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HIGHLIGHTS

Highlights of City Auditor Report #0725, a report to the City Commission and City management

WHY THIS AUDIT WAS DONE

This audit was conducted as part of our 2007 annual audit plan.

This audit focused on a review of the Purchasing Section of Procurement Services and included areas such as relevant policies and procedures governing the purchasing process, a customer satisfaction survey of selected individuals (outside Procurement Services) that interact with the Purchasing Section as well as other sections of Procurement Services, and a review of selected contracts.

WHAT WE RECOMMEND

Purchasing Procedures (Procurement Manual)

- Complete and distribute administrative procedures for the procurement process.
- Eliminate multiple draft versions of the purchasing procedures currently promulgated by Procurement Services.
- Change certain aspects of the purchasing procedures to include best practices.
- Increase the user friendliness of the Procurement Manual (which serves as the purchasing procedures for the City).

Customer Satisfaction Survey

- Further develop the training opportunities related to the procurement of goods and services provided by Procurement Services.
- Increase the emphasis on the importance of customer service.
- Develop methods for customers to provide feedback to Procurement Services on a continuous basis.

Contract Review

- Utilize the City's Electronic Document Management System (EDMS) for organization and retention of records supporting the contracting process.
- Increase the involvement of Procurement Services in significant sole source acquisitions.

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Audit Conducted by Dennis Sutton, CPA, CIA

August 7, 2007

Audit of the Purchasing Section of the Procurement Services Division

WHAT WE FOUND

Overall, we found that Procurement Services did an adequate job of overseeing the purchasing process of the City. We also noted no issues that would indicate the purchasing process is biased, unfair, or outside policy or procedure.

Nonetheless, we noted various items, which, if addressed, should strengthen controls, current policies, procedures, and practices, and the operations of the Purchasing Section of Procurement Services. Those items related to the Procurement Manual, the responses from the customer satisfaction survey, and our testing of selected contracts.

The Procurement Manual

- The manual has not been finalized and approved as the purchasing procedures for the City.
- Two different draft versions of purchasing procedures were available to City employees on the Procurement Services intranet website.
- The draft Procurement Manual that was reviewed was incomplete.
- Other minor issues that could improve the purchasing procedures were noted.

Customer Satisfaction Survey

- Training was identified as an area in which below average customer satisfaction was noted.
- Concerns about customer service were raised in the customer satisfaction survey.
- A process is not in place to allow users an opportunity to provide feedback to Procurement Services.

Contract Testing

- Procurement Services is only minimally involved in large sole source acquisitions.
- Documentation supporting the contracting process was retained in up to four separate locations.
- Procedures are not in place to provide guidance for purchasing agents throughout the purchasing process.

**Audit of the
Purchasing Section
of the
Procurement Services Division**

AUDIT REPORT #0725

August 7, 2007



Copies of this audit report #0725 may be obtained from the City Auditor's web site (<http://talgov.com/auditing/index.cfm>), by telephone (850 / 891-8397), by FAX (850 / 891-0912), by mail or in person (City Auditor, 300 S. Adams Street, Mail Box A-22, Tallahassee, FL 32301-1731), or by e-mail (auditors@talgov.com).

Audit conducted by:

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Sam M. McCall, CPA, CGFM, CIA, CGAP, City Auditor

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Audit of the Purchasing Section of the Procurement Services Division



Sam M. McCall, CPA, CGFM, CIA, CGAP
City Auditor

Report #0725

August 7, 2007

Executive Summary

Overall, we concluded that Procurement Services did an adequate job of overseeing the purchasing process of the City.

The Procurement Services Division of the Department of Management and Administration (DMA) has been designated as having responsibility for the procurement process of the City.

This audit focused on a review of the Purchasing Section of Procurement Services and included areas such as: relevant policies and procedures governing the purchasing process, a customer satisfaction survey of selected individuals (outside Procurement Services) that interact with the Purchasing Section as well as other sections of Procurement Services, and a review of selected contracts.

Overall, we concluded that Procurement Services did an adequate job of overseeing the purchasing process of the City. We also noted no issues that would indicate the purchasing process is biased, unfair, or outside policy or procedure.

However, we have recommendations relating to three broad areas of the procurement process as follows:

Purchasing Procedures (Procurement Manual)

- Complete and distribute administrative procedures for the procurement process.
- Eliminate multiple draft versions of the purchasing procedures currently promulgated by Procurement Services.
- Change certain aspects of the purchasing procedures to include best practices.

- Increase the user friendliness of the Procurement Manual (which serves as the purchasing procedures for the City).

Customer Satisfaction Survey

- Further develop the training opportunities related to the procurement of goods and services provided by Procurement Services.
- Increase the emphasis on the importance of customer service.
- Develop methods for customers to provide feedback to Procurement Services on a continuous basis.

Contract Review

- Utilize the City's Electronic Document Management System (EDMS) for organization and retention of records supporting the contracting process.
- Increase the involvement of Procurement Services in significant sole source acquisitions.

Based on the above identified issues and our related recommendations, management has developed an action plan that should help improve the procurement process of the City. That action plan is included in this report as appendix A.

We would like to acknowledge the full and complete cooperation and support of Procurement Services' management and staff throughout this audit.

Audit of the Purchasing Section of the Procurement Services Division



Sam M. McCall, CPA, CGFM, CIA, CGAP
City Auditor

Report #0725

August 7, 2007

Scope, Objectives, and Methodology

We have performed an audit of the Purchasing Section of the Procurement Services Division of the Department of Management and Administration. The scope of the audit did not include all aspects of the Purchasing Section; It was limited to a review the City's procurement policy and purchasing procedures in effect as of June 30, 2006, a survey of selected customers of the Procurement Services Division, and a review of selected City contracts. The close interrelationship between the purchasing process and other aspects of procurement (i.e., accounts payable) resulted in the responses from the customer satisfaction survey extending into areas of the procurement process other than purchasing.

