

Nightmare on Procurement Street: Building Towards a Modern Procurement Organization

Government Finance Officers Association of Texas (GFOAT) Fall Conference

October 30, 2024



HARVARD Kennedy School

Government Performance Lab

Introductions



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Fellow

Objectives and Agenda for Today's Session

Session Objectives:

- Participants with functions across finance and operations will connect with each other on challenges and opportunities to improve their procurement function.
- Participants will identify key innovative practices to modernize procurement in their home jurisdictions.

| Time | Concept | Activity |
|-------------|---|---|
| 1:00 – 1:30 | | Introductions, Icebreaker and Framing |
| 1:30 – 2:10 | <i>Customer-Centric and Efficient Procurement</i> | Activity: Process Woes in Citylandia |
| 2:10 – 2:50 | | Gallery Walk: Common Operational Challenges |
| 2:50 – 3:00 | | BREAK |

| Time | Concept | Activity |
|-------------|--|--|
| 3:00 – 3:45 | <i>Results-Driven Contracting</i> | Activity: Paper Airplane Exercise |
| 3:45 – 4:15 | <i>Equitable and Strategic Procurement</i> | Scenario: Fostering Improved Vendor Relationships |
| 4:15 – 4:45 | | Cross-Departmental Collaboration for Procurement in Modern Organizations |
| 4:45 – 5:00 | | Closing |

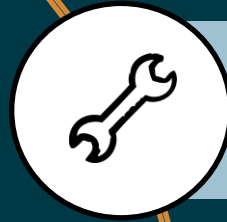
Breaking the Ice

What's the most interesting or wildest procurement your agency has made in recent years?

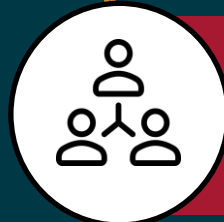


The Government Performance Lab (GPL)'s Procurement Practice

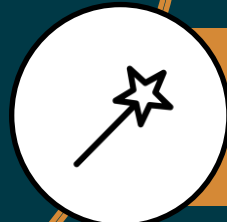
Through work with over 500 state and local governments over the last decade, the GPL **develops and tests promising practices**; we then **spread those practices** to communities nationwide.



Extreme Procurement Makeovers to transform procurement systems



Intensive coaching and executive education programs to spread solutions

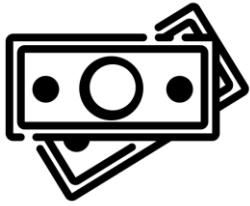


Learning community to build government capacity: Procurement Excellence Network

Technical assistance provided through our procurement practice

Procurement and the Modern Government

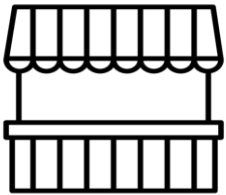
Why does procurement matter?



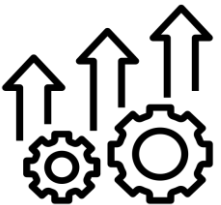
State and local governments spend **25–50% of their budgets on procured goods and services**, from road repairs to emergency medical services to HVAC installation in schools.



Yet procurement is often **considered a back-office administrative function** for compliance, **not a tool for achieving strategic goals.**






Procurement processes can be the starting point for achieving improved outcomes for historically marginalized groups, creating more environmentally-friendly outcomes, and jumpstarting more equitable economic growth.






Processes are sticky, so there is potential for sustained improvements if you can shift direction.

Centering challenges for procurement staff/user depts

Common Challenges:

-  Procurement/contracting in **reactive** rather than proactive mode (always a fire drill).
-  Staff are **siloed** within their specific roles as it relates to procurement.
-  Tensions exist **between greater standardization versus more flexibility.**

Impact of Procurement Challenges:

-  Staff **misallocate time navigating convoluted processes** rather than focusing on strategic activities.
-  Staff experience frustration risking **burnout** and **high-turnover rates.**
-  Procedures designed for good stewardship of taxpayer money can **limit ability** to advance core government objectives.

GPL's Framework for Procurement Excellence



Efficient & Fair

Transforms the procurement process to be efficient, inviting, and transparent

Excellence looks like:

- Procurement runs quickly, smoothly, and cost-effectively
- Solicitations are accessible and inviting



Results-Driven

Improves the outcomes of contracted programs, products, and services

Excellence looks like:

- Services are high quality and meet residents' needs
- Vendors propose innovative solutions



Equitable

Invests in equity to improve economic mobility and achieve better outcomes for historically marginalized populations

Excellence looks like:

- Small and MWBE businesses get their fair share of contracts
- Services are delivered equitably



Strategic

Elevates and resources procurement as a strategic function

Excellence looks like:

- Staff are well-trained and supported
- Anticipates and plans for procurement needs well in advance

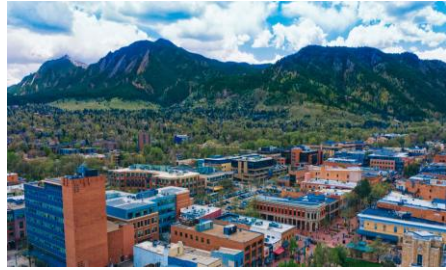
Real-world examples of procurement excellence



Efficient & Fair

Tulsa, OK

Streamlined and rearranged reviews to reduce procurement cycle times by 18% and improve internal customer satisfaction by 40%.



Results-Driven

Boulder, CO

Focused on outcomes in a broadband internet RFP to reduce disparities in access and save \$8M, while contracting with new minority-owned businesses.



Equitable

Phoenix, AZ

Identified opportunity to unbundle landscaping contracts across 400 sites. Increased diverse vendor participation through outreach and capacity building.



Strategic

Mount Vernon, NY

Established a procurement task force to create cross-departmental buy-in for key improvement initiatives.

Efficient Procurement

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Efficiency is the foundation for procurement transformation.



A confusing, burdensome procurement process can crowd out important strategic thinking around what goals and outcomes a new contracted service or program should achieve.

✘ A bad process looks like...

- Excessive rounds of review and administration requirements.
- Unclear role delegation that causes conflict between purchasing and programmatic staff.
- A lack of consistency for many steps of the process stemming from general confusion.
- Frustrated vendors, especially among those firms that haven't mastered your process!



✔ But a good process could mean...

- Less time spent on administration and more time on strategy and planning.
- A clear set of steps that everyone understands.
- Roles that ask for the right inputs from the right people at the right time.
- An operation that sees vendors more through the lens of collaboration and partnership than compliance.

But you can't propose impactful, sustainable solutions without accurately diagnosing the problems!

What tends to slow procurement down?

Some common reasons for delays we see are below. **Which of these resonate most with you?**



Communication

- Staff **don't understand** how to initiate a process
- Departments and procurement staff **don't collaborate** on drafting scopes of work, leading to extensive back-and-forth
- Poorly written RFPs **don't clearly explain** the government's needs, leading to questions, addendums, and poor proposals



Planning

- Procurement offices are **understaffed**, leading to some procurements being deprioritized
- Governments **don't invest early in market research** and vendor outreach, and RFPs deadlines must be extended
- Procurement **needs aren't forecasted in advance**, even when they're recurring, leading to a last-minute scramble



Regulation

- Legal teams can take a **long time to review** RFP and contract documents
- Approval processes contain many **redundant, unnecessary steps** (which is further exacerbated by paper processes)
- Staff don't write detailed, compliant procurement requests, leading to **rejections and resubmissions**

Welcome to Citylandia!



Diagnosing Process Problems in Citylandia

Imagine you've recently started a job as the new Chief Procurement Officer in Citylandia. You learn that many of the department directors are frustrated that they aren't getting the goods and services they need in a timely manner. It is your job to identify what might be causing a slow procurement process.

At your table, review the prompt. Once everyone has finished reading, assign a notetaker and **identify 3 hypotheses** for what could be causing a slow procurement process.

- What could be causing the lengthy procurement process?
- What data would you like to see to confirm or refute your hypothesis?

We'll then discuss these hypotheses and review data that Colin and Laura, playing the role of your data analysts, have put together.

Quotes from Buyer Interviews

“Sometimes I get so absorbed in writing an interesting RFP. I work on it nonstop for days and don’t pay attention to anything else!”

- Andrea

“This job is rough. I can barely come up for air sometimes figuring out all the tricky federal funding requirements.”

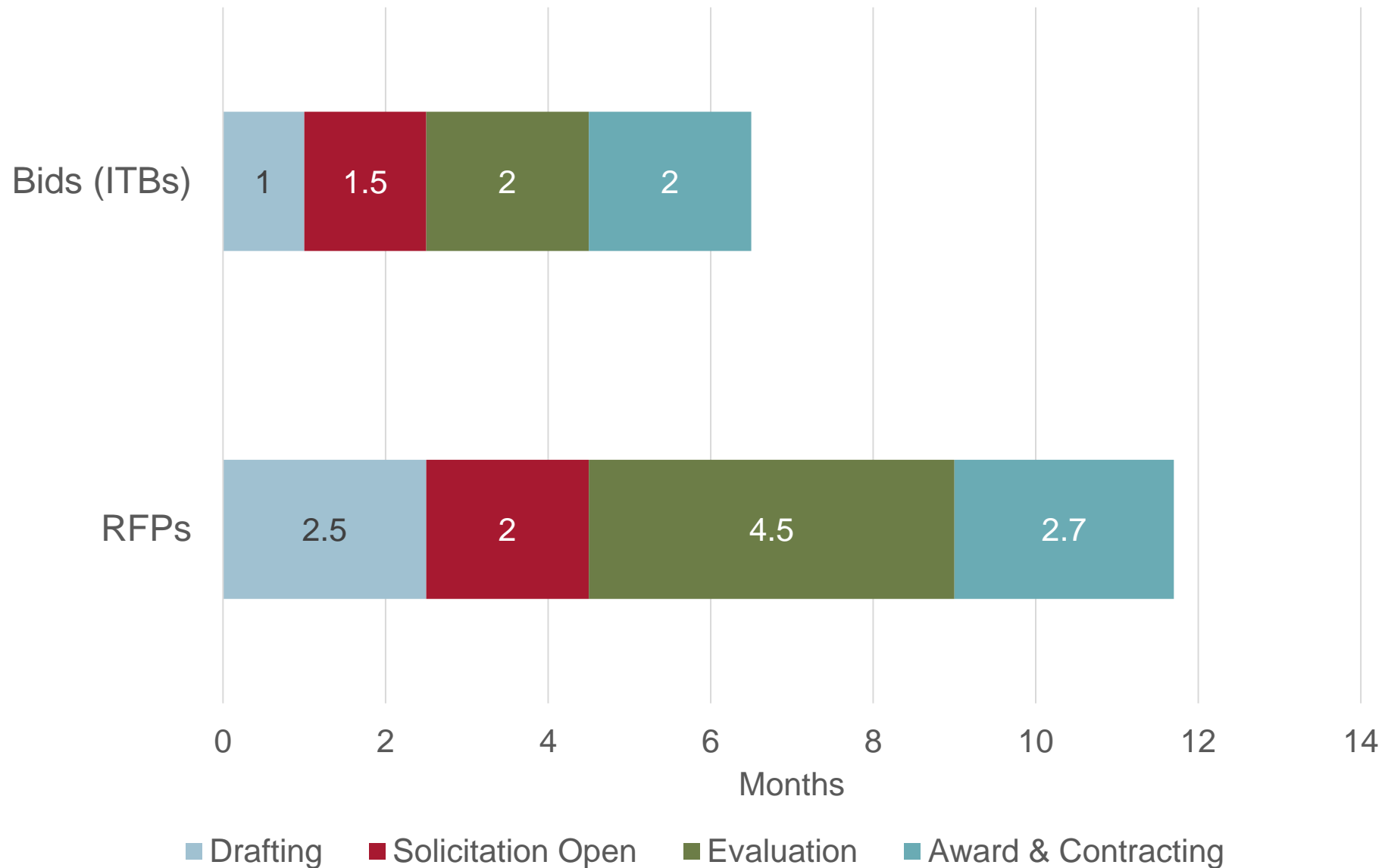
- Bruno

“I love helping my departments with their small dollar purchases. They need the help too – there’s been SO much staff turnover!”

