%
- Size of department by number of Programs/Activities in Chart of Accounts – 15%
- Number of POs issued – 15%
- Number of Ascend PO initiators – 15%
- Number of IFBs issued – 15%
- Number of RFQs issued – 10%
- Number of County contracts managed – 10%
- Number of cooperative contracts managed – 10%
- Department total budget – 5%

Step 4- Collect data for subjective measurements based on procurement officer's perception of their workloads and the departments that they support. Microsoft Forms was used as the tool to develop a survey for procurement officers to rate/rank departments on each subjective factor. MS Forms was chosen as it was already part of the MS Suite that the County has licenses for, so no additional costs were incurred.

Procurement Officers ranked each of their currently assigned departments on 12 independent factors using three different Likert scales, depending on Frequency, Intensity and Quality. Each survey took less than three minutes, and the data was automatically compiled in a spreadsheet.

2. Please rate the frequency that the following factors impact the department's procurement workload. *

	Never	Rarely	Sometimes	Often	Always
Complexity: Projects for this department are lengthy or involve many stakeholders					
Research: I spend a lot of time researching procurement solutions for this department because their needs and questions are unusual.					
Creativity: A standard procurement solution is rarely sufficient.					
Coordination with Outside Policies: Projects for this department require considering policies beyond VPPA/ Purchasing Regs					
Health of Department structure: Internal management issues negatively impact procurements					

3. Please rate the intensity that the following factors impact the department's procurement workload. *

	None	Very Mild	Mild	Moderate	Severe
Political Navigation (Internal): Encountering situations where stakeholders in the department have conflicting priorities					
Factors outside of Purchasing's Control: problems caused by staff availability or response time					
Outside Pressure: The Department has high visibility projects or problems.					
Department Turnover: Frequently training/building relationships with new staff at the department					
Seasonal Factors: Certain times of year are busier than others for this Department					

4. Please rate the quality of the following factors demonstrated by the department. *

	Excellent	Good	Fair	Poor	Very Poor
Expertise: Department's understanding/acceptance of the objectives/purpose of Purchasing					
Year End PO Closeout: The Department's process for monitoring and closing POs throughout the year					

Step 5- Data Analysis Subjective

A number value was assigned to each subjective and objective measure. For example, Very Poor Quality = 5, Excellent Quality = 1.

Larger numbers indicated the department presented relationship challenges, as it came to both their internal communications and with procurement staff. A weighted system was then implemented to put the agencies into different categories.

Total Score – Subjective:

- 501-715 = CHALLENGING
- 400-500 = MODERATE
- 0-399 = EASY

The departments were ranked from highest to lowest numerical score, indicating where the greatest opportunities existed. The results were verified and are consistent with observations made by procurement officers. The evaluation of the subjective factors allowed the department to take subjective ideas and quantify them into a numerical format. This new presentation of the data then allowed the department to see the information graphically to allow planning and implementation of efforts of providing training to make the biggest impact.

Decreasing this score for a department would, theoretically, mean that the Procurement Officer is spending less time managing the relationship.

Step 6- Data Analysis Objective

The next step in the process was to analyze the range of results from data that was pulled from the County's financial system to determine the procurement workload of each department. Values identified were given the rankings of EXTREMELY HIGH, HIGH, MEDIUM, and LOW volume. A numerical value was assigned to each rating, consistent with the 5-point subjective scale.

LOW = 1 / MEDIUM = 3.5 / HIGH = 5 / EXTREMELY HIGH = 20

Larger numbers indicated the department presented significant workload volumes.

Total Score - Objective:

- ABOVE 1200 = EXTREMELY HIGH VOLUME
- 300-700 = HIGH VOLUME
- 161-299 = MODERATE VOLUME
- 0-160 = LOW VOLUME

Again, as with the subjective data, the information was ranked from highest to lowest.