The objectives of this audit were to (1) review and identify improvements that could be made to the City's procurement policy and purchasing procedures; (2) determine user satisfaction with the services provided by Procurement Services and identify any areas of the purchasing process that users believe are in need of improvement; and (3) determine compliance with existing applicable policies and procedures during the purchasing process.

To meet those objectives we: (1) gained an understanding of the City's various purchasing processes and practices; (2) conducted interviews of Procurement Services' staff, as applicable; (3) reviewed applicable City policies and procedures relating to the procurement process; (4) conducted a customer survey of users of the City's PeopleSoft procurement system; and (5) examined current and expired City

contracts, bid records, and other documentation related to the acquisition of goods and services.

This audit was conducted in accordance with Generally Accepted Government Auditing Standards and the Standards for the Professional Practice of Internal Auditing and accordingly, included such tests of the records and other auditing procedures as were considered necessary.

Background

Procurement Services has been delegated many procurement responsibilities by the City Manager.

The City of Tallahassee’s Code of Ordinances identifies the City Manager as the procurement agent for the City. In that role, the City Manager has delegated many related responsibilities to the Department of Management and Administration (DMA) and its Procurement Services Division. Those responsibilities include establishing policies and procedures and providing oversight for the purchase of all supplies and approval of payment for those supplies.

At the time of our audit, there were approximately 780 current and expired contracts in the contract listing maintained by Procurement Services. Of those 780 contracts, 330 were current and 450 were expired. Those contracts are for the acquisition of a wide variety of goods and services and include items such as the retention of contractors for capital projects, retention of consultants where expertise is needed beyond that of City staff, and the acquisition of items to support the daily operations of the City government.

Duties and Responsibilities of Procurement Services

The Procurement Services Division is divided into three sections. Those sections are Purchasing, Accounts Payable, and Contract Management. Our audit focused on the Purchasing Section and only involved the other sections to the extent considered necessary to obtain an understanding of the processes administered by the Purchasing

Section of the Procurement Services Division, or as included by respondents of our customer satisfaction survey.

Procurement Services' purchasing responsibilities include, but are not limited to:

- Developing and distributing administrative procedures pertaining to purchasing activities of the City;
- Providing leadership in, and oversight of, the development of invitations to bid and requests for proposals;
- Reviewing and approving all procurement award recommendations submitted to the City Manager; and
- Maintaining vendor performance records and authorizing termination of vendor relationships.

Other responsibilities of Procurement Services that are not within the scope of this audit include:

- Administration of the accounts payable process;
- Administration of the procurement card program; and
- Disposition of materials and equipment declared to be surplus.

Purchasing Authority

The purchasing process of the City of Tallahassee is a decentralized process where the authority to purchase goods and services, subject to dollar limit thresholds, has been delegated to departments other than Procurement Services. Those thresholds are set by City policy. The following table illustrates purchasing authority limits.

The purchasing process of the City is a decentralized process where many purchases are made at the departmental level.

Approving Body	Approval Limit
City Commission	Above \$50,000
Appointed Officials	Up to \$ 50,000
Procurement Services Manager	Up to \$25,000
Department Directors	Up to \$10,000

Therefore, Procurement Services is not involved in acquisitions below the thresholds established in the procurement policy. As of the time of this audit, individual departments were authorized to make acquisitions without the involvement of procurement services with a cost up to \$10,000.

Issues and Recommendations

Overall, we concluded that Procurement Services did an adequate job of overseeing the purchasing process of the City. We noted no issues to indicate activities that would be considered unfair, biased, or outside policy or procedure in the Purchasing Section’s acquisition of goods or services. We did, however, note several areas for improvement in the procurement process and the operations of Procurement Services.

City’s Procurement Policy

The City’s policy for the procurement of goods and services (CP 242) was reviewed as part of this audit. We noted the procurement policy serves as high-level guidance for the overall procurement process, and the specific details of the purchasing process are addressed in separate purchasing procedures. Those procedures are promulgated and distributed as the Procurement Manual and are addressed in the next section of this report.

The City’s procurement policy provides high-level guidance for the purchasing process.

In our review of the procurement policy, we noted that the policy was clear and concise as to the roles and responsibilities of the various individuals involved in the acquisition of goods and services on behalf

of the City. The policy is also clear on competitive thresholds and the required levels of managerial approval, which are based on acquisition amount. We also noted that the policy provided an adequate framework from which detailed procurement procedures could be developed.

The City's Procurement Procedures

As previously noted, Procurement Services has been charged with developing and distributing procedures pertaining to the purchasing activities of the City. Procurement Services has developed purchasing procedures and is distributing those procedures as the Procurement Manual. The Procurement Manual addresses areas such as roles and responsibilities of the individuals involved in the procurement process, ethics in procurement, vendor grievance process, and the various processes that can/should be used when acquiring goods and services. It should be noted that the Procurement Manual is intended to serve as the procedures for purchasing only and is not intended to include accounts payable or purchase card procedures, however those areas are minimally included as necessary to adequately address the various areas of the purchasing process.

The directions and guidance within the Procurement Manual are consistent with applicable laws and policies.