- Cory

“Because I work with the City Manager’s office, sometimes I can get them to expedite a contract approval. It pays to make friends across the city!” - Diana

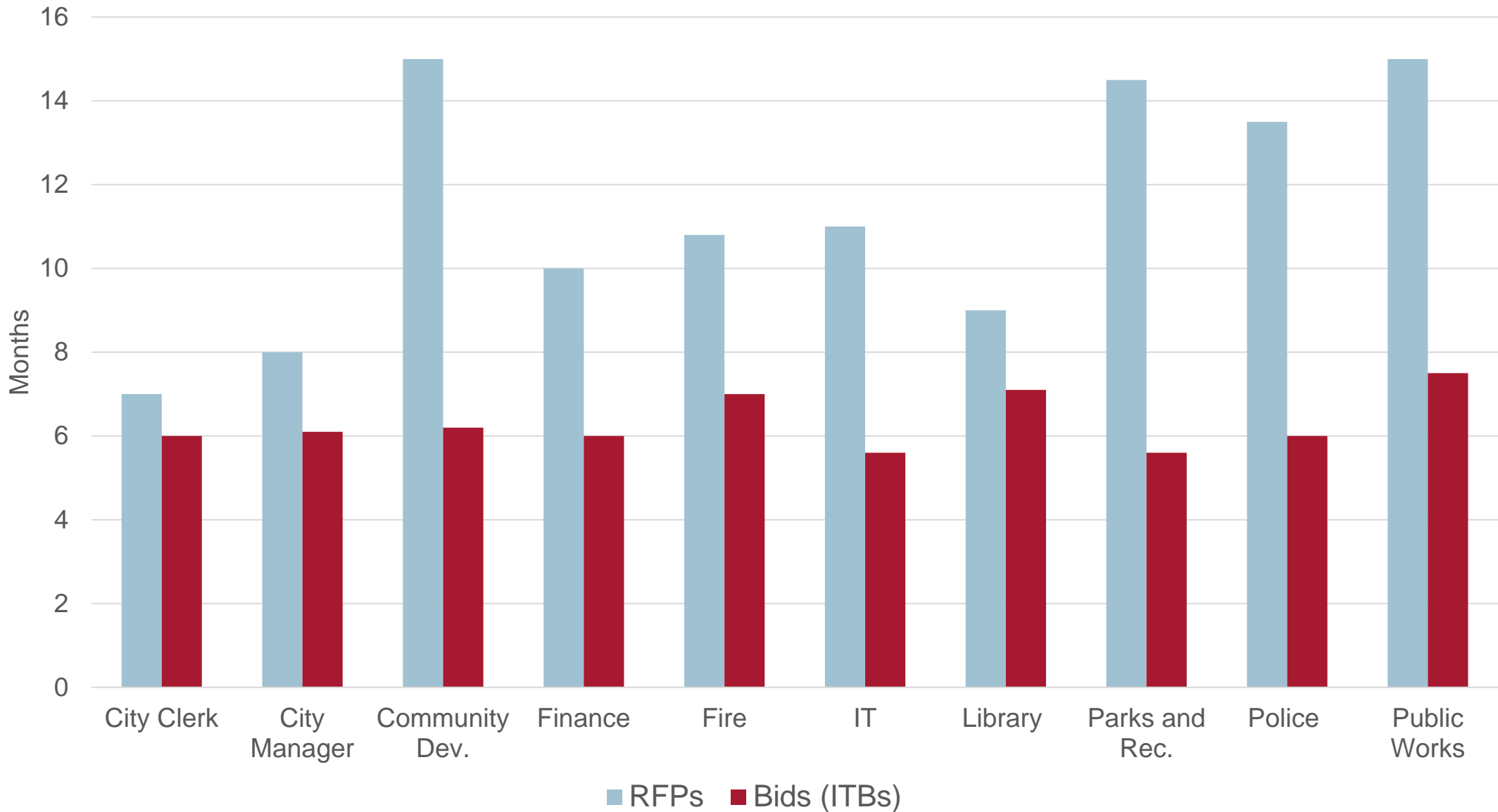
FY23 Average Cycle Times for RFPs and Bids (ITBs)



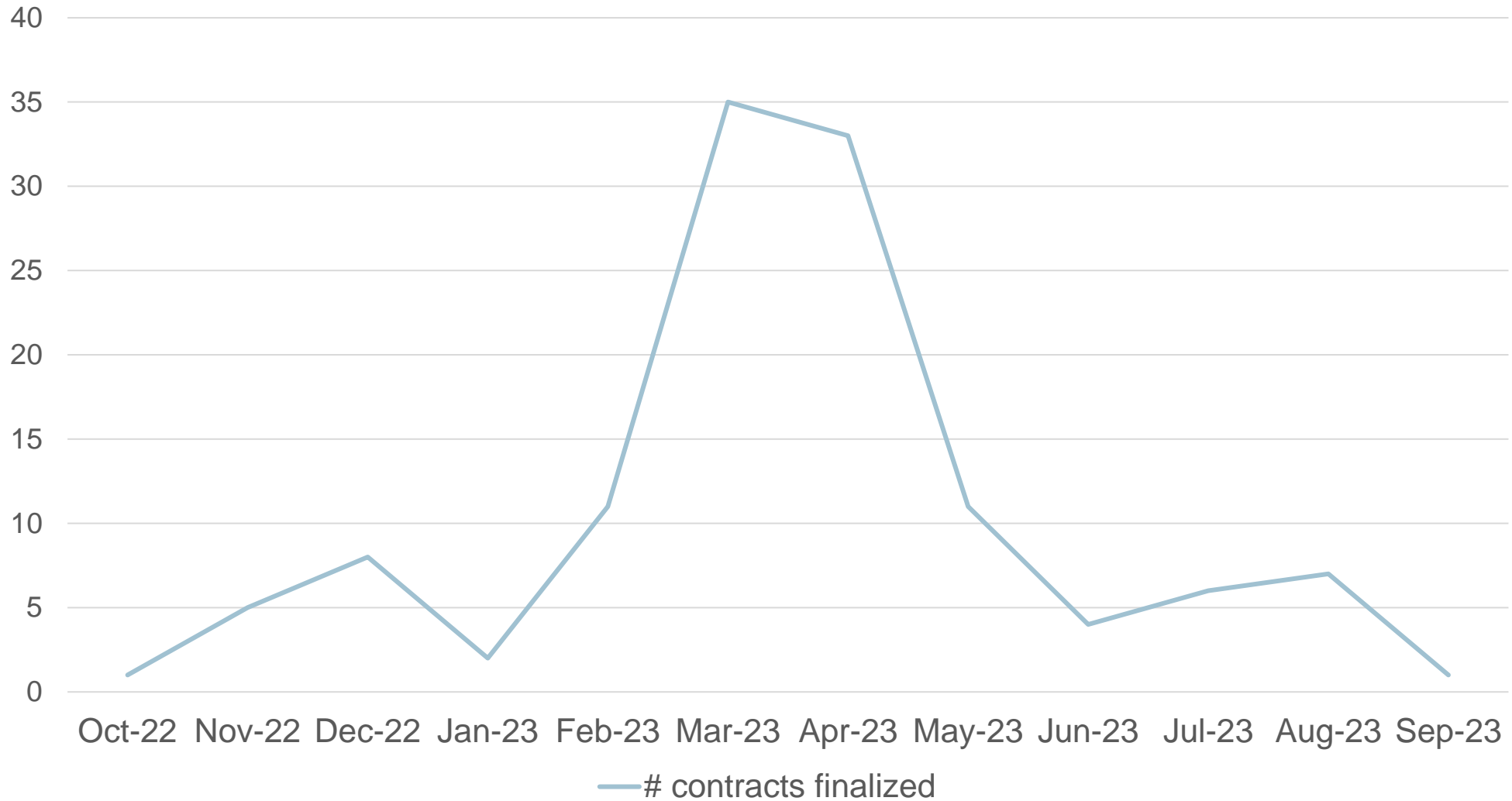
FY23 Solicitations by Department

| <i>Department</i> | <i># Solicitations (RFPs and ITBs)</i> | <i>% of Total</i> |
|-----------------------|--|-------------------|
| City Clerk | 3 | 2.4% |
| City Manager | 6 | 4.8% |
| Community Development | 28 | 22.6% |
| Finance | 4 | 3.2% |
| Fire | 12 | 9.7% |
| IT | 5 | 4.0% |
| Library | 3 | 2.4% |
| Parks and Recreation | 12 | 9.7% |
| Police | 13 | 10.5% |
| Public Works | 38 | 30.7% |

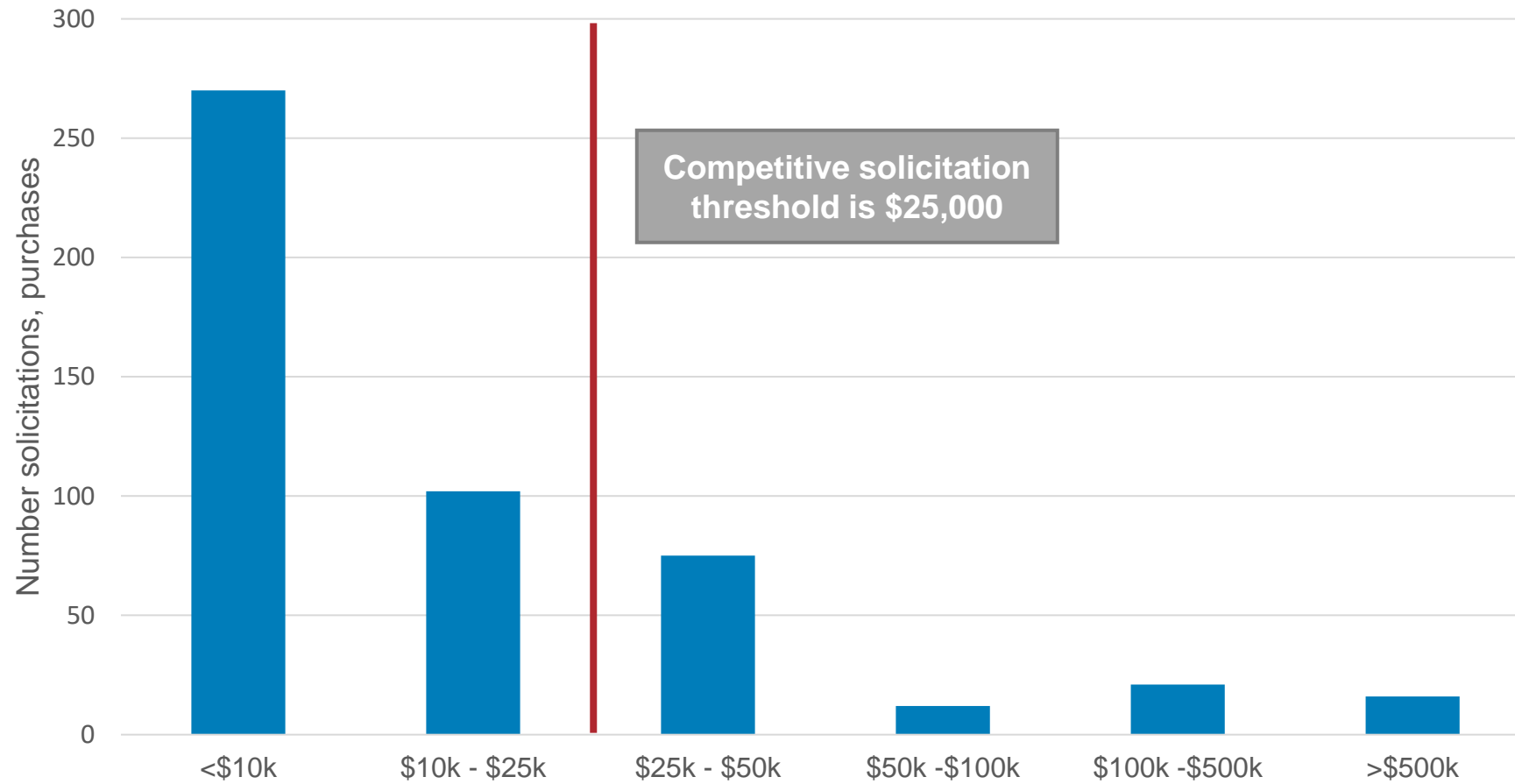
RFP and Bid (ITB) Average Cycle Times by Department



