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2024 Cronin Submission Booklet

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1949

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1950

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Minnesota
1952

Blaine Yoder
Nebraska
1953

John Bush
Ohio
1954

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Michigan
1955

C.L. Magnuson
Connecticut
1956

Charles Byrley
Kentucky
1957

Ira Baker
Oklahoma
1958

John Dyer
Maine
1959

Lacy Wilkinson
Colorado
1960

Franklin Pierce
Tennessee
1961

E. Guy Martin
Louisiana
1962

Henry Knouft
Kansas
1963

Charles Sullivan
New Jersey
1964

Alan Vessey
Minnesota
1965

Francis Brooks
Nevada
1966

William Finnegan
Connecticut
1967

Hugh White
South Carolina
1968

John Ayers
Washington
1969

Thomas Blanco
Illinois
1970

John Short
Wisconsin
1971

Ramon Damerell
Oregon
1972

Frank Pennoni
Michigan
1972–73

Willis Holding, Jr.
North Carolina
1974

Gerald Geer
Washington
1975

Herman Crystal
New Jersey
1976

John Fisher, Jr.
Tennessee
1977

John Hittinger
Florida
1978

Homer Forester
Texas
1979

E.R. (Bud) Roon
Colorado
1980

Stanley Hanna
Maryland
1981

Hugh Carleton
Louisiana
1982

James Christiansen
Utah
1983

John Spath
New York
1984

Jack Pitzer
Iowa
1985

Giulio Mazzone
New Jersey
1985–1986

Howard White, Jr.
Alabama
1987

Thomas M. Bostick
Georgia
1988

Edward J. Erxleben
Arkansas
1989

Wayne A. Casper
Arizona
1990

Robert J. Link
Alaska
1990–1991

William S. Warstler
Michigan
1992

Paula Moskowitz
New York
1993

N. Kent Rose
Alabama
1994

Douglas G. Richins
Utah
1995

Richard B. Thompson
Maine
1996

Donald G. Buffum
Mississippi
1997

Dugan Petty
Alaska
1998

David Gragan
Texas
July–Sept 1999

Jan Hamik
Wisconsin
2000

Joyce Murphy
Missouri
Sept 2000–May 2001

Pat Kohler
Washington
May–Dec 2001

Richard Thompson
Maine
Jan–Mar 2002

Denise Lea
Louisiana
Mar 2002–Sept 2003

George Street
Tennessee
2003–2004

John Adler
Arizona
2004–2005

Ellen Phillips
Massachusetts
2005–2006

Voight Shealy
South Carolina
2006–2007

Jeff Holden
South Dakota
2007–2008

Vern Jones
Alaska
2008–2009

Dianne Lancaster
Oregon
2009–2010

Greg Smith
Nevada
2010–2011

Ron Bell
Virginia
2011–2012

Carol Wilson
Connecticut
2012–2013

Dean Stotler
Delaware
2013–2014

Deborah Damore
Vermont
2015

Paul Mash
Utah
Jan–March 2016

Larry Maxwell
New Mexico April
2016–2018

Michael Jones
Alabama
2018

Lisa Eason
Georgia
2019

George Schutter
District of
Columbia
2020

Rosalyn Ingram
Florida
2021

Delbert H. Singleton
South Carolina
2022–2023

Valerie Bollinger
Idaho
2024

Past Gold Cronin Winners

2023 - Michigan
Lifecycle Supplier Outreach &
Relationship Management

2022 - Michigan
Competitive Proof of Concept: Trying
Before You Buy While Complying with
Competitive Requirements

2021 - Wisconsin
Interagency, Data-Driven Collabora-
tion: Wisconsin's Innovative Approach
to Specification Development

2020-None Selected

2019 – Michigan
Circumventing Risk with
Contract Management

2018 – Alaska
Continuous Improvement in
Statewide Procurement

2017 – Utah
ValuePoint Cloud Solutions
Procurement

2016 – Tennessee
Radio Equipment and Services

2015 – Tennessee
Tourist Development –
Marketing and Advertising

2014 – Virginia
eVA Mobile Apps

2013 – Mississippi
Driving Efficiency into Business
Operations

2012- Oregon
Direct Dealership Price
Agreements

2011 – Oregon
Nationwide Lodging Services

2010 — Minnesota &
Wisconsin
Partnership Initiative

2009 — Oregon
Information Technology
Managed Service Provider for
Hourly and Project-Based
Services

2008 — Ohio
Multi-State Procurement
of Unique Services

2007 — Minnesota
Spend Analysis System

2006 — New York
Hazardous Incident Response
Equipment (HIRE)

2006 — Hawaii (IT)
Compliance Express
Program

2005 — Massachusetts
(Classic)
Envirocalc: Environmental
Benefits & Energy Cost
Savings Calculator for
Purchasers

2005 — Washington (IT)
WEBS: Washington Electronic
Business Solution

2004 — Illinois (Classic)
Transformation of
Procurement Performance

2004 — Arizona (IT)
SPIRIT: Automated
eProcurement System

2003 — Connecticut (Classic)
Weekly Information
Newsletter

2003 — Virginia (IT)
eVA Electronic Procurement
Solution

2002 — Alaska
Long Distance Learning

2001 — Idaho
Purchasing Modernization
Initiative

2000 — Utah
Vehicle Purchase Program

1999 — Ohio
Natural Gas Purchasing
Program
1998 — Missouri
PC Prime Vendor Contract

1997 — Wisconsin
Advantis Credit Bureau Access
Program

1996 — North Carolina
Micro-Computer & Peripherals
Contract as Developed &
Managed on the Internet

1995 — 1994
None Selected

1993 — Minnesota Document
Management System

1992 — Oregon
Vendor Information Program

1991 — Arizona
Contract for Abatement of
Underground Storage Tanks

1990 — New York
Contract for Electronic
Ballasts

1989 — Missouri
Pharmacy Service Contract for
Correctional Facilities

1988 — Kansas
Freight Management Systems

1987 — West Virginia Natural
Gas Contract

1986 — Alaska
Video - "A Better Way To Buy"

1985 — Missouri Competitive
Bidding of Residential
Rehabilitation Services

2024 GEORGE CRONIN AWARDS FOR PROCUREMENT EXCELLENCE SUBMISSIONS

Finalists:

Submissions:

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2024 GEORGE CRONIN AWARDS FOR PROCUREMENT EXCELLENCE FINALISTS

State of Colorado

Department of Personnel and Administration
State Purchasing and Contracts Office

2024 George Cronin

Awards for Procurement Excellence

Whose Contract Is It Anyway?
Improving Outcomes Through Contract Management
Training for Program Staff in Colorado

Executive Summary

As public procurement employees, we are held to a high standard and must be good stewards of public funds. Effective contract management is critical to this endeavor and relies on collaboration between procurement professionals and program staff. However, the division of responsibility is not always clear, and program staff have many other responsibilities besides contract management. To address these concerns, Colorado has created a new contract management policy and training course for program staff.

The training course demonstrates the importance of contract management, explains requirements and best practices, and clarifies the contract manager's role and responsibilities. We encourage program staff to work closely with their agency's procurement team while also explaining who is responsible for which tasks. While many states have extensive, time-consuming contract management certifications, we decided to emphasize flexibility and reach. We knew that providing information quickly and succinctly and repeating the training annually would ensure that **all** our busy state employees receive the tools they need to manage their contracts as soon as possible. This has been a multi-year commitment to modernizing and improving procurement practices:

- **2021** — Design and delivery of contract management training by the central procurement office to managers of high-risk contracts statewide.

- **2022** — Transition to training delivered by each agency to managers of high-risk contracts.

- **2023** — Expansion of annual training from high-risk contracts to all personal services contracts and purchase orders over $100,000.

- **2024** and beyond — Creation of a sustainable long-term training culture.

This project began in 2021, when Colorado Governor Polis set a "Wildly Important Goal" of ensuring that 75% of the state's high-risk contracts were managed by certified contract managers by fiscal year end, only a few months away. At the time, state agencies were assigning roles inconsistently, and only a few had formal contract management policies in place. Despite these challenges, we exceeded our goal with a 95% training completion rate and overwhelmingly positive feedback.

In 2023, we expanded this training requirement beyond managers of high-risk contracts to all employees managing personal services contracts and purchase orders over $100,000. Training completion was over 93% among employees who were required to complete the training by policy, and over 700 additional employees completed training beyond the policy requirement.

As this project moves from initial rollout to ongoing implementation, we consider it a resounding success! We created an **innovative** statewide contract management training course that, for the first time in Colorado history, targeted those managing high-risk contracts. Both the project as a whole and the training course specifically are **transferable**, since the basic tenets of effective contract management are similar from state to state, as are the common problems states face.

The **service improvement** we've provided is twofold: We've increased training, communications, and support for agencies and institutions of higher education (IHEs) to ensure they're proactively managing their contracts. We've also improved the experience for suppliers, who benefit from better-managed contracts and clearer expectations. Improved contract management also means a **cost reduction** for both the state and contractors because it helps catch contract issues earlier. This saves staff time and resources spent on performance delays; reduces service interruptions; and decreases the need for contract remedies such as notices to cure and contract terminations.

Innovation

In fiscal year 2021, Colorado Governor Polis tasked the Department of Personnel & Administration (DPA) with strengthening contract management processes statewide. This was originally a one-year goal, but due to the project's success, the Executive Director of DPA and the Chief Procurement Officer decided to expand the project from high-risk contracts to all personal services contracts over $100,000 and to make training and reporting an annual compliance requirement. This was accomplished in consultation with agencies to ensure their buy-in and support.

The first step was developing a training course for program staff who manage high-risk contracts. The course needed to be consistent with requirements under the Colorado Procurement Code & Rules and to meet the varied needs of our decentralized state agencies. The course emphasizes the importance of contract management and clarifies the contract manager's role and responsibilities throughout the contract lifecycle, from initial project planning through contract closeout. In response to feedback from agency procurement staff, we encourage program staff to work with their agency's procurement team while clearly explaining who is responsible for which tasks. In addition, we provide a best practices guide for quick reference and a sample contract manager agreement agencies can use to document the expectations of the role. We prioritized disseminating important information quickly and efficiently to all staff who can benefit from it.

The initial goal was for 75% of those who manage high-risk contracts to complete the course in the first year. We far exceeded that goal, reaching 95% course completion in 2021 and receiving positive feedback on the training: 91% of staff who responded to a survey indicated that they found the training helpful. In addition to the course, we highlighted contract management at events throughout the year. At our statewide procurement staff summit in 2021, for example, we showcased best practices and lessons learned from individual agencies and institutions of higher education.

In 2022, we worked closely with the agencies to formalize training and reporting requirements in statewide policy, clarifying the roles of procurement and program staff. We consulted with a wide range of stakeholders in procurement, accounting, and executive leadership. Through this work, we not only achieved buy-in and support, but also established a true, collaborative partnership.

Once training, policies, and partnerships were in place, we worked to build a sustainable, long-term culture of training. Starting in 2023, all agencies and IHEs must provide annual training to staff managing services contracts over $100,000. Reporting on this training requirement is required for agencies to retain their purchasing delegations. In 2023, the first year of the expanded requirement, the completion rate among employees covered by the new, broader policy was over 93%, with over 1800 contract managers trained. In addition, agencies chose to provide training to 700 additional employees beyond those covered by the policy, demonstrating the value they find in the training.

We have approached these new requirements with flexibility and support. Since our goal is to work collaboratively with our decentralized agencies, we do not require any specific format for the training. However, most agencies continue to use our course, which allows them to save time and money — while still being able to make agency-specific adjustments to the content and delivering it in the way that best meets their staff's needs. Some larger agencies have chosen to develop their own training, often incorporating content from our course into other training materials. The new contract management training requirement has even inspired some agencies to develop more comprehensive training on purchasing and contracts. By choosing to emphasize flexibility in our decentralized procurement system, Colorado has shown that innovation leads to more innovation.

Transferability

Every state has contracts to manage. While some of the challenges we face may be state-specific, we've found that most contract management problems and best practices are universal — making this project highly transferable.

For example, when contract issues arise, a common first response is to want to change the contract language when, in fact, contract management is often the bigger problem. The language people are looking to add may even already be in the contract, but the contract manager either isn't aware or doesn't know how to use that information. Another common issue — faced by every state — is the misunderstanding of the division of responsibilities between program staff and procurement staff. All these problems (and more!) can be solved by providing consistent training to all contract managers.

Developing and maintaining a multi-hour certification program requires a significant investment of staff resources, but our experience shows that even simple training covering key responsibilities and best practices can yield impressive results. Colorado's decision to prioritize flexibility and focus on the essentials has created an approach to contract management training that is transferable to any state, even one that does not currently have the resources to devote to extensive certification programs. While this flexible approach initially arose as a result of Colorado's decentralized procurement structure, all states inevitably rely on subject matter experts who are scattered across agencies, and our results show how training can profitably be delivered to those staff.

Another advantage of this flexible approach is that it can reach large numbers of staff quickly and efficiently, including staff for whom contract management is a secondary responsibility. Even states with more extensive certifications already in place for contract managers might benefit from adding a more flexible option to train program staff who are involved in contract administration; contract managers who are not currently covered by their state's certification program (such as managers of low-dollar contracts); and any other staff members who could benefit from understanding contract management best practices (such as grant managers and executive leadership). In sum, any procurement office could benefit from this innovative approach to contract management training.

Service Improvement

In Colorado, we pride ourselves on providing great service to our customers, both agencies/IHEs and suppliers alike. Our goal is always to ensure the procurement of quality goods and services, achieving best value through fair, open, and competitive processes, and this project furthered that goal.

For state agencies and IHEs, this service improvement can be seen not just in terms of better contract management and outcomes, but also in the continued support our central procurement office provides them. Colorado has long had a statutory requirement that contracts for services over $100,000 must have a contract manager with subject matter expertise who is responsible for contract management and performance monitoring. However, with no further details about training or qualifications and no standardized policy, agencies were implementing this requirement inconsistently.

The original contract management training course we developed and deployed helped get agency staff on the right course, and we have provided additional support through subsequent developments. Colorado's CPO and the procurement instructional designer collaborated with each agency's procurement official to devise the most appropriate training strategy for their specific needs. We then worked with the agencies' training and HR teams to ensure they had the resources to implement that strategy. Additional support included discussions about identifying the staff who needed training, strategy planning for training rollout and communications, and facilitating the sharing of resources among agencies. The fact that agencies have already expanded training beyond the minimum required staff members clearly demonstrates the service improvement they recognize.

For suppliers, the service improvement has come in the form of better contracts and more efficient contract management. Their contacts at the agencies and institutions of higher education are better equipped to provide guidance as they manage their contracts. This leads to clearer expectations and smoother relationships between contractors and the state.

Savings & Efficiency

Efficient contract management has many benefits, including cost-saving opportunities. By clearly defining roles, responsibilities, and expectations, states reduce the risk of supplier nonperformance and minimize costly delays. The risk of lawsuits, an expensive endeavor for state governments, is also reduced. Anecdotally, we have heard from our agency partners that poor contract management by the state sometimes leads to contracts not being renewed for option years. This in turn means the state must pay one vendor for work performed, while quickly rebidding for future years, or even being forced into a non-competitive procurement such as a sole source or emergency procurement. This can result in poor outcomes in terms of cost, risk, contract term, and quality of deliverables.

One of the key goals of this project was gaining oversight of our decentralized agencies' inconsistent contract management practices. For this exact reason, we do not have precise "before" numbers for the wasted resources and staff time that this project is likely to save. However, a review of generally available statistics indicates that poor contract management is extremely costly for organizations. In particular, Gartner reports that 25%-40% of a lawyer's time is spent on tasks that don't require a lawyer, validating our decision to focus on division of responsibilities between program staff and procurement as a potential area for cost savings. Similarly, KPMG has found that poor contract management can cost organizations up to 40% of a contract's value when outsourcing, and World Commerce and Contracting calculates that poor contract management costs businesses 9% of total revenue on average. Given these figures and the very large dollar amounts passing through state contracts each year, even small incremental improvements due to better contract management have the potential to yield a significant cost reduction.

Conclusion

Colorado's new approach to contract management training has had an immediate and significant effect on state agencies' management of their contracts. By emphasizing collaboration with our agency partners, we have maximized the **cost reduction** and **service improvement** we offer them through this project, as validated by their enthusiastic uptake of the training and resources we provide. Our decision to emphasize flexibility and to prioritize the most important information increases the reach of the training in Colorado as well as its **transferability** to other states, both in terms of the resources needed to implement the program, as well as the universal applicability of the course content itself. All of these factors combine to make this project the kind of **innovative** contribution to public procurement that Colorado always strives to achieve.

Commonwealth of Massachusetts

Executive Office for Administration & Finance
Operational Services Division

2024 George Cronin
Awards for Procurement Excellence

Decarbonizing Massachusetts' Vendors

An integration of climate consideration into public procurement supply chain

Executive Summary

Responding to the Healey-Driscoll Administration's creation of a first in the nation, cabinet-level Climate Chief appointment, in July 2023, the Massachusetts Operational Services Division (OSD) introduced a Climate and Sustainability Unit to its public procurement office. This strategic initiative aligns with the Governor's objective of reducing carbon emissions across all operations and enhancing the Commonwealth's resilience to the impacts of climate change. Public procurement plays a pivotal role in the economic and environmental landscape, particularly concerning vendor decarbonization. It serves as a catalyst for driving emission reductions and creating green jobs. OSD's focus on vendors represents a groundbreaking approach.

Traditionally, vendors are recognized for the green products or services they provide rather than for their own contributions to climate resiliency and mitigation within the supply chain. While Environmentally Preferable Products (EPP) procurement programs have been in service for more than a decade, few resources have thus far been devoted to vendor carbon footprints as created by business as usual. The new OSD unit encompasses longstanding EPP recognition under the new umbrella of Commonwealth decarbonization efforts. Recognizing the significant impact of public procurement on driving decarbonization and promoting sustainable development, OSD is pioneering a new process to engage vendors in measuring and achieving decarbonization targets.

The holistic approach to integrating climate initiatives includes: 1) the introduction of a post-award climate vendor form in the Request for Response (RFR), 2) the development of a climate vendor scorecard based on data collection, and 3) the implementation of a baseline emission strategy to calculate vendor carbon footprints. These tools are designed to align procurement activities with climate goals, identify environmentally responsible vendors, and further incentivize their participation. By integrating these measures, OSD aims to promote sustainability, enhance vendor accountability, and ensure that public procurement practices contribute significantly to the reduction of greenhouse gas emissions.

Key elements of the new process for decarbonizing vendors are:
1. **Introduction of Post-Award Climate Form**: This form initiates required reporting of sustainability practices for awarded bidders. Vendors will be required to address criteria such as energy efficiency, recycled content, waste management, and energy consumption within their operations.
2. **Development of a Climate Vendor Scorecard**: This scorecard provides a standardized framework for evaluating vendors' sustainability efforts. It improves transparency and accountability and facilitates data driven decision making, while capturing economic benefits and promoting risk management.
3. **Designing a baseline emission strategy**: This tool measures baseline emissions, encompassing Scope 1, Scope 2, and Scope 3 emissions associated with vendor activities. OSD uses vendor-provided information to establish a baseline for current vendor emissions, creating the impetus for calculating carbon footprints.

By implementing those key elements into the new process, OSD is making vendor decarbonization more effective, building a sustainable future for generations, and is acting as a catalyst for sustainable development.
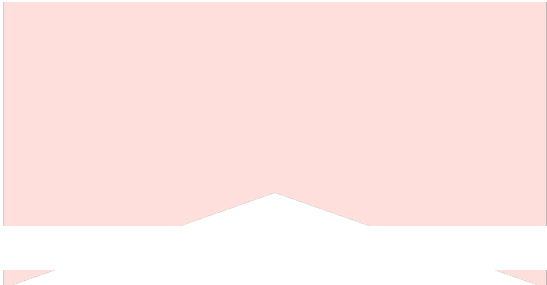
Innovation

The passive approach being taken by many states towards greening procurement is being replaced in Massachusetts by a dynamic integration of active solutions in our procurement space. The new post-award vendor reporting form represents a pioneering approach to promoting sustainability practices for Statewide Contract participants. OSD's initiatives aim to motivate vendors to adopt innovative strategies for integrating climate goals into their operations. This approach not only attracts and rewards socially responsible vendors, but also establishes OSD's credibility as a state agency leader in combating the effects of climate change. By systematically collecting and analyzing data, OSD's analytical team will gain valuable insights into current trends in vendor sustainability practices, allowing OSD to identify areas for improvement, recognize leaders in sustainability, and provide targeted feedback to vendors.

In the long run, by making emission reduction an integral part of vendor operations, we expect it to become a habitual practice. This approach incorporates several key strategies:

> **1. Innovation in Vendor Participation to Reduce Emissions**: By requiring information about awarded vendors' environmental practices and helping them understand that they are better equipped to align their operations with our agency's sustainability standards, we aim to raise awareness, underscore the importance of reducing emissions, and promote sustainable practices. This transparency helps build a stronger relationship between our agency and the vendors. Over time, vendors will become more comfortable and proactive in addressing climate-related issues. Collecting detailed environmental data from vendors will enable us to develop a more accurate and effective vendor scorecard, enhancing our ability to track progress and drive improvements. This continuous engagement not only improves their sustainability practices but also strengthens their commitment to reducing their environmental impact.
>
> **2. Development of a Climate Vendor Scorecard**: OSD is developing in-house carbon accounting tools to measure and manage vendors' carbon footprints, facilitating the creation of a climate scorecard for each vendor. Typically, vendors collaborate with third-party entities to report their carbon footprints, often at their own expense, either voluntarily or as a requirement. Alternatively, if vendors wish to conduct business with a state agency, they may be mandated to provide a certificate from a third-party assessor. However, outsourcing this task to a third-party, results in said third-party owning the vendor data. Lacking transparency about their methodology complicates the assessment of vendors' progress in climate-related initiatives. Thus, OSD is conducting in-house data collection and analysis. By identifying vendors actively engaged in low-emission strategies, OSD encourages the adoption of best practices in carbon reduction throughout the supply chain. This data-driven approach underpins the development of procurement practices inclusive of sustainability and emission reducing policies and practices.
>
> **3. Innovation Strategy Development**: Vendor decarbonization should become a recognized priority across all industries. By continuously monitoring and evaluating vendor performance in terms of climate-related metrics, OSD can identify challenges such as vendor reluctance, misunderstandings of OSD requirements, facility constraints, or technological limitations enables OSD to devise strategies to overcome barriers to innovation.

OSD actively engages with vendors, government agencies, and other stakeholders to ensure that vendor decarbonization becomes ingrained in business practices. The integration of the new processes into OSD's procurement procedures represents a comprehensive and innovative approach to accountability.

Transferability

Governments often underestimate the potential of their procurement power as a crucial environmental policy tool. By directing government procurement spending toward more sustainable practices, there is a significant opportunity not only to reduce emissions from governmental operations but also to encourage vendors to adopt and develop technologies that mitigate and adapt to the climate crisis.

Establishing a standardized post-award form improves efficiency by providing clear guidelines for vendors to follow. Introducing specific metrics related to carbon reduction measures allows OSD to identify high-performing vendors and incentivize others to improve their sustainability practices. Furthermore, OSD will implement a standardized vendor scorecard that streamlines the evaluation process, enabling procurement agencies to assess vendors' decarbonization performance efficiently.

Other states can replicate our approach and turn their procurement power into a force for economic growth and environmental sustainability. Involving the integration of sustainability criteria into procurement practices, establishing baselines for vendor emissions, and fostering continuous improvement through regular tracking and feedback within the supply chain will set a powerful example for other states to follow.

As described, incorporating a post-award climate form in procurement procedures establishes a transparent mechanism for states to address decarbonization reporting criteria and data analysis. Other states can replicate this approach by integrating similar forms and eventual, measurable targets, into their procurement processes. States can adapt the form to align with their own legal frameworks, environmental objectives, and procurement policies and practices.

The Massachusetts vendor scorecard provides a quantitative approach for evaluating vendors' efforts toward decarbonization that can pave the way to the eventuality of standardized environmental practices criteria. Its structured format can serve as a model for other states aiming to integrate sustainability criteria into the vendor selection processes and to instigate and evaluate awarded vendors' carbon reduction initiatives.

Service Improvement

The new OSD climate initiatives will enable the Commonwealth to determine the extent to which its statewide contract vendors enrich and enhance procurement by optimizing climate friendly operations. Every step we take towards further decarbonization efforts is an improvement in procurement activities. By establishing a Climate and Sustainability Unit, OSD now has the internal resources to launch this particular new vendor evaluation process in-house, allowing for a better understanding of vendors' operations over time. This capability enables OSD to monitor vendors' facilities and warehouses directly and assist them in addressing questions about their energy consumption and processes.

OSD's integrated climate-focused procurement process emphasizes innovation through collaboration and data-driven decision-making to decarbonization vendors across the supply chain. Streamlined, automated evaluation processes increase the efficiency of evaluation, and lead to cost reductions achieved through efficient resource management. The transferability of these approaches ensures that other states can replicate and further adapt these tools to enhance their procurement processes.

Our initial vendor survey indicated that, for the most part, it remains large vendors who are measuring and reporting climate progress effectively. However, climate action is not exclusive to wealthy companies. Climate change impacts small and local vendors, as well as minority-owned

businesses. It is essential to help these vendors recognize the positive impact they can have in combating climate change. By supporting them in understanding and improving their environmental practices, we ensure that all vendors, regardless of size, can contribute meaningfully to climate goals, thereby improving the whole of environmentally friendly goods and services provision.

These climate initiatives enhance service improvement by advancing the goal of decarbonizing vendors in public procurement. Over time, the post-award climate form and vendor scorecard will increase vendor awareness of reducing greenhouse gas emissions. Vendors now understand that our selection processes prioritize decarbonization efforts and effectively integrate sustainability criteria into procurement practices. This heightened awareness streamlines evaluation processes and ensures that awarded contracts contribute to low emission goals. By developing an in-house climate vendor scorecard and implementing a post-award climate form for vendors to complete after contract award, we are positively impacting the day-to-day operations of our public procurement office.

Savings & Efficiency

Developing an in-house emissions accounting system to measure Scope 1 and Scope 2 emissions of vendors based on their carbon footprint is a cost-saving measure.

Hiring third-party services often reduces transparency and visibility for the state agency, as they become reliant on the scores provided by the third party. While outsourcing may seem like an easy solution, investing in consultants to train agency staff and hiring dedicated personnel to manage emissions accounting is far more efficient in the long run. This approach not only enhances transparency between the agency and vendors but also fosters collaboration and visibility among vendors themselves.

By taking ownership of emissions accounting internally, the agency can achieve greater control, accuracy, and long-term cost savings while fostering a culture of sustainability and accountability. The impact of the climate vendor post-award form and vendor scorecard in the process of decarbonizing vendors in public procurement for cost reduction is significant. It centers on the potential for cost reduction, resource savings, and improved efficiency measures. The vendor scorecard incentivizes vendors to adopt cost-effective decarbonization measures by evaluating their performance in reducing carbon emissions and contributes to resource savings across the supply chain. For example, vendors may optimize transportation routes or invest in renewable energy sources, leading to reduced resource consumption and associated costs.

Conclusion

Massachusetts' innovative measures, including the post-award climate form, climate vendor scorecard, and baseline emission strategies, are pivotal in driving vendor decarbonization. These tools ensure that sustainability criteria are embedded in procurement processes, promoting environmentally responsible practices among vendors.

By emphasizing innovation, and data-driven decision-making, OSD sets a precedent for sustainable procurement practices across the nation. The transferability of these initiatives opens the door for other states to replicate and adapt these strategies, fostering a broader implication for supply chain climate action. Furthermore, service improvements and cost reductions achieved through these measures highlight the economic and environmental benefits of integrating sustainability into procurement. Ultimately, the efforts of OSD in vendor decarbonization exemplifies the way in which public procurement can lead in mitigating climate change, supporting the creation of green jobs, and building a sustainable future.

State of Michigan

Department of Technology, Management, and Budget
Central Procurement Services

2024 George Cronin
Awards for Procurement Excellence

**Cloudy with a Chance
of Savings: Infrastructure
as a Service**

Executive Summary

After extensive terms and conditions negotiations to create a level playing field with the world's largest Cloud Service Providers, the State of Michigan finalized its Infrastructure as a Service (IaaS) Program in early January of 2023. This exciting program gives the State multiple options for cloud hosting in State controlled environments. The IaaS program introduces two highly competitive vendors as options, Google and Amazon Web Services. These vendors will allow the State to properly match its systems with the optimal cloud hosting environment for each solution all while creating greater competition. To our knowledge this effort is unique in public procurement.

To maximize the impact of this program, Michigan now includes language within its standard IT Software solicitations that allows prospective vendors to leverage the State's IaaS program for the hosting component of their proposal. This saves time for negotiations, ensures consistency, and contributes to cost savings.

Innovation

Historically the State of Michigan had multiple "tenants" or hosting environments. These were spread across multiple platforms, and each had their own unique set of negotiated terms. What is unique about Michigan's direct cloud hosting contracts is the programmatic approach taken. Michigan negotiated with multiple Cloud Service Providers (CSP) at the same time to create consistency in terms, while also leveraging each vendor against each other creating a more optimal agreement for Michigan. By developing multiple direct contracts as part of the same effort, Michigan avoided having multiple IaaS hosting contracts with varying terms and conditions. A level terms playing field for all infrastructure providers drives increased competition. This allows for the selection of the best CSP through a streamlined process based on features, service levels, risk profile, and cost.

For this effort, the State of Michigan negotiated with major CSPs and succeeded in reaching agreement on addendums that sit over their standard terms. These negotiations have allowed State of Michigan terms to take precedence, placing the CSPs on equal footing. The idea was to address the risks and time required to obtain cloud solutions and streamline the process for new projects going forward. Michigan's IT RFP templates identify these CSP agreements and encourage bidders to collaborate with the CSPs in responding to IT solution bids. This saves the bidders money and time to develop the responding to bids, but also saves the State time negotiating the new terms and reduces cybersecurity risks associated with hosting. This will help a multitude of projects including custom builds and commercial off-the-shelf applications.

Transferability

Contract negotiations in the Public IT procurement space are always challenging and lengthy. Every procurement is unique and the speed at which the industry moves, makes subsequent negotiations ever changing.

All state governments have unique challenges that require unique solutions, and each state has different procurement statutes to work under and satisfy. Utilizing a similar concept as Michigan's IaaS model should be available to any state procurement office. It required only time and personnel to work with hosting providers and negotiate similar addendums to their standard terms. Michigan worked with its Attorneys General, Cyber Security officials, procurement professionals and the Cloud Service Providers. This was an intensive negotiation but resulted in a durable framework that can be used repeatedly in the future.

These contracts have extended purchasing language which would allow other states to use them. Michigan pioneered this effort with its hosting vendors, paving the way for other states to do the same.

Service Improvement

The IaaS program allows DTMB to deliver requested cloud solutions far more efficiently by eliminating the need to bid each new instance and negotiate hosting terms. In the past, a new tenant (or configured piece of infrastructure) had to be created and negotiated for any bid requiring hosting. With IaaS, cloud tenants are already configured by Michigan's Chief Technology Officer's (CTO) office and do not require new lengthy negotiations. Consistent cyber security terms for all projects in the hosting arena saves huge amounts of time and labor by Cyber Security and the Attorney General's office. Depending on complexity, this would take hundreds of hours of negotiating and configuration time, on every project that required it.

For example, When MiLogin (the State's Identity and Access Management (IAM) environment) wanted to move to the cloud, they used the IaaS program. Instead of going out through a traditional multi-month RFP (average is 9 months), the team was able to quickly look at the different cloud service offerings, pick the best solution and execute an agreement within a few weeks. Their initial savings produced an 8% discount which has since increased to 20% on top of the savings realized by moving from on premises hosting to the cloud.

To maximize the benefits of the IaaS program, Michigan now includes language within all IT Software solicitations to allow prospective vendors to leverage the State's tenants under the IaaS program for the hosting component of their bid. This saves even more time on negotiations, ensures consistency, and contributes to cost savings. IaaS has been welcomed by Michigan's IT procurement professionals, Cyber Security Professionals, CTO's office, and Attorney General's office.

Savings & Efficiency

Implementing an IaaS program creates many efficiencies and has realized savings. So far, Michigan has realized over $650,000 in hard savings, just from consolidating existing Google and Amazon spend under these two contracts which leverage all of the state's spend. The state had multiple tenants negotiated by multiple vendors for their contractors. By pulling all of these together under two contracts, Michigan was able to leverage this economy of scale and negotiate better pricing. Michigan is also looking at discounts of upwards of 20% on new purchases thanks to this consolidation of spend volumes.

A new vendor can choose the preapproved cloud hosting environment that makes the most sense or fits best based on how the software is built. We anticipate that vendors will save time on negotiations and configuration to meet the State's needs. Outcomes for the state and vendor will be better because vendors are allowed to choose which hosting environment fits best for their solution.

An important part of this model is increased competition. The State of Michigan previously hosted all non-vendor hosted applications in either the State's Microsoft Azure instance or within the State's on-premises hosting environment. The establishment of two new cloud tenants allows for much greater competition. As new projects arise Google and Amazon will compete with each other for new business. Similarly, this model levels the playing field. Through negotiations, the State of Michigan was able to achieve very similar terms and conditions with Google and Amazon Web Services. This allows CPS to evaluate on an apples-to-apples basis and pick the best value based on a technical and pricing perspective.

Additional, procurement efficiencies have been realized. With the institution of proper processes, technical users are able to review offerings, determine the best value, and quickly standup or spin down IaaS offerings. This significantly shortens timelines on these IT projects, especially by eliminating lengthy reviews of hosting terms and conditions by our Cyber Security and Attorney General's office.

Conclusion

The State of Michigan's IaaS Program is blazing a trail in the public sector hosting arena. These negotiations and successful establishments of pre-negotiated options for cloud hosting in state-controlled environments are game-changers. Google and Amazon Web Services now have a template to undertake these negotiations with other states. This program increases competition between major vendors and allows bidders on new solutions options to easily adopt an approved cloud hosting paradigm as part of their bid. This eliminates the need to negotiate hosting which saves time and money for both the state and prospective vendors.

Michigan IaaS program is already paying dividends; with $650,000 in hard saving already achieved through consolidation and spend leveraging, and vast amounts of administrative effort and time saved by both eliminating the need to negotiate the hosting portion of many new IT contracts and the subsequent lengthy reviews by Michigan's Cyber Security and Attorney General's office. CPS expects IaaS to continue to provide these benefits for years to come.

State of Michigan

Department of Technology, Management and Budget
Central Procurement Services

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Enhancing Vendor Compliance Through RMIS Integration

Executive Summary

Contractual insurance requirements are a powerful tool for managing risk. By specifying insurance types and minimum coverage levels in contracts with its vendors, an organization can transfer the financial burden of potential incidents to the party best positioned to prevent them. This not only protects an organization's bottom line but also incentivizes vendors to prioritize safety and quality control.

However, it is not enough to simply include insurance requirements in a contract. Regularly monitoring vendor compliance through requests for certificates of insurance (COI) is crucial. Outdated COIs or inadequate coverage exposes an organization to unnecessary risk. A proactive approach to monitoring ensures the necessary financial protections are in place.

Utilizing a Risk Management Information System (RMIS) to streamline the process of monitoring vendor compliance with contractual insurance requirements is a unique and effective method undertaken by the State of Michigan's Enterprise Risk Management (ERM) team.

By creating individual vendor profiles that specify the types and limits of coverage required, Michigan's RMIS has revolutionized how we track insurance requirements, automated vendor notifications, and provides analysis of compliance data. This proactive approach has been wildly successful, eliminating manual processes, and significantly reducing the risk of non-compliant vendors.

Thanks to the RMIS, Michigan has dramatically increased the rate of vendor compliance by over 70% since system implementation in November 2021. (See Exhibit 1) This success highlights the RMIS's effectiveness in providing real-time visibility, fostering vendor relations, and ensuring the State of Michigan is protected.

Innovation

Using an RMIS to track and manage COIs is an innovative approach to vendor compliance. Traditionally, COI tracking involved manual spreadsheets, emails, and an immense amount of administrative effort. Often, compliance is measured simply by having a COI on file. Actual compliance with specific requirements feels like a bridge too far to track without insurance expertise. Michigan's RMIS transforms this process by centralizing COI data, automating compliance checks against the individual set contractual insurance requirements, and providing real-time visibility into potential insurance coverage gaps. This technology-driven shift streamlines a historically burdensome and inaccurate task, freeing up internal resources while ensuring reliable risk mitigation.

By creating various automated notifications based on triggering events, Michigan has increased both the frequency and quality of communication with our vendors regarding insurance-related matters. These events include:

- Upon contract execution to obtain the first COI;
- Seven days prior to the expiration of one or more required insurance policies;
- Upon the expiration of one or more required insurance policies; and
- Every 10 days thereafter until a compliant certificate is received.

Notifications are individually tailored according to each vendor's contractual insurance requirements. Built-in data fields are populated with relevant deficiencies and/or requirements, and instructions are provided to assist vendors with submitting revised COIs and/or supplemental documentation. Letter templates for these events are attached as Exhibit 2.

The benefits of this approach extend throughout the enterprise. Automated COI tracking reduces errors inherent in manual processes, minimizing the chance of working with uninsured or underinsured

vendors. Robust reporting capabilities allow for proactive risk analysis, highlighting potential liabilities before issues arise, and making informed decisions concerning contract continuation. Additionally, enhanced vendor oversight bolsters the State of Michigan's reputation as a responsible business partner with a commitment to risk management.

Perhaps most importantly, utilizing an RMIS to track COIs aligns with the broader push towards digital transformation. It enables data-driven decision making in the realm of vendor management, improving operational efficiency while simultaneously reducing the state's risk exposure.

Real-time notifications and alerts empower the enterprise to maintain comprehensive vendor compliance, offering enhanced protection against costly claims and potential legal disputes arising from vendor-related incidents.

As Michigan undertook its modernization to an RMIS system, benchmarking of other states' COI and contractual risk practices was conducted. No other state responded that they manage risk in this way or use an RMIS. Given this, Michigan is confident that this truly novel approach is demonstrably an innovation in the realm of public procurement (and public risk management).

Transferability

The challenge of ensuring vendor insurance compliance is universal in the public sector. States rely on countless vendors, and verifying their insurance coverages is crucial for risk mitigation. Fortunately, Michigan's use of an RMIS for vendor COI compliance tracking presents an easily transferable model.

The beauty of this approach lies in its adaptability. While core functionalities remain consistent, other states can tailor an RMIS to their specific needs and resources. For instance, they may adjust reporting formats to align with their state's regulatory framework. Sharing best practices, customization considerations, and potential challenges fosters a knowledge-sharing network, accelerating the nationwide adoption of this efficient RMIS method.

Ultimately, the transferability of RMIS could serve as a catalyst to strengthen risk management in procurement practices across all states. By following Michigan's blueprint, a unified approach to vendor insurance compliance emerges. This not only benefits individual states but also reinforces the collective risk mitigation posture of the public sector as a whole. The more states that adopt this strategy the better risk can be managed across the public sector. An RMIS system like Michigan uses is a commercial off the shelf piece of software that the state feeds contractual insurance requirements into and the system tracks compliance. Michigan has also made the contract for this software available for use by other entities including states, local units of government, school districts, universities, community colleges and non-profit hospitals.

Service Improvement

An RMIS protects service delivery by minimizing disruptions caused by vendor non-compliance. Proactive alerts and real-time notifications of expiring or inadequate insurance policies allow for timely intervention. This means end users can work confidently with vendors, knowing they are protected from service delays or disruptions covered by required insurance policies. By ensuring uninterrupted vendor operations, the RMIS promotes a seamless and reliable service experience.

A robust RMIS solution demonstrates a commitment to responsible risk management. By ensuring vendors maintain proper insurance coverage, the state signals dedication to protect against potential financial losses or liabilities. This proactive stance instills confidence in the public, fostering trust in the quality and reliability of services offered by the state. Exhibit 1 showcases the rise in vendor compliance after this system was implemented.

An RMIS significantly improves service delivery efficiency by automating and streamlining vendor compliance processes. Reduced administrative overhead and minimized errors related to manual tracking frees   up resources. This resource optimization allows state agencies to devote more time and energy directly towards serving their clients. The result is a more agile and responsive agency, capable of fulfilling its mission with enhanced effectiveness.

Savings & Efficiency

Implementing an RMIS enables an organization to shift from reactive compliance measures, characterized by responding to issues as they arise, to a proactive approach focused on anticipating, preventing, and mitigating compliance risks before they have an impact. This proactive stance not only enhances compliance efficacy, but also contributes to improved risk management and organizational resilience through efficient, cost-saving means.

An RMIS can provide continuous monitoring of various aspects of compliance, such as policy expirations, coverage limits, and regulatory requirements. Additionally, automation provided by the RMIS allows system-generated alerts and notifications when compliance thresholds are approaching or when deviations occur. This functionality not only eliminates the need for manual entry, but also standardizes data, ensuring consistent, accurate information is presented to all vendors and agencies.

Additionally, the RMIS provides a single repository for data, affording enterprise-wide instant access for review and analysis, as well as up-to-date information on vendor compliance statuses. This automation and accessibility reduce the labor associated with manual compliance tracking and alleviate the need for extensive training of procurement professionals on insurance terms and compliance.

By streamlining the insurance terms and compliance process, the ERM team estimates a two-thirds reduction in the time associated with COI compliance management. Furthermore, procurement professionals no longer require 90-minute insurance training sessions or have to perform manual data entry tasks. Michigan estimates a 66% reduction in time spent by staff for COI compliance checks, from 15 to 5 minutes per contract. With approximately 4,200 active contracts annually, that is a reduction of 1,050 hours of work annually, which represents $40,000 in annual labor costs. The estimated eliminated 10 minutes per contract is approximately how long it used to take to manually review a contract, record the terms, review the COI, determine compliance, mail merge delinquency letters, and field vendor emails.

Conclusion

To conclude, the innovative use of an RMIS for tracking and managing Certificates of Insurance (COIs) represents a significant leap forward in vendor compliance practices. By automating COI tracking, providing real-time visibility into compliance status, and facilitating proactive risk management, our approach modernizes a traditionally cumbersome and error-prone process. This not only enhances operational efficiency and reliability but also strengthens risk mitigation efforts, protecting the organization from potential financial losses and liabilities.

Furthermore, the transferability of this RMIS model presents a valuable opportunity for other state agencies to enhance their vendor compliance practices. By sharing best practices, customization considerations, and potential challenges, together NASPO members can foster a collaborative network that accelerates the adoption of efficient RMIS methods nationwide. This unified approach not only benefits individual states but also reinforces the collective risk mitigation efforts of the public sector.

Implementation of an RMIS realizes tangible savings and efficiencies by shifting compliance measures from reactive to proactive, streamlining processes, and reducing manual labor. The estimated reduction in annual labor costs underscores the substantial cost-saving potential of this technology-driven approach. Ultimately, by embracing innovation and leveraging technology to enhance vendor

compliance practices, organizations can achieve greater operational effectiveness, reliability, and resilience in service delivery.

EXHIBIT 1

Compliance Rate

EXHIBIT 2

{_Today-M/dd/yyyy}

Dear {ContactName}:

This correspondence is regarding the contractual agreement between {CustomText6} and the State of Michigan.

Per the terms of the contract, {CustomText6} is required to provide proof of insurance and maintain coverage throughout the term of the contract.

Our records indicate one or more required insurance policies will expire within the next 7 days:
   {This.#ExpiringPolicies7Days.ExpPolicies}

Upon renewal of the above referenced policy(ies), please submit a revised certificate of insurance as soon as possible to maintain compliance with the contract terms.

Certificates must be submitted electronically, in PDF format, to DTMB-RiskManagement@michigan.gov.

Also, please note the contract number <u>must</u> be included on any certificate of insurance submitted. Failure to do so will result in noncompliance.

If you have any questions, please contact DTMB-RiskManagement@michigan.gov.

Kind Regards,
DTMB Enterprise Risk Management

{_Today-M/dd/yyyy}

Dear {ContactName}:

This correspondence is regarding the contractual agreement between {CustomText6} and the State of Michigan.

Per the terms of the contract, {CustomText6} is required to provide proof of insurance and maintain coverage throughout the term of the contract.

Our records indicate one or more required insurance policies will expire within the next 7 days:
{This.#ExpiringPolicies7Days.ExpPolicies}

Upon renewal of the above referenced policy(ies), please submit a revised certificate of insurance as soon as possible to maintain compliance with the contract terms.

Certificates must be submitted electronically, in PDF format, to DTMB-RiskManagement@michigan.gov.

Also, please note the contract number <u>must</u> be included on any certificate of insurance submitted. Failure to do so will result in noncompliance.

If you have any questions, please contact DTMB-RiskManagement@michigan.gov.

Kind Regards,
DTMB Enterprise Risk Management

{_Today-M/dd/yyyy}

Dear {ContactName}:

This correspondence is in reference to the contractual agreement between {CustomText6} and the State of Michigan.

{CustomText6} is required to provide proof of insurance coverage as set forth in the terms of the contract.

Our records indicate the coverage provided on your certificate of insurance does not meet the contract's requirements as detailed below.

{This.#MissingPolicies.MissingPolicyText}
{This.#ExpiredPolicies.ExpPolicies}
{This.#Deficiencies.DeficiencyDescription}

Please review the contract terms to ensure your certificate contains all required insurance, including specific limits of coverage and endorsements (if applicable).

Certificates must be submitted electronically, in PDF format, to DTMB-RiskManagement@michigan.gov.

If you have any questions, or need a copy of your contract, please contact DTMB-RiskManagement@michigan.gov.

Kind Regards,
DTMB Enterprise Risk Management

State of Missouri

Office of Administration
Division of Purchasing

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Operational Improvement Through Turnaround Time Management

Executive Summary

We got off the hamster wheel and finally saw the common enemy. It's easy to get lost in the daily rush of drafting bids, issuing them to vendors, and evaluating responses. Often, there seems to be no time to take a step back and look at things strategically. Constantly dealing with details and line items can be exhausting and limits our capacity to improve. Creating a turnaround time management process provides crucial relief, enabling both leadership and staff to improve operations.

Missouri Purchasing fully embraced turnaround time management by implementing two relatively low-cost tools and developing a process to utilize those tools effectively. This approach not only redefined how bids are prioritized and managed, but also changed culture. The result is significant operational improvement and enhanced customer satisfaction.

Missouri Purchasing established the foundation for innovation in two ways, by developing granular turnaround time goals for each procurement phase and utilizing a color-coded system. These two pre-requisites, in combination, have enabled the creation of quick and helpful procurement turnaround time management tools using Smartsheet and Tableau. Smartsheet is a superpowered spreadsheet that captures Missouri Purchasing's bid worklog data and informs buyers of turnaround time goals. Tableau is a data visualization software that quickly displays our procurement operational metrics. Each week, division leadership and each of the buying teams hold team meetings to review the analysis produced by both tools. The tools also enable buyers to self-manage their procurement outcomes. Utilizing these innovations allows our office to stay informed about all procurements in progress, address emerging bottlenecks, and guide Missouri Purchasing through the week.

The successful adoption of turnaround time management in Missouri's procurement operations serves as a robust model for other organizations seeking to improve customer service and decrease turnaround time. Replicating these quick, effective, and inexpensive tools requires nominal software licensing fees and the consultation of a data analyst.

The slogan "Say NO to tableau reds" encapsulates the division's new operational improvement ethos, which fosters a competitive, yet positive, working environment. Due to this cultural shift, the number of overdue bids decreased by 62%, showcasing service improvement. Moreover, the initiative has diminished the average turnaround time for all bids. Specifically, the turnaround time for bid type RFP<$250,000 has decreased by 31.4%, exemplifying our time savings and efficiency. This Cronin Award submission promises ongoing enhancements in service and efficiency, setting a standard for excellence for all procurement operations.

Innovation

Missouri Purchasing has always monitored procurement status and periodically compared actual turnaround time against our overall turnaround time goals. However, until the innovations described below, Missouri Purchasing has struggled to effectively generate actionable analysis to drive meaningful improvements in its procurements. By adopting the DMAIC (Define, Measure, Analyze, Improve, Control) innovation cycle, operational improvements have been quantitatively observed.

DEFINE: In response to "encouragement" from customers for quicker bids, Missouri Purchasing closely examined its bid awarding process of drafting, issuance, and evaluation. After developing a bid awarding process map, leadership acknowledged that Missouri Purchasing needed a way to systematically manage its procurement turnaround times at each phase and step of the bid awarding process. The hierarchical organization of bids into phases and further into detailed steps provides the necessary detail to perform root cause analysis and create a lasting impact on customer satisfaction. Leadership utilized the DICE framework before beginning the initiative and established specific goal dates for each procurement phase by analyzing historical data. Three bid types were categorized and given turnaround time goals representing their complexity: IFB, RFP<$250,000, and RFP>$250,000.

Missouri Purchasing identified two factors that negatively impact turnaround times: the lack of step sequencing guidance and the lack of estimated times of step completion. To address these issues, the steps within each phase were sequentially organized and estimated times were assigned to each step. Step sequencing guidance and estimated times of completion documents are shared with customer agencies at the start of the procurement process to enhance cooperation and set expectations for both purchasing staff and the agency and judge the percent completion within a phase. Missouri Purchasing's Turnaround Time Worksheet for RFP>$250,000 (Fig. A) is included in the appendix.

Overall goals represent the entire bid journey from buyer assignment to award, while phase goals indicate performance only within that phase. To leverage our office's competitive, yet positive spirit, we use color-coding to readily indicate turnaround time performance: green for swift completion, yellow as a limit warning, and red for exceeding goal turnaround times. Creating both the overall color-codes and phase color-codes (Fig. 1) was pivotal for driving improved turnaround times.

Procurement Phase Turnaround Time Goals

PHASE	FLAG	ALLOTTED TIME/PHASE - FLAG COLOR START DATE		
		IFB	RFP < $250K	RFP> $250K
Drafting	🟢	1	1	1
	🟡	10	17	40
	🔴	15	24	54
Issuance	🟢	1	1	1
	🟡	10	17	32
	🔴	15	21	42
Evaluation/Award	🟢	1	1	1
	🟡	10	30	50
	🔴	15	40	64
TOTAL DAYS:		45	85	160

Fig. 1

MEASURE: Missouri Purchasing recognized that before beginning meaningful analysis, the following <u>actual</u> metrics must be measured: 1) assign to buyer date, 2) completion date of each phase, 3) final award date. Utilizing formulas that add "turnaround goal days" to the "assign to buyer date", we can calculate the following <u>goal</u> dates: 4) goal date for each phase, and 5) overall goal date. By maintaining these actual and goal date measures in a worklog, we can efficiently analyze our progress and ensure a robust dataset to effectively compare against a historical average. In practice, Missouri Purchasing measures turnaround times for overall days and phases, but not for steps. However, creating step turnaround time goals has assisted with task sequencing and timely task completion that had previously bottlenecked bid progress.

ANALYZE: After defining and measuring our data, we needed to efficiently communicate the important aggregated trends. For the data to be actionable, staff and managers need to be able to easily interpret the data results. Within Missouri Purchasing, Directors previously read through 40+ pages of Excel-based bid tracking data. By the time they finished the review, they were unable to act on the discoveries because the data had already changed. This "analysis" was not helpful. By reducing cognitive load through dashboards, directors are given the capacity to make operational improvements. This ensures they can quickly assess performance against goals and orient themselves towards the next obstacle. Missouri Purchasing enlisted the state's Operational Excellence team to construct bid operational dashboards in Tableau. Our dashboards quickly showcase color-coded status trends and turnaround time metrics that provide situational awareness for directors and teams. Screengrabs of our analysis dashboards (Fig. B – Fig. K) are included in the appendix.

IMPROVE: Each row in our Smartsheet bid worklog corresponds to a specific bid which the assigned buyer updates at least weekly. Innovations such as, turnaround time metrics and overall color status, are placed inside the worklog and therefore, inside the buyer's routine. Buyers are now engaged with their bid's turnaround time on a timely and accurate level.

By employing cell background conditional formatting within our bid worklog (Fig.2), we can highlight essential data to the buyer. Additionally, through cell background conditional formatting, we can automatically display the overall color of the bid. Conditional formatting has increased staff awareness and sensitivity to their turnaround times. Additionally, within the bid worklog, by placing goal dates side by side with actual dates, buyers receive an easy to digest status update on their pace without the need for managerial prompting. For example, the bid's progress in the bid worklog extract (Fig. 3) can be quickly interpreted, as being one month and two days ahead of the phase goal for issuance. This enables buyers to self-manage and improve their turnaround times.

Bid Number ⓘ	Turnaround Time Goal 🔒 fx ⓘ	Current Turnaround Time 🔒 fx ⓘ	Days Until Red 🔒 fx ⓘ
IFBC30034902000825	45	100	-55
RFPS30034902301799	85	70	15
RFPS30034902001762	85	29	56

Fig. 2

Goal Issue Date	Issue Date
11/20/22	10/18/22

Fig. 3

Missouri Purchasing utilizes Smartsheet's additional features. For example, an email with goal dates is automatically sent to buyers when a bid is assigned to them. These emails assist the buyers with scheduling themselves through the procurement process. Smartsheet features like reports, email reminders, smart filters, automated date collection, forms, and permission settings all help Missouri Purchasing improve its operations.

CONTROL: Missouri Purchasing maintains control over our innovations through weekly meetings, monitoring our turnaround times at both leadership and team levels. In these meetings, directors and teams engage with the Smartsheet bid worklog and Tableau dashboard to discuss color status updates on every bid through automatically generated reports. In both Smartsheet and Tableau, color is used as a quick and easy attribute to determine how much attention each bid should receive. In director meetings, Directors keep tabs on aggregate operational metrics such as the number and percentage of reds per week and the average turnaround time. Directors identify bottlenecked bids and allocate additional attention towards delayed bids. In team meetings, buyers and managers investigate bid progress, discuss questions, and locate solutions. In both meetings, color coding assists Missouri Purchasing in drawing attention to delayed bids and driving those bids to a speedy award. Missouri Purchasing successfully manages turnaround time and you can too!

By successfully integrating turnaround time goals into buyers' lives and reporting on the number procurements with an overall color of red, the phrase "Say NO to Tableau reds" organically took root. This phrase embodies the resulting culture of competitive positivity. Spurring buyers to make a real difference and driving procurements to completion.

Transferability

The innovations behind turnaround time management can be transferred to fit your needs. If your office battles with turnaround times and dissatisfied customers, implementing turnaround time management processes and tools can orient and organize your operations. The methods of turnaround time management are applicable to many governmental structures and can be configured towards your procurement office. Importantly, an e-procurement system isn't necessary to realize the benefits! If data experience is not already located in house, it may be necessary to borrow a data analyst or consultant to construct and maintain the tools developed from following this template.

Procurement leadership is more likely to implement innovations if access to data is quick, helpful, and inexpensive. To be quick and helpful, we recommend Smartsheet for data collection and automation, and Tableau or Power BI for data visualization and reporting. However, other software may satisfy your office's needs. Smartsheet is a low-to-no code cloud based superpowered spreadsheet that is easy to implement. Tableau and Power BI are both data visualization software that offer dashboard creation and internet viewing. Utilizing quick and helpful turnaround time management tools is critical in transferring Missouri Purchasing's innovations to your procurement office.

Smartsheet and Tableau incur nominal licensing fees. To sufficiently operate a purchasing office of 3 teams and 40 employees, annual expenditure on licenses might be estimated at $5,000. These licenses include 4 Smartsheet creator licenses with pro support, 2 Tableau creator licenses, and 10 Tableau viewer licenses. With quick, helpful, and relatively inexpensive tools, your office can also experience operational improvement through turnaround time management.

Service Improvement

Missouri Purchasing's vision statement is "Excellent Procurement Service Every Time". Delivering excellent procurement service almost always necessitates speedy awards. Therefore, purchasing offices can achieve procurement excellence through a reduction in turnaround times.

A tableau red can be interpreted as a dissatisfied customer. Customer agencies are waiting for us to complete our tasks, and if we can't serve them fast enough, our service quality will suffer. As Missouri Purchasing implemented turnaround time management, the count of dissatisfied customers has decreased from February 2023: 52 reds to April 2024: 20 reds. A remarkable decrease of 62%!

Additionally, turnaround time goals inform both employees and customer agencies of expectations within the process. Therefore, the implementation of overall goals, phase goals, and step goals lead to enhanced coordination and a decrease in frustration.

Fig. 4
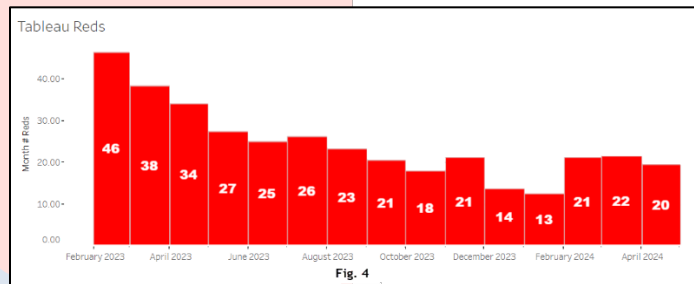
Savings & Efficiency

Through the utilization of turnaround time procedures and tools, Missouri Purchasing records and displays time savings. Through the adoption of the innovations showcased above, a substantial savings and efficiency is observed quantitatively in turnaround time.

By managing turnaround time, we have been able to save time without sacrificing work quality. The following graph can be produced by measuring our turnaround time for bid type RFP<$250,000. The Y-axis shows turnaround time in days, and the X-axis shows month of award. The bar's background color indicates the count of bids awarded each month, and the orange line represents the three-month

moving average. The bar values are produced by grouping together all bids that were awarded in each month and creating an average of their turnaround time. The orange line was produced by grouping bids in the three months before the month on the X-axis and calculating the average turnaround time. The green reference line is our overall turnaround time goal for this bid type. Within the last year, the three-month rolling average in turnaround time saw a 31.4% decrease. In February 2023 the average turnaround time was 137 days while in April 2024 the average turnaround time was 94 days. Similar trends are also observed for other bid types.

Fig. 5
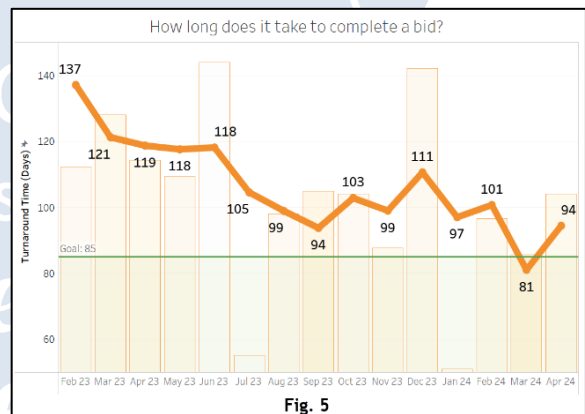
Conclusion

In conclusion, Missouri Purchasing has exemplified a successful management of turnaround times. The foundation for innovation was established in two ways. First, developing granular turnaround time goals for each procurement phase, and second, utilizing a color-coded system. Turnaround time analysis was conducted by measuring critical operational metrics. Missouri Purchasing created a turnaround time management process and showcased transferability through accessible software like Smartsheet and Tableau. The significant reductions in turnaround time and the cultural shift towards competitive positivity have showcased procurement excellence.

The success experienced by Missouri Purchasing serves as an inspiring blueprint for procurement offices aiming to enhance their operations. The strategies discussed in this paper have strong potential for similar achievements across diverse environments and operational scales with a minimal investment of resources. As we move forward, it is clear that integrating turnaround time management remains not only beneficial, but essential for procurement offices who seek to maintain high standards of efficiency and service in an increasingly demanding marketplace. Through the purposeful implementation of turnaround time management tools, all procurement organizations can deliver excellent procurement service every time.

Appendix Table:
A. Turnaround Time Steps Sheet (RFP > $250K)
B. Tableau Bid Phase Status Overview Dashboard
C. Tableau Buyer Workload Dashboard
D. Tableau-Bid Completion Total
E. Tableau-Bid Completion Draft Phase
F. Tableau-Bid Completion Evaluation Phase
G. Tableau-Overall Goal Table (used for weekly meetings)
H. Tableau Reds Report
I. Tableau Total IFB/RFP Report
J. Tableau Total Procurements Report
K. Tableau Red Procurements by Phase

Fig. A

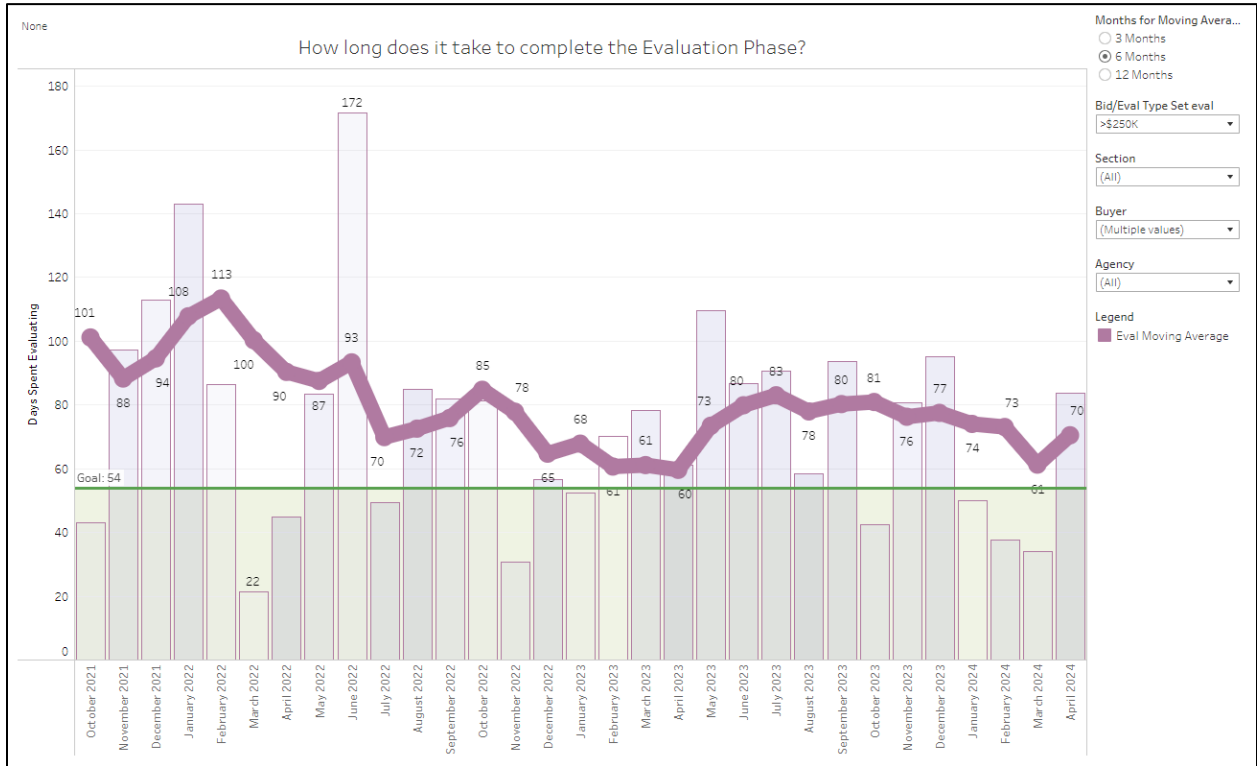|	Step #	Steps in Competitive Procurement Process RFP >$250k	Estimated Day
		REQUEST RECEIVED	
DRAFTING PROCESS	1	Agency submits request, solicitation checklist to OA-Purchasing. Section Manager reviews the request documents for completeness, assigns to the buyer, and logs in the SharePoint Bid Worklog	Day 0
	2	Buyer makes initial contact with agency (intro, next steps)	Day 1
	3	Buyer prepares RFP file memo. Buyer drafts RFP, submits draft for management review. After management review, buyer submits to agency for review, ideally suggesting 5 days for agency feedback to buyer.	Day 30
	4	After agency feedback, buyer obtains any needed final approval from OA-Purchasing's management team prior to issuing.	Day 54
		RFP ISSUED	
ISSUANCE PROCESS	5	Buyer issues solicitation (about 4-6 weeks on the street)	Day 54
	6	While solicitation is on the street, buyer contacts evaluators to (1) ensure evaluator training is completed, (2) obtain confidentially forms, (3) schedule and conduct pre-evaluation meeting (no later than **two days** prior to closing), (4) (ideally within **one week of closing**) schedule all anticipated evaluation meetings, and (5) make sure evaluators can access RFP SharePoint site.	Day 96
		SOLICITATION CLOSES/EVALUATION BEGINS	
EVALUATION PROCESS	7	Within **24 hours** after closing, proposals sent to evaluators, preferably via SharePoint. Evaluators generally have one week to prep for Technical Proposal review.	Day 97
	8	Buyer conducts Cost, Preference, Terms, and other reviews prior to 1st Evaluation meeting • Cost Evaluation (Including verification that MissouriBUYS prices match pricing in vendor's pricing) • M/WBE, SDVE, B/S review and draft memos • Last Addendum Signed and Returned or Accepted in MissouriBUYS • E-Verify • No Tax Due Status (RSMo 34.040.7) • SOS • Federal Funds • Off-Shore (Executive Order 04-09) • Buy American • Terms and Conditions Exceptions • Reciprocal • Labor Standards • Proprietary/Confidential Information • Purchasing Suspension • Buyer has peer review cost evaluation	Day 104
	9	Evaluation meeting(s) • discuss compliance issues (meets all "must" and "shall") • draft narrative that identifies the adjectival rating assigned by the evaluators including the evaluators' justification	Day 120
	10	Draft and Issue Best and Final Offers (BAFOs), if necessary	Day 129
	11	Additional Evaluation Meeting, as necessary to draft/revise/finalize narrative based on BAFO responses	Day 139
	12	Evaluation narrative reviewed by OA-Purchasing for impartiality, fairness, factual content, etc.	Day 149
		AWARD	
AWARD PROCESS	13	After OA-Purchasing managerial approvals, finalize the evaluation • obtains the evaluators' signatures on the evaluation report and inserts remaining applicable points onto evaluation form and totals points and prepares the necessary recommendation memo for the agency • submits evaluation and recommendation to state agency for final review and approval to proceed • agency responds with approval/disapproval for award • finalizes the solicitation for award • submits the folder for final approval by Purchasing management • awards the contract	Day 159
	14	Awards the Solicitation-notifies non-awarded vendor(s) and awarded vendor(s), MissouriBUYS, letters for any awarded participation points	Day 160

Fig. B

Bid Status

Draft	Issued	Under Eval	Grand Total
50	19	46	115

Agency (All)   Solicitation Type (All)   Section (All)   Buyer (All)

DIVISION OF PURCHASING
Excellent customer service, every time.
May 7, 2024

Draft Status — Null 18, Green 14, Yellow 2, Red 16

Issue Status — Null 5, Green 4, Yellow 1, Red 9

Under Evaluation Status — Null 11, Green 24, Yellow 4, Red 7

Fig. C

Buyer Workload Dashboard

Agency (All)   Bid/Eval Type (All)   Section (All)

Filters let you investigate the data

Workload by Active Status

Buyer Workload Status by Bid Type

Active Status: Awarded, Draft, Issued, Under Eval

Bid/Eval Type: <$250K, COOP/SFS, >$250K

Fig. D

How long does it take to complete a bid?

Fig. E

How long does it take to complete the drafting phase?

Fig. F

How long does it take to complete the Evaluation Phase?

None

Months for Moving Avera...
○ 3 Months
● 6 Months
○ 12 Months

Bid/Eval Type Set eval
>$250K

Section
(All)

Buyer
(Multiple values)

Agency
(All)

Legend
▬ Eval Moving Average

Y-axis: Days Spent Evaluating

Goal: 54

Bar values by month (October 2021 – April 2024): 101, 88, 113, 143, 172 (peak), 108, 100, 90, 87, 93, 70, 72, 76, 85, 78, 65, 68, 61, 61, 60, 73, 80, 83, 78, 80, 81, 76, 77, 74, 73, 61, 70

Fig. G

Overall Goal Table:

Active Status: (Multiple values)
Bid/Eval Type Set total: (All)
Section: (All)
Buyer: (All)

Total Days to Complete	Current Status	Bid Description	Section	Buyer	Solicitation Type	Day of Assigned to Buyer	Active Status	
344	Active	Intensive In-Home and Intensive Family Reun...	Services	Kristina Cramer	>$250K	May 29, 2023	Under Eval	🟥
302	Active	Market Regulation Actuarial Services (DCI)	Services	Ariel Bradford	<$250K	July 10, 2023	Under Eval	🟥
279	Active	Acutarial Review of Captive Insurance (DCI)	Services	Mertrell Nickens	<$250K	August 2, 2023	Under Eval	🟥
232	Active	Check-in supervision program for pre and pos...	IT	Molly Hurt	>$250K	September 18, 2023	Under Eval	🟥
207	Active	Voluntary Life Insurance	Services	Nicolle Backes	<$250K	October 13, 2023	Under Eval	🟥
196	Active	NASPO Computer Equipment, Peripherals & R...	IT	Kelsey Huwe	COOP/SFS	October 24, 2023	Under Eval	🟦
183	Active	Underground Storage Tank Investigation, Re...	Services	Melissa Sackett	<$250K	November 6, 2023	Under Eval	🟥
181	Active	MALDI Biotyper Sirius CA System SFS	Commodities	Tammy Havalias	COOP/SFS	November 8, 2023	Under Eval	🟦
169	Active	Interstate Process Server Services (DSS)	Services	Ariel Bradford	<$250K	November 20, 2023	Under Eval	🟥
		Missouri Parenting Partnership Program (M...	Services	Nicolle Backes	>$250K	November 20, 2023	Issued	🟥
159	Active	Accelerating Self-Monitoring Blood Pressure...	Services	Ashten Lorts	<$250K	November 30, 2023	Under Eval	🟥
		Missouri Apprenticeship Connect Portal	IT	Jacqueline Satterlee	>$250K	November 30, 2023	Draft	🟥
148	Active	Workers Comp Nurse Case Mgmt (OA/GS)	Services	Ashten Lorts	>$250K	December 11, 2023	Under Eval	🟨
131	Active	Offender Communication Services	IT	Jacqueline Satterlee	>$250K	December 28, 2023	Issued	🟨
123	Active	Computer Gaming System and Related Servic...	IT	Kelly Miller	>$250K	January 5, 2024	Draft	🟩
120	Active	SW Environmental Assessments	Services	Melissa Sackett	>$250K	January 8, 2024	Under Eval	🟩
		SW Photogrammetric Mapping Services	Services	Madison Williams	>$250K	January 8, 2024	Under Eval	🟩
		SW Recycling Services - Jefferson City & Cole...	Services	Melissa Sackett	<$250K	January 8, 2024	Issued	🟥
119	Active	Statewide Professional Grade Tools & Diagno...	Commodities	Ashley Hensley	COOP/SFS	January 9, 2024	Issued	🟦
		Statewide Public Safety/Law Enforcement Vi...	Commodities	John Geiser	COOP/SFS	January 9, 2024	Under Eval	🟦
111	Active	Support and Maintenance of STACS DB and S...	IT	Jacqueline Satterlee	COOP/SFS	January 17, 2024	Under Eval	🟦
107	Active	SW Language Interpretation Translation Ser...	Services	Mertrell Nickens	<$250K	January 21, 2024	Under Eval	🟥
106	Active	Senior Community Service Employment Prog...	Services	Ariel Bradford	>$250K	January 22, 2024	Draft	🟩
		Window Washing Services for Jefferson City ...	Services	Madison Williams	<$250K	January 22, 2024	Under Eval	🟥
105	Active	Statewide Law Enforcement/Public Safety/G...	Commodities	John Geiser	>$250K	January 23, 2024	Under Eval	🟩
104	Active	Laboratory Glassware Washers and Dryers - ...	Commodities	Tammy Havalias	<$250K	January 24, 2024	Under Eval	🟥

Fig. H

Tableau Reds

Month # Reds: 46, 38, 34, 27, 25, 26, 23, 21, 18, 21, 14, 13, 21, 22, 19, 17 (February 2023 – June 2024)

Tableau Reds Scatter

Legend
- # of "Tableau Red's"
- 1 month moving average of # of Tableau Reds

Fig. I

Total IFB/ RFP

Month Eligible Procurements: 107, 106, 105, 102, 102, 91, 88, 84, 78, 70, 65, 73, 89, 90, 84, 81 (February 2023 – June 2024)

IFB/RFP Scatter

Legend
- Month IFB/RFP Procurements
- 1 month moving average of number of IFB/RFP

Fig.J

Total Procurements

Month # Total Procurements

143 135 142 153 148 138 127 124 123 117 110 110 128 118 116 117

February 2023 — April 2023 — June 2023 — August 2023 — October 2023 — December 2023 — February 2024 — April 2024 — June 2024

Month of Week Of:

Total Procurements Scatter

of Total Procurements

Feb 1, 23 — Apr 1, 23 — Jun 1, 23 — Aug 1, 23 — Oct 1, 23 — Dec 1, 23 — Feb 1, 24 — Apr 1, 24

Day of Week Of:

Legend
- # of Total Procurements
- 1 month moving average of number of total procurments

Fig. K

Draft
10 1 4 4 19

Days until Draft Red	Buyer	
-77	Ariel Bradford	Therapy Services for Fulton State Hospital (DMH)
-69	Ariel Bradford	Senior Community Service Employment Program (DHSS)
-55	Mertrell Nickens	SW Temporary Clerical and Labor Personnel QVL
-47	Ryan Bulinski	Public Drinking Water Mgmt Training Svcs (DNR)
-34	Sarah Sclesky	Landfill Assessment Services QVL (DNR)
-24	Ariel Bradford	Food Warehousing and Delivery Services (DESE)
-17	Kristina Cramer	Missing Youth and Human Trafficking (DSS)
-8	Madison Williams	Durable Medical Equipment Consultation Services (DSS)
	Mertrell Nickens	Tourism Temporary Personnel Services QVL (DED)
	Sarah Sclesky	Gulf Hypoxia Outreach & Education Project 2 (DNR)
5	Kristina Cramer	Chafee Foster Care Program for Success (DSS)

Under Evaluation
5 5 17 3 30

Days until Eval Red	Buyer	
-114	Mertrell Nickens	Acutarial Review of Captive Insurance (DCI)
-113	Ariel Bradford	Market Regulation Actuarial Services (DCI)
-51	Nicolle Backes	Voluntary Life Insurance
-21	Ashten Lorts	Smoke-Free Rental Housing Program Rebid (DHSS)
-6	Kristina Cramer	Intensive In-Home and Intensive Family Reunification Services (DSS)
10	Mertrell Nickens	SW Language Interpretation Translation Services (formally Verbal Language Interpretation Services)
11	Mertrell Nickens	Fire Safety - Additional Continued Ed Training Courses QVL
12	Julie Kleffner	HMO/PPO Network Access Services
14	Melissa Sackett	SW Hazardous Waste Disposal and Recycling Services
17	Mertrell Nickens	Statewide Security Guards QVL - Add Vendors

Overall
16 4 25 10 55

Days Until Red	Buyer	
-234	Ariel Bradford	Market Regulation Actuarial Services (DCI)
-211	Mertrell Nickens	Acutarial Review of Captive Insurance (DCI)
-201	Kristina Cramer	Intensive In-Home and Intensive Family Reunification Services (DSS)
-139	Nicolle Backes	Voluntary Life Insurance
-101	Ariel Bradford	Interstate Process Server Services (DSS)
-52	Melissa Sackett	SW Recycling Services - Jefferson City & Cole County
-39	Mertrell Nickens	SW Language Interpretation Translation Services (formally Verbal Language Interpretation Services)
-38	Madison Williams	Window Washing Services for Jefferson City State Office Buildings (FMDC)
-36	Ashten Lorts	Workers' Compensation Telephone Triage Services (OAGS) -- Rebid
-26	Nicolle Backes	Missouri Parenting Partnership Program (MOPPP) (DESE)
-24	Ashten Lorts	Smoke-Free Rental Housing Program Rebid (DHSS)
	Nicolle Backes	Behavioral Professional Recruitment

Section
- [ ] (All)
- [ ] Commodities
- [ ] IT
- [✓] Services

Buyer
(All)

Agency
(All)

Solicitation Type
- [✓] (All)
- [✓] <$250K
- [✓] >$250K

2024 GEORGE CRONIN AWARDS FOR PROCUREMENT EXCELLENCE SUBMISSIONS

State of Florida

Department of Management Services
Division of State Purchasing

2024 George Cronin
Awards for Procurement Excellence

Contract Management and Procurement Tracking

Executive Summary

The State of Florida Division of State Purchasing established an innovative process to manage and track procurement and contracts efficiently using software provided by the Monday platform. The division transitioned from manual and sometimes paper-based processes that were susceptible to errors, delays, and lacked transparency, to a dedicated software that allowed for bureaus to track the procurement and contract management lifecycle and manage vendor relationships while ensuring compliance with regulations and internal policies.

In addition to managing and tracking procurements and contracts, the State of Florida was able to take advantage of customizable workflows and alerts to ensure timely action and adherence to deadlines. Robust reporting and analytics capabilities provided by Monday further empowered the division to make informed decisions, optimize resource allocation, and demonstrate accountability to stakeholders and regulatory bodies.

Innovation

Currently the division manages 69 contracts with 858 vendors. All of these are tracked on the Monday platform, with statuses reporting on the progress of feasibility studies, the contract drafting process, and the agreements' positions in Florida's stages of public procurement template, amongst others. These statuses are assigned to procurement and contract professionals with regular updates available to supervisors and other leadership as requested; all information is distilled into easy-to-read tables and dashboards updated in real time.

The division has also moved to use Monday to track sister agencies' requests to utilize alternate contract sources, which are agreements adopted by entities other than the Division of State Purchasing that require approval to use. Again, this has removed the need for manual updates via email or physical copies.

The Division of State Purchasing utilizing this platform for procurement and contract management demonstrates a paradigm shift in efficiency and effectiveness by replacing manual, sometimes paper-based processes with digital solutions. The Monday platform streamlines procurement workflows, reduces errors, and enhances transparency while providing the agency its first opportunity at procurement benchmarking. Through automation, customization, and advanced analytics, these innovative tools empower the division to optimize resource allocation, ensure compliance with regulations, and make data-driven decisions. The use of this platform for procurement and contract management software represents a transformative leap forward, enabling the agency to modernize their operations and achieve greater efficiency and accountability.

Transferability

The transferability of the Monday platform lies in its adaptability to serve diverse contexts and needs. Such software solutions are designed with flexibility in mind, allowing for seamless integration with existing systems and workflows. Moreover, as the Division of State Purchasing grows to meet the ever-changing challenges in the realm of procurement, this software can scale accordingly, accommodating changes in procurement volumes, complexity, and stakeholder dynamics. Its transferability offers continuity and efficiency in procurement and contracting operations across different agencies throughout the state and country, fostering consistency, compliance, and transparency throughout the procurement and contracting process.

Immediate transferability is evident in the divisions' plans moving forward. Starting with fiscal year 2024-25, the division is expanding the use of the Monday platform to track strategic initiatives related to the Division of State Purchasing's enterprise procurement support, such as travel to meet with

enterprise contractors, project tracking for the state's award-winning e-procurement platform, MyFloridaMarketPlace, tracking of procurement public records requests, and integration with our certification database for the division's professional development offerings, such as Florida Certified Contract Manager. Other states can replicate any of these initiatives within their own organizational structure with minimal lead time.

Service Improvement

The division's procurement and contract management bureaus have undertaken significant enhancements to optimize operations and enhance service delivery. The following improvements have been implemented:

1. **Document Workload Reduction**: Through the adoption of digital solutions and streamlined processes, we have successfully reduced the document workload by an impressive 75%. This reduction has not only increased efficiency but has also freed up valuable resources for more strategic initiatives.

2. **Transparency Enhancement**: Addressing previously nonexistent transparency levels, we have implemented comprehensive reporting mechanisms and communication channels. This enhancement ensures that stakeholders have access to accurate and timely information, fostering trust and accountability.

3. **Timelines for Special Procurement Types**: By quantifying timelines for special procurement types, we have improved planning and resource allocation. This ensures that procurement processes are completed in a timely manner, supporting the agency's objectives effectively.

4. **Risk Mitigation Strategies**: From thorough analysis, we have identified and eliminated single points of failure within our processes. This proactive approach to risk mitigation enhances resilience and ensures continuity in service delivery.

5. **Vendor Database Establishment**: We have created an internal vendor database comprising 858 individual contractors. This database provides easy access to qualified vendors, streamlining procurement processes and fostering stronger vendor relationships.

6. **Standardized Tracking Procedures**: To enhance organizational coherence, we have standardized how employees track special projects and training activities. This standardization promotes consistency and ensures that projects are executed efficiently and effectively.

7. **Contract Expiration Management**: To proactively manage contractual obligations, we have implemented alerts and scheduling mechanisms based on current contract expirations. This ensures timely renewal and mitigates potential disruptions to service delivery.

These service improvements underscore our commitment to excellence in procurement and contract management. By leveraging technology, enhancing transparency, and implementing standardized processes, we are better positioned to meet the needs of our stakeholders and support the mission of our agency effectively.

Cost Reduction

The first cost reduction realized is a result of the 75% reduction in work related to manual processes and reporting of the statuses of contracts and procurements. The following information is used to calculate this cost reduction:

- The processes related to collecting, reporting, and reviewing statuses took approximately one hour (60 minutes) of work each week per person and have since been reduced to 0.25 hours (15 minutes) per week.
- The average salary of individuals involved in collecting, reporting, and reviewing information is $60,000 annually.
- There are no more than 30 employees involved in collecting, reporting, or reviewing information.

A salaried employee grossing $60,000 annually makes $28.85 per hour. If this reporting process has been reduced 75%, this translates to a cost reduction of $21.64 per hour per week. For thirty (30) employees, this is a savings of $649.20 per week and $33,758.40 per year.

The second cost savings realized comes by the division's implementation methodology. By utilizing an internal two-person team for software implementation rather than hiring external staff at a rate of $120 per hour, significant cost savings have been achieved. The implementation process, totaling 200 hours, was completed entirely by the internal team.

1. **Internal Team Cost**:

   - Two-person team x 200 hours = 400 labor hours

   - No additional hiring costs or overhead expenses

2. **External Staff Cost**:

   - External staff rate: $120 per hour

   - Total cost = $120/hour x 200 hours = $24,000

Cost Savings Calculation:

- Cost of internal team implementation: $0 (no additional hiring or overhead costs)

- Cost of external staff implementation: $24,000

- Total cost savings = $24,000 - $0 = $24,000

By leveraging existing internal resources, we have realized substantial cost savings amounting to $24,000. This approach not only demonstrates financial prudence but also maximizes the efficiency and effectiveness of our internal workforce. Moreover, by utilizing an internal two-person team, we can continue to maintain and expand the existing solution while keeping knowledge within the agency.

Totaling both categories of cost reduction amounts to a gross reduction of $57,578.40; subtracting the annual cost of $21,525.20 for licenses results in a net cost reduction of $36,233.20 for the first year. Subsequent year net cost reductions are forecasted to be at least $12,233.20 annually with no changes to the current process. This will result in a five-year gross cost reduction of $192,612 from an investment of $107,626; a projected net cost reduction of $84,986 and a return on investment of 79%. *Figures One* and *Two* below detail these findings.

Year	Gross Cost Reduction	Investment	Net Cost Reduction
1	$57,578.40	$21,525.20	$36,233.20
2	$33,758.40	$21,525.20	$12,233.20
3	$33,758.40	$21,525.20	$12,233.20
4	$33,758.40	$21,525.20	$12,233.20
5	$33,758.40	$21,525.20	$12,233.20
TOTAL	$192,612	$107,626	84,986

Figure One

$$Return\ on\ Investment\ (ROI) = \frac{Net\ Cost\ Reduction}{Investment}\ X\ 100\%$$

$$ROI = \frac{\$84,986}{\$107,626}\ X\ 100\%$$

$$ROI = 0.79\ X\ 100\%$$

$$ROI = 79\%$$

Figure Two

Conclusion

The State of Florida Division of State Purchasing has created an efficient process that not only benefits the state, but also our vendors and customers. Furthermore, it has the ability to be easily replicated at the local, state, and national level with minimal resources resulting in measurable and meaningful efficiencies. We are proud of the work that has been completed and would love the opportunity to share our process and help other states achieve a similar outcome for their contracts.

State of Illinois

Chief Procurement Office
for General Services

2024 George Cronin
Awards for Procurement Excellence

Commitment to Diversity

Executive Summary

The Commitment to Diversity Program (C2D) was launched in 2022 by the Chief Procurement Officer for General Services in Illinois to champion diversity, equity, and inclusion (DEI) in state procurement. This impactful program provides training for state employees with procurement responsibilities and encourages offerors to demonstrate their commitment to DEI. C2D is customizable and can be seamlessly integrated into state training curriculum and Requests for Proposals (RFP) processes. The program's primary objective is to address biases affecting procurement outcomes and to incorporate DEI evaluation factors in RFPs. To date, the C2D Program has engaged nearly 600 evaluators in assessing the DEI actions of 176 offerors. An inspiring example has emerged, illustrating how a company's commitment to diversity played a pivotal role in securing a bid and inspiring broader change. The potential benefits of this innovative program are vast, including the potential to enhance community wealth equity, drive company success, and foster state progress. C2D has the capacity to catalyze more than a thousand actions focused on diversity, equity, and inclusion annually. This program is undeniably creating a substantial and meaningful impact.

Innovation

In 2022, the Chief Procurement Officer for General Services (CPO) launched the Commitment to Diversity Program (C2D) to use the state's procurement function to encourage habits of diversity, equity, and inclusion (DEI) among offerors and their communities. The program aims to achieve this by training state employees on the impact of cognitive biases in procurement and incentivizing offerors to promote DEI. The CPO aims to reflect the shared aspirations of the people of Illinois, the legislature, and the Governor, ensuring that taxpayer dollars are maximized for the benefit of institutions, communities, and lives, while realizing the values of DEI.

C2D includes Commitment to Diversity Training (C2D-Training) and the Commitment to Diversity Factor (C2D-Factor). C2D-Training aims to change the behavior of state employees with procurement responsibilities for the benefit of offerors and state agencies. The C2D-Factor is intended to influence the actions of offerors to benefit their employees, communities, and themselves.

C2D-Training - Promoting DEI in procurement starts with individuals recognizing how their biases can restrict competition and result in an unfair evaluation of an offeror's proposal. In 2023, 1,596 state employees with procurement responsibilities completed a mandatory CPO-developed training titled "Diversity and Inclusion in Procurement." All state employees completed a mandatory training titled "Diversity, Equity, Inclusion and Accessibility Training." Both trainings consist of self-guided slides with learning reinforced through case studies.

When a published solicitation contains instructions and specifications based on the procurer's cognitive biases, potential offerors are intentionally or unintentionally excluded from participating. When an evaluator uses preconceived and prejudiced perspectives to make biased judgments and conclusions, an offeror's score is influenced favorably or unfavorably—biases in procurement lead to exclusion, unfair treatment, protests, and even lawsuits. C2D-Training consists of ongoing training and conversations, creating a culture in state procurement that values increasing offeror diversity as equally important to, as much as receiving the right item at the right price and at the right time.

C2D-Factor - How can public procurement go beyond the narrow scope of diversity contracting goals to make meaningful and broad change? The recently amended Illinois Procurement Code requires offerors to demonstrate a commitment to DEI through their business practices — taking DEI aspirations beyond state purchasing and expanding it to the community at large. Illinois' Request for Proposal (RFP) process now includes a third evaluation factor to be scored independently from the technical requirements and pricing factors.

The Commitment to Diversity Factor (C2D-Factor) goes beyond the narrow scope of procurement preferences and diversity goals by affecting more than just those vendors winning government contracts. The C2D-Factor awards RFP points to offerors that intentionally recruit, promote, donate, volunteer, and diversify suppliers. This initiative creates an essential opportunity to advance our shared vision of more diverse, equitable, and inclusive workplaces and communities. The C2D-Factor is the beginning of the next innovation curve in public procurement.

The C2D-Factor has benefits beyond diverse contractors and subcontractors in state procurement. It also benefits community organizations, educational institutions, and diverse businesses and individuals not directly involved in state procurement. It has been over forty years since public procurement started providing meaningful advantages to diverse companies. In 1984, a year after Congress passed the Disadvantaged Business Enterprise law, Illinois enacted the Business Enterprise Act, which set contracting goals for minority, female, and persons with disabilities-owned businesses. While these goals have increased state contracting with diverse contractors, the rate of their impact has been slow.

This unique approach not only provides year-round DEI benefits, but also ensures their sustained impact, extending beyond the procurement process or contract period. Similar to diversity goal programs, the federal and state governments have successfully used other preferences in public procurement to incentivize vendors. For instance, Illinois, like many other states, has over 30 preferences that benefit the environment (e.g., recycled materials, corn-based plastics), locations (e.g., Illinois small businesses, HUB Zones), and people (e.g., veterans, persons with disabilities). However, the true benefit of these preferences is often only realized upon contract execution.

Notably, the C2D-Factor accounts for up to 20% of the technical score, requiring offerors to prioritize their diversity initiatives if they hope to be competitive. There are six categories and elements within those categories, where offerors can earn points by demonstrating DEI actions for the extent to which they have engaged women, minorities, or persons with disabilities (WMD) in their businesses, education, and community. The categories are:

1. Achievement in the state's diversity goal-contracting program.
2. Contracting or subcontracting with any WMD business in the prior year.
3. Money spent with the objective of supporting DEI in the workplace and assisting WMD businesses, organizations, and communities in the prior calendar year.
4. Commitment of a non-monetary contribution, like mentoring or volunteering, to WMD businesses, organizations, and communities in the prior calendar year.
5. Having a current DEI Actionable Policy for their company.
6. Percentage of total, managerial, and executive diverse staffing.

This transformative approach to DEI has the power to revolutionize the way systematic change is achieved, fostering equity across a company's culture and values, and extending beyond state procurement. It holds vast potential to impact society by enhancing accessibility, creating more opportunities, advocating for fair practices within companies, and strengthening companies' contributions to their communities.

Since the C2D-Factor was introduced, 155 RFPs have included these DEI evaluation categories in their evaluation process. 176 offerors were required to assess their role in promoting these values and 28 agencies conducted thorough evaluations of approximately 528 DEI actions. The CPO-GS evaluated and used these findings to shape and improve the factor categories, elements, and scoring. Currently, there are 27 RFPs awaiting evaluation.

Transferability

The topic of stronger DEI initiatives has garnered attention across the world, and many entities have taken action by introducing new bills, task forces, and campaigns. C2D is a constructive and adaptable solution to promote DEI. It can be easily and inexpensively customized and integrated into any state's training curriculum and RFP process.

The "Diversity and Inclusion in Procurement" training is housed and managed in the state's online learning management system. The training is a series of slides with customizable content. The C2D information guides for agencies and vendors are downloadable from the Chief Procurement Officer's website. All the material is based on the RFP evaluation factors and best practices in DEI promotion. The training content and information guides are readily available and can be adapted for use by another state. All material continues to be updated and improved.

To ensure a fair, unbiased, and standard evaluation process, the CPO-GS refined and codified six C2D-Factor categories and developed an accompanying scoring sheet. All agencies seamlessly use the C2D-Factor's categories and scoring sheet, and only require addition of the RFP's technical score to attain the non-priced total score. The scoring sheet then accurately calculates the points into percentages to provide the final score for the evaluation. Even though we use this method for scoring, our totaling process can easily be modified to fit different states' evaluation scoring needs and award percents. *See below how the state caculates their Commitment to Diversity score.*

Illinois C2D

Max Points= 100   Actual Points= AP
Max Percent= 100%   Actual Percent= AP%

Max Technical Score (determined by the solicitation) = MTS

AP% x 20% x MTS= Commitment to Diversity Score

Our metrics can be used in any RFP process. You can adjust the percentage to your needs, replace our maximum technical score with your preferred score, or adjust the actual points/percentages to achieve a flat maximum number. This provides a flexible and customizable approach to RFP evaluations. *See below a few examples of how the scoring could be adjusted to fit individual needs.*

AP% x Earned

Max Points = 100   Actual Points = AP
Max Percent= 100%   Actual Percent= AP%

Other Factor Points = OFP

AP% x OFP = Commitment to Diversity Score

Higher %

Max Points = 100   Actual Points = AP
Max Percent= 100%   Actual Percent= AP%
             Max Points Awarded= MPA

AP% x30%x MPA= Commitment to Diversity Score

AP% x All

Actual Points= AP
Actual Percent= AP%

Max Price Score= MPS and Max Skill Score= MSS

AP% x20%(MPS+MSS) = Commitment to Diversity Score

Flat Max

Max Points = 50   Actual Points = AP
Max Percent= 100%   Actual Percent= AP%

AP% x50 = Commitment to Diversity Score

The aggregation of the C2D-Factor can be adjusted to reflect the priorities of another state. The sum of the elements must be equivalent to 100 for the suggested calculations to be valid. For example, if a state chooses to exclude the first category regarding compliance with a diversity contracting goal, then the retained categories need to be re-weighted. Another example is that Illinois, for instance, has established that an offeror earns the maximum available points if their employees that are women, minorities or persons with disabilities exceeds 51% of all staff. We chose this percentage based on census data that indicates most companies' employees average 49%. If the demographics of a state differ significantly, then the scoring process can be adjusted to ensure that the threshold to earn maximum points is within achievable limits. If a state desires to promote the efforts directed towards another classification, such as veterans, then the existing categories would still be applicable. Similarly, if a state intends to encourage more specific internal company DEI actions, a new element or category can be introduced, and the points can be rebalanced accordingly.

Government demand to promote DEI is strong and increasing. Our team has developed an easily adaptable and comprehensive solution that can be seamlessly integrated into any procurement office. We continue to engage with new and experienced procurement staff, existing contractors, and vendors seeking state contracts about the importance of the C2D Factor. Our training materials, including videos, guidance packets, flow charts, and national resource lists, are designed to facilitate the successful implementation or submission of this commitment. We see our program as a benchmark and start of an innovation curve for diversity and inclusivity in procurement. As familiarity with it spreads, it will be easily replicated.

Service Improvement

In order for the state to use its procurement function to promote DEI in offerors, accountability starts and ends with the Chief Procurement Officer (CPO) leading the effort. Illinois aims to use tax dollars not only to purchase necessary supplies and services, but also to leverage each dollar to encourage vendors and their communities to become more diverse and inclusive. This goal can only be achieved when embraced by the over 1,000 state employees with procurement responsibilities.

After creating a multi-year DEI plan, the Chief Procurement Officer (CPO) formed a dedicated team to manage its implementation. This team offers training to state employees on the various biases that can influence procurement outcomes, as well as the DEI evaluation categories incorporated into RFPs. It is essential for individual procurers to align with our DEI values and have a comprehensive understanding of equity and inclusivity in order to feel accountable and empowered.

The state's procurement employees consistently engage with the C2D-Factor when handling RFPs. They have direct access to the CPO's evaluation categories and elements, along with the offeror's reported DEI actions. It is mandatory for all RFP evaluators, most of whom have minimal exposure to procurement, to successfully complete the Diversity and Inclusion in Procurement course to qualify as evaluators. Since the implementation of the C2D-Factor, a total of nearly 600 evaluators have rigorously assessed the DEI actions of 176 offerors.

During the nascent stages of the C2D Program, one instance came to light where a company's steadfast commitment to diversity not only helped them win a contract, but also resulted in inspiring change on a broader scale. An employee, Netta Jenkins, at Unqorked, aspired to create DEI objectives within her organization. Witnessing her efforts culminating in an $8 million dollar state contract, she was motivated to extend the same progress to other companies. Ms. Jenkins subsequently authored a book titled "The Inclusive Organization" and presented her message in various platforms such as TED Talks, Forbes, Entrepreneur, CNN, Business Insider, and Black Enterprise. Her belief that DEI requisites would become more prevalent in public procurement prompted her to seize the opportunity to aid businesses in advancing beyond the curve by fulfilling the stipulations even before being asked. This case serves as an exemplar of the genuine aspirations of the program - to encourage companies to correlate the integration of DEI values with the potential for success.

Savings & Efficiency

Our innovation is genuinely unique in procurement and can incrementally contribute to increasing community wealth equity, company success, and state progress. Systemic change requires time, effort, and resources, but the gains from these investments are broad and nestled throughout communities.

At this point, we're unable to determine if the contracted price of supplies and services procured with an RFP containing C2D-Factors is more or less than when procured without the factors. However, anecdotally, through conversations with vendors and agencies, we believe the C2D-Factors will not increase the state's contracted costs.

However, by making vendor WMD relationships a cornerstone of the C2D Factor, we can expect to see fewer Good Faith Effort Waivers and faster recruitment time when it comes to accomplishing diversity contracting goals. Additionally, our C2D training for agencies creates a more thoughtful process when evaluating submissions, reducing the potential for outlier meetings and protests.

By incentivizing vendors to take year-round DEI actions, vendors will increase their network of diverse subcontractors and suppliers, foster economic growth for marginalized communities and start-up businesses, and benefit from diverse management and workforces. While it's difficult to quantify the overall societal impact of the C2D Program, it's clear that every action that offerors take to promote DEI is beneficial to the recipients.

Consider the potential scale of the C2D Program. In a state like Illinois, where 50 RFPs are conducted annually, and each RFP receives 4 offerors, each of whom takes 6 actions promoting DEI, the annual potential impact of the C2D Program could be a staggering 1,200 actions!

State of *Indiana*

Department of Administration
Division of Procurement

2024 George Cronin
Awards for Procurement Excellence

Choosing Your Voice:
Putting the "AI"
in Your Training

Executive Summary

One Director, with creative flare, feeling limited by both time and funding, searched high and low for a way to make his team's trainings effective… no…. engaging… no… dare we say enticing!

But how to be enticing? The Director came up with idea after idea, none were right. Then he decided the team would record as a group. They would script out the content and as the family they had grown to be, they would sit around the proverbial dinner table and simply chat.

Multiple attempts were made yet challenges grew. Nerves, environmental noise, voice quality from one day to the next, lack of quality sound/recording equipment, scheduling challenges remote work and this was not the team's only work responsibility! None of these factors were easily overcome but he would not be dissuaded from making the training what he knew it could be. The Director had creative flare. He was unique, a performer at heart. He could use his voice to command attention with humor and inspire others through a simple one liner. Quotes from sitcoms, a song lyric or a good ol' euphemism would turn "dry as a popcorn fart," content into something that would warm the cockles of any bored heart. But those on his team weren't as comfortable being in front of people, or as confident with leading trainings, or as assured with crafting engaging content. Time was needed to train the trainers so they could be comfortable as "performers" in the recordings. He needed more time!

But time was in short supply, when the perfect opportunity to try something new finally came to fruition; training for the rollout of the Travel & Expense (T&E) Module in PeopleSoft. Though he knew this was to be done with no budget and threaded intricately between projects, he did not shy away from the challenge; nor did his team.

The training for a new process that would forever improve the lives of those who funded their own business expenses was set aside time and time again for other peer agency projects to be implemented. Therefore when a small window of opportunity before the next fiscal year end activities and the go live date of a prominent time clock solution of a peer agency presented itself, this Director knew he must find a way to get this training done. It meant reducing eighteen (18) months of effort down to nine (9) months. His team was had their doubts that this was possible and even less comfortable with the idea of getting all the recording done but he knew that if it wasn't accomplished this time, the Travel & Expense (T&E) PeopleSoft module could be delayed indefinitely.

Call it divine inspiration, magic or simply a great find after diligent exploration, the Director found a way! Murf AI Software opened the creative possibilities that would allow the deadlines to be met! It all sounds too good to be true!

However, it was not too good to be true, it was exactly what the Director hoped he would discover. He informed his team and the journey into using AI in training materials began for the State of Indiana, Department of Administration, Technology and Operations (T&O) team. This was in 2022.

Innovation

A bit of background for all this. . .

The Indiana Procurement Division is housed within the Indiana Department of Administration (IDOA). This division is charged with ensuring compliance of the State's procurement and contracting laws governing the expenditure of public funds as well as providing timely responsive support to agencies. The division ensures quality products and services are procured at competitive prices, safeguarding the process to provide equal opportunity to all qualified vendors and contractors as well as monitoring vendor

performance to ensure accountability. Within the Procurement Division there are four (4) teams that each work in support of the overall procurement responsibilities. The team relevant for this evaluation is the Technology and Operations (T&O) Team.

T&O is tasked with, well a lot! The team creates all of the training for the Oracle PeopleSoft Application (PS) modules and state processes for which the Procurement Division is responsible. PS provides a number of services to the State of Indiana including housing the Supplier Contracts Module (SCM), which the entire state uses for the fully electronic contracting process. This includes posting state contracts on the public portal. Additionally, PS is used for ePro Modules, everything to do with Requisitions, and Purchase Orders, the State Travel program, the entire bidder registration, the PS Sourcing module, and electronic special procurement (per Indiana Code 5-22-10) process.

Outside of the PeopleSoft system, T&O oversees the state's Delegation of Procurement Authority Program (DPAP), which includes audits of agency procurement files and practices to confirm compliance with procurement laws and policies. Further, any Indiana Office of Technology (IOT) tickets submitted through the IOT Helpdesk that references any of the above, are routed to the T&O team for resolution. Additionally, never forget the all-encompassing "other duties as assigned!" All of this is covered by a team consisting of one director and seven (7) team members.

The purpose of this project was to create and distribute wide-reaching and complex training to state employees. T&O used Artificial Intelligence (AI) technology via the Murf AI software to narrate Travel and Expense (T&E) training modules.[1] This innovative approach consisted of computer-based training (CBT) to explain all aspects of the collection and processing of State employee travel time and expense. This included the process for travel administrators to the actual traveler themselves. Although IDOA Procurement did not have a budget to create this training, they became responsible for this project in order to prepare the state for the use of the PS

The T&E module allows employee travel to be fully processed through PS. From the requests for authorization to travel all the way through to the end of the process for a traveler to submit their own expense and receipts for reimbursement. Each state agency sets up their own "workflow" of how travel requests are to be approved. This workflow then goes to the IDOA travel team and other oversight agencies for approval. Expenses and reimbursement requests are then automatically tied to the previously approved travel request, routed, again as the agency requests internally, then to IDOA and on to the State Comptroller for electronic payment to the traveler. Thus, many efficiencies were gained by switching to this process improving travel services for all state agencies and employees, but IDOA Technology & Operations Management (T&O) had to make sure the state knew how to use it. . . .Enter the Murf AI software solution. . .

The software has the capability to utilize 120 plus text to speech voices in over 20 languages and accents, it can be widely utilized. Perfectly timed voice overs could be generated in just a few minutes. Murf also offers music and other sound and audio enhancements to improve the video product. Murf AI eliminates the need for a sound room as environmental factors impacting the audio quality could be removed.

Murf AI solution, provided the freedom the team members were seeking. Their anxiety of recording removed, they could easily create content, and explain concepts. Those who weren't fond of their own voice, or with leading trainings tried on the variety of voices of their preferred avatars and comfortably remained in supportive roles.

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[1] Remember this was the project with a very limited window of opportunity.

The time element of this project was a huge driver for this innovation. We had a constrained amount of time to fully roll out because of fiscal year activities and our IT support staff would be obligated. In addition, the Comptroller, a critical partner in this endeavor was implementing a time clocks project that made them unavailable. The time taken for the creation of the training content could not be reduced, but the actual recording of the information could be. The team could upload written text into the Murf AI software, and within seconds had a voice returned.

As opposed to, in the "old fashioned days," the team would have to secure a quiet location, recording equipment, read the script while maneuvering through the slides and if any verbal misses or skips would result in starting all over from the beginning. Not only was this time consuming but frustrating, inefficient, and rife with vocal inconsistencies.

Additionally, the software has the capability to utilize 120 plus text to speech voices in over 20 languages and accents, it can be widely utilized. Perfectly timed voice overs could be generated in just a few minutes. Murf also offers music and other sound and audio enhancements to improve the video product. Murf AI eliminates the need for a sound room as environmental factors impacting the audio quality could be removed.

Transferability

Applying Murf AI software as a means to create training across all Indiana State agencies reaching roughly 30, 000 employees, giving this project practical ability to be used by other states. This program has a free option that T&O team used until it became such a valuable tool that purchasing the upgraded version with additional features was a worthwhile expenditure. Murf AI Software has three licenses, the mid-rate option is the Pro plan costing $341.87 each/annually. Per license, there is a download time of 48 hours, 24 hours of transcription, and commercial use rights (Enterprise, no cost provided, unlimited generation, transcription, storage).

The Team's success made it a desirable resource for other agencies. IDOA was able to easily add this off-the-shelf solution to our State software contract. Consequently, the other state agencies are now able to experience their own efficiencies through Murf AI Software.

Service Improvement

Years ago, the first online training course with voiceovers took place. This involved extensive time commitments for learning the editing tool, Captivate, aligning video, voice, and demonstrations. The workload was split between multiple team members, for example, scripting, demonstrating, recording, and editing. This obligated the team to months of effort, and delayed releases causing training to be outdated prior to release.

The Captivate system that was originally used to create the training content could only have one video file at a time. Thus, if a mistake was made during production, the process would need to be started over again. Though all of this was a great option to provide an alternative to in-class sessions or simply posting slides on-line, more engaging training was desired.

Fast forward to today, the T&O team is proficient in utilizing Captivate to create trainings; but, the T&E roll out threw some new impediments. Given that the T&E module is a part of the State's ERP system, its implementation was bumped twice by other projects that were deemed mission critical. Therefore, when we finally got the green light to proceed, we had to meet the constrained deadline offered. As

previously mentioned, fiscal year end and the Comptroller's time clock project was to begin immediately after our roll out was complete; extending our timeline was not an option.

We had to learn how the T&E module functioned and how to configure it to conform to our State policies. This was done as we created the training. This roughly translated from eighteen (18) months of work completed in nine (9) months.

The ultimate benefit of all of this hard work by the T&O team is faster reimbursement for the State Travelers' expenses. Before T&E, everything was on paper and had to physically make its way from the traveler around the state to the Comptroller's Office in Indianapolis. All of which was slow and inefficient. Now, if all moves as it should, reimbursement could be received within five (5) business days. These benefits were able to be highlighted in the training that the T&O team created using the Murf AI Software.

In looking toward future uses for the Murf AI Software, T&O will provide training to capitalize on reporting opportunities. T&E reporting has become available in a real time manner. Allowing agencies and even specific programs within an agency to see and track all spend related to travel.

Savings & Efficiency

Again, there were no funds allocated to the T&O team to create this training. Our innovative Director of the T&O team searched extensively and found this software. The team used the free option until it was determined it became such a valuable tool that purchasing the upgraded version with additional features was a worthwhile expenditure.

For less than $400 per year, we continue to use the Murf AI software. This project is innovative in its simplicity. An example is that expensive, complicated initiatives are not the only way to achieve a "win" for our overworked and understaffed teams!

Appendix - Supporting Materials:
https://www.in.gov/idoa/wbt/TandE_WorkflowApprovalsConfiguration/index.html

State of Michigan

Department of Department of Technology, Management, and Budget Central Procurement Services

2024 George Cronin
Awards for Procurement Excellence

MiProData, YourProData, OurProData: Procurement Data Management That Drives Innovation

Executive Summary

The mission of Central Procurement Services ("CPS") is to provide state agencies with the mechanism to purchase the products and services required to serve the citizens of the State of Michigan on time, of good quality, and at a reasonable price. Increasingly, information technology solutions are a key enabler of this mission. CPS has become a data-driven organization, in large part because it has found solutions to leverage all its procurement-related data in a way that makes the data easy to work with and utilize.

One of the corner-stone solutions Michigan has used was a CPS-built Microsoft Access database, colloquially called the *Contract Database*. Starting in 2017, the database was expanded to include more than just contract information. It was enhanced to effectuate automation of contract cover pages, change notices, and State Administrative Board bid tabs; project management functions; key performance indicator reporting; and workload planning. Subsequently, the Contract Database was augmented with a SQL database back-end, administered and maintained by the State's IT staff, and a Microsoft Access interface managed by CPS. This switch occurred during the COVID-19 pandemic due to the slow speeds of Microsoft Access over a virtual private network (VPN).

Despite these upgrades, and the Contract Database's record of driving and enabling innovation within CPS, technology continued to move at lightning speeds and the limits of this approach were hit. The in-house system began to reach its technological limitations, and a new database/contract lifecycle management ("CLM") tool would be needed for CPS to continue to move forward. Though planning for a replacement of the Contract Database began in 2019, in 2022 efforts moved into high gear and the participation of employees across CPS was needed. Staff at all levels of CPS were involved in developing user stories and testing to ensure this replacement would truly fulfill its potential. These efforts paid off with the development of the new, more comprehensive, stable and secure system, called MiProData (a contraction of Michigan Procurement Database).

This new system went live May 7, 2024 for CPS staff, and had a very successful launch, particularly for a brand new, custom-built system. MiProData is not only a replacement for the previous system, but addresses stability and security concerns, as well as adding substantial new functionality and additional automation of routine tasks. MiProData is a revolutionary procurement tool, built by the State of Michigan, that will be rolled out beyond CPS to all agency procurement areas, starting in 2025.

Innovation

CLM tools are not new, and there are multiple COTS solutions available on the market. However, as they are generally built with private sector users in mind, many public procurement entities do not take advantage of these tools. Michigan found that existing solutions would not meet its needs: to replace all the functionalities of its existing database, automate additional Michigan-specific processes, and provider greater stability and a better user experience while users are working outside of the office.

In seeking better options, CPS decided to work with the state's own development team on a custom solution that would meet current needs, streamline and automate unique processes (such as Michigan's legal requirement to have many contracts approved by the State Administrative Board) and be flexible enough for future adaptations; all while providing a more stable platform that works better with Michigan's hybrid work from home/in office schedules. The result of these efforts is MiProData.

MiProData's development consisted of nine epics: each covering a different group of related distinct functionality.

Contract: Stores both current and expired contract information aligned with the State's needs. This includes change notices, links to relevant information from the project phase, and spend summaries and releases from SIGMA (Michigan's ERP system). It also allows Managers to initiate new projects for expiring contracts.

Project: Contains data on past, current, and future sourcing projects, including timelines and milestones. It automates processes such as Code of Conduct signing and customer experience survey distribution upon project completion, also collating the survey data. Managers can assign projects and track their status through system-triggered emails and project status reports. Users also use the system to generate contract and change notice cover pages.

Admin Functionality: Provides CPS's Technology and Reporting Team administrative functions that allow CPS to adjust various values and settings that guide system operations, such as agency names, adding and removing users, etc., without needing to engage the state's development team.

Ad Board: Automates Michigan's State Administrative Board process, recording data and metadata about projects in progress, generating the needed approval documentation, and provides for internal manager approvals, It also allows the Ad Board Secretary the ability to review documents and automatically generate agendas, and then records approvals within the system and provides notification of the approval.

MiDEAL: Provides new functionality for tracking Michigan's cooperative purchasing program, including integration with the state's system for accepting payments from vendors. This functionality is set to be added to the system by the end of 2024.

Contract Monitoring: Utilized by the Supplier Relationship Management team to ensure Program Managers submit compliance reports within the contract-specified timeline. The system automatically sends emails to Program Managers to request the Contract Monitoring Report (CMR) on due dates and notifies them when overdue, including supervisors in these emails for accountability.

Reporting: Offers users the capability to generate on-demand reports, such as the Buyer Portfolio Report, CMR Report, Workload Reports (summarized and detailed), and various project and contract reports.

DataMart Integration: Pertains to the integration of a shared DataMart that includes data from MiProData, SIGMA (ERP), Keylight (IT approvals and security), and Clarity (IT project management). This feature allows for the importation of contract and spend data directly from the "source of truth" system. Though it is not directly covered by this project, the infrastructure is now in place to enable Michigan's IT areas to have direct access to CPS's wealth of data on IT projects that go through the procurement process.

Technical Requirements: Covers various technical requirements not directly requested by clients but nonetheless necessary, akin to safety inspections on a new building.

These epics add up to a comprehensive and unique system, which has the added benefit being able to be rolled out to all of Michigan's agency procurement areas. Given the accomplishments CPS former database enabled, MiProData will serve as the backbone for continued innovation in Michigan.

Transferability

There are many ways to approach a CLM-like solution that do not require major IT systems development. Until MiProData's launch in May 2024, CPS's solution was an in-office built Microsoft Access Database. The basic principles, to aggregate contract, project, supplier performance information, and leverage it to reduce manual data entry, provide project statuses, and provide

workload information and key performance indicators can be applied with readily available tools and can start in a more basic way.

As an organization that has a mature technology and data program, Michigan's new solution was a very large project that entailed years of planning, development, and testing before it was implemented. However, this was not the start of the journey. CPS believes that starting more simply, with an in-house solution that can grow over time, allows a procurement organization to truly understand its requirements when it is time for a more robust solution.

Identifying and utilizing good CLM principles is highly replicable. By evaluating the individual modules detailed above, any state can evaluate their individual needs and start implementing solutions with the tools at hand. This has the added benefit of familiarizing staff with the concepts and practices before major efforts or funds are expended.

Service Improvement

MiProData represents a major service improvement for CPS staff, as well as for our customers. Elimination of repeated manual data entry from documents like change notices reduces errors as well as tedious work. In-system approvals provide not only an effortless audit trail but simplify and streamline a process that only a few years ago meant keeping track of physical, signed documents, passed from person to person. Automated post-project surveys provide constant feedback from CPS's end users on customer satisfaction and CPS's performance, as a whole, by division, by section and by individual employee.

Unlike CPS's original solution, MiProData can also be used as an enterprise solution, which will help encourage best practices in Michigan's agency procurement areas as well as extend efficiencies and service improvements to those areas. This includes enabling project status (for end users), upcoming projects (for potential vendors) and KPI dashboards that will cover all procurement projects done under CPS's authority, no matter which agency is doing the work. Since end users do not always understand, or even have reason to care about the difference between CPS and agency procurement areas, the consistency and best practices MiProData will encourage will result in a better, more transparent experience for them as well.

Many of Michigan's recent achievements, from our KPI program to our Contract Monitoring program were made possible by the previous database, and now these improvements can be made available for use by Michigan's agency procurement areas as well. Given the service improvements these programs have had within CPS, expanding these programs will further extend their benefits.

Switching from an in-house Access database to a system developed and supported by Michigan's IT professionals also provides technical support and up-time service level agreements that were not achievable before.

MiProData will improve the experience for nearly everyone involved in the procurement process, from CPS employees and agency procurement employees, to agency program managers and vendors.

Savings & Efficiency

One of the guiding principles of the development of MiProData has been the elimination of low value effort, such as repeated data entry, automating notifications, streamlining of approval processes, etc. This frees staff to spend more time focused on high value efforts such as category management and vendor performance.

From 2017 when the first internal database tool was developed to 2023, the average duration of a change notice completed by CPS went from 32 business days down to 22 business days. Though this did

not happen in a vacuum, it is clear the database automation did help cut the time it takes CPS to finish a contract change notice.

Other processes made more efficient, and that touch all of CPS's contracts include Contract Monitoring Reports (sending and receiving links to end users and compiling vendor data for all contracts), post-project surveys (sending and receiving surveys to stakeholders and compiling that data by individual procurement professional), and Conflict of Interest forms for evaluation committee members (sending, receiving, and tracking for audit purposes).

MiProData will be deployed state-wide, and some estimates can be made of the time savings based off this information. Even assuming only three hours of staff time saved per contract per year, MiProData will save 12,600 hours of staff time across the state per year (across approximately 4,200 contracts). Using the average cost of a CPS employees for FY 24 ($78.07), this would result in an administrative savings of $983,682 per year in staff effort across the state annually.

CPS also believes that by encouraging best practices and providing greater insight into the contracts of agency procurement areas, MiProData will be a catalyst for hard cost savings by highlighting contract consolidation opportunities, as well as improving agencies' contract monitoring practices, resulting in better outcomes for our customers and reducing the number of sometimes costly performance failures.

Conclusion

If knowledge is power, as the old saying goes, then the ability to harness all of a state's procurement-related data represents real strength. MiProData builds on CPS's already successful approach to harness that data to enable successful new programs and automate tedious, mistake prone, repetitive tasks, and runs with it. New automations (such as the Ad Board approval process), as well as the stability and security of a true purpose-built system will help further enable innovations in CPS. Further, because this new solution is capable of serving as an enterprise solution, it will push both pre-existing and new improvements out to our agency procurement areas.

The result is not only administrative efficiencies, but it will enable agency procurement areas to take advantage of best practices that CPS has already implemented as well as provide a more complete picture of Michigan's overall procurement data. Data collected that cannot be utilized is of little value, but MiProData will allow Michigan to harness its data like never before and helps set the groundwork for CPS's plans to utilize generative AI and machine learning to enable further efficiencies in the coming years.

State of North Carolina

Department of Administration
Division of Purchase & Contract

2024 George Cronin

Awards for Procurement Excellence

North Carolina Electronic Vendor Portal (NC eVP)

Executive Summary

The North Carolina Department of Administration's Division of Purchase and Contract (NC DOA P&C) had a problem: the system supporting the statewide competitive procurement and vendor diversity programs was reaching end of life after more than 20 of service, built on old, unsupported technology and was cumbersome to update. Resources knowledgeable of the legacy system had either retired or were nearing retirement. Dual entry into multiple systems was required to advertise, evaluate, and award competitive procurement opportunities, and the statewide vendor registration process was happening in a separate NC DOA P&C system, which was also nearing the end of life. The vendor diversity programs were run offline, making the process slow, inaccessible, and lacking transparency.

To combat this problem, NC DOA P&C released a transformational update to its electronic Vendor Portal (eVP) in July 2023, bringing streamlined processes for state procurement professionals and making it easier for vendors to do business with the state of North Carolina. The new eVP is the latest step of NC DOA P&C's journey to move its NC eProcurement program to cloud-based solutions to benefit from regular product enhancements and provide known operating costs. NC eProcurement is the state's enterprise-wide, web-based purchasing system that provides procurement and enhanced administrative functions to buyers and vendors, resulting in operational efficiencies, cost savings, and strategic procurement information.

The new eVP enables those who do business with state of North Carolina entities to register as vendors and maintain their business information in a centralized vendor account that is distributed to state entities across North Carolina through NC eProcurement. With the new eVP, the Department of Administration brought together features from its former Interactive Purchasing System (IPS) and North Carolina Business Invitation Delivery System (NC BIDS), such as formal solicitation posting, contract award posting, and online bid responses from vendors. Previously, vendors registered to do business with the state of North Carolina in an outdated version of eVP while IPS allowed entities to publicly post bids to vendors. The upgrade merged functionality from the old eVP and IPS into a single, cloud-based application to optimize the way buyers do business with vendors for the state.

The new eVP also brought broad innovation to the certification process for Historically Underutilized Businesses (HUB) and NC Small Business Enterprises (NCSBE) and enabled greater transparency in public procurement with enhancements in procurement data availability.

Innovation
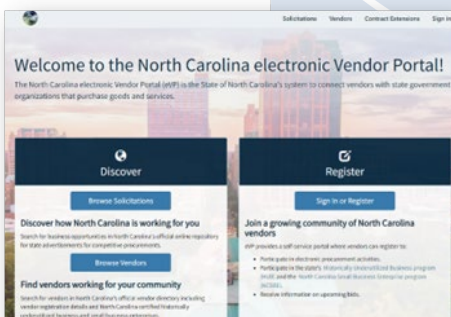
In its former state, NC DOA P&C was faced with managing multiple aging, on-premises applications, administering paper-based and duplicative processes, and an impending departure of experienced system subject matter experts from the workforce. NC DOA P&C decided to prepare for the future and proactively address all these issues at once by transforming two major legacy platforms into one modern eVP. The project's goal was two-fold: to streamline procurement processes, saving time and taxpayer dollars, and to modernize how vendors do business with the state. Smaller, individual projects to address each of these issues could have been undertaken over time, tackling the issues in separate chunks, but addressing everything together made for a larger overall impact of the upgrade and leveraged efficiencies in the design and deployment process. Optimizing the system for all involved provided enhanced functions to state administrators, vendors, and state procurement users, resulting in greater supplier diversity, operational efficiencies, more procurement transparency, and cost savings.

North Carolina's unique approach, bringing together the public posting of bid opportunities, vendor registration, and the supplier diversity program and joining those functions with the existing central procurement program, is now a model for states. Other states may be at different points of modernization in their procurement systems. Whether systems are modern and cloud-based, online but aging, or are completely paper-based, an assessment of the current status with an emphasis on closing the gaps in efficiency by bringing all stakeholders closer together can yield excellent results to whatever degree of improvement is attainable.

Transferability

eVP's success in North Carolina demonstrates its potential as a benchmark for procurement innovation nationwide. Its user-friendly interface, automated workflows, and centralized connectivity make it an attractive template for states aiming to enhance vendor engagement and streamline procurement operations. By leveraging established technologies and modular design principles, other states can capitalize on the eVP's success and tailor it to their unique needs and environments.

By documenting and refining its processes, North Carolina has created a blueprint that other states can leverage. The eVP's basic requirements and core functionalities serve as transferable elements that can be adapted and implemented to enhance procurement efficiency and transparency nationwide. It supports competitive procurement with the ability to have sealed bids and to provide procurement with the template to post required tabulations and awards publicly. Along with these functionalities the solicitation and award data remain available on the public portal, supporting government transparency initiatives.

Following NC DOA P&C's model, other states may begin a procurement transformation of their own by assembling selected key stakeholders from the government agency overseeing procurement, the purchasing and vendor communities, administrators from any special committees (like the vendor diversity program), and representatives from any relevant technical teams. The state should designate a business lead and establish a culture of transparency by hosting multiple cycles of design co-creation, rapid prototyping, and system demonstrations for key stakeholders, taking new feedback and making it immediately actionable.

The Microsoft Power Platform, which was selected due to existing compatibility with the Microsoft 365 productivity tools and used by most states, is designed to scale dynamically based on demand. This means that as the number of users or the volume of data increases, the platform can allocate additional resources to ensure optimal performance and stability. Because of current licensing structure within the state, North Carolina completed much of the legwork with this project that would make other technology-enhancement projects for other state agencies easier to initiate, should they decide to move their technology to a similar cloud-based platform.

Microsoft's government cloud, often referred to as Azure Government, provides a secure and compliant platform tailored specifically for government entities. Azure Government's support for compliance, interoperability, data sovereignty, and collaboration enable government entities to seamlessly transfer and share resources not only within states but also across state boundaries while meeting their unique security and regulatory requirements.

Service Improvement

Service delivery for all North Carolina stakeholders has improved dramatically across the board. Getting to this point required engaging early and often with key stakeholders and establishing a culture of transparency and partnership. NC DOA P&C instituted numerous mechanisms for continuous feedback through implementation. Co-creating designs, rapid prototyping, and system demonstrations for key stakeholders was critical to taking feedback and implementing the improved functionality.

All user groups, key stakeholders, state procurement users, and vendors can create customized reports and dashboards providing visibility into the procurement process. This feature was not available in the legacy system. State administrators, who previously managed the entirely paper-based vendor diversity programs for certifying vendors as HUB and NCSBE, have had their jobs completely transformed through the new eVP.

The following tables will highlight the primary impacts on state administrators, vendors, and state procurement users.

State Administrators Impact

Before	After
• Manual, paper-based, HUB and NCSBE Certification process	• Automated, paperless, HUB and NCSBE certification process
• Manual notifications and correspondence from HUB Office	• eVP fully automated correspondence process

Vendor Impact

Before	After
• Paper HUB certification process, > 3 months cycle times	• Digitized HUB certification process, < 50 days cycle times
• Multiple data entry points for registration and account management	• Single point of entry for registration and account management
• Missed bid opportunities	• Electronic bid notification
• Multiple bid posting sites	• Single point of entry for bid posting
• Siloed communications with state agencies	• Interactive communication with state agencies
• Manual, check mail in process	• Electronic payment option
• Limited vendor location/address and business contact management	• Improved management of address/location and business contact, notifications
• Multiple siloed vendor search	• Master vendor search capability
• Entity specific bid submission	• Streamlined bid submission

Procurement User Impact

Before	After
• Manual and duplicative data entry of solicitations and contract extensions	• Posting of solicitation events and contract extensions have been automated, eliminating duplication
• Manual and duplicative data entry of solicitations to the HUB Bid Opportunity site	• Solicitations are now automatically posted from eVP to the HUB Bid Opportunity site on a nightly basis, eliminating duplication
• Basic navigation with systematic limitations	• Improved navigation, upgraded data views
• Inadequate vendor profile management and frequent IRS tax ID failures, stymied accounts payable function	• Automated tax ID verification process yielding an improved accounts payable function
• Multiple help desks, confusion on who to call	• Singular help desk for all inquiries

Savings & Efficiency

NC DOA P&C collaborated with key stakeholders including individuals from 45,000+ vendors, 1,000+ purchasers, state administrators from two supplier diversity programs and the NC DOA State Construction Office, along with representatives from 15+ interfaces touching multiple aspects of state procurement. Using this structured approach enabled 650 entities, state agencies, universities, and community colleges across North Carolina to undergo a full system upgrade within a nine-month timeframe.

20% Increase in registrations to receive POs

50% Increase in base registrations
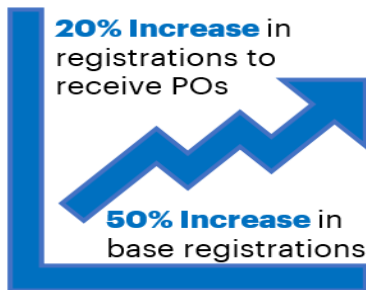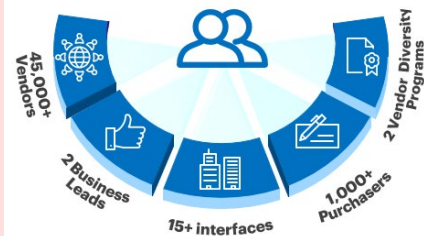
With about 180 new vendor registrations per week, there has been a 50% increase in base registration and a 20% increase in registrations to receive purchase orders through the new eVP system. This increased use of the system, along with a consolidated, more user-friendly email notification of bid opportunities increases competition and improves procurement outcomes for the state. In addition, by leveraging automation, the need to post solicitations to multiple systems for 1,000+ state users has been removed, saving state procurement an average of 85 hours per month, and allowing procurement professionals more time to focus on strategic initiatives.

The vendor diversity certification process was paper-based and involved mailing evidence to the HUB office, where it would be manually reviewed in a process that took more than 3 months. In the new eVP, vendors complete their HUB and NCSBE applications and renewal processes online, in under 50 days, on average. They are no longer required to complete an offline application and can upload their documentation directly to eVP.

Paper-based processes have been brought online, moving submission for over 22k certification documents to an electronic format.

This significant improvement of the certification process enables vendors to become certified more quickly and encourages diverse businesses in North Carolina to realize increased business opportunities across the state. State vendor diversity certification cycle time has been cut almost in half, improving participation, reporting and transparency of the program. Since moving to a paperless process, over 22,000 certification documents transferred into an electronic format, replacing US Mail and in-person handoff for these items.

Conclusion

The Department of Administration's new electronic Vendor Portal represents a truly innovative change for public procurement across the state of North Carolina. With streamlined processes for vendors, procurement users, and state administrators, the new eVP application enables efficiency in the procurement process. Greater access to vendor and award data enables transparency of procurement and supports inclusion in state procurement. The establishment of the electronic Vendor Portal as a new cloud-based platform provides a foundation for future innovation to serve the state of North Carolina's needs going forward.

State of Ohio

Department of Administrative Services
Office of Procurement Services

2024 George Cronin

Awards for Procurement Excellence

OhioBuys Organizational Change Management

Executive Summary

Several years ago, the State of Ohio embarked on a journey to implement its first electronic procurement system. The primary goal was to modernize and enhance procurement practices across State government. This involved improvements in organization, policies, processes, and technology tools, together with effective project and change management, to advance capabilities across governance, planning, sourcing, contract management and other procurement management disciplines.

To achieve these objectives, the State prioritized a comprehensive organizational change management (OCM) strategy. A team of certified OCM practitioners was assembled to implement one of the State's most complex and wide-reaching IT projects to tens of thousands of users. At the beginning of the project, the State developed an OCM plan to ensure users would be effectively prepared for and supported after system implementation.

Collaboration with executive sponsors, business owners, and customers has been pivotal in realizing the State's vision of a modern procurement ecosystem. The project has successfully achieved each of its key performance indicators (KPIs). Moreover, the State's OCM approach provides a model for other states to emulate during complex IT projects in the future.

Innovation

Since the inception of the OhioBuys program, OCM has been essential to achieving its strategic objectives. The State invested in a team of certified OCM practitioners to implement the program and focused on developing a holistic strategy to ensure successful implementation and sustained success. The OCM strategy was built around three phases of change:

Preparing for Change

As preparations began for each phase of the project, readiness assessments were conducted. The assessments were conducted to determine how aware stakeholders were of the impending changes and how they felt about the project.

A critical outcome of these assessments was a Sponsor roadmap, a compilation of activities and support tasks aimed at ensuring the highest likelihood for sponsor success. The roadmap encompassed activities and messages designed to enhance sponsor visibility and maintain focus on the OhioBuys vision and adoption among key stakeholders. When planning sponsor actions, they were personalized to align with the sponsor's style and preferences based on their change leadership background, past successful strategies, and overall communication style.

Additionally, to expand the sponsor's reach and influence, the team identified a sponsor coalition consisting of key project leaders. This coalition was instrumental in disseminating the vision and mitigating risks to OhioBuys' success, including business owners, the Solution Manager, and agency leads and their management teams.

Managing Change

In addition to traditional tools like communications plans and training materials, more innovative approaches were also employed as the OhioBuys system was developed and rolled out to users. A small group of agency representatives were integrated into the project team, influencing solution design, and contributing to key decisions. This strategy increased credibility with users.

Instead of a single, "big bang" rollout, a phased onboarding approach was adopted, focusing on working with small groups of agencies. Agencies, boards, and commissions were assigned into onboarding waves with defined timelines. System design and implementation was split into three releases: Payment Card (Pcard) ordering was deployed first; traditional requisition to purchase order, receiving, and supplier

management capabilities were deployed approximately 12 months later; and sourcing and contracting features were deployed 11 months after the second release. These tactics concentrated OCM resources and provided more personalized support as agencies adapted to new processes and a new system.

The OCM team also advocated that staff within the central Office of Procurement Services volunteer as "Change Champions" to support the changes brought about by OhioBuys and help facilitate adoption and acceptance within their groups. These personnel were among the first to know about updates on the project and were tasked with driving the change forward and assisting the OCM and Project Team in sharing communications across their peer group, to subordinates and to management staff. They also showed their commitment via visible and active behaviors – championing from the front and advocating for changes within their groups. Lastly, the Change Champions listened for issues or resistance within their groups and gathered feedback, then raised those items to the OCM and Project Team to ensure they could be dealt with swiftly and appropriately.

Suppliers were also affected by the advent of OhioBuys, necessitating a devoted supplier enablement program. OCM practitioners worked with data analytics experts to develop a segmentation methodology capable of categorizing suppliers based on agencies they were doing business with, their level of engagement with the State previously, and their usage within the new system. This allowed for more effective prioritization of communication efforts and for catered messaging to be developed based upon a supplier's characteristics instead of a general one-size-fits-all approach. This methodology was then used to create data visualizations that summarized supplier enablement metrics and gave agencies and the project team a tool to easily extract supplier contact information for communications. Communication templates and supplier enablement checklists were also produced by the OCM team to assist agencies with communication efforts.
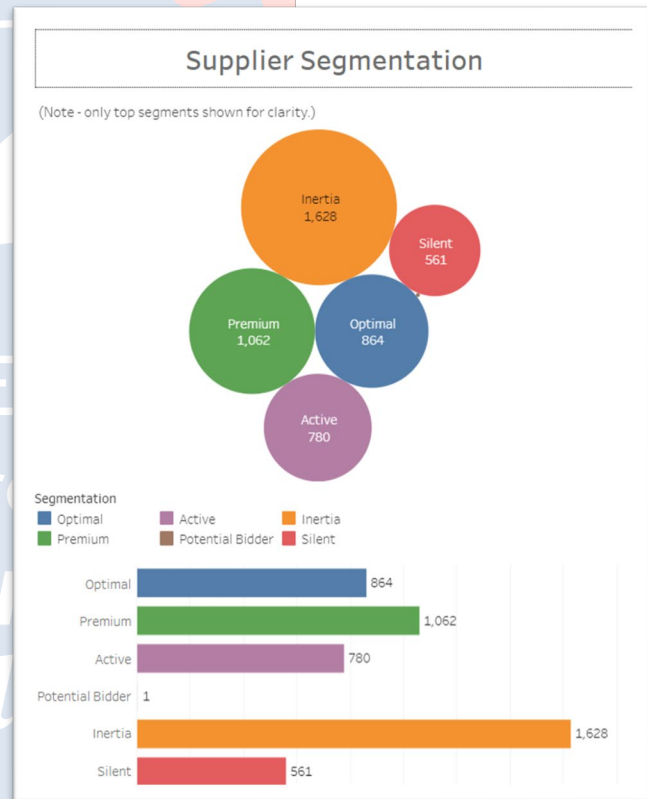
Figure 1 - Supplier Segmentation Summary
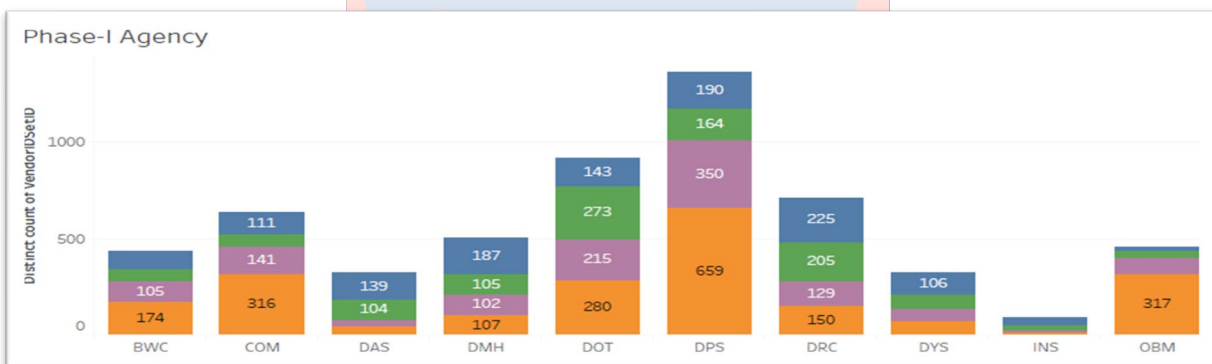
Figure 2 - Supplier Segmentation by Agency

Reinforcing Change

To ensure that OhioBuys could "sustain the gain," emphasis was also placed on developing tools for ongoing adoption of the solution. A new type of training called "Office Hours" was developed to assist users with OhioBuys functionality. This allowed users to work one-on-one with a trainer after completing training, receiving direct help on a specific transaction as they navigated the system. Office Hours have been appreciated and heavily used by agencies with over 400 sessions conducted in 2023 alone.

Furthermore, a monthly Sustainment Meeting was established, bringing together program management and agency leads. These meetings provide stakeholders with opportunities to discuss program updates, KPIs, and offer an open forum to discuss system questions, challenges, and desired enhancements. They also serve to promote inter-agency collaboration, allowing agencies to network and share best practices.

Transferability

The OhioBuys program emphasized the accessibility of OCM materials and the repeatability of OCM strategies to effectively support users in their adoption journeys. Both were critical given the scale of implementation in the State of Ohio, with over 100 agencies and 13,000+ agency users, as well as tens of thousands of suppliers.

By relying on staff augmentation resources instead of a systems integrator for OCM deliverables, the State retained ownership of the work products and strategies developed. This approach ensured the work products created by the State team are available for sharing with other states. Examples of these work products include Change Management plans tailored to releases of specific OhioBuys modules, which allowed for more targeted OCM engagement, communication templates, sponsorship roadmaps, surveys, and more.

Additionally, many OhioBuys OCM artifacts spanning multiple phases of the eProcurement implementation lifecycle are publicly available online. Process documentation and checklist templates were developed and shared with agencies to assist agencies as they prepared for implementation. These resources helped agencies compare current and future state business processes and allowed them to segment activities into three groups: those things to stop doing, those things to continue doing, and those things to start in the new process. Collectively, these resources enabled agencies to more effectively navigate the changes brought about by OhioBuys and continue to be used even though the system is in steady-state, as new statutory/policy changes are introduced.

Monthly newsletter published via email and online provide regular updates to agencies about policy and system changes, guidance on trending topics, and other pertinent information. Enhancement updates, training materials including videos and written learner guides/job aides, user tips, and a comprehensive website can also be leveraged by other states as a benchmark. While each state's business processes and requirements will vary, these resources provide a framework that can be replicated and modified as necessary and have a track record of enabling a successful eProcurement solution implementation.

Service Improvement

Effecting OCM strategies have been a key factor in positioning the State to realize the efficiency gains brought about by OhioBuys. Business owners and agency leads were consulted to identify the KPIs for the program in 2019, and the KPIs selected are listed below. The various OCM activities described above have enabled users to successfully transition into and thrive in the system, as demonstrated by the achievement of these KPIs.

1. **82% Reduction in Cycle Time:** This is measured from the time a request is submitted to when the purchase order is dispatched. OhioBuys has significantly reduced overall requisition processing time from 25.9 days before implementation to just 4.7 days.

2. **Tenfold Increase in Number of Solicitations Executed:** This is measured as the number of solicitations conducted in OhioBuys. Since baseline measurements in 2019, OhioBuys has significantly increased this number—with a tenfold increase. A contributing factor here has also been policy changes brought about by OhioBuys, which incentivize conducting solicitations. These changes include reducing the amount of post-solicitation reviews required, thanks to the transparent nature of the system. In addition, OhioBuys centralizes all opportunities to do business with the State on a common, publicly-accessible website, further encouraging engagement

3. **126% Increase in Average Number of Proposals Received:** This is measured as the total number of proposals received divided by the number of solicitations executed. This number has increased from 1.9 pre-OhioBuys to 4.3 with OhioBuys.

Collectively, the continued achievement of these KPIs contribute to more effective and efficient service offerings to OhioBuys' customers. Onboarding of additional users has promoted more centralization in terms of a common platform and processes being used by agencies. This provides a more consistent experience for suppliers and as their costs of doing business with the State are reduced because of this centralization and having one system to learn and access, KPI 3 demonstrates there is more competition now for opportunities to do business with the State. This translates into better value being delivered to OhioBuys' customers.

Savings & Efficiency

The successful implementation of OhioBuys provides potential cost savings to the State and its supplier base. Legacy applications and websites, along with their associated costs have been and continue to be decommissioned across multiple agencies. For example, within the State's central procurement office, a custom website and the associated database were decommissioned. In years prior to OhioBuys, the State had paid approximately $120,000 to re-write and re-platform this solution. Two other applications will also ultimately be retired once record retention policies allow for purging of the historical data.

Effective change management and the implementation of OhioBuys have also paved the way for a higher revenue share collection rate from suppliers holding revenue share-generating contracts. Prior to OhioBuys, 87% of the revenue share due to the State was being collected when averaging the collection rate from fiscal year (FY) 2019 – 2021. In FY 2023 and 2024 year to date, the average collection rate is 96%. This 9% increase in collection rate means that in FY 23 and 24 year to date, the State has collected $1.8M more in revenue share than may have been collected prior to OhioBuys assuming the average 87% collection rate was achieved. This is a significant source of funding for the State's central procurement office and increases help reduce the need to recover the office's costs from other state agencies.

As highlighted in the "Reduction in cycle time" KPI discussion above, effective OCM efforts also positioned agencies to use OhioBuys to enhance their procurement processes. As processing times have shrunk, users have regained time in their schedules to focus more on data analysis, strategic sourcing activities, and their agency's core mission.

Furthermore, successful deployment of OhioBuys has provided other efficiency gains that are significant in nature but more difficult to quantify. OhioBuys enabled the State to digitize its contract signature process and leverage an electronic signature solution, retiring the legacy process of obtaining approvers' wet signatures. While baseline data was not available, it was commonplace for contracts to be "held" for agency leadership until they traveled to the office building where the contract was physically located. In other cases, contracts were sent via inter-office mail for signature. OhioBuys not only facilitated a faster contract signing process, but it also brought transparency and efficiency because the system's workflow history feature could quickly tell interested stakeholders who had the contract for signature and whether each signer had signed.

State of Oklahoma

Office of Management and Enterprise Services

2024 George Cronin
Awards for Procurement Excellence

Ironclad

Executive Summary

The Office of Management and Enterprise Services ("OMES") embarked on a new procurement journey in 2022 with a solicitation for competitive bids from suppliers that could provide a legal case management system.

OMES was particularly looking to update its contracting process to increase overall velocity, visibility and efficiency. OMES, in an effort to improve its overall procurement process, elected to procure Ironclad, a contract lifecycle management software, as the trusted process to assist in improving OMES contracts and other various agreements.

The Ironclad system allows internal OMES users to submit and manage requests for legal review, which allows for ensuring a consistent and streamlined process. The contracting process is comprised of four (4) main stages: create/build, review/manage, signature coordinator, and archive. The Ironclad platform speeds up the review and negotiation process exponentially since everything is conveniently and centrally located.

Ironclad allows all internal OMES users in the contract workflow the ability to see and follow real-time updates in the activity feed during the entire contract process. In other words, the internal OMES users have the ability to conveniently review and have visibility of all stages of the contracting process.

Ironclad enables a streamlined and transparent process, while tracking and maintaining data which can be recalled in the form of "Insight" reports. This reporting tool offers a wide variety of ways to capture relevant data that can be displayed in different charts. Ironclad also allows for the ability to export data into a report that can then be shared with others.

After OMES employees have spent time training and working with Ironclad, the OMES contract workflows have become easy to build and have allowed the contracting process to meet the specific needs of OMES and of each distinctive contract, agreement, or other documents needing legal review.

Ironclad is accompanied with built-in AI. This helps to assist in capturing inconsistencies in contract language, clauses, terms, and many other areas specific to contracts, ensuring consistent and expected outcomes.

Innovation

Prior to OMES' adoption of the Ironclad technology, the legal team operated out of the Microsoft Planner. This process required numerous e-mails, phone calls, and Teams correspondence, which is then manually transposed into the Microsoft Planner for record keeping.   As a result, the notes were not always transposed, which left management often unable to determine a project's status with ease. Additionally, a separate, timely, and manual entry of the data into an excel sheet was required to track statistics.

With the adoption of Ironclad, all internal correspondence is viewable by internal OMES users and remains isolated from correspondence with suppliers and external agencies. The internal OMES user may be the internal OMES individual that is the technical subject matter expert, the security representatives, or the OMES certified procurement officer. Internal viewing of all internal correspondence allows for maintaining the confidentiality of deliberations and the overall negotiating process. External correspondence is tracked separately; however, the view can be changed so that internal and external communications are organized together for easy viewing with the simple click of a single button. Data is captured and saved to a repository, which is easily searchable. If an end user needs to find a specific internal OMES user response, or evidence of a supplier's previous agreement with a particular term or condition, it can be located quickly, efficiently, and easily. Ironclad provides numerous benefits to OMES, including:

1. Internal OMES user information, supplier information, and other necessary information is easily accessible on a sidebar.
2. Internal and external comments to documents are maintained separately.
3. Internal comments are automatically removed prior to submitting documents to the supplier.
4. Internal OMES users may be tagged in documents via comments, as well as in the activity feed, for direct responses to comments within the documents.
5. Ironclad keeps track of each and every version of the contract document. New versions can be compared with old versions, which allows changes to be made via approved changes, manual edits and/or merging updates from redlines with the click of a button from a single user interface.
6. Entire paragraphs can be re-written to allow for different terms using the integrated generative artificial intelligence function.
7. Dates, names, signatories, lifecycle information, and nearly any other field can be populated automatically by building conditions and tracking fields. This ultimately results in saving basic data entry time on every contract workflow.
8. Ironclad tracks and sends alerts, or notifications, when different contract lifecycle events are about to occur such as opt-out periods, renewal options, or termination, as well as other important contract management functions.
9. Related records are internally connected, and data fields can be automatically populated from the related record for ordering documents, amendments, and other documents.
10. Ironclad has the capability to track any data point and generate associated reports.

Transferability

Ironclad contract workflows are customizable and can be easily adapted to the specific needs of the state and other state agencies.

The artificial intelligence (AI) is specific to the particular instance of the SaaS program. Users can train the AI to recognize a state's preferred terms without worrying about it identifying, for example, another

state's choice of law provisions. In addition, the AI is limited to a particular contract workflow, alleviating concerns about sharing potentially confidential information. Whether procurement is centralized within a single agency or distributed among several agencies, the solution can be customized to fit each particular and specific need. Ironclad is scalable to also meet the procurement needs for municipalities, counties, and special district's accessing the central purchasing division of OMES. Contract workflows can be customized for various contract types, from contracts of adhesion merely being sent out for signature, to detailed statewide contracts containing significant pages of negotiated terms. Contract metadata is maintained in the Ironclad repository and can be used to easily create reports to measure metrics that are unique to different state and agency needs.

Contract workflows built in Ironclad can be exported and shared with other state agencies who can then import the contract workflow into their licensed Ironclad account and quickly customize it to meet their specific needs. This saves the user hours of time having to build a contract workflow from the ground up and could ultimately benefit dozens of entities in Oklahoma.

Ironclad has the ability to create multiple contract workflows to meet the needs of clients and their respective contracts. The Ironclad platform is a user friendly and easy-to-use platform for individuals to navigate and manage. Customized reports can be saved and shared with other users, including management and leadership. Once the customized reports are generated, the reports can be saved to the user dashboard, allowing the ability to monitor real time 24/7 contract information.

Service Improvement

The use of Ironclad has significantly decreased the amount of time it takes to complete contracts. For example, for the Information Services Division of OMES, the total contract time for statewide contracts went from 130 days to 54 days. Ironclad's automation has replaced the manual process of transposing all correspondence and notes between all parties involved, saving OMES an average 624 hours annually.

Management and select internal OMES users have the ability to easily determine the status of legal reviews at their convenience. This saves time from having to reach out to legal counsel and allows internal OMES users to stay apprised as the contract progresses.

Ironclad builds in an approval process for new users, which cuts down on training time that may have been spent to manually teach a new user to do various tasks.
1. For example, the system automatically engages the cyber security team when a review involves the accessing, processing, storing or transmitting of state data.
2. Further, the system automatically builds the applicable template documents. This saves the users from having to manually build the contract.

All contract workflows contain and maintain correspondence between both internal OMES users as well as external counterparties while protecting internal conversations from external viewing.
1. Ironclad allows for quick communication to internal parties by using the Ironclad message board. This message board sends a notification alert, via e-mail, to the internal OMES user(s) with the request or question intended specifically for them.
2. E-mail notifications from Ironclad will conveniently link that internal OMES user to the associated contract workflow to review and respond, as applicable.

Savings & Efficiency

In order to demonstrate overall savings and efficiency, Ironclad can generate reports displaying key performance indicators that allow internal OMES users to identify areas for improvement and streamline

the overall contracting process. Prior reports required manual input of data into external data mining software before a report could be generated. The following chart reveals savings for OMES since November of 2023:

Contract Type	FY: 2023 Completion Time (In Days)	FY: 2024 Completion Time (In Days)	Processing Time Improved By (In Days)	Savings to date
Information Technology Statewide Request for Proposal	131.78	54.91	76.87	$46,198.87
Agency Request for Proposal	58.26	27.7	30.56	$18,366.56
Order off of a Statewide Contract	12.42	8.79	3.63	$2,181.63
				$66,747.06

The overall savings in time, however, from the submission of a contract to the execution of a contract are only part of the benefit that Ironclad provides. There is also time saved in the future on contract life-cycle management because of the automatic reminders that can be set up for specific contracts, or groups of contracts, to alert users of pending deadlines for renewal options, opt-out periods, or contract expirations. Overall, this reduces the chance that OMES may inadvertently have a contract lapse and experience potential service loss.

Ironclad allows for easily accessible meta-data that OMES can keep for future contract negotiations. For example, Ironclad can provide the answers to all the following questions:

1. How many contracts have reduced insurance requirements?
2. When does a particular supplier's certificate of insurance expire?
3. Which suppliers are most, and least, responsive during the negotiating process?
4. When did a supplier last have their security assessment complete and is it up to date?

Ironclad produces easy-to-read bar graphs with data showing how long it took each supplier to provide contract documents back to OMES, plus a list of suppliers where OMES had to cancel the contract workflow due to non-responsiveness of the supplier.

The overall ease of accessibility of these metrics does not only improve the current contracting process but helps to identify objectives and expediencies in the contracting process moving forward.

If an internal OMES user assigned to a particular contract is out of office or terminates employment, the newly assigned internal OMES user does have to spend time going through countless emails to figure out where the contract negotiations or project left off. Ironclad allows the new internal OMES user the opportunity to review the activity feed and quickly pick up where the old user left off.

Taken together, these efficiencies have decreased the number of hours required to process procurement contracts by a substantial and significant margin. OMES is only in the beginning stages of implementing and perfecting this new procurement tool yet has already accomplished a great deal. The improvement in business processes and automation that will be effectuated through analysis of the metrics and performance indicators are still in their infancy, but the total savings and increases in efficiency promise to increase year over year for the foreseeable future. OMES is excited to continue with this innovative contracting system, and eager to continue to view the benefits it will provide to both OMES and the State of Oklahoma as a whole.

Supporting Materials

Overview Total Number of Workflows by Stage

Overview Workflows Completed by Employee (Last 90 Days)

Overview Average Time in Review Stage (Last 90 Days)
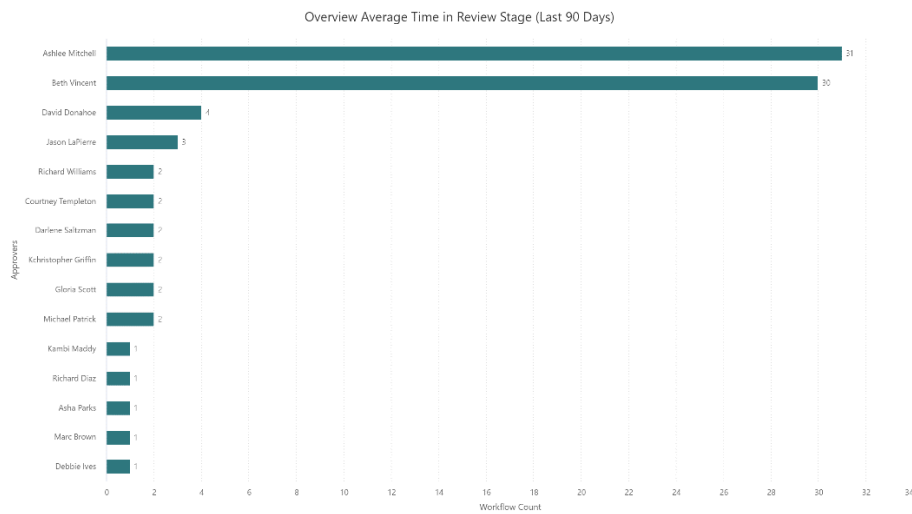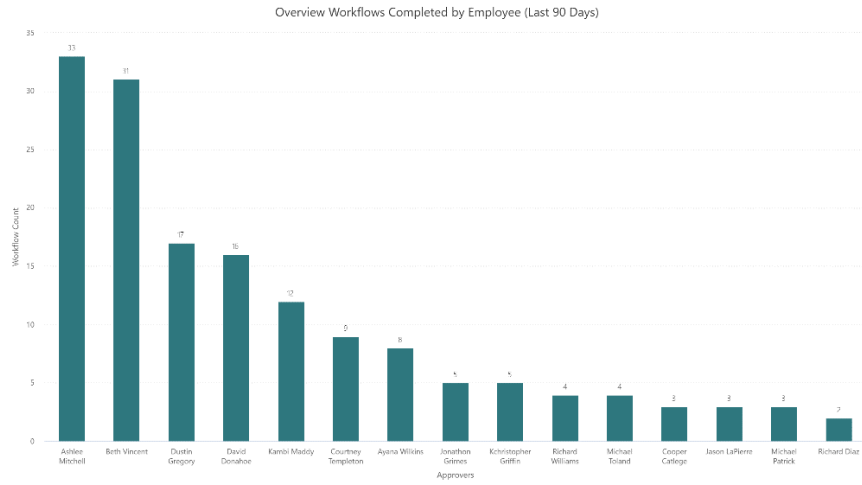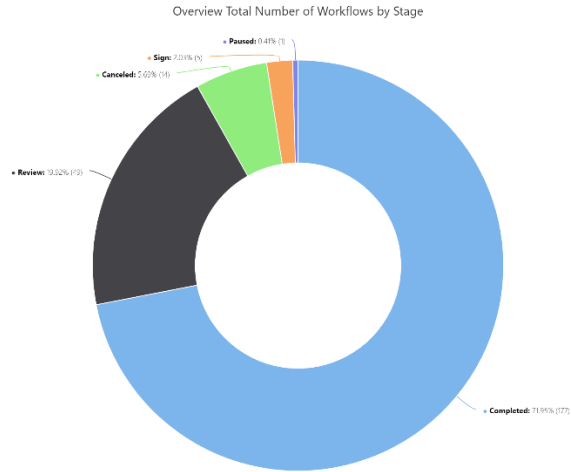
State of Oregon

Oregon Department of Administrative Services
State Procurement Services

2024 George Cronin

Awards for Procurement Excellence

The Path to Procurement Equity: Data Driven equity for all; Oregon: a case study

Executive Summary

The Office of Procurement Equity (OPE) in Oregon is a testament to the power of collaboration. It is the result of a joint effort by The Racial Justice Council (RJC), its Economic Opportunity Subcommittee, state agencies, legislative leaders, and the governor's office. This initiative, born out of the recognition of systemic inequalities in Oregon's government procurement processes, was formally set in motion through the 2021 Oregon Disparity Study budget, sanctioned under HB5006. This budget provided the platform to address procurement equity from a fresh perspective and incorporate innovative strategies and technologies.

Purpose and Scope: The primary mission of the OPE is to promote and implement procurement equity, ensuring that government procurement processes are fair and inclusive. The office's scope encompasses analyzing existing disparities, understanding challenges, and deploying strategies to promote equity within public procurement in Oregon.

Core Processes - The Path to Success:

The path to procurement equity involves several core processes:

1. **Data Storytelling**: Utilizing interactive data dashboards to highlight disparities found in the study and tell compelling stories that drive action toward equity.

2. **Relationship Building**: Establishing and nurturing relationships with affected parties, including minority-owned, women-owned, and veteran-owned small businesses.

3. **Policy Development**: Developing and refining policies, procedures, and processes to create and support a small business procurement program that enhances the ability of all small businesses, including those owned by women, minorities, and veterans, to engage in state contracting.

Summary of Key Findings:

1. **Racial and Ethnic Disparities**: Minority-owned businesses in Oregon are awarded contracts at a significantly lower rate than their non-minority counterparts.

2. **Gender Disparities**: Women-owned businesses face a considerable gender gap in contract awards and opportunities.

3. **Small Business/Veteran-Owned Business Disparities**: Local small businesses and veteran-owned businesses struggle to compete against larger corporations.

Identified Barriers:

1. **Limited Access to Information**: Underrepresented businesses often lack awareness of procurement opportunities.

2. **Unequal Access to Networks**: Challenges in networking access and limitations to relationship building hinder procurement opportunities.

3. **Capacity Constraints**: Financial and resource limitations prevent small and minority-owned businesses from competing effectively.

Strategies for Addressing Equity

1. **Enhance Outreach and Communication**: Improve information dissemination to underrepresented businesses.

2. **Capacity Building Programs**: Offer mentorship, training, and resources to strengthen the competitive capacity of minority-owned, women-owned, veteran-owned, and small businesses.

3. **Inclusive Sourcing Practices**: Encourage public entities to diversify their supplier base.

4. **Monitoring and Reporting**: Implement systems to track progress and ensure accountability in achieving procurement equity targets.

Results and Recommendations: OPE has made significant strides in the first six months since the publishing of the report, the creation of the office, and the hiring of staff to begin the work. These achievements, including the identification and addressing of disparities within public procurement in Oregon, are a testament to the effectiveness of our strategies. Committee members are encouraged to pay particular attention to the detailed analysis of barriers and the proposed strategies for mitigation. These findings underscore the need for sustained effort and collaboration to achieve meaningful and lasting procurement equity, but also instill confidence in our ability to overcome these challenges.

The Office of Procurement Equity (OPE) has introduced several game-changing innovations that have significantly improved operations and outcomes. One of the most notable is the Dynamic Data Dashboards, a tool that allows users to interact with data sets from the disparity study. This makes the 545-page report easily searchable and queryable, providing specific answers to user queries. Another major innovation is the phased implementation approach of the 2023 State of Oregon Disparity Study's recommendations. This approach is designed to create synergies between current, past, and future efforts in supplier diversity and procurement equity. Lastly, the creation of an outreach team, guided by data, to develop purposeful relationships with suppliers and affected parties, represents a significant step forward in fostering more impactful and meaningful engagement.

Innovation

Innovative Data Visualizations - Transforming Data Transparency:

One of the primary innovations of the Office of Procurement, among others, is the data visualizations and dashboards created by the OPE's DREAM team (Data, Research, Equity, Analysis, Metrics).
Creating an interactive data dashboard and a qualitative dashboard infographic to consolidate a 545-page report represents a groundbreaking approach to presenting the disparity study's findings. This initiative is unique in several key aspects, making it a valuable resource for understanding procurement equity.
Scale and Magnitude of Effort: The effort to distill a comprehensive 545-page report into an interactive dashboard and an accompanying qualitative infographic is substantial. This project involved meticulous data analysis, sophisticated software engagement, and thoughtful design to ensure that complex data sets are accessible and meaningful. The scale of this endeavor demonstrates a significant commitment to transparency and user engagement, making it a notable contribution to the procurement function.
Conceptual Originality: This project's conceptual originality lies in its dual focus on quantitative data and qualitative insights. By merging these two dimensions into a cohesive dashboard, the project provides a holistic view of the disparity study's findings. Users can not only see the numerical disparities but also understand the contextual and narrative elements that explain them. This innovative approach sets a new standard for how procurement data can be presented and understood.
Impact on State Operations: This project significantly impacts state operations by enhancing the ability of interested and affected parties to make informed decisions based on the disparity study's findings. By making the data easily accessible and interpretable, the dashboard facilitates better policy formulation, more effective outreach, and targeted interventions to address procurement disparities. Transparency and ease of use foster greater trust and collaboration among state agencies, businesses, and the public.
Path-Breaking Ideas and Efforts: This initiative distinguishes itself from similar projects in other states through its pioneering use of technology and design. The interactive dashboards and infographics are not just tools for data presentation; they are integral to the strategic goal of achieving procurement equity. This project exemplifies how technology can be leveraged to drive meaningful change and serves as a model that can be replicated and adapted by other states seeking to address similar issues.

Transferability

The Office of Procurement Equity structure is a direct product of the partnerships established by its members and the outreach/networking efforts with other states and municipalities, including many NASPO members. For example, the NASPO REACH presentation in 2023 highlighted the Western Region's coordinated approaches to Diversity, Equity, and Inclusion. These connections are the true power of the office, creating synergies across states and regions. By contacting states that have established or have attempted to establish supplier diversity programs, the office was able to glean the best practices, academic research, and current case law. This informed the creation of a system that can be adopted or duplicated in other states and municipalities.

Generality of Legal and Structural Environment: The legal and structural environment necessary for this innovation generally applies across states. Most states conduct disparity studies and have procurement policies aimed at promoting equity. The legal frameworks governing public procurement and data transparency are

typically conducive to adopting similar innovations. States can adapt the principles and methodologies used in Oregon to fit their specific legal and procedural contexts without significant modification.

Broad Applicability and Benchmark Potential: The innovation's core principles—using interactive visualizations to make data accessible and engaging—are universally applicable, along with making data-informed decisions regarding policy and outreach efforts of the state procurement office. Any state looking to improve its procurement equity can use these approaches as their template. The interactive dashboard and qualitative infographic method can be tailored to various disparity studies, making it a versatile tool for different regions and contexts.

Adaptability to Different Environments: Even states with different governmental structures or specific regional needs can adapt this innovation. For example, states with decentralized procurement systems can implement local dashboard versions tailored to regional data. The responsibility of the Office of Procurement Equity Structure and Data tools ensures that states can customize their programs and data dashboards to reflect local priorities and disparities.

Benchmarking and Best Practices: This office provides a robust benchmark for other states. By demonstrating how data visualization and interactive tools can enhance understanding and engagement, Oregon sets a standard for transparency and effectiveness. Other states can follow this example to:

1. Increase interested and affected party engagement through user-friendly data access.

2. Improve decision-making processes with clear, actionable insights.

3. Promote equity and accountability in procurement practices.

Service Improvement

One of our genuine innovations is using interactive data visualizations and qualitative dashboard infographics to present equity and spending analysis. This represents a significant service improvement in enhancing procurement equity within state purchasing agencies. Here's how:

Effective and Efficient Service Delivery: Purchasing agencies streamline accessing and understanding disparity study findings by adopting interactive data visualizations and qualitative infographics. Traditional reports are often lengthy and complex, requiring extensive time and effort to decipher. The use of dynamic visualizations condenses complex data into easily digestible formats, enabling state agencies, interested parties, and affected parties to quickly grasp key insights and make informed decisions. This efficiency improvement translates to more effective recognition of areas where resources should be focused and data-informed decision-making opportunities within purchasing agencies.

Change Management Strategy: A robust change management strategy is employed to promote the adoption of interactive data visualizations and qualitative infographics within purchasing agencies. This strategy includes:

1. Comprehensive training programs: Users will receive training on how to navigate and interpret visualizations effectively.

2. Continuous support and guidance: The Office of Procurement Equity is available to provide user support and create resources to address any questions or issues that arise.

3. Promotional campaigns: Internal communication campaigns highlight the benefits of interactive visualizations and encourage agencies and affected parties to incorporate the information in the dashboards into their decision-making processes.

Impact Metrics: Metrics for assessing the impact of these service improvements may include:

1. User engagement metrics: Tracking the number of users accessing the interactive visualizations, frequency of usage, and duration of sessions.

2. Decision-making effectiveness: Surveys or interviews with agencies and affected parties to gauge how much the visualizations have improved their ability to make informed decisions.

3. Time and resource savings: Quantifying the time saved in accessing and analyzing disparity study findings compared to traditional report information queries and other traditional questioning formats.

Overall, the adoption of interactive data visualizations and qualitative dashboard infographics enhances the delivery of procurement services within state purchasing agencies by improving efficiency, increasing engagement, and facilitating data-driven decision-making.

Savings & Efficiency

The innovation of using interactive data visualizations and qualitative dashboard infographics to present disparity study findings offers substantial potential for cost reduction, resource savings, and improved efficiency within procurement processes. Here's how:

Cost Reduction and Resource Savings:

1. **Minimized Data Analysis Costs**: Traditional reports often require extensive manual analysis to extract insights from complex data sets. Interactive visualizations reduce the time and resources needed for data analysis by presenting data in a user-friendly format. Agencies and affected parties can quickly navigate through the visualizations to identify trends, patterns, and disparities without relying on specialized data analysis expertise.

2. **Streamlined Decision-Making Processes**: The efficiency gains from accessing actionable insights through interactive visualizations translate to faster decision-making processes. Agencies and affected parties can promptly identify procurement disparities, assess the impact of existing policies, and formulate targeted interventions to promote equity. This accelerated decision-making timeline saves both time and administrative resources.

3. **Reduced Printing and Distribution Costs**: Interactive visualizations eliminate the need for printing lengthy reports, saving on paper, ink, and distribution expenses. Instead of producing and disseminating physical copies of the disparity study report, purchasing organizations can provide access to the interactive dashboard online.

Improved Efficiency:

4. **Enhanced Accessibility and Usability**: Interactive visualizations improve the accessibility and usability of disparity study findings, enabling agencies and affected parties to access and interpret complex data efficiently. Users can easily navigate through the visualizations, filter information based on specific criteria, and drill down into detailed insights with minimal effort. This streamlined access to information promotes efficiency in decision-making and resource allocation.

5. **Data-Driven Insights**: Procurement processes become more data-driven and evidence-based by providing agencies and affected parties with interactive access to disparity study data. Users can explore data visualizations, uncovering actionable insights that inform strategic planning, policy development, and resource allocation decisions. This data-driven approach fosters efficiency by aligning procurement efforts with identified disparities and strategic.

Conclusion

The use of a synthesized programmatic structure, effective storytelling via data visualizations and qualitative infographics, and data-driven targeted outreach is not only effective in promoting procurement equity, but also highly adaptable. This approach