We reviewed the Procurement Manual for completeness and thoroughness in covering the various aspects of the purchasing process, consistency with applicable laws and policies, and with best practices. Our review was intended to identify areas where improvements could be made to increase the understandability and usability of the manual, increase consistency with applicable laws and policies, and increase the use of best practices in the purchasing process.

Our review of the Procurement Manual did not identify any instances where the manual’s guidance or instructions conflicted with applicable laws or policies.

Procurement Services has been charged with developing and distributing purchasing procedures.

The directions and guidance provided within the Procurement Manual were consistent with the laws and policies that govern the acquisition of goods and services by the City.

We did, however, note other issues with the Procurement Manual as follows:

- The manual has not been finalized and approved as the purchasing procedures for the City.
- Two different draft versions of purchasing procedures were available to City employees on the Procurement Services intranet website.
- The draft Procurement Manual that was reviewed was incomplete.
- We also noted other issues that could improve the purchasing procedures.

We were unable to ascertain the existence of a final or approved Procurement Manual.

We were unable to ascertain the existence of a final or approved set of purchasing procedures.

The Procurement Manual serves as the purchasing procedures for the City. We were unable to ascertain the existence of a final or approved set of purchasing procedures. Therefore, we are unable to provide assurance that Procurement Services has complied with the City’s procurement policy (CP 242) that assigns responsibility for “developing and distributing administrative procedures pertaining to purchasing...” to Procurement Services. However, we were able to identify and obtain an undated draft Procurement Manual. That draft Procurement Manual is made available to City employees through Procurement Services’ intranet web site and referred to as authoritative guidance by Procurement Services’ staff.

Purchasing procedures should provide for an efficient, consistent, and adequately controlled method of acquiring goods and services. Without

complete and approved procedures for City employees to follow, there is the potential for confusion, inconsistency, and error by employees when acquiring goods or services. This observation was supported by the results of our survey of Procurement Services' customers. (The results of the survey will be addressed later in this report.) We recommend that management make the completion and approval of the Procurement Manual a priority. We also recommend that management consider forming a focus group to assist with the finalization of the procedures. That focus group should include key individuals from Procurement Services as well as other City departments to help ensure that the needs of Procurement Services' customers are addressed.

We noted that two different sets of purchasing procedures were available to City employees.

At the time of our audit, there were two versions of "draft" purchasing procedures available on Procurement Services' intranet website.

The promulgation of two different sets of procedures can lead to confusion from a user's standpoint since it is not clear which set of procedures should be followed/used when making purchasing decisions. The first of those procedures is identified as "Interim Contract Procedures" while the second is identified as "Contract Procedures." To address this issue, we recommend that one of the two versions be removed from the website to remove any question among City departments as to which set of procedures should be used.

Of the two versions of the purchasing procedures, we reviewed the more recent of the two, "Contract Procedures." In that review, we noted several issues and other instances where improvements could be made.

The Procurement Manual (purchasing procedures) was not complete.

Our review of the draft Procurement Manual showed that the document was not complete.

Procurement Services has made the draft Procurement Manual available to City departments and uses it as an authoritative reference when making purchasing decisions and providing guidance to City

employees. As such, the procedures should be complete. Incomplete procedures can lead to inconsistent application of “procurement rules,” unequal treatment of vendors, delays in the procurement process, and inefficiencies in acquiring goods and services. Examples of items that were noted as being incomplete include:

- Entire sections left blank with notations that “X” subject should be inserted in this section;
- Instances where steps were left out of process descriptions; and
- Missing links and references to other documents.

We recommend that the completion and finalization of the Procurement Manual be a priority for Procurement Services.

In our review, we also noted other areas where improvements should be made to the purchasing procedures.

Our review of the purchasing procedures did not identify any requirement as to a number of quotes that must be obtained when departments are acquiring goods or services with a cost between \$1,000 and \$10,000. It has been common practice, and a verbal requirement from Procurement Services, that three price quotes are required for such purchases. This is a sound business practice as it helps ensure that a fair price is obtained from vendors when acquiring relatively inexpensive items without making the acquisition process overly cumbersome or time consuming. We recommend that the minimum number of quotes required prior to purchasing goods or services with a cost between \$1,000 and \$10,000 be identified and included in the purchasing procedures.

The minimum number of quotes required for purchases between \$1,000 and \$10,000 is not documented.

We also noted that while no suspension or debarment actions have been taken against any City vendors to date, no set criteria are outlined in the purchasing procedures to provide guidance should such actions be needed. Suspending and/or disbaring a vendor is the final step when

Criteria for vendor disbarment decisions have not been set.

dealing with troublesome vendors and outside of legal action the harshest punishment that can be given to a vendor. As such, the vendor disbarment process should have set criteria to ensure that vendors are treated fairly and consistently.

The requirement for rotating vendors should be removed from the purchasing procedures.

A third item that we noted where improvements should be made related to a statement made in the purchasing procedures relating to competitive procurement. The procedures state, “Departments shall **rotate vendors** (emphasis added) to ensure fair and open competition.” The concept of fair and open competition is stressed in both the procurement policy and the Procurement Manual and is a good practice to help ensure that the City gets the best price and value for the money that it expends when making purchases. Competition in procurement is where vendors vie to earn the City’s business through lower price or enhanced service. Rotating vendors is having a set pool of vendors already selected and utilizing each one in sequence, such that no one vendor will be the sole supplier or service provider. Rotating vendors may help ensure that too much business is not conducted with the same vendor, but it does not help ensure that the City is getting the best price and value from each expenditure. Therefore, we recommend that the statement be removed from the purchasing procedures.

We noted many places where the inclusion of examples of forms and templates in the procurement manual would improve the ability of users to understand the related narrative description.