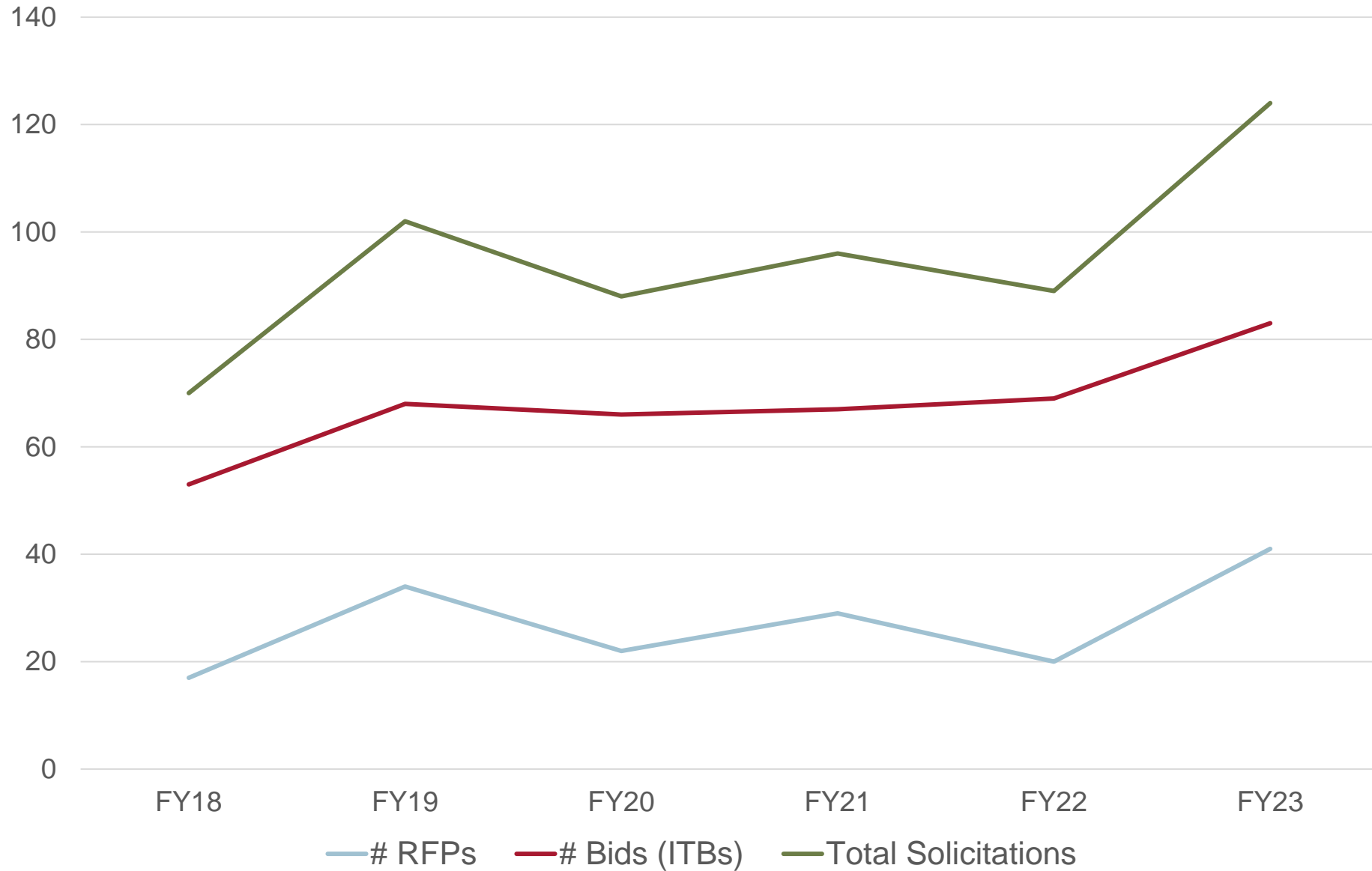
FY23 Contracts Finalized Each Month



of FY23 Unique Solicitation and Small Purchases



Number of Total Solicitations each FY



Peer City Thresholds from around Statelandia

| <i>Jurisdiction</i> | <i>Population (2020)</i> | <i>Threshold</i> |
|----------------------------|---------------------------------|-------------------------|
| Metropolis | 2,000,000 | \$100,000 |
| South Park | 450,000 | \$50,000 |
| King's Landing | 340,000 | \$75,000 |
| Pleasantville | 120,000 | \$50,000 |
| Smallville | 56,000 | \$35,000 |
| Bedrock | 280,000 | \$75,000 |
| Sunnydale | 73,000 | \$50,000 |
| Whoville | 3,000 | \$25,000 |
| Twin Peaks | 12,000 | \$50,000 |

Discuss at your table...

- Now that you have reviewed additional data, what is your updated theory about what is causing the slow cycle times?
- How are you approaching the meeting with your City Manager and Finance Director in three weeks? What do you plan to tell them about how you plan to improve the procurement process and reduce cycle times?

Debriefing connections to your work

- How many of you currently look at data like this with your team?
- Do any of you include other user departments in those meetings?
- What is one step you could imagine taking - one thing you would approach differently with your teams after this simulation?

Operational Challenges: Gallery Walk

We will break out into small groups shortly. What topics would you like to discuss?

Increasing finance and procurement staff capacity

 0  0



Working effectively with user departments / agencies

 0  0



The intersection of budgeting and procurement forecasting

 0  0



The emerging impact of Generative AI on procurement and finance

 0  0



Gallery Walk

Now after diving deeper into process efficiency challenges, let's zoom out to talk more broadly about the intersection of procurement, finance, and operations.

We will **move around across ten groups** focused on **challenges and emerging solutions** in the following categories, along with topics you suggest:

- 1) *Shared technology systems between procurement and finance*
- 2) *The emerging impact of Generative AI on procurement and finance*
- 3) *The intersection of budgeting and procurement forecasting*
- 4) *Working effectively with user departments/agencies*
- 5) *Increasing finance and procurement staff capacity*

Discussion in Groups

What ideas did you write, or did others share that resonate with you?

What solutions have you tried with initial success?

Break!

Results-Driven Procurement

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Cross My Heart and Hope to Fly



Cross My Heart and Hope to Fly

- **The Cardinal County Purchasing Office has released a Request for Proposals (RFP) for airplane prototypes:**
- Each of you are a prospective respondent who is eager to be awarded this contract. Although you will work individually, there are two teams (Yellow and Blue). The top response from each team will be used to determine the winner.
- Paper airplanes must be built under the parameters outlined in the RFP document. **Non-compliance will not be tolerated.**
- The RFP Release Time will be displayed.

Submission Details

SUBMISSIONS DUE: [TIME]

TOP SCORE – YELLOW TEAM: []

TOP SCORE – BLUE TEAM: []

Why was the Yellow Team so bad?

Let's see how both teams respond to these questions:

- Is the County Manager elected?
- What problem was the RFP attempting to solve?
- Does the County care about outcomes? What do they care about?
- How are RFP submissions judged?
- What are good model designs of paper airplanes based on the County's prototyping?
- Did you have sufficient time to respond?

Why care about airplanes?

- **Define the problem and related goals** (including the target population in the case of a social services contract)!
- **Don't hide the ball** and make respondents search for important information.
- Align procurement to clearly defined **department objectives**.
- Conduct strategic processes to develop **important background information, analyses, and contacts** to enhance the procurement.
- **Focus on what matters** and make it easy for the vendor community! 1) Give adequate time to respond, and 2) Remove unnecessary requirements or make them easier to fulfill.

Writing a better RFP is often a first step to improving the performance of contracted services



RFPs contain information respondents need to craft good responses



Responses aligned with what government staff and residents need



Proposals most likely to improve results are identified and selected



Contracts reinforce improving results using expectations, incentives, and requirements



Government and vendors/providers work together to improve results

Characteristics of a Results-Driven RFP

| RFP Section | Characteristic | Key Questions |
|---|--|--|
| Introduction/ Overview | A clear problem statement with defined outcome goals and a defined target/user population | <ul style="list-style-type: none"> • <i>What are you trying to achieve? In what ways do you want to modify the status quo?</i> • <i>Who are the intended recipients or users of this program or service? What are their needs?</i> |
| Scope of Work | A scope of services description that invites innovation | <ul style="list-style-type: none"> • <i>What does the vendor need to do to achieve your goals?</i> • <i>How does the RFP create space for vendors/providers to propose solutions that will help achieve the outcome goals?</i> |
| | Performance metrics and a plan for managing performance during the contract term | <ul style="list-style-type: none"> • <i>How will you set the expectation that performance will be regularly evaluated?</i> • <i>How will you measure whether the procured program or service is making progress toward the goal?</i> |
| Evaluation Process & Selection Criteria | A purposeful evaluation and selection process | <ul style="list-style-type: none"> • <i>How does the selection process identify the proposals most likely to achieve the stated outcome goals?</i> • <i>What information do you need from proposers?</i> |

Taking an outcomes-oriented approach invites innovation

CONVENTIONAL



**BETTER:
WHAT ELSE MIGHT BE
OUT THERE**



Best practices for creating a successful RFPs

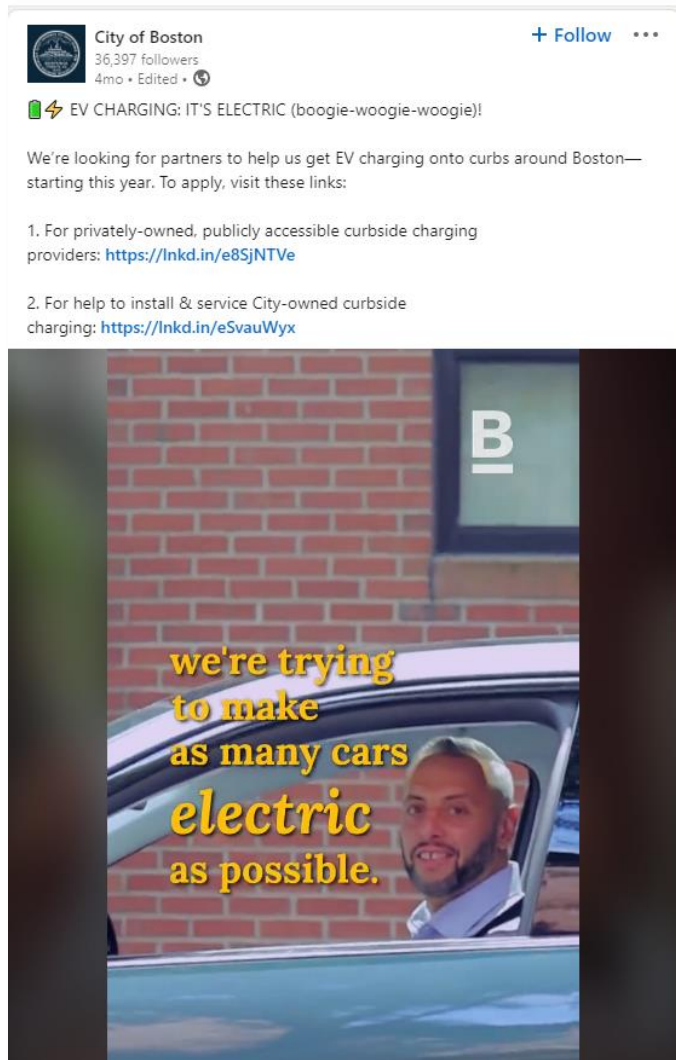
- Place all **project-specific information**, including the **Scope of Work**, towards the **beginning of the RFP**, and terms and conditions at the end.
- **Create a welcoming document**: use easy-to-navigate section headers and include a table of contents
- Use **plain language**, avoiding jargon and agency-specific terminology. Write for humans!
- Use **proposer checklists** to help proposers easily understand what their submittal package should include.