After verification of the data, the results were consistent with observations made. The ranking showed some notable and unexpected results. Examples of these results from Fiscal Year 2019 identified the departments that produce the highest number of annual purchase orders and initiators of those orders. The PWC Public Works Department generated the highest number of purchase orders - 3,085 from 73 approved initiators. The second highest generator of purchase orders was the County's Volunteer Fire Stations with 2,275 purchase orders generated by 67 initiators. Each of these departments are supported by a single procurement officer. This, along with other factors such as solicitations requiring procurement to initiate and run the process, were captured. For Invitation to Bid, the Department of Fire and Rescue had the most in FY2019 by initiating 10. The County's Finance Department initiated the most Request for Proposals, also with 10. The Public Works Department has the total highest number of contracts – both County initiated and those that were done by other public entities, which the county is riding and requires administration – with 137 County contracts and 81 riding contracts in the system.

Step 8- Data Analysis Combined

Now that both the subjective and quantifiable data had been gathered, verified, and analyzed, the final part of this process was to combine both sets of data to create a visual summary of results for future reference.

Department: Management & Budget

OBJECTIVE:

Number of County contracts managed:	1	LOW
Number of Cooperative contracts managed:	0	LOW
Number of Ascend Buyers (PO Initiators)	2	LOW
Department Total Budget FY18	1806691	LOW
Department Total Budget FY19	1589962	LOW
Size of Department (by Chart of Accounts)	3	LOW
Number of POs Issued FY19	8	LOW
Number of POs Issued FY18	23	LOW
Number of IFBs Issued FY19	0	LOW
Number of IFBs Issued FY18	0	LOW
Number of RFQs Issued FY19	0	LOW
Number of RFQs Issued FY18	0	LOW
Number of RFPs Issued FY19	0	LOW
Number of RFPs Issued FY18	1	LOW

Objective Score: 124 LOW VOLUME

SUBJECTIVE:

Complexity: Projects for this department are lengthy or involve many stakeholders	Never	1
Research: I spend a lot of time researching procurement solutions for this department because their needs and questions are unusual.	Never	1
Creativity: A standard procurement solution is rarely sufficient.	Never	1
Coordination with Outside Policies: Projects for this department require considering policies beyond VPPA/ Purchasing Regs	Never	1
Health of Department structure: Internal management issues negatively impact procurements	Never	1
Political Navigation (Internal): Encountering situations where stakeholders in the department have conflicting priorities	None	1
Factors outside of Purchasing's Control: problems caused by staff availability or response time	None	1
Outside Pressure: The Department has high visibility projects or problems.	Very Mild	2
Department Turnover: Frequently training/building relationships with new staff at the department	None	1
Seasonal Factors: Certain times of year are busier than others for this Department	Mild	3
Expertise: Department's understanding/acceptance of the objectives/purpose of Purchasing	Good	2
Year End PO Closeout: The Department's process for monitoring and closing POs throughout the year	Good	2

Subjective Score: 229 EASY

The analyzed results were presented side-by-side per department. The conditional formatting applied was a standard stop light format of red, yellow, and green. Red for high volume/high challenging, Yellow for medium/moderate, Green for low volume/easy. This graphical representation of the data allowed procurement to identify and investigate anomalies, such as a department that is green in subjective, yet red in objective, or a department that is easy to interact with and understands the procurement processes, but generates an above average workload for the procurement officer. The inverse was a department that is red in subjective and green in objective. This type of department had minimal procurement knowledge and was difficult to interact with the personnel in the department, but the workload generated was considered minimal.

The results identified where the greatest challenges and opportunities lay for the procurement staff. Departments that graphically were red or bright orange after the combines scores were eye openers on where to focus efforts, and more importantly, where to look at the total workloads for the procurement officers for those departments.