The inclusion of examples and forms would increase users’ ability to understand the Procurement Manual.

Throughout the purchasing procedures, there were narrative references and descriptions of many forms and templates. While these descriptions were generally complete and useful, it would improve the ability of readers to understand the narratives if examples of those forms and templates were included in the manual.

For example, department directors are assigned responsibility for developing departmental purchasing procedures for “exception”

transactions less than \$10,000, which will be paid for by purchase card. An example of such a procedure would assist department directors in complying with this provision of the procurement manual.

Another example of where a sample form would help departments is the section of the procedures that addresses vendor performance evaluations and departmental responsibilities related to those evaluations. The purchasing procedures require contract administrators to complete a vendor performance evaluation form at the end of each contract. The inclusion of an example or a completed sample of the form in the Procurement Manual would help contract administrators understand and complete the evaluation form.

Therefore, to improve the ability of the readers to understand the various forms referenced and described in the manual, we recommend that examples of forms be included in the manual whenever possible.

Customer Satisfaction Survey of Procurement Services' Customers

We conducted a survey of the customers of Procurement Services. Our survey was intended to obtain an understanding of the level of satisfaction that the City employees had with the various services provided by Procurement Services. The survey asked customers to identify their level of satisfaction with several aspects of the purchasing process on a scale of 1 to 5. We defined satisfaction levels based on the numerical ratings of the responses as follows in Table 1.

Table 1

Definition of Satisfaction Level				
Significantly Below Average	Below Average	Above Average	Significantly Above Average	
1	2	3	4	5
Level of Satisfaction				

The survey consisted of three main parts. The first part addressed the users’ satisfaction with five different processes of purchasing goods and/or services. Those processes included the requisition/PO process, formal bids and proposals, sole source acquisition, check request, and purchase cards. The second area related to the users’ satisfaction with the customer service provided by Procurement Services and included questions about specific services and responsibilities of Procurement Services. Those services and responsibilities related to customer service, staff responsiveness, training, and the Procurement Manual. In the third and final area of the survey, we asked respondents to further explain areas in which they reported high and low levels of satisfaction in the first two areas of the survey. Additionally we provided an opportunity for respondents to make suggestions as to potential improvements that could be made by Procurement Services. The survey instrument is included as Appendix B to this report.

In some instances, respondents addressed areas outside the previously identified scope of this audit, the purchasing process. We considered those comments in the course of our evaluation of responses and

included those additional comments in this report as deemed appropriate.

The survey was distributed to 228 City employees identified as either being responsible for preparation of, or approval of, purchasing requisitions in the PeopleSoft financial system. Of those 228 surveys distributed, we received 88 responses, or a 38.6% response rate.

On a scale of 1-5, users reported a 3.43 level of satisfaction with Procurement Services.

The results of the survey showed that overall, the customers of Procurement Services were satisfied with the different purchasing processes and the customer service provided by Procurement Services, with an overall rating of 3.43.

As previously noted, selected customers of Procurement Services were asked to rate their level of satisfaction with various purchasing processes and the customer service provided by Procurement Services. Our review of the responses showed there was an overall satisfaction rating of 3.43 for both of the first two sections combined.

The analysis of the ratings of the purchasing processes showed above average customer satisfaction (a rating of 3.46) with the purchasing processes.

For each of the five purchasing processes addressed, we inquired upon five specific parts of the purchasing processes:

- Ease of use;
- Convenience;
- Level of training provided by Procurement Services;
- Level of support from Procurement Services; and
- Overall satisfaction with the process.

Table 2 below shows the average rating for each purchasing process surveyed, and the overall average for the five processes combined.

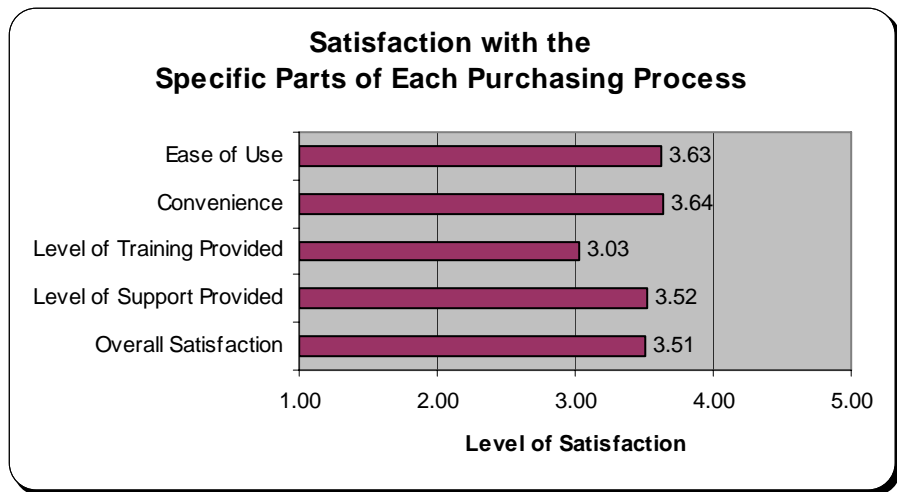
Table 2



The above table shows that none of the purchasing processes were rated with a below average level of satisfaction and customers were very satisfied with the P-card purchasing process.

Each of the five component parts of the purchasing processes were also analyzed for customer satisfaction. Table 3 shows the average rating of each of the component parts regardless of the purchasing process.

Table 3



This table shows that respondents were satisfied with each of the individual parts of various purchasing processes inquired upon. The level of satisfaction with the training provided was identified as having the lowest level of satisfaction for the parts of the purchasing process surveyed and will be discussed in greater detail later in this report.