Guidebook: Crafting a **Results-Driven** Request for Proposals **(RFP)**



HARVARD Kennedy School
Government Performance Lab

Design and creative outreach make a difference!



City of Boston
36,397 followers
4mo • Edited •

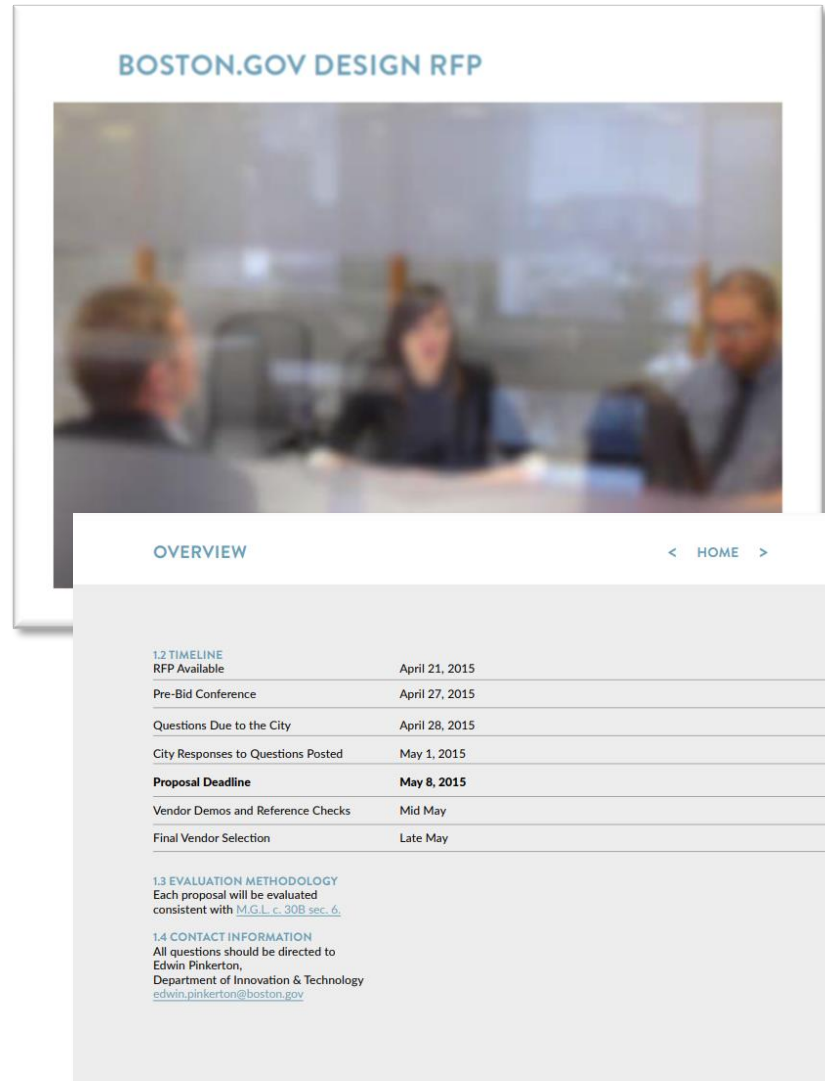
EV CHARGING: IT'S ELECTRIC (boogie-woogie-woogie)!

We're looking for partners to help us get EV charging onto curbs around Boston—starting this year. To apply, visit these links:

1. For privately-owned, publicly accessible curbside charging providers: <https://lnkd.in/e8SjNTVe>
2. For help to install & service City-owned curbside charging: <https://lnkd.in/eSvauWyx>

B

we're trying to make as many cars electric as possible.



BOSTON.GOV DESIGN RFP

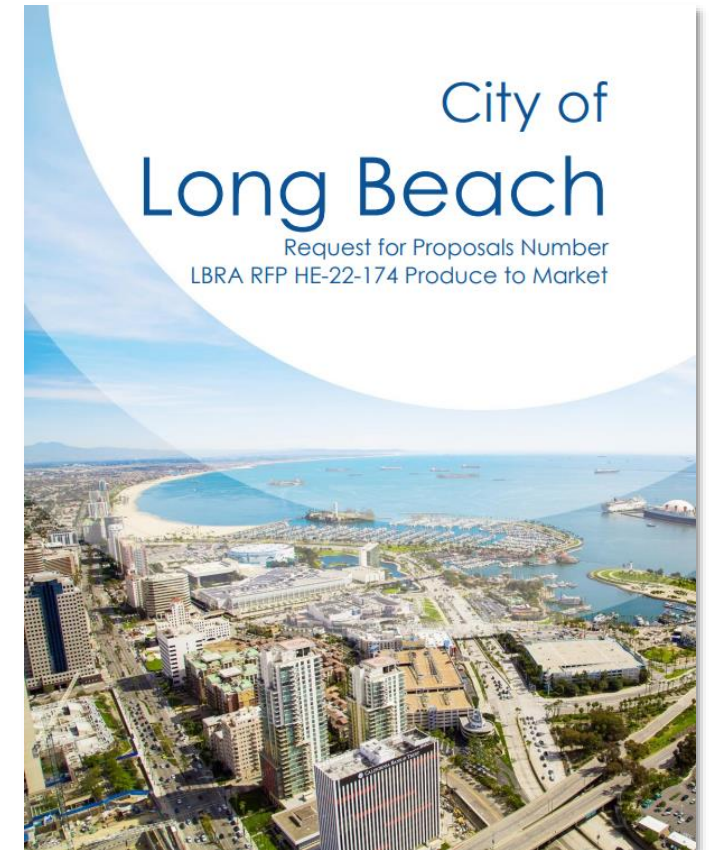
OVERVIEW < HOME >

1.2 TIMELINE

| | |
|------------------------------------|--------------------|
| RFP Available | April 21, 2015 |
| Pre-Bid Conference | April 27, 2015 |
| Questions Due to the City | April 28, 2015 |
| City Responses to Questions Posted | May 1, 2015 |
| Proposal Deadline | May 8, 2015 |
| Vendor Demos and Reference Checks | Mid May |
| Final Vendor Selection | Late May |

1.3 EVALUATION METHODOLOGY
Each proposal will be evaluated consistent with [M.G.L. c. 30B sec. 6](#).

1.4 CONTACT INFORMATION
All questions should be directed to Edwin Pinkerton, Department of Innovation & Technology
edwin.pinkerton@boston.gov



City of Long Beach

Request for Proposals Number
LBRA RFP HE-22-174 Produce to Market

Equitable and Strategic Procurement

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Fostering Improved Vendor Relationships

Activity: a-COUNT-ability

- You are a contract manager for Statelandia's Department on the Environment (DOE). DOE is charged with protecting and enhancing Statelandia's natural resources so that the state continues as a wonderful and safe place to live, visit, and raise a family.
- You have been asked to review a copy of a study commissioned from an outside vendor. Among other things, it's your job to make sure the Department doesn't overpay for the study.
- The provider is paid **\$10 per word**.
- You will have **1 minute** to count the **number of words** in the **second bullet point** on the next slide/on your handout (there are 3 bullet points in the report).
- At the end of the **1 minute**, record your count and calculate the appropriate payment amount for the reviewed section.

1 minute on the clock!

Executive Summary

The Department on the Environment (DOE) is charged with protecting and enhancing Statelandia's natural resources so that the state continues as a wonderful and safe place to live, visit, and raise a family. A recent study commissioned by the department investigated changes in local vegetation and animal life over the past 10 years. The study's findings are largely in keeping with recent newspaper accounts and anecdotal evidence shared by residents during DOE's listening tour this summer. Findings included:

- A survey of 1,012 local beekeepers found that the number of bees has remained steady over the last decade with hives in south-east Statelandia proving most productive with an average output of 13.6kg of honey per hive.
- Plant disease has killed off eighty percent of vegetation in fields immediately surrounding the state, in turn disrupting the food sources for many native animals. As a result, the likelihood of an elephant stampede in the state has increased significantly in the past three months as these animals search for alternative means of sustenance. Early notification systems and other precautions should be implemented immediately to safeguard the residents.
- Certain species of grass in western Statelandia have been found to be better equipped to handle drought because of their improved cultivars.

Activity: a-COUNT-ability

How much should the provider be billing for the section you reviewed?

Activity: a-COUNT-ability

What did you learn from the report?
Are there any actions we should take in response?

What you might have missed was...

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Activity: a-COUNT-ability

What do we miss if we focus on compliance reporting alone?

What's wrong with “set it and forget it” for contracts?

CONVENTIONAL APPROACH

- Contract management is a **back-office** function
- Quality assurance focuses on **compliance**
- Results are not reviewed until the **end of a contract**



“It looks like all six of our vendors submitted their invoices on time this quarter. I don’t see any violations that concern me.”

“Great. Please file these away into their contract files and email them to say thanks.”

Why actively manage contracts?

ACTIVE CONTRACT MANAGEMENT

Agencies or departments frequently review data with vendors and have regular conversations about service delivery concerns, to take actions aimed at improving results.

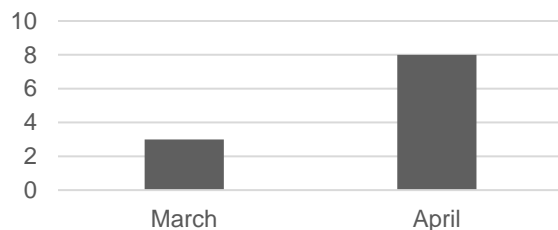
“What patterns are we noticing this month?”

“We’ve received more complaints on our janitorial services.”

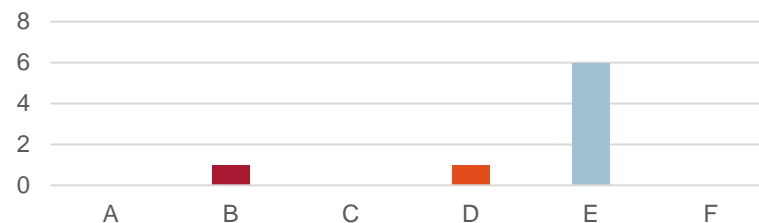
“When breaking down the data, it looks like its Vendor E receiving more complaints. Let’s schedule a site visit to understand what's going on.”

Great, and let's share what we learn with other vendors so they can avoid these issues. And, next month, let's review this data again to see if complaints have gone down.

