

**SUBMITTAL TO THE BOARD OF SUPERVISORS
COUNTY OF RIVERSIDE, STATE OF CALIFORNIA**

624



FROM: Human Resources Department

SUBMITTAL DATE:
April 27, 2007

SUBJECT: Request for Sole Source Purchase of FranklinCovey Training and Materials

RECOMMENDED MOTION: Approve the proposed sole source purchase of training and materials from FranklinCovey without securing competitive bids in accordance with Ordinance 459.5 in the amount of \$40,000 in FY 06/07 and \$75,000 in FY 07/08.

BACKGROUND: Over the last several years, the County of Riverside has taken a highly proactive approach to preparing the organization for the impending future retirements of its more experienced executives, managers and supervisors through competency based training and development of future leaders. As part of that effort, the Human Resource Center for Government Excellence (CGE) implemented the Management Excellence Academy and Supervisory Excellence Academy both of which are strategically designed to provide participants with practical skills that can be applied immediately.

Ronald W. Komers
Asst. County Executive Officer/Human Resources Dir.

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|-----------------------|-------------------------------|-----------|-------------------------|---------|
| FINANCIAL DATA | Current F.Y. Total Cost: | \$ 40,000 | In Current Year Budget: | Yes |
| | Current F.Y. Net County Cost: | \$ 8,800 | Budget Adjustment: | No |
| | Annual Net County Cost: | \$ 16,500 | For Fiscal Year: | 2006/07 |

| | | |
|---|----------------------------------|--------------------------|
| SOURCE OF FUNDS: Charges to Department Budgets | Positions To Be Deleted Per A-30 | <input type="checkbox"/> |
| | Requires 4/5 Vote | <input type="checkbox"/> |

C.E.O. RECOMMENDATION:

APPROVE

Steve Schubert

County Executive Office Signature

- Consent
- Policy
- Consent
- Policy

Dep't Recomm.:
Per Exec. Ofc.:

Prev. Agn. Ref.: | **District:** | **Agenda Number:**

3.24

BACKGROUND continued

To ensure the most cost effective delivery, CGE staff have been certified to deliver two FranklinCovey courses, "Seven Habits of Highly Effective Managers" and "FOCUS: Achieving Your Highest Priorities" in the Management and Supervisory Academies respectively.

JUSTIFICATION

The Human Resources Department has reviewed many Tactical Management and Time Management skills training programs and found the FranklinCovey programs to be the most effective, highly rated programs of their type. What makes them unique is that these courses include core concepts that are both consistent with and build upon concepts currently taught in other powerful academy courses such as Crucial Conversations and Profession of Management.

FranklinCovey has been in business for 24 years and has a well established government client base. FranklinCovey is the only approved supplier of the training materials used in conjunction with its licensed programs.

PRICE REASONABLENESS

The County will receive the maximum discount offered to Government agencies, up to 30% off non-governmental pricing. The training certification and materials fees are a value compared to other approaches on the market and the participant learning is of the highest value for the money. They also guarantee our investment in trainer certifications and free trainer re-certification in the event that any certified trainer terminates employment and must be replaced.

Date: April 27, 2007

From: Ronald W. Komers
Asst. County Executive Officer/
Human Resources Director

Department/Agency: Human Resources Department

To: Board of Supervisors

Via: Purchasing Agent

Subject: Sole Source Procurement; Request for FranklinCovey

The below information is provided in support of my Department requesting approval for a sole source. Outside of a duly declared emergency, the time to develop a statement of work or specifications is not in itself justification for sole source.

Supply/Service being requested: **Training and materials in the amount of \$40,000 in FY06/07 and up to \$75,000 in FY 07/08.**

Supplier being requested: **FranklinCovey**

Alternative suppliers that can or might be able to provide supply/service: CGE staff have been certified to teach two FranklinCovey courses, "Seven Habits of Highly Effective Managers" and "FOCUS: Achieving Your Highest Priorities" in the Management and Supervisory Academies respectively. FranklinCovey is the only approved supplier of the training materials used in conjunction with its licensed programs.

Extent of market search conducted: The Human Resources Department has reviewed many Tactical Management and Time Management skills training programs and found the FranklinCovey programs to be the most effective, highly rated programs of their type.

Unique features of the supply/service being requested from this supplier, which no alternative supplier can provide: In addition to being part of an integrated development system, the FranklinCovey "Seven Habits of Highly Effective Managers" and "FOCUS: Achieving Your Highest Priorities" courses include core concepts both consistent with and built upon concepts currently taught in other powerful academy courses such as Crucial Conversations and Profession of Management.

Reasons why my department requires these unique features and what benefit will accrue to the county: The FranklinCovey courses build the competencies identified as necessary for Riverside County supervisors, managers and leaders to be effective in building and sustaining a high performance culture. Further, CGE staff have been

certified to teach two FranklinCovey courses, "Seven Habits of Highly Effective Managers" and "FOCUS: Achieving Your Highest Priorities" in the Management and Supervisory Academies respectively. Certification of county staff ensures the most cost effective method to deliver these courses as part of the Management and Supervisory Academies. FranklinCovey is the only approved supplier of the training materials used in conjunction with its licensed programs.

Price Reasonableness: The County will receive the maximum discount offered to Government agencies, up to 30% off non-governmental pricing. The training certification and materials fees are a value compared to other approaches on the market and the participant take aways are of highest value for the money. They also guarantee our investment in trainer certifications and free trainer re-certification in the event that any certified trainer terminates employment and must be replaced.

Does moving forward on this product or service further obligate the county to future similar contractual arrangements? No, however, we foresee an ongoing need through FY08/09 for training and materials related to delivering existing programs in our Management and Supervisory Academies



Department Head Signature

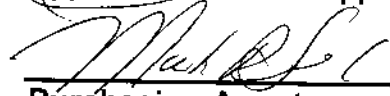
5/1/07
Date

Purchasing Department Comments:

Approve

Approve with Condition/s

Disapprove



Purchasing Agent

5-2-07
Date