The second major area of the survey involved questions about users' satisfaction with the customer service provided by Procurement Services. Our analysis of the survey results showed that, in general, users reported above average satisfaction with the customer service they were receiving, a 3.34 average for all five categories. Training was identified as having a below average rating of satisfaction, 2.97. Table 4 shows the ratings received for each category of customer service.

Table 4



There were two areas that stood out in our review of the survey responses. The first area was the P-card purchasing process and the second area was training. Additionally, there were some issues that were identified through the narrative responses provided by respondents.

The survey respondents indicated a very high level of satisfaction with the P-card purchasing process.

Survey respondents reported a very high level of satisfaction with the P-card purchasing process.

Respondents specifically ranked the ease of use, convenience, and overall level of satisfaction with the P-card program with the highest levels of satisfaction. Of the various purchasing processes inquired upon, the P-card was the only process to receive an above average satisfaction rating of 4 or above. Some of the comments relating to the P-card process include:

- “The purchasing card is a great tool and makes purchases and travel much less tedious.”
- “P-card – quick, efficient.”
- “P-card process is user friendly.”

Training was the one area that stood out as having below average satisfaction in several categories. However, when all training ratings were averaged, the overall training rating was 3.00.

Training was the one area that stood out as having a reported below average level of satisfaction

We included a question about training in each of the five different procurement processes. We also dedicated one section of the customer service part of the survey specifically to training. Table 5a shows the average of the responses of questions relating to training for each of the purchasing processes and Table 5b shows the average of the responses for the questions from the customer service part of the survey. Overall, when the ratings from all questions relating to training are averaged (both Tables 5a and 5b), training received a rating of 3.00.

Table 5a

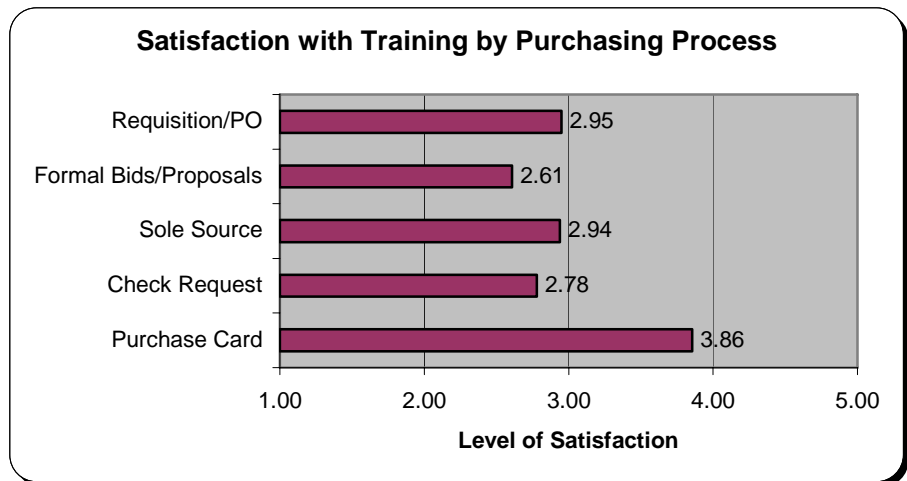


Table 5b



When the satisfaction ratings of the five procurement processes (Table 5a) are analyzed, it is apparent that training for the P-card purchasing process received a significantly higher rating than the training for the other processes. For the various purchasing processes combined, respondents gave training an average rating of 3.03. However, if P-card is excluded, the average satisfaction rating is 2.82 or below average.

Our analysis of the ratings for training from the customer service section of the survey showed a slightly below average level of satisfaction of 2.97.

Based on the explanatory narratives provided by responders, the frequency of the training was the most common complaint. Those complaints included comments such as:

- “I would like to see increased training opportunities.”
- “Frequency of training could be increased.”
- “No training on day-to-day processes.”
- “Training is lacking in Procurement Services.”

The second most common complaint about training related to the types of training available. Those comments included items such as:

- “Suggest a biennial refresher short course on process and procedures.”
- “Train new folks using Procurement Services (first time users).”
- “Offer training courses for follow-up.”
- “Training, interface with PeopleSoft.”
- “There needs to be regular training provided for administrative staff, project managers, and supervisors.”

When the issue of training was discussed with Procurement Services, the response was that training does occur on a regular basis and that Procurement Services is willing to schedule and conduct training when a need is identified or requested.

Based on the responses from the survey and the response made by Procurement Services, it appears that the issue may involve a breakdown in communication, such that users are not made aware of training opportunities by Procurement Services and a lack of communication from users to Procurement Services that additional training is wanted/needed.

We recommend that Procurement Services consider refining the training program to include regular periodic training sessions on each of the different procurement processes individually, how to use the PeopleSoft Financials System (FMS) procurement module, and general guidance for procuring goods and services on the behalf of the City of Tallahassee. Additionally, we recommend that Procurement Services send out monthly e-mails to the FMS users group notifying them of the training available for the month.

Concerns about customer service were raised in the customer satisfaction survey.

In the narrative portion of the survey, there were comments that indicated dissatisfaction with the consistency of customer service provided by Procurement Services. The numerical ratings provided by survey respondents showed above average satisfaction with the customer service received, a rating of 3.35.

However, based on the narrative comments provided by customers, we noted that users reported a wide range of responses, from a very low level to a very high level of satisfaction. We also noted that respondents did not limit their responses to the Purchasing Section and made comments that seemed to include the Accounts Payable Section in their perception of customer service.