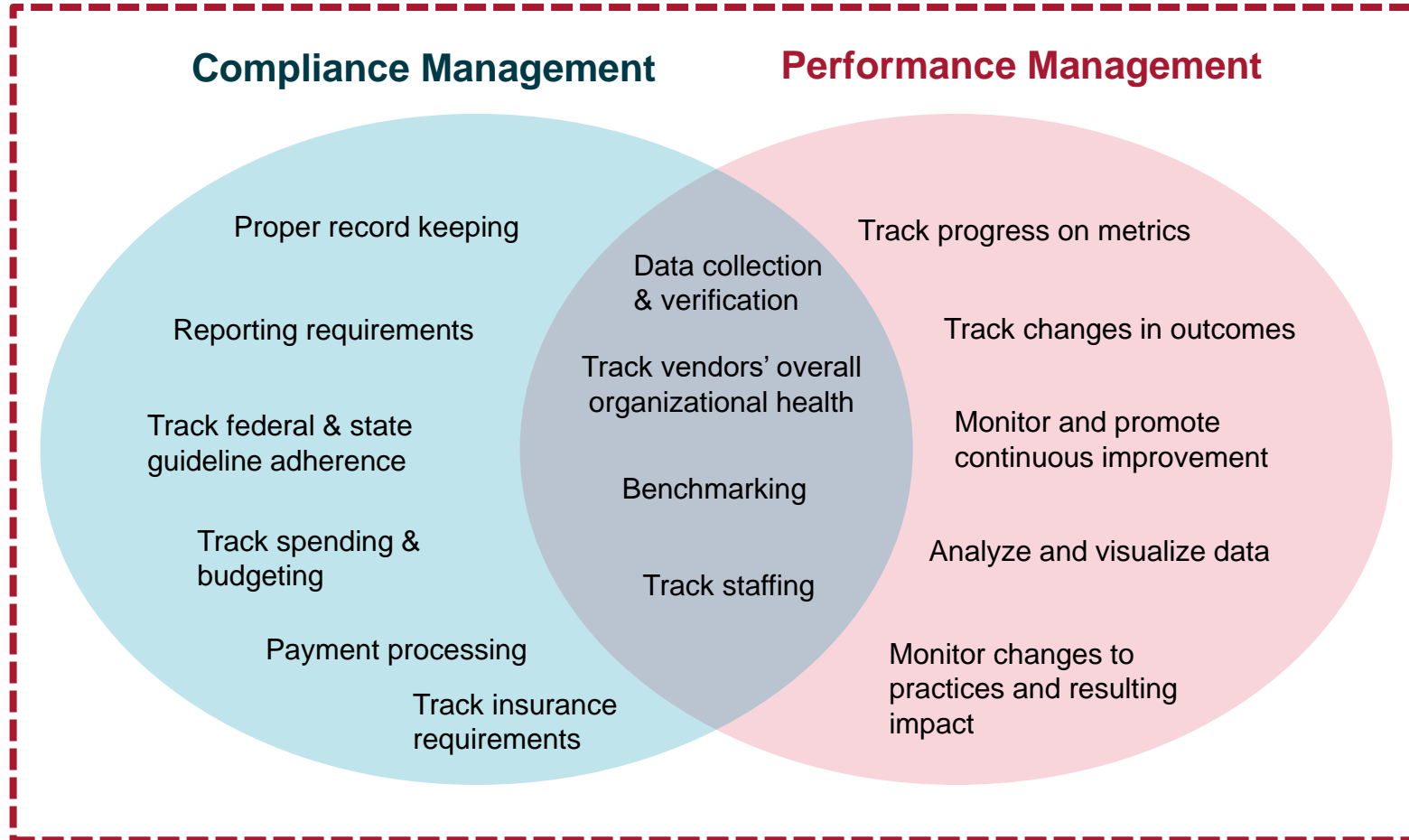
Total Complaints Received



Complaints Received in April by Vendor



Compliance Management vs. Performance Management



Compliance Management

How efficiently are providers/vendors using funds?

Performance Management

How effectively are providers/vendors meeting contract and community (including staff) goals?

A strong kickoff sets the whole contract up for success

Signs of a successful contract kickoff:



You and the vendor are aligned on the vision for success



All parties have a clear sense of roles and responsibilities.



You have established a tone of open communication.



All parties are familiarized with risks and core contract requirements.

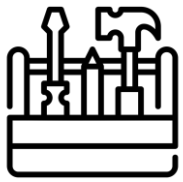


The vendor is up-to-speed and ready to start work!

Turn to the person next to you...

What have you done at the start of prior contracts to set up a successful relationship with a vendor? What has worked well?

What do you gain by investing in a strong relationship with a vendor?



Toolbox: Strategies for Contract Management

Communication is key! For any of these strategies, clearly communicate the reasoning behind your activities. Anticipate: “What’s the point of doing this extra work?” “Why are we trying something new?” “How will we adjust if it doesn’t work?”

- Progress or status reports** that include a mix of qualitative and quantitative data. Minimize the burden on vendors but try to solicit robust information.
- Invoicing** is a natural checkpoint for contract management activities. Are the activities billed for matching what you expected the vendor to complete during the prior period?
- Performance management meetings.** Regular check-ins can be the most effective contract management activity!
- Continue holding lower stakes meetings** to maintain trust and sustain an “open door” culture for vendors to contact you in between formal meetings.
- Site visits** to assess service delivery on the ground. Develop a checklist of items to review that isn’t shared in advance.
- Speaking with end users or clients,** including surveys or questionnaires with end users or service recipients about their perceptions of the vendor’s performance. These activities could be done in collaboration with the vendor.
- Vendor-led “community of practice” meetings** that create a forum for vendors to share best practices and learning with each other, respond to broader challenges, and identify new methods of service delivery.
- Connecting vendors to other resources or organizations** who can help build their skills and capacities or take a more nuanced approach to their work (e.g., non-profit associations, advocacy groups).



Toolbox: Strategies for Contract Closeout

Don't just let a contract fade away! Take steps early on to plan for a smooth transition at the end of the contract, especially if you anticipate a new vendor may be awarded the contract in the future.

- Hold reflection sessions to capture and communicate lessons learned:** These sessions could be held internally or with the vendor and should capture what you've learned and what you'd do differently next time. Document lessons learned, what worked well and what failed – to inform the next RFP and future contract management techniques.
- Formal end-of-contract performance report:** Prepare a formal report on the vendor's performance, using performance information collected and by talking to end users or frontline staff who have seen the vendor's work directly.
- Transfer information and data:** Double check you've got the info you need. Is there knowledge you're at risk of losing? Do gov't staff need to review or go through with the vendor all files and data that are being transferred?
- Develop a contract closeout checklist or procedure:** Use a checklist to see if all invoices are paid, all material/equipment/badges are returned, system access is removed, and that all obligations and final reports are completed.
- Conduct an exit interview with a vendor:** What was their experience working with the jurisdiction? Do they have suggestions for us?
- Minimize gaps in service and plan for a new vendor to come in:** Can you pay for an overlap period between vendors? What can you do to avoid a lapse in service? How can you do a warm handoff of clients between vendors?

Procurement in a Modern Organization (Cross Department Collaboration)

Elevating the status of procurement means...

Hiring the right people

Changing culture

Operating as a strategic function

Building the confidence and capacity of government staff

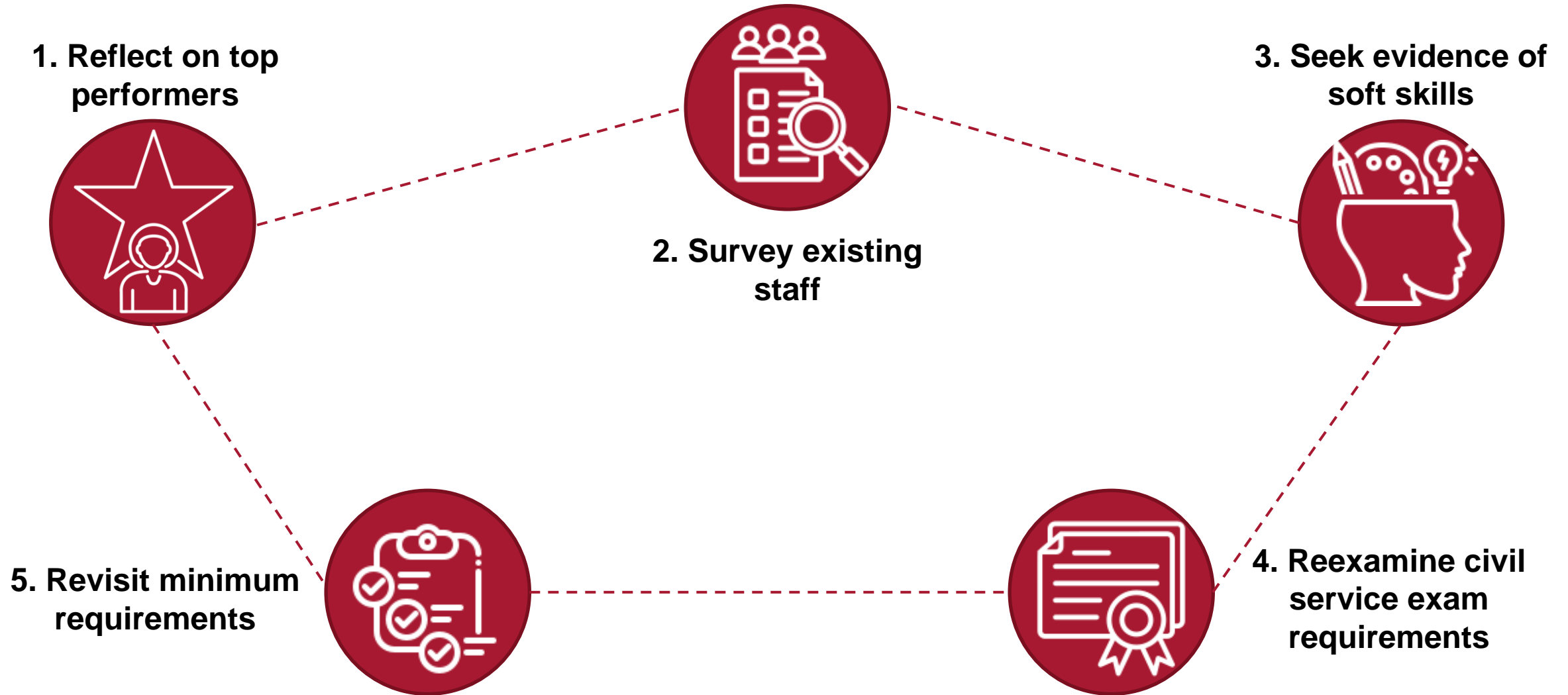
Using tech and automation smartly

Leveraging the work of other organizations



**Procurement
Excellence Network**

Hiring - reconsider what you're looking for



Making Procurement “Fun and Cool”

Why culture matters

1. Procurement excellence requires **excellent people** (and recruitment incentives are limited)
2. Culture change is the **glue that makes process reforms stick**.
3. This work can be detail-oriented and exhausting! Take the time to **look up, laugh, and celebrate**.

Core Principles

1. Build your team
2. Don't shy away from the silly
3. Add elements of competition
4. Design helps

City of Long Beach Purchasing Agent Michelle Wilson, dressed as the Queen of Fair for a staff training on procurement basics.



In Glendale, departments procured separately for the same services, wasting resources and yielding varying degrees of service quality

- The city held many separate contracts for similar services.
 - A landscaping contractor with contracts for both the Water and Transportation departments had different inspection processes and didn't know which department's work to prioritize.
- There was no mechanism to share best practices across departments.
- Vendor expertise also wasn't well utilized, and the city tended to over-rely on cooperative agreements.



Glendale's Strategic Procurement Team brought departments together for city-wide improvements

The following year, City leaders **assessed the performance** of the prioritized procurements and repeated the process with a new team



1. Compile list of upcoming procurements

At the city-wide and department-specific level, leaders meet to identify all upcoming procurements.

