



What We Learned from a GFOA Award of Excellence Win: Practical Procurement Innovations You Can Use Today

Sarah Araya,
Procurement Program Manager

10/06/2026

Russian Ridge, Judith Zimmermann

PRESERVE



PROTECT



RESTORE



EDUCATE



ENJOY



Agenda

Introduction and Background
About the Procurement Program
2025 GFOA Award for Excellence
How did we Get Here?
The Evolution of our Program
Achievements & Impact
Lessons Learned
Closing Remarks & Questions



Monte Bello, Jonathon Chang

PRESERVE



PROTECT



RESTORE



EDUCATE



ENJOY

About the Midpeninsula Regional Open Space District



- Midpen is an independent **special district** established by California voters in Santa Clara County in **1972**. The District expanded to include southern San Mateo County in 1976 and the San Mateo Coastside in 2004.
- The District manages more than **77,000 acres of preserved land across 26 open space preserves, offering over 250 miles of trails.**
- The District employs more than 200 full-time staff and seasonal workers across a wide range of disciplines.
- Departments include the General Manager's Office, HR, Budget & Finance, IT, General Counsel's Office, Real Property, Engineering & Construction, Planning, Visitor Services, Land Stewardship & Trails, Facilities and Fleet, Natural Resources, and Public Affairs.



About the Procurement Program



- The **Procurement** program was established in 2016 following the appointment of a new CFO to lead the **Administrative Services** business line.
- Initially a **single staff function**, the Procurement team has grown to a dedicated unit with a **fulltime Manager, two Senior Procurement Technicians**, and an **Intern** providing **centralized oversight** of all District procurement activity.
- The Procurement team won the **GFOA Award for Excellence in 2025**; the first time the District has received this honor and the team's first award in its history.
- The Procurement team was awarded their first-ever **Achievement of Excellence in Procurement** award in 2026!



2025 GFOA Award for Excellence



- The Procurement program transformed from a transactional function into a **strategic partner, improving transparency, compliance, and collaboration** across all departments.
- Excessive sole-source purchasing was reduced by **strengthening competitive practices, clarifying expectations, and educating departments** on proper purchasing.
- **Proactive communication and relationship-building became foundational**, with Procurement engaging departments through meetings, office hours, trainings, and ongoing support.
- **Leadership investment** elevated Procurement's visibility and capacity, **expanding staff resources**, and reinforcing Procurement's "Seat at the Table" in organizational decision-making.



Created in 1972, the **Midpeninsula Regional Open Space District** (Midpen) is an independent special district that helps plants, animals, and people thrive throughout the greater Santa Cruz Mountains. It spans San Mateo County, Santa Cruz County, and Santa Clara County in California, and is home to more than 750,000 people. The organization's mission is to preserve a connected greenbelt of more than 70,000 acres of public open space that includes bay wetlands, redwood forests, and coastal grasslands.



Midpen is governed by a seven-member publicly elected board of directors representing wards throughout the district and has a staff of more than 180 employees from 13 departments, including budget and finance, engineering and construction, general manager's office, general counsel's office, human resources, information systems and technology, land stewardship and trails, facilities services and fleet, natural resources, planning, public affairs, real property, and visitor services. The procurement program for Midpen reports to the chief financial officer and the director of administrative services.

Over the past several years, the procurement function at Midpen has transformed from a transactional support function into a strategic partner with a recognized "seat at the table." This evolution was driven by addressing long-standing challenges that limited transparency, compliance, and efficiency.

Procurement tackled excessive sole-source purchasing by strengthening competitive practices and establishing clear expectations and standards. Contract

contingency usage, which had not been separately tracked before 2019, is now monitored with dedicated purchase orders that ensure accountability and budget control. Procurement also implemented digital signatures to streamline internal approvals, reduce delays, and improve records management. Midpen's enterprise resource planning (ERP) processes were also modernized and strengthened to promote accountability and improved control. A SharePoint site was launched as well, creating a centralized hub for resources, policies, and guidance. Together, these improvements have built

a culture of transparency, compliance, and collaboration, and have positioned the procurement staff as a trusted advisor and central resource for the organization.

Understanding the problem before defining the solution

Midpen was formed in 1972 as a very small organization. Over the last 50+ years, as the organization grew and became more complex, it still maintained a small feel. "Many of our staff are biologists working out in the

2026 Award of Excellence in Procurement



- In **2026**, the Midpeninsula Regional Open Space District won their **first National Procurement Institute Award of Excellence**.
- The award reflects a decade of sustained effort, a true culmination of **ten years of program development** and **continuous improvement**.
- The Midpeninsula Regional Open Space District was **one of three bay area agencies** recognized alongside the San Francisco International Airport (**SFO**) and San Francisco Public Utilities Commission (**SFPUC**).
- **8 California Special Districts** recognized statewide.
- **59 California** agencies **awarded** overall.