We acknowledge that Procurement Services is often put in the position of having to enforce City policies and procedures by not processing paperwork that is incomplete, incorrect, or in violation of City policies and procedures. This necessary function and duty of Procurement Services has the potential to lead to dissatisfaction in its customers. However, a customer's perception of the service they receive is very important to the success of an internal service operation such as Procurement Services.

We recommend that Procurement Services address these perceptions (whether true or not) and place emphasis on customer service through reminders and reinforcement of its importance during staff meetings. We also recommend Procurement Services utilize the training provided by Equity and Workforce Development (as time and resources allow) to increase staff awareness of the importance of customer service.

We noted that there was not a process in place to allow users an opportunity to provide feedback to Procurement Services.

Customer feedback is a key part of process improvement. Therefore, it would be helpful for Procurement Services to have a mechanism in place that would encourage their customers to communicate ideas and provide comments.

While discussing the results of the customer survey with management, it became apparent that some of the issues raised by the respondents were unexpected. Procurement Services' management also indicated that changes to various aspects of Procurement Services would be considered in response to the survey. As such, we would like to commend Procurement Services' management for looking at the criticism provided in the survey as an opportunity to improve its operations and customer service.

To promote further feedback from Procurement Services' customers, we recommend the development and implementation of two different mechanisms for users to provide feedback on the procurement process. The first is through a standard customer feedback form that is available to customers at all times through Procurement Services' intranet website. The second should be more specific and distributed to key individuals involved in acquisitions through the bid/RFP process. The first would provide Procurement Services' customers a mechanism to provide feedback on a continuous basis, and the second would encourage prompt feedback relating to each contract developed.

Contract testing

To test compliance with applicable laws, policies and procedures, we selected a sample of 25 contracts for examination. That sample included both current and expired contracts and was selected on both a random and judgmental basis. The judgmental items were chosen

based on the type of contract in order to ensure a variety of contract types were included in the sample. Contract types selected included term contracts, professional services agreements, price agreements, and consulting contracts.

Our review did not identify any fraudulent or improper contracts or instances of an unfair/biased contracting process.

We did not note any instances where goods and/or services were acquired outside of City policy or procedures or where vendors were treated other than in a fair and consistent manner. We did however, note issues relating to document retention.

Procurement Services is only minimally involved in large sole source acquisitions.

Our examination of contract files showed that Procurement Services was only minimally involved in the contracting process for acquisitions identified as sole source that require City Manager or City Commission approval. Without Procurement Services' involvement in those sole source acquisitions, departments are developing, negotiating, and executing contracts without the involvement of the City's designated procurement official. This could increase the possibility of unclear contract terms being included in contracts and noncompliance with applicable laws, policies, and procedures during the contracting process.

We noted one instance where vital documentation relating to a sole source contract was not retained in accordance with applicable record retention laws. In this instance, the documentation was the statement of work that described the amount of the contract, duties, responsibilities, and deliverables of the vendor. It was an attachment to the contract and never submitted to the Treasurer-Clerk's Office for inclusion in the City's official records. We were unable to determine the dollar amount of the contract, but we were able to determine that a purchase order for

Procurement Services should increase its involvement in significant sole source acquisitions.

Our review did not note any fraudulent or improper contracts.

\$210,721 was generated and \$195,721 was expended based on the contract.

If Procurement Services had been involved in the process, this omission may not have occurred because of supervisory review of contract files at the conclusion of the contracting process. Accordingly, we recommend that Procurement Service become more involved in sole source acquisitions that require approval above the department head level or \$10,000.

When this issue was brought to the attention of Procurement Services, they concurred that their role in sole source acquisitions was greatly reduced from that of ordinary acquisitions. However, they asserted that they do take certain actions relating to large sole source acquisitions. For example, they ensure that a City Commission agenda item, where the acquisition is submitted for approval, clearly identifies the fact that it is a sole source acquisition. Also, in cases where there are concerns that it may not be a valid sole source acquisition, inquiries are made of the department and other vendors to verify the fact that only one vendor can reasonably provide the goods or services.

To improve the City's oversight and reduce the chance of noncompliance with laws, policies, and procedures, we also recommend that the Procurement Manual (purchasing procedures) include the requirement that Procurement Services be responsible for ensuring adequate supporting documentation is generated and retained, and make efforts to verify the validity of the sole source claim of the department for large acquisitions (i.e., those requiring City Manager or City Commission Approval).

If implemented, our recommendation will require a change in the business practices of the City relating to sole source acquisitions. This is not a change that can be made solely by Procurement Services and

will require City departments to comply, as Procurement Services does not have a way to become aware of large sole source acquisitions prior to the departmental request for approval.

Documentation supporting the contracting and bid process was retained in up to four separate locations.

We noted that the documentation supporting the contract process was separated and retained in up to four separate locations within Procurement Services. For example, we noted the request for proposal, support for the vendor selection, and contract documents were filed in one location, the paper copies of documentation supporting the bid responses were filed in another location, other supporting documents in electronic format were retained in a third location, and in some instances other supporting documentation was retained in the City's Electronic Documents Management System (EDMS).

The lack of documentation standards, consistency, and organization within the contract and bid files can lead to important documents not being retained or being misfiled. Without clear standards as to what should be retained in the contract and bid files, procurement agents may be unsure as to what documentation should be retained and where it should be filed.

Procurement Services acknowledged that the files were not maintained in a consistent manner but that process improvements were in progress with a conversion to using the City's EDMS to retain all required supporting documents.

We recommend that the EDMS conversion be continued and completed in a timely manner. We also recommend that standards for file organization and document retention practices be included in internal purchasing procedures. Additionally, to help ensure procurement agent compliance with the revised process, we recommend that each file be

reviewed and signed off on as to completeness and organization by the procurement agent supervisor at the conclusion of each acquisition.