2. Rank procurements based on level of priority

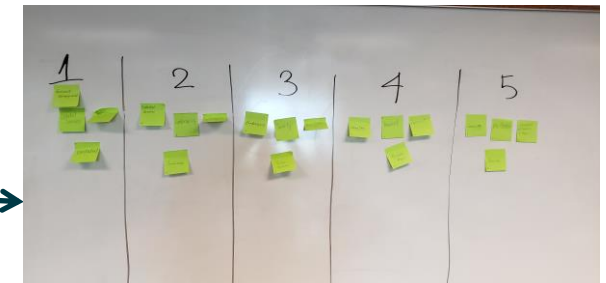
| Division | Item # | Item Description | Contract Award | Year | Vendor Company Name | Final Contract | Original | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 |
|----------------|--------------|------------------------|----------------|------|---------------------|----------------|-------------|------|------|------|------|------|------|------|------|------|------|
| Administration | 1.00-00-0001 | Office Supplies | 2020-01-01 | 2021 | OFFICE DEPOT | \$100,000 | \$100,000 | | | | | | | | | | |
| Administration | 1.00-00-0002 | Information Technology | 2020-01-01 | 2021 | TECHNICAL SERVICES | \$500,000 | \$500,000 | | | | | | | | | | |
| Administration | 1.00-00-0003 | Professional Services | 2020-01-01 | 2021 | CONSULTING GROUP | \$200,000 | \$200,000 | | | | | | | | | | |
| Administration | 1.00-00-0004 | Construction | 2020-01-01 | 2021 | CONSTRUCTION | \$1,000,000 | \$1,000,000 | | | | | | | | | | |
| Administration | 1.00-00-0005 | Transportation | 2020-01-01 | 2021 | TRANSPORTATION | \$300,000 | \$300,000 | | | | | | | | | | |
| Administration | 1.00-00-0006 | Public Works | 2020-01-01 | 2021 | PUBLIC WORKS | \$800,000 | \$800,000 | | | | | | | | | | |
| Administration | 1.00-00-0007 | Police | 2020-01-01 | 2021 | POLICE | \$1,200,000 | \$1,200,000 | | | | | | | | | | |
| Administration | 1.00-00-0008 | Fire | 2020-01-01 | 2021 | FIRE | \$1,500,000 | \$1,500,000 | | | | | | | | | | |
| Administration | 1.00-00-0009 | Public Safety | 2020-01-01 | 2021 | PUBLIC SAFETY | \$2,700,000 | \$2,700,000 | | | | | | | | | | |
| Administration | 1.00-00-0010 | Police | 2020-01-01 | 2022 | POLICE | \$1,200,000 | | | | | | | | | | | |
| Administration | 1.00-00-0011 | Fire | 2020-01-01 | 2022 | FIRE | \$1,500,000 | | | | | | | | | | | |
| Administration | 1.00-00-0012 | Public Safety | 2020-01-01 | 2022 | PUBLIC SAFETY | \$2,700,000 | | | | | | | | | | | |
| Administration | 1.00-00-0013 | Police | 2020-01-01 | 2023 | POLICE | \$1,200,000 | | | | | | | | | | | |
| Administration | 1.00-00-0014 | Fire | 2020-01-01 | 2023 | FIRE | \$1,500,000 | | | | | | | | | | | |
| Administration | 1.00-00-0015 | Public Safety | 2020-01-01 | 2023 | PUBLIC SAFETY | \$2,700,000 | | | | | | | | | | | |
| Administration | 1.00-00-0016 | Police | 2020-01-01 | 2024 | POLICE | \$1,200,000 | | | | | | | | | | | |
| Administration | 1.00-00-0017 | Fire | 2020-01-01 | 2024 | FIRE | \$1,500,000 | | | | | | | | | | | |
| Administration | 1.00-00-0018 | Public Safety | 2020-01-01 | 2024 | PUBLIC SAFETY | \$2,700,000 | | | | | | | | | | | |
| Administration | 1.00-00-0019 | Police | 2020-01-01 | 2025 | POLICE | \$1,200,000 | | | | | | | | | | | |
| Administration | 1.00-00-0020 | Fire | 2020-01-01 | 2025 | FIRE | \$1,500,000 | | | | | | | | | | | |
| Administration | 1.00-00-0021 | Public Safety | 2020-01-01 | 2025 | PUBLIC SAFETY | \$2,700,000 | | | | | | | | | | | |
| Administration | 1.00-00-0022 | Police | 2020-01-01 | 2026 | POLICE | \$1,200,000 | | | | | | | | | | | |
| Administration | 1.00-00-0023 | Fire | 2020-01-01 | 2026 | FIRE | \$1,500,000 | | | | | | | | | | | |
| Administration | 1.00-00-0024 | Public Safety | 2020-01-01 | 2026 | PUBLIC SAFETY | \$2,700,000 | | | | | | | | | | | |
| Administration | 1.00-00-0025 | Police | 2020-01-01 | 2027 | POLICE | \$1,200,000 | | | | | | | | | | | |
| Administration | 1.00-00-0026 | Fire | 2020-01-01 | 2027 | FIRE | \$1,500,000 | | | | | | | | | | | |
| Administration | 1.00-00-0027 | Public Safety | 2020-01-01 | 2027 | PUBLIC SAFETY | \$2,700,000 | | | | | | | | | | | |
| Administration | 1.00-00-0028 | Police | 2020-01-01 | 2028 | POLICE | \$1,200,000 | | | | | | | | | | | |
| Administration | 1.00-00-0029 | Fire | 2020-01-01 | 2028 | FIRE | \$1,500,000 | | | | | | | | | | | |
| Administration | 1.00-00-0030 | Public Safety | 2020-01-01 | 2028 | PUBLIC SAFETY | \$2,700,000 | | | | | | | | | | | |
| Administration | 1.00-00-0031 | Police | 2020-01-01 | 2029 | POLICE | \$1,200,000 | | | | | | | | | | | |
| Administration | 1.00-00-0032 | Fire | 2020-01-01 | 2029 | FIRE | \$1,500,000 | | | | | | | | | | | |
| Administration | 1.00-00-0033 | Public Safety | 2020-01-01 | 2029 | PUBLIC SAFETY | \$2,700,000 | | | | | | | | | | | |
| Administration | 1.00-00-0034 | Police | 2020-01-01 | 2030 | POLICE | \$1,200,000 | | | | | | | | | | | |
| Administration | 1.00-00-0035 | Fire | 2020-01-01 | 2030 | FIRE | \$1,500,000 | | | | | | | | | | | |
| Administration | 1.00-00-0036 | Public Safety | 2020-01-01 | 2030 | PUBLIC SAFETY | \$2,700,000 | | | | | | | | | | | |

5. New RFPs issued

Department and procurement staff **analyze past performance** and **apply RDC** to prioritized procurements

4. Teams develop new RFPs for 3 prioritized procurements

3. Ted-X pitches and voting to decide focus for the year



The City of Long Beach led an eight-week RFP-a-thon to help staff from all departments write stronger RFPs

50+ participants working in teams of 2-4

20+ RFPs, impacting **~\$15 million** in contracted dollars

Services ranging from Community Gardens, to Health Supports for Older Adults, to Compost Hauling

| <u>Workshop 1</u> | <u>Workshop 2</u> | <u>Workshop 3</u> | <u>Workshop 4</u> | <u>Workshop 5</u> | <u>Workshop 6</u> | <u>Workshop 7</u> | <u>Workshop 8</u> |
|-------------------|--------------------|-------------------------|-------------------------------|---------------------|-------------------|-------------------------|---------------------------------------|
| Getting Started | Background & Goals | Description of Services | Metrics & Contract Management | Evaluation Criteria | Proposal Content | Pulling it All Together | Getting Ready to Manage Your Contract |

Approach: Accessible, engaging, collaborative workshops, coached by Purchasing staff.



Results:

- *“I’ve written many RFPs in my years with the City. Never before have I written one so intentionally and thoughtfully.”* (RFP-a-thon Participant & Senior Manager from the Financial Management Dept.)
- **100% of participants** indicated they would recommend the RFP-a-thon to a colleague or participate again.
- Participants’ assessment of their skills and confidence to write an RFP **grew by 36%** through the Workshop.

Seattle built a Procurement Dashboard for both depts and Purchasing to have more eyes on the process

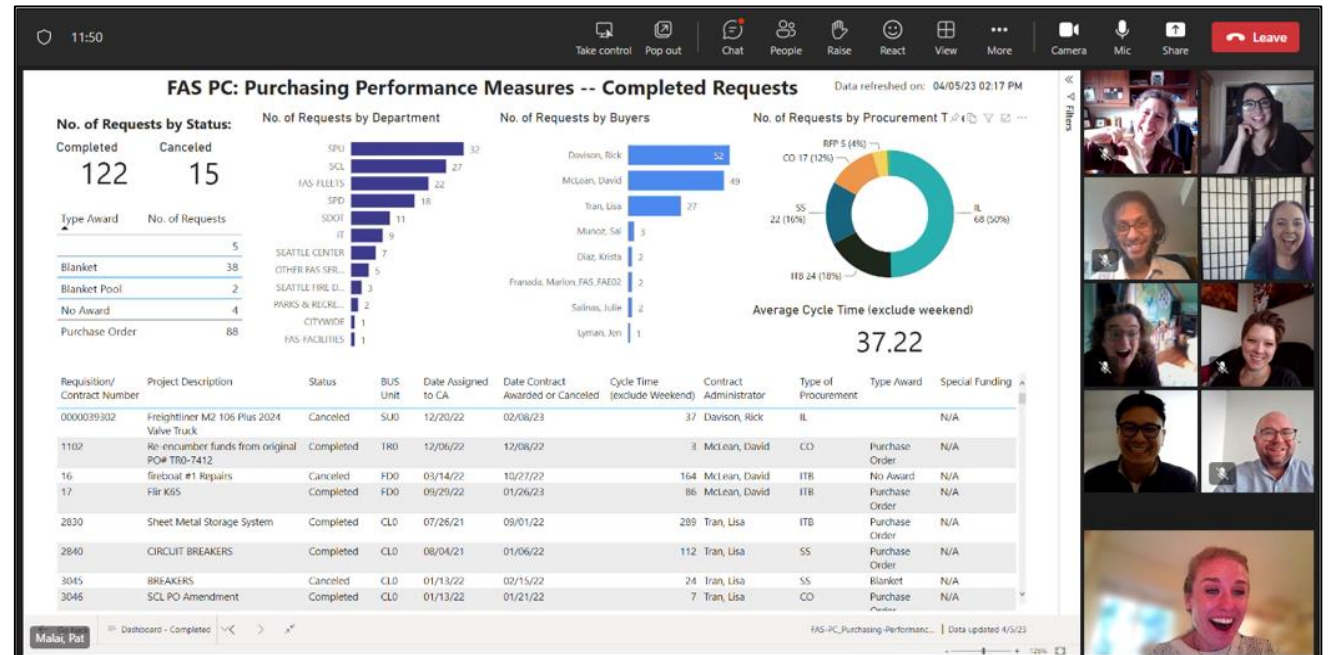
Use Cases:

Purchasing

- Billing
- Prioritization and resource management
- Project assignments

Departments

- Updated + accurate status; early identification of canceled requests
- Elevating priority requests
- Understanding of overall purchasing workload



Screenshot of performance meeting showcasing Procurement Status Dashboard.

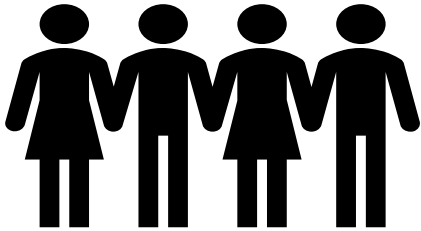
The city used Microsoft PowerApps to create an easily accessible dashboard, supplementing the city's e-procurement software.

Investing in Cross-Department Training and Communication

Why should governments focus on strengthening their internal procurement training programs?

Procurement is an engine that powers communities.

If procurement is the engine,
then properly trained staff are the fuel!



Training + Learning = Capacity building

Shift in organizational attitudes, behaviors, and culture to empower staff to innovatively apply skills, knowledge, and resources to improve performance.