	A	B	C	D
1	Department	Subj	Obj	Combir
2	Public Works	445	1264	1709
3	FRS Volunteer Stations	657	608	1265
4	Parks	712	480	1192
5	Finance	607	573	1180
6	DFR	573	544	1117
7	Adult Detention Center	653	388	1041
8	DOIT	529	464	993
9	Police	570	400	970
10	Community Services	387	452	839
11	Office of Elections	715	124	839
12	Library	389	352	741
13	Public Safety Communications	580	139	719
14	Social Services	334	362	696
15	Human Resources	497	178	675
16	Transportation Non Capital	482	183	665
17	Economic Development	492	164	656
18	Board of County Supervisors	476	179	655
19	Sheriff's Office	399	231	630
20	Office of Housing and Community	393	212	605
21	Agency on Aging	288	291	579
22	Executive Management	347	199	546
23	Commonwealth Attorney	328	139	467
24	Planning	255	207	462
25	Clerk of the Court	317	132	449
26	Development Services	229	219	448
27	Criminal Justice Services	245	167	412
28	County Attorney	264	124	388
29	Juvenile Court Services Unit	202	164	366
30	Management & Budget	229	124	353
31	Circuit Court	228	124	352
32	PW Health District	186	164	350
33	Virginia Cooperative Extension	175	164	339
34	Magistrate	207	124	331
35	Human Right Commission	196	124	320
36	Juvenile and Domestic Court	196	124	320

Some of the findings:

- Public Works was significantly higher than other departments in volume; however, their subjective score was lower, which demonstrates their purchasing processes and management are healthy.
- Volunteer Fire Stations had an astronomically high PO volume, which had a weight of 20% for the objective score.
- Capital projects and the corresponding workload was removed from the evaluation to the extent possible. The decision to remove capital projects was made to allow the study to focus on

the non-capital departments, which make up most procurements ends users. This primarily impacted Parks, Public Works, and Transportation.

- Elections had a significantly low volume with an exceptionally high subjective score, indicating that their processes and management present considerable challenges and may need special attention. This also applied, to a lesser degree, to the Adult Detention Center and Public Safety Communications.
- Courts were generally low on both scales, but because they are structured separately with different staff, governing authority, and obstacles, they must be considered separately. Collectively, they represent an approximate score of the high 400s.

Step 9 - The final step was to present the data and results to the team and gain commitment for ongoing communications about the process and continuous evaluation of the data. The goal is to repeat the process twice yearly to ensure progress and workloads remained balanced and equitable for procurement staff.

The results were presented to procurement staff in proposed silos without names or numbers. The meeting with the procurement team was to achieve specific and measurable goals regarding the complete workload rebalancing project. These goals included: Identify ideal assignments, determine timeline for implementation, develop communication plan and develop transition plan.

Financing and Staffing

Beyond the staffing from Procurement Services, staff utilized resources in other county departments to tap into specific knowledge and skill sets that were not readily available internally in procurement. This included staff in communications, budget, and information technology, all which provided needed assistance which helped shape all parts of this project.

There were no other costs, outside of staff time. The project initially took approximately 8- 12 months from conception to the initial surveys and data analysis. The process has been repeated twice.

Program Results

The objective evaluation showed us which departments have the largest demand for procurement support. Objective measures generally improve through procedural or strategic interventions: moving PO purchases to P-Card, encouraging HVLD or recurring service POs, streamlining the number of PO initiators, splitting the department among multiple Procurement Officers, or encouraging the department to increase the resources devoted to procurement functions, such as a full time Contract Administrator, etc.

The rebalance of staff and the departments assigned to them has allowed for positive changes for the procurement officers and the departments they support. The charts below show the original workloads and the scoring of both quantitively and subjective measures. The second chart reflects the same

information, but after the reassignments of departments, showing a more balanced workload spread among all staff.