Procedures are not in place to provide guidance to purchasing agents throughout the purchasing process.

As part of our testing of contracts, we attempted to obtain copies of Procurement Services' internal procedures for the administration of the purchasing process. We did not note any procedures for internal use by Procurement Services throughout the purchasing process.

We noted several instances in the course of our testing where minor issues relating to contracts and/or the contracting process may have been avoided if internal procedures had been in place. Examples include unclear contract language, contract file checklists either not utilized or incomplete, and (as previously noted) disorganized files.

As previously noted, the Procurement Manual serves as the City's purchasing procedures. The procedures in the manual apply to Procurement Services and purchasing agents. However those procedures were primarily written and intended for use by departments and employees outside Procurement Services and do not specifically address the duties and responsibilities of purchasing agents in relation to the purchasing process.

We did not note any procedures for internal use by Procurement Services throughout the purchasing process.

We recommend that Procurement Services develop internal procedures for the purchasing process. Such procedures should be primarily designed to assist procurement agents in the acquisition of goods and services, help ensure that agents comply with applicable laws and policies, and help ensure that required supporting documentation is retained in an efficient and organized manner.

Conclusion

The results of our audit procedures showed that, overall, the Purchasing Section of Procurement Services did an adequate job of overseeing the

purchasing activities of the City. However, we did note areas where the purchasing process could be improved. Those improvements were in the areas of the City’s purchasing policies and procedures and customer service. Specific recommendations have been made within this report to address each of the issues identified. Management’s planned actions, based on those recommendations, are included in appendix A of this report.

We would like to acknowledge the cooperation of Procurement Services and thank them for their assistance throughout the course of this audit.

***Response from
Appointed
Official***

City Manager:

I am pleased to see that the recent audit of the Purchasing Section of the Procurement Services Division indicated that overall, Procurement Services did an adequate job of overseeing the purchasing process of the City and that there are no issues indicating that this process is biased, unfair, or outside policy or procedure. I appreciate the thoroughness of this review as we strive to ensure that public funds are properly expended. Procurement staff has reviewed the action plan and has already begun working on issues raised in this audit. I would like to thank the City Auditor's Office for their comprehensive audit of the City's procurement process.

Appendix A - Action Plan

Action Steps	Responsible Employee(s)	Target Date
Objective A: Complete and issue the procurement procedures.		
1. A focus group will be developed to assist in the development and revision of the Procurement Manual. The	Cathy Davis Kent Rickey	9/30/07

members of focus group will be solicited from the customer departments of Procurement Services. An attempt will be made to include a variety of members to help ensure that many different perspectives can be included.		
2. Efforts will be made to include examples of forms, templates, and other documents referred to in the Procurement Manual whenever reasonably possible.	Kent Rickey Bernice McQueen	9/30/07
3. The Procurement Services' Manager will conduct a review of the manual that is produced by the focus group. That review will be intended to ensure the manual does not conflict with any applicable policies and/or procedures, is complete, and addresses all required issues.	Cathy Davis	3/31/08
4. A final draft of the Procurement Manual will be distributed to Procurement Services' customers to allow those users an opportunity to provide feedback on the manual and make suggestions as to possible improvements.	Kent Rickey	9/30/08
5. After the draft exposure period, the manual will be submitted for approval as the City's procurement procedures.	Cathy Davis	12/31/08
6. Once approval for the manual is obtained it will be made available to all City employees.	Bernice McQueen	12/31/08
7. The manual will be published on the Procurement Services' intranet website, and all previous drafts will be removed.	Bernice McQueen	12/31/08
Objective B: Develop departmental procedures for Procurement Services' staff to follow throughout the procurement process.		
1. Internal or departmental procedures will be developed. Those procedures will be designed and written for the governance of the internal operations of Procurement Services and not necessarily the overall procurement process. The procedures will address areas such as: <ul style="list-style-type: none"> • Recordkeeping • Training • Contract Monitoring • Contract Closeout Process 	Kent Rickey Cathy Davis	12/31/07
Objective C: Improve the procurement related training opportunities available to City employees.		
1. The focus group assembled to assist in the development of the Procurement Manual will be asked to identify additional training courses that should be designed and conducted to meet the needs of City employees.	Kent Rickey Bernice McQueen	12/31/07
2. New training courses will be developed, based on the needs identified by the focus group, as applicable. Potential new courses identified in the audit include courses focused on procurement related policies and procedures, courses on each of the various procurement processes, and periodic	Kent Rickey Bernice McQueen	9/30/08

short refresher training designed to update users on changes in the various procurement processes.		
3. A monthly training calendar will be developed and distributed to employees in the FMS users group.	Bernice McQueen	9/30/07
Objective D: Improve the perception of the customer service provided to the users of Procurement Services.		
1. The importance of good customer service will be emphasized and communicated to the employees of Procurement Services.	Cathy Davis	9/30/07
2. Procurement Services' staff will be encouraged to attend customer service training offered by Equity and Workforce Development when opportunities exist and workload allows.	Cathy Davis	9/30/07
Objective E: Improve the document retention and filing practices of Procurement Services.		
1. The internal or departmental procedures will include standards for organization and document retention relating to the various procurement processes.	Kent Rickey Joan Austin	12/31/07
2. Managerial or supervisory review of procurement records will be conducted and documented for each acquisition.	Kent Rickey Cathy Davis	9/30/07
3. The City's EDMS will be used to file and retain all documents relating to the contracting process.	Joan Austin	9/30/07
Objective F: Improve the City's oversight of large sole source acquisition process.		
1. Department directors and key City employees will be notified of the change in City business practices relating to Procurement Services' increased involvement in large sole source acquisitions. They will also be informed that it is the responsibility of the department making the acquisition to notify and involve Procurement Services.	Cathy Davis	9/30/07
2. Procurement agents will be involved in the sole source acquisition process in an oversight and consulting role.	Kent Rickey	9/30/07
3. Documentation supporting sole source acquisitions will be provided to Procurement Services to ensure such acquisitions are adequately documented, controlled, and are valid sole source acquisitions.	Kent Rickey	9/30/07
4. The requirement that Procurement Services be consulted with, and involved in, sole source acquisitions will be included in the Procurement Manual.	Kent Rickey Cathy Davis	9/30/07

