



Purchasing Task Force

Finance Department

Finance Committee

August 10, 2016

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BACKGROUND

- Periodically, the Finance Department review purchasing policies and processes:
 - City Charter
 - Municipal Code
 - Purchasing Resolution
 - Administrative Manual Policies



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BACKGROUND

- Creation of Purchasing Task Force resulted from
 - Feedback from City Departments
 - Performance and financial audit
 - Matrix
 - Baker Tilly



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GOALS AND OBJECTIVES

1. Clear and concise purchasing guidelines
2. Provide the public with an easy method to view all bid, RFP's and RFI's
3. Strengthen internal controls
4. Identify automated systems
5. Improve the centralization of information
6. Dedicated Intranet Page



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TIMELINE

July 2016:

- Finance Department (FD) to internally review all purchasing policies and procedures; and
- FD to develop a draft plan to achieve the goals and objectives.

August 2016:

- Selection of Purchasing Task Force (PTF) Members (at least one from each Department);
- Introduction meeting with FD and PTF members; and
- PTF members complete a questionnaire

September 2016:

- Meetings between FD and PTF members to discuss questionnaire and potential changes to the City's purchasing practices.

October 2016:

- FD to update draft recommended changes to the City's current purchasing processes and policies based on PTF feedback, best practices, and recommendations from external audits;
- FD to present draft recommended changes to PTF members for final review and comment.



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TIMELINE

November 2016:

- FD to present draft recommended changes to City Manager's Office;
- FD to develop a matrix of how each change needs to be accomplished (e.g. Administrative Manual updates, changes to resolutions, changes to the municipal code, etc.).

December 2016:

- FD to work with City Attorney's Office, if needed, to draft potential changes to City's municipal code and/or Purchasing Resolution.

January 2017:

- FD to present findings and recommended changes to the Finance Committee.

February/March 2017:

- FD to present findings and recommended changes, with input from the Finance Committee, to the City Council for review, input and adoption.

March 2016 through June 2017:

- FD to work with PTF members to train staff citywide on the new purchasing processes and policies.



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RECOMMENDATIONS

That the Finance Committee:

1. Receive and provide feedback on the creation of the City's internal Purchasing Task Force; and
2. Direct staff to return to the Finance Committee no later than January 2017 with recommendations on the City's existing purchasing processes and policies.



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THANK YOU



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