Initial

Procurement Officer #1		Procurement Officer #2		Capital Procurement Officer #1		Assistant Director	
Adult Detention Center	1041	Agency on Agi	579	Board of County Supervisors	655	DOIT	993
Office of Elections	839	Development	448	Executive Management	546	Commonwealth Attorney	467
Police	970	Library	741	Management & Budget	353	County Attorney	388
Public Safety Communications	719	*Public Works	177	Human Rights Commission	320		
PW Health District	350	*Public Works	295	Human Resources	675		
Sheriff's Office	630	*Public Works	159	Finance	1180		
		Office of Hous	605				
		Transportation	665				
	4549		3669		3729		1848
Difference from Average:	-+19419		-+20299		-+20239		(22,120)

Procurement Officer #3		Procurement Officer #4		Procurement Officer #5		Procurement Officer #6	
Circuit Court	352	*Public Works	119	DFR	1117	Parks	1192
Clerk of the Court	449	*Public Works	293	FRS Volunteer Stations	1265		
Community Services	839	*Public Works	232				
Virginia Cooperative Extension	339	*Public Works	218				
Criminal Justice Services	412	*Public Works	216				
General District Court	299						
Juvenile Court Services Unit	366						
Juvenile and Domestic Court	320						
Economic Development	656						
Employee Advisory Committee	0						
Magistrates Office	331	The					
Planning Office	462						
Social Services	696						
	5521		1078		2382		1192
	-+18447		(22,890)		(21,586)		(22,776)

After redistribution of workloads

Procurement Officer #1		Procurement Officer #2		Procurement Officer #3	
Adult Detention Center	1041	Finance	1180	DOIT	993
Police	970	Human Resources	675	Community Services	839
Public Safety Communications	719	Economic Development	656	Social Services	696
Sheriff's Office	630	Board of County Supervisors	655	Office of Housing & Community Development	605
Clerk of the Court	449	Executive Management	546	Agency on Aging	579
Criminal Justice Services	412	County Attorney	388	Human Rights Commission	320
Magistrates Office	331	Management & Budget	353	Employee Advisory Committee	
				PW Health District	350
CS Total:	4552		4453		4382
Difference from Average:	+411		+312		+241

Procurement Officer #4		Procurement Officer #5		Assistant Director	
Public Works - Buildings & Grou	278	DFR	1117		
Public Works - Director's Office	103	FRS Volunteer Stations	1265		
Public Works - Fleet	241	Virginia Cooperative Extensio	339		
Public Works - Neighborhood Se	170	Juvenile Court Services Unit	366		
Public Works - Property Manage	228	Circuit Court	352		
Parks - Recreation Services	218	Juvenile and Domestic Court	320		
Parks - non-Capital, non-Rec	810	General District Court	299		
Library	741				
Commonwealth Attorney	467				
	3258		4058		
	(883)		-+83		

Capital Procurement Officer #1		Capital Procurement Officer #2		Lead Procurement Officer	
Transportation (Non-Capital)	665	Public Works - Solid Waste	238	Office of Elections	839
Development Services	448	Public Works - FCM Non Capit	140		
		Public Works - Environmental	310		
SCS Total:	1113		688		839

Brief Summary

This project was the first time that the Procurement Office did a qualitative and quantitative analysis on how procurement officers were assigned departments to support. The total project from conception to end results took more than eight months. The evaluations provided information that was eye opening and allowed the procurement division to pivot in its format to gain efficiencies and to know where to focus its efforts to gain the greatest results.

The objective evaluation showed which departments have the largest demand for procurement support. Objective measures generally improve through procedural or strategic interventions, allowing the Procurement Officer to identify the procedures/strategies most needed to support and assist the department.

The subjective evaluation showed where procurement staff should direct efforts to make the biggest impact. Subjective measures generally improve through interventions by the Procurement Officer: relationship development, communication improvements, and training.

The process that was implemented is under continuous evaluation. The indicators are reviewed bi-annually, while an in-depth status of the change is reviewed on an annual basis. The staff is also committed to identifying trends and adjusting based on a three-year plan.

The County is in the process of bringing in two new departments in fiscal year 2022. Once these departments are fully stood up and staffed, a new evaluation will be done based on the six-month workload of the new departments to ensure that workload for all is balanced.

This process allowed the procurement staff to identify which departments created the most workload and why. With that data, staff was able to rebalance workload by reassigning departments based on the analysis and to recognize which departments still require additional support. This improves morale for procurement officers and provides better customer service for each department.