Objective G: Provide the customers of Procurement Services a mechanism to communicate their satisfaction with Procurement Services and an opportunity to make suggestions for continuous process improvement.

<p>1. A process will be developed whereby individuals that acquire goods and services on behalf of the City are able to provide feedback (on an ongoing basis) to Procurement Services as to improvements they believe could be implemented to improve the process of the overall procurement process.</p>	<p>Kent Rickey Bernice McQueen</p>	<p>12/31/07</p>
<p>2. A customer survey form will be developed for individuals involved in the procurement of goods and services though the bid/RFP process to provide comments and suggestions at the end of the acquisition process.</p>	<p>Kent Rickey</p>	<p>12/31/07</p>

Appendix B – Customer Satisfaction Survey



Office of the City Auditor Procurement Services Customer Survey

The Office of the City Auditor is conducting an audit of the city procurement process. This questionnaire relates to the audit objective of assessing City of Tallahassee employees' satisfaction with the services provided by the Department of Management and Administration, Procurement Services Division. Please take a few minutes to complete this questionnaire and return it to the City Auditor's Office via inter-office mail (Box A-22, attention Christy Crump) or email <mailto:crumpc@tal.gov>. All comments, suggestions, concerns, and compliments are welcome.

When rating your level of satisfaction, please mark an "x" in the appropriate box for each item, with 1 being the lowest and 5 being the highest. If you have not had experience with or utilized a particular service, do not respond to questions associated with that service. If you have questions or need clarification, please contact Dennis Sutton at 891-8399 or Beth Breier at 891-8386.

	Level of Satisfaction						
1) Procurement Related Processes							
a) Requisition / Purchase Order Process	Low					High	
i) Ease of use	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>	
ii) Convenience	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>	
iii) Level of training provided by Procurement Services	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>	
iv) Level of support from Procurement Services	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>	
v) Overall satisfaction	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>	
b) Formal Bids and Proposals	Low					High	
i) Ease of use	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>	
ii) Convenience	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>	
iii) Level of training provided by Procurement Services	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>	
iv) Level of support from Procurement Services	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>	
v) Overall satisfaction	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>	
c) Sole Source Justification Process	Low					High	
i) Ease of use	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>	
ii) Convenience	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>	
iii) Level of training provided by Procurement Services	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>	
iv) Level of support from Procurement Services	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>	
v) Overall satisfaction	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>	
d) Check Request Process	Low					High	
i) Ease of use	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>	
ii) Convenience	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>	
iii) Level of training provided by Procurement Services	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>	
iv) Level of support from Procurement Services	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>	
v) Overall satisfaction	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>	
e) Purchase Card Process	Low					High	
i) Ease of use	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>	
ii) Convenience	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>	
iii) Level of training provided by Procurement Services	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>	
iv) Level of support from Procurement Services	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>	
v) Overall satisfaction	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>	

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Office of the City Auditor Procurement Services Customer Survey

	Level of Satisfaction					
	Low			High		
2) Procurement Service's Customer Service						
a) Level of satisfaction with Procurement Services staff's:						
i) Courteousness	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
ii) Helpfulness	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
iii) Professionalism	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
b) Level of satisfaction with Procurement Services staff's responsiveness in terms of:						
i) Timeliness of response to inquiries or questions	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
ii) Level of knowledge	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
iii) Accuracy of information provided	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
iv) Consistency of information provided	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
v) Timeliness of problem resolution	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
vi) Attitude toward problem resolution	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
c) Level of satisfaction with the training provided by Procurement Services in relation to:						
i) Completeness	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
ii) Frequency	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
iii) Training materials	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
iv) Applicability to your need	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
d) Level of Satisfaction with the Procurement Manual in relation to its:						
i) Ease of use	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
ii) Organization	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
iii) Understandability	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
iv) Guidance relating to:						
(1) Small dollar purchase	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
(2) Formal bids and proposals	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
(3) Sole source purchases	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
(4) Emergency purchases	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>
e) Your overall level of satisfaction with the services provided by Procurement Services	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	N/A <input type="checkbox"/>

3) If there are any areas in which you marked a low level of satisfaction we would like to receive your comment as to why you are not satisfied in that area.



Office of the City Auditor Procurement Services Customer Survey

4) If there are any areas in which you marked a high level of satisfaction we would like to receive your comment as to why you are satisfied in that area.

5) Please list any suggestions you have for improving the procurement manual.

6) If you could make additions, changes, improvements, to the organization or services provided by Procurement Services office, what would they be?

7) List any services or goods for which you would like a contract to be developed.

8) Additional Comments/ Suggestions:

Name, Department, and Contact Information (optional):

Please return to Christy Crump via e-mail to crumpc@talgov.com or inter-office mail to Box A-22

Thank you for completing this survey.

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