How Did We Get Here?



- **Inconsistent** processes
- **Limited** visibility and tracking
- Over-reliance on **informal** practices
- Over-reliance on **sole source** purchasing
- Procurement **excluded** from critical processes.

From Startup to Strategic Partner: The Evolution of Procurement



Foundation: Establishing the Function (2016)

- Procurement program established with the District's **first dedicated Procurement staff member**, laying the foundation for centralized purchasing oversight.

Growth: Building Structure & Processes (2019)

- Launched a **contractor outreach initiative** to increase awareness and participation from local vendors.
- Implemented **formal contingency tracking processes** to strengthen financial oversight.
- Expanded internal support, with administrative staff assisting with **purchase order creation and contract routing**.

Modernization: Digitizing and Strengthening Controls (2020–2021)

- Implemented **digital contract signatures** (Adobe Sign later upgraded to DocuSign).

- Delivered the District's **first Annual Contingency Spend Report to the Board**, increasing transparency.
- Introduced tools to **track contract expirations** and manage **fiscal year purchase order rollovers**.

Systems Transformation (2022)

- Migrated from **Tyler New World** to **Munis ERP**, embedding Procurement approvals into requisition workflows and improving financial controls.
- Transition period following the departure of the District's first Procurement staff member.

Contingency for Use Authorization Form & Contingency Purchase Order:



Contingency for Usage Authorization

Attach supporting documentation

DATE: _____

Vendor's Name:		Project Manager:	
Project Name:		Contract Number:	Contract Expiration Date:
			Board Report #:
			Board Approval Date:
☐ Multi-Year (if initial)			
Contract Total		Contingency Funds	
Initial Contract Amount: Include base and contingency amounts if incorporated in initial contract.		Total Sum of Authorized Contingency: Sum of all approved contingency funds including Executive Management directive, board reports, contract amendments, and contract change orders.	
Sum of Amendments/ Contract Change Orders: Sum of authorized changes after initial contract. DO NOT include initial contract amount. (Enter positive number to add or negative number to subtract)		Amount of Previous Contingency POs: Total of all previously authorized contingency funds encumbered on fully executed purchase orders for this contract. (Subtract)	
Contract Grand Total: Sum of initial contract, all authorized amendments, and all authorized contract change orders. This sum includes all authorized contingencies identified in initial contract, amendments, and contract change orders.		New Request for Contingency PO: Contingency amount to encumber funds on a new Contingency PO. (Subtract)	
\$ 0.00 (New Total)		Remaining Contingency Balance: Total sum of authorized contingency funds minus encumbrances on all Contingency POs including this request. (New Total)	
Allocation of funds for new Contingency PO:			
GL # _____	Proj # _____	Amt \$ _____	
GL # _____	Proj # _____	Amt \$ _____	
GL # _____	Proj # _____	Amt \$ _____	

Explanation for use of Contingency Funds: State the reason why the project requires the use of contingency funds. What are the unforeseen circumstances? What are the additional services?

APPROVAL ROUTING				Initial & Date
Project Manager				
Department Manager				
Budget Analyst				
Engineering & Const. Planning, Real Property	Land & Facilities, Nat. Res., Visitor Services	Admin. Services, Finance, ISF, HR, Grants, Procurement	Public Affairs directly to GM	
Susanna Chan, AGM	Brian Malone, AGM	Stefan Jaskulak, CFO	Ana Ruiz, GM	
Procurement Entry: _____ Initial & Date		Contingency PO#: _____		

12-18-2020
Location: <https://www.midpeninsulaopen.space.com/technical/contingency>



**Midpeninsula Regional
Open Space District**
5050 El Camino Real
Los Altos, Ca 94022

Bill To ADMIN
Midpeninsula Regional
Open Space District
5050 El Camino Real
Los Altos, CA 94022

Vendor 11470
Aecom Technical Services Inc
1178 Paysphere Circle
Chicago, IL 60674

Ship To ADMIN
MROSD
5050 EL CAMINO REAL
LOS ALTOS, CA 94022

PURCHASE ORDER

Fiscal Year 2023 Page 1 of 1

THIS NUMBER MUST APPEAR ON ALL INVOICES, PACKAGES, AND SHIPPING PAPERS

Purchase Order Number **02310130**
Purchase Order Date **02/22/2023**
Department **ADMINISTRATIVE SERVICES**
Contract **20200119**

Email invoices to AccountsPayable@OpenSpace.org
For details please visit
<https://mroscavendors.muniselfservice.com>

VENDOR PHONE NUMBER	VENDOR EMAIL	VENDOR NUMBER	REQUISITION NUMBER	BUYER NAME	DELIVERY REFERENCE
---------------------	--------------	---------------	--------------------	------------	--------------------

510-874-1751	rose.henshaw@aecom.com	11470	2300238	Jared Hart	
--------------	--	-------	---------	------------	--

NOTES

Contingency - Hwy. 17 Wildlife & Trail Crossing

The Above Purchase Order Number Must Appear On All Correspondence - Packing Sheets And Bills Of Lading

ITEM #	DESCRIPTION	QUANTITY	UOM	UNIT PRICE	EXTENDED PRICE
1	Contingency - Highway 17 Wildlife and Trail Crossing	1.0000	EA	\$8,925.0000	\$8,925.00
2	Contingency - Highway 17 Wildlife and Trail Crossing	1.0000	EA	\$16,575.0000	\$16,575.00



Strategic Expansion & Program Maturity (2023 –Forward)

- **Strategic Expansion & Program Maturity (2023–Present)**

- **Expanded the Procurement team**, adding a new manager and promoting two full-time staff members.
- Introduced **monthly Procurement Office Hours** to provide real-time guidance and support for staff.
- Redesigned the **Procurement SharePoint site** to centralize policies, procedures, and templates.
- Expanded **training programs** to improve staff understanding of procurement processes.
- Created a **centralized contractor interest list** to broaden vendor engagement.
- Expanded our **On-Call Contracts program** to accelerate project delivery.
- Implemented a **contract expiration management program**.
- Upgraded the District's **public solicitation platform from Periscope to BidNet Direct**, improving vendor access and transparency.

Procurement SharePoint Site



The screenshot shows the Procurement SharePoint site home page. At the top is a navigation bar with links: Home, Admin Services, Visitor and Field Services, Project Planning and Delivery, General Manager's Office, General Counsel's Office, and Project Central. Below this is a 'Procurement' sub-header. The main content area includes a left-hand navigation pane with links to Procurement Home, Contracts Management, Purchase Orders and Requisitions, Solicitations, Documents, Calendar, Confidential, and Site navigation. The central content area features a 'PROCUREMENT DREAM TEAM' section with photos and names of Sarah Araya, Kimberly Whelan, Cristen Shima-Kunze, and Veronica Aréllanes. Below this is a 'FRONT DESK' section with photos of Veronica Aréllanes and Jessica Lubke. A 'MUNIS Help Desk' button is visible. A 'DocuSign Contract Routing Status' button is also present. A large section titled 'FY26-27 Purchase Order Rollover Spreadsheet' includes a link to the 'FY26-27 PO Rollover Report'. At the bottom, there are two promotional tiles: 'Procurement Trainings' and 'Contractor Interest List'.

- Our team **Sharepoint** site is used as a central **information** hub.
- Staff can locate **contract** and **solicitations templates, guidance** for all procurement **processes**, and copies of the District's Board and Administrative **policies**.
- In partnership with our IT team, we developed a **Helpdesk** ticketing system for Munis, the District's **ERP platform**. If staff need help adjusting the funding of an existing PO, need to update the GL account or project code, or need help onboarding a new vendor, they can submit a Munis Helpdesk ticket and our staff will respond within 12-24 hours.
- Staff can reference our **Contractor Interest List** when requesting quotes from vendors for work valued under the General Manager's purchasing threshold.
- Staff can access all **Procurement Trainings** for quick reference.

Achievements & Impact

- **Strengthened** competitive practices and reduced reliance on sole sourcing.
- **Enhanced accountability** through dedicated purchase orders for contract contingency spend tracking.
- **Streamlined approvals** and records management via digital signatures.
- **Improved transparency** and consistency with the Procurement team integrated into ERP workflows.
- Created a **centralized** resource hub on SharePoint, ensuring staff have consistent access to up-to-date policies, processes, and templates.



Lessons Learned



- **Build** trust and relationships
- **Standardize** processes
- **Leverage** technology
- **Data** improves Oversight
- **Prioritize** transparency and vendor access
- **Invest** in training
- **Culture** change takes **time**, **consistency** and **commitment**
- **Leadership support** is **critical**
- **Start** Small, then **Scale**

Thank YOU!



Contact



Sarah Araya: saraya@openspace.org



Procurement: procurement@openspace.org

Questions?

openspace.org

info@openspace.org



Los Trancos, Thirumalai Suresh