Training adds value – but what makes it challenging?

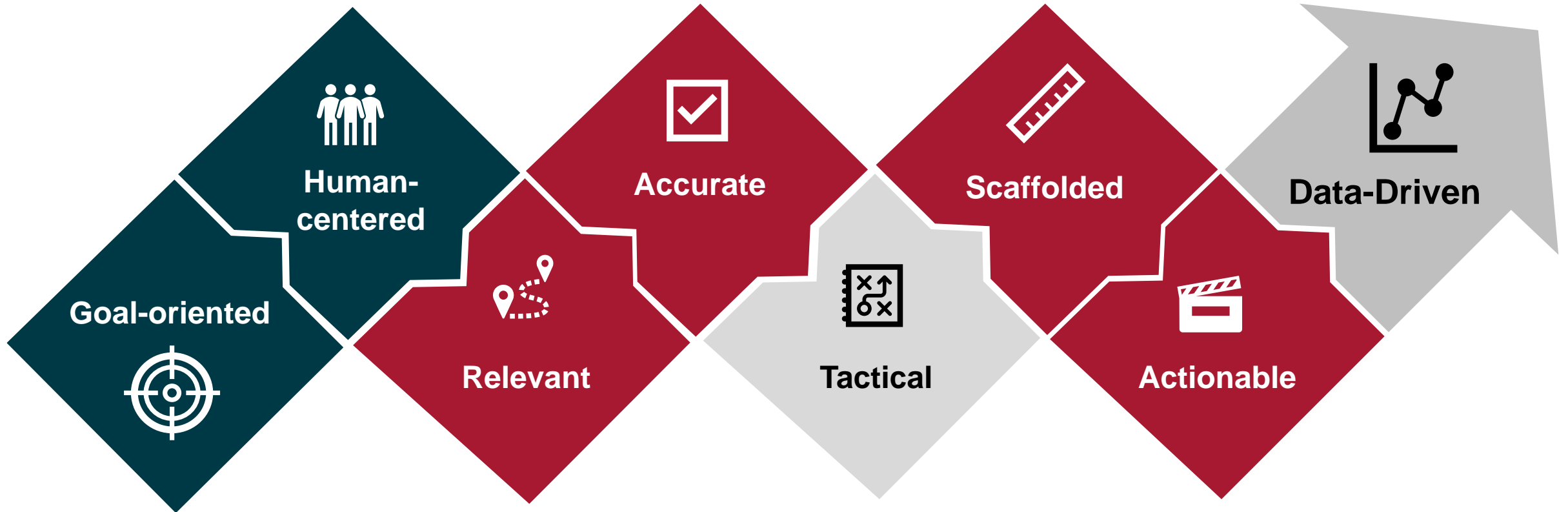
“Our process is broken, and so is our training. I left with more questions than answers.”

“There is a lot of resistance to change. It is hard to teach a dog new tricks.”

“My team does not have the skills to design or lead training so we hired consultants, but they did not tailor the training to our needs!”

What challenges have you experienced in your governments related to procurement training?

Building blocks for impactful training

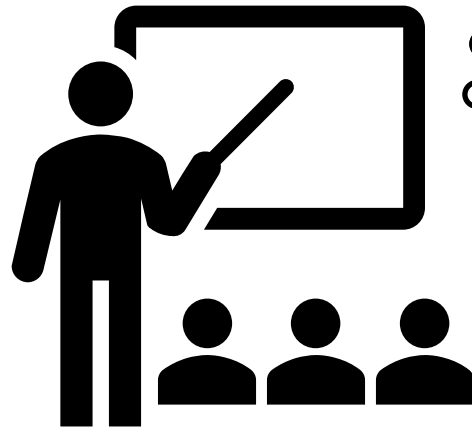


Reminder: training ≠ learning

Just because you train on something, doesn't mean your audience will learn it.

“OK folks, let's test your knowledge.

Write a paragraph explaining different purchasing thresholds in our procurement code.”



What is a purchasing threshold?

Wait, how many sentences in this paragraph?

Where is our procurement code?
Have I seen that before?

Is purchasing thresholds the same as a spending limit?

DELIVER TRAINING in a way that results in SUSTAINED LEARNING

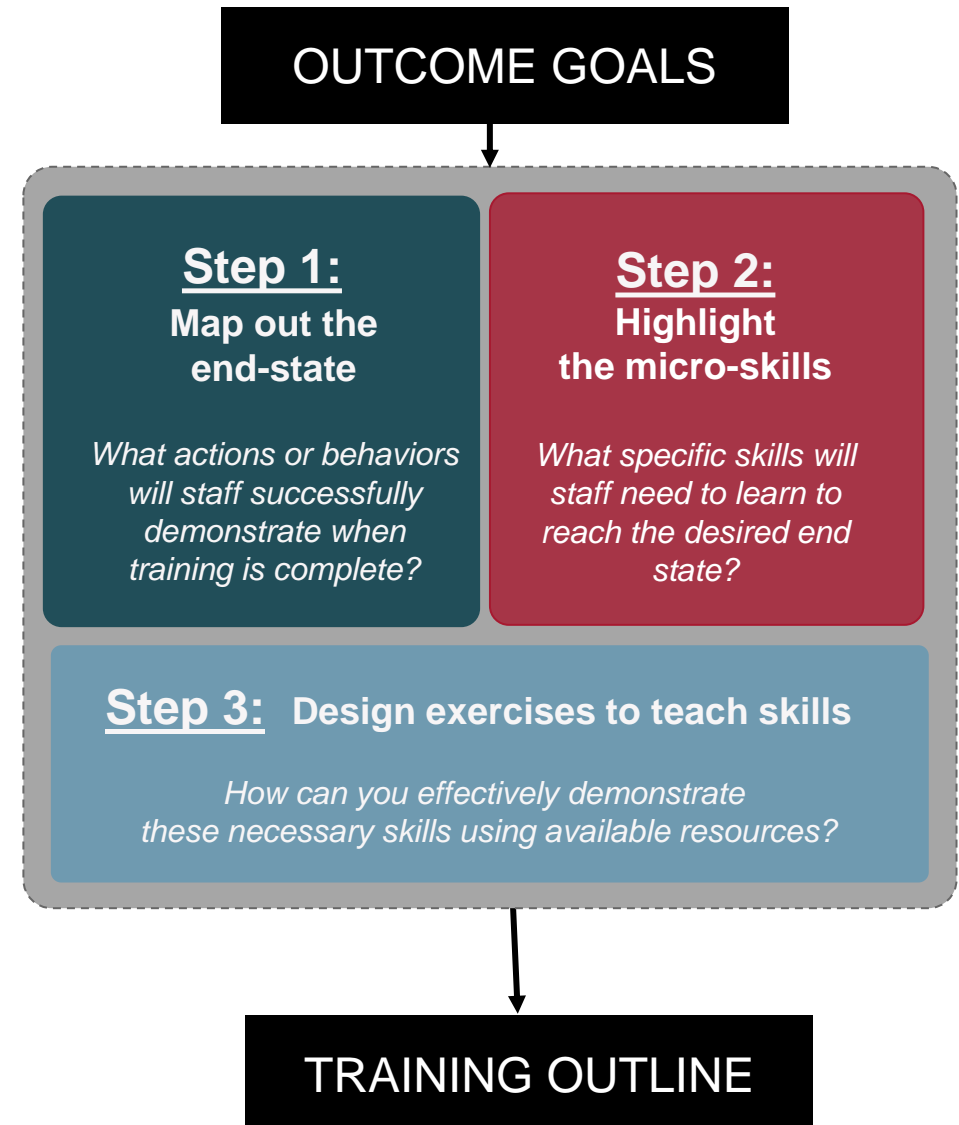
Use “Micro-skills Mapping” to develop an outline!

What do you do?

- Write out the **specific actions** you want staff to be able to **execute** at the end of training.

Why is it useful?

- Develop a **human-centered, tactical and actionable** training outline.
- Present content in **logical and digestible** pieces (scaffolded).



Training Goal: Let's make a cake!

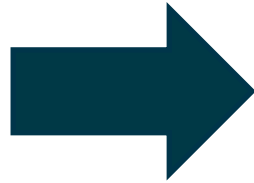


Instructions

- Imagine you are leading a training on baking a cake.
- Identify 5 micro-skills required to train someone to bake a chocolate cake.

Remember: Even the simplest tasks require a number of skills

Training Goal: Let's make a cake!



Required Micro-skills:

- Making the cake batter
- Proper measurements for ingredients
- Proper order to add ingredients
- Removing a broken eggshell from the cake batter
- Identifying the correct pan
- Proper usage of a whisk or stand mixer
- Turning on a stove
- Managing the temperature
- Decorating the cake
- And more...*

Even the simplest tasks require a number of skills

Let's try it together! Internal Policy Change

New Message – ↶ ✕

To **Citylandia Managers & Department Heads** Cc Bcc

Subject **URGENT: Change to Solicitation Submission Policy**

The Citylandia Central Procurement Department has introduced a new policy requiring all departments to submit a new intake form and submit them prior to drafting a new RFP. Effective October 13, 2024 employees will receive access to a new internal SharePoint site – Citylandia Procurement Hub (**CPH**). Each employee should have received an email with unique login credentials.

Employees must access and complete the intake form template saved in the CPH document library and send it to their direct manager for approval. Once approved, employees must schedule a kick-off meeting with the centralized procurement office using the SharePoint Calendar tool.

Send 🗑️ ⌵

Let's try it together! Internal Policy Change

New Message - ↗ ✕

To **Citylandia Managers & Department Heads** Cc Bcc

Subject **URGENT: Change to Requisition Submission Policy**

The Citylandia Central Procurement Department has introduced a new policy requiring all departments to submit a new intake form and submit them prior to drafting a new RFP. Effective October 14, 2024 employees will receive access to a new internal SharePoint site – Citylandia Procurement Hub (CPH). Each employee should have received an email with unique login credentials.

Employees must access and complete the intake form template saved in the CPH document library and send it to their direct manager for approval. Once approved, employees must schedule a kick-off meeting with the centralized procurement office using the SharePoint Calendar tool.

Send 🗑️ | ▼

So, what now?

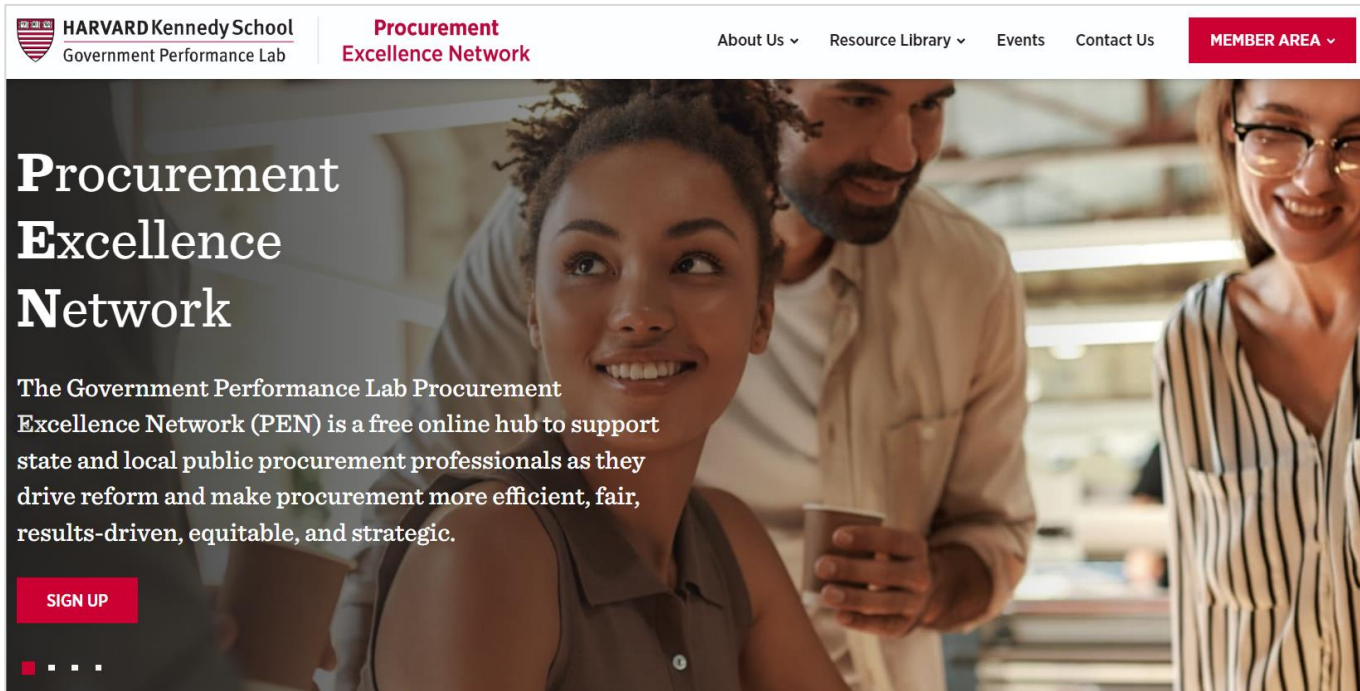
Organize the exercises for teaching each micro-skill into a plan!



*Turn implicit
knowledge into explicit
skills!*

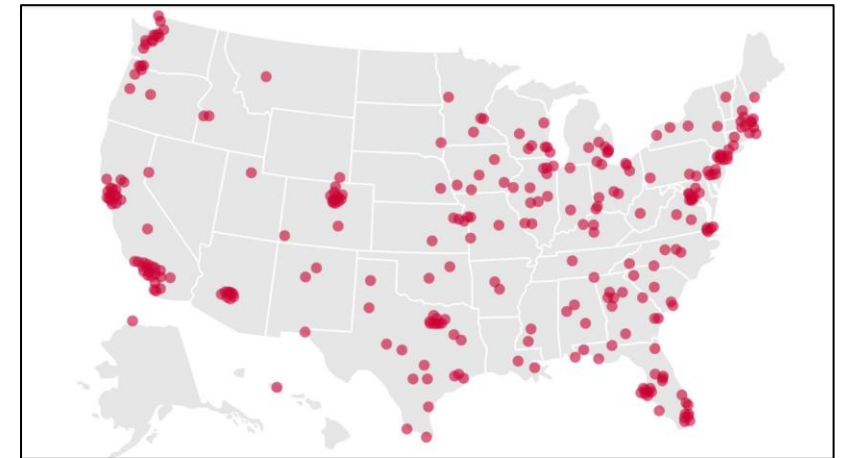
About the Procurement Excellence Network

What is the Procurement Excellence Network?



The screenshot shows the top navigation bar of the Procurement Excellence Network website. On the left is the Harvard Kennedy School Government Performance Lab logo. The main navigation includes 'About Us', 'Resource Library', 'Events', 'Contact Us', and a red 'MEMBER AREA' button. The hero section features a photograph of three diverse professionals in an office setting. The text reads: 'Procurement Excellence Network' and 'The Government Performance Lab Procurement Excellence Network (PEN) is a free online hub to support state and local public procurement professionals as they drive reform and make procurement more efficient, fair, results-driven, equitable, and strategic.' A red 'SIGN UP' button is located at the bottom left of the hero section.

PEN U.S. Members



[GPLPEN.HKS.HARVARD.EDU](https://gplpen.hks.harvard.edu)

The GPL's **Procurement Excellence Network (PEN)** is a **FREE** community built by and for government professionals. With more than **1,900 members**, PEN offers resources to help your government take its procurement practice to the next level.

PEN Offerings & Benefits

Virtual Trainings, Roundtables, and Bootcamps on procurement topics

How to Design and Deliver Effective Procurement Trainings



Growing **library of best practice publications and templates**

Are Procurement Thresholds Slowing You Down?



Contract Management Template

Coaching opportunities with GPL experts to workshop procurement challenges



Member Directory and Discussion Board to facilitate connections with peers



Building Connections via PEN

Member Directory

Features

- **Exclusive** to PEN Members
- **Search for connections:**
 - *Name*
 - *Government*
 - *Procurement Expertise*
- **Review biographies** to learn about interests and experience

PEN can also facilitate introduction emails or calls!


The screenshot shows the website interface for the Harvard Kennedy School Procurement Excellence Network. At the top left is the Harvard Kennedy School logo and the text "HARVARD Kennedy School Government Performance Lab". To the right is the "Procurement Excellence Network" logo. Further right are navigation links: "About Us", "Resource Library", "Events", and "Contact Us". Below the navigation is a search bar with three input fields: "Search Members By Name", "Search By Jurisdiction", and "Filter By Expertise". Each search field has a red magnifying glass icon. Below the search bar are three member profiles, each with a portrait photo, name, title, organization, and location. The first profile is for Kim Rayray, Contracts & Procurement Manager at the City of Seattle, Seattle, Washington. The second is for Cheryl Womble, Purchasing Agent at the City of Lancaster, Lancaster, Texas. The third is for Shawn Postera, Sustainable Procurement Manager at Multnomah County, Portland, Oregon.


HARVARD Kennedy School
Government Performance Lab


Procurement Excellence Network

About Us ▾ Resource Library ▾ Events ▾ Contact Us

Search Members By Name 🔍 Search By Jurisdiction 🔍 Filter By Expertise ▾


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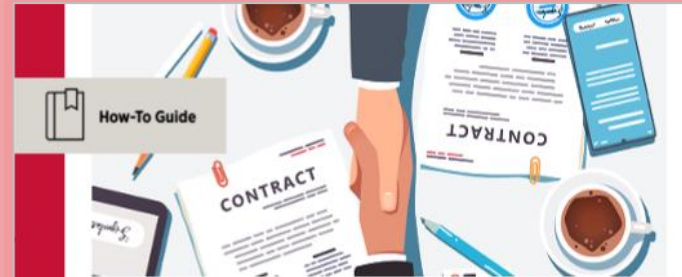
Resource Library – Publications & Templates



APRIL 2022

USING GOVERNMENT PROCUREMENT TO ADVANCE RACIAL EQUITY

 **HARVARD Kennedy School**
Government Performance Lab



 **How-To Guide**

Orienting Towards Outcomes: Results-Driven Approaches to Contract Management

Authors: Elena Hoffnagle and Hope Patterson
Contributors: Kailey Burger Ayogu, Aaron Hirsh, Kate Mertz, and Anh Ton

In this how-to guide you will:

- Understand strategies for shifting your contract management approach from a compliance orientation to one centered on performance improvement.
- Build your toolbox of management strategies to achieve contract objectives, while mitigating risks.
- Learn new ways to work collaboratively with your vendors, from early kickoff meetings to contract closeout.

 **HARVARD Kennedy School**
Government Performance Lab

**Procurement
Excellence Network**

 **HOW-TO GUIDE**

 **HARVARD Kennedy School**
Government Performance Lab

**Procurement
Excellence Network**

Optimizing Pre-Qualification Approaches for Fairness, Speed, and Results

Authors: Colin Erhardt and Maja Gray
Contributors: Rebecca Graffy, Elena Hoffnagle, and Hope Patterson

In this How-To Guide you will:

- Learn about pre-qualification approaches and what distinguishes them from other procurement types.
- Learn when to create a pool of vendors, how to best prequalify your vendor pool, and how to manage and allocate work.

Introduction

Government procurement processes are designed to be fair, transparent, and open to all. Those values are the reason why governments make purchases through competitive vehicles such as Requests for Proposals (RFPs) or Invitations to Bid (ITBs): formal solicitation processes that allow all potential vendors to participate, while providing a mechanism for the government to spend public funds with firms who will best meet residents' needs at the most reasonable price.

While RFPs and ITBs might be some of the most familiar formal procurement methods, they are not the only competitive procurement approaches that governments can employ; solicitations where

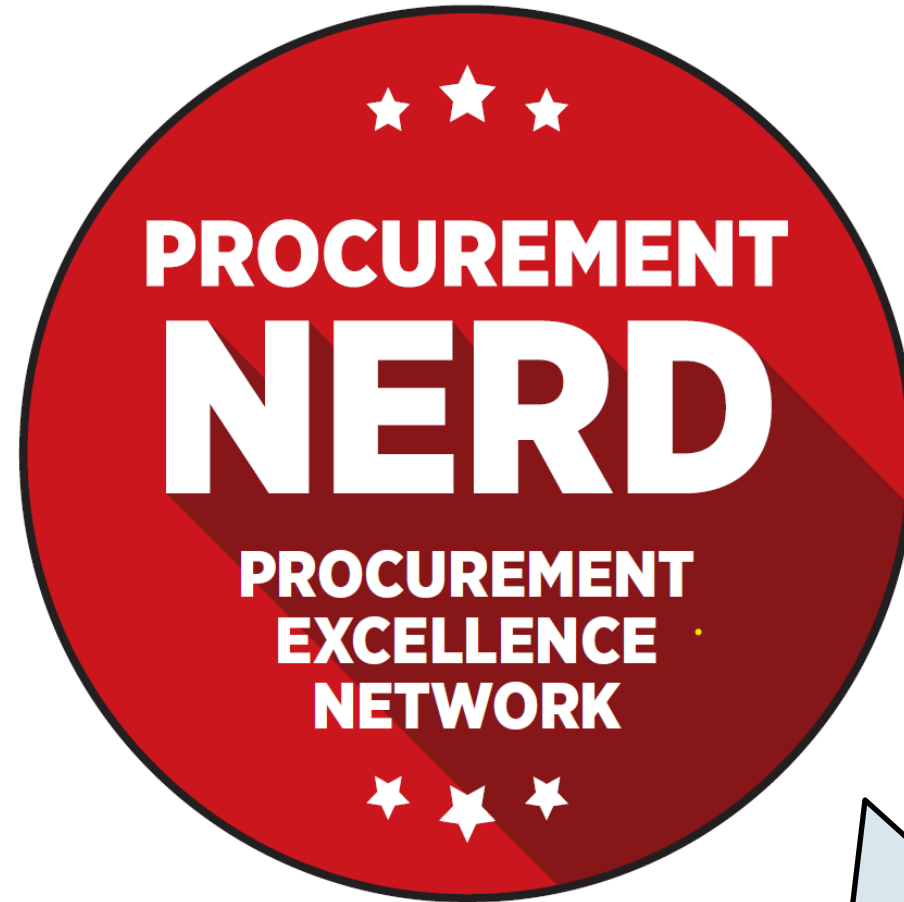
multiple vendors are pre-qualified for work can also be advantageous. This type of procurement can help governments more quickly hire vendors for as-needed work, while reducing the administrative burden for both staff and vendors that would result from issuing formal individual solicitations for numerous projects, duplicating the vetting of initial qualifications, expertise, and rates.

Next Steps: Sign-up for PEN today!



Please take 2 minutes to join
this FREE online community!

<https://gplpen.hks.harvard.edu/sign-up/>



Find our team at the conference
or after this session to grab this
custom swag!

Join us for our next free PEN event!

Improving Vendor Certification Programs to Advance Procurement Equity

Thursday, November 7 | 1-2p ET



Join PEN for an interactive session that explores the **benefits and challenges of vendor certification programs.**

During this training, we'll explore tactical strategies that will help your government:

- Assess whether to launch a new certification program
- Streamline existing certification processes
- Help certified firms meaningfully participate in solicitation opportunities

We look forward to seeing you there!

Thank You!



Colin Erhardt

colin_erhardt@hks.harvard.edu



Nayana Nagapurapu

nayana_nagapurapu@hks.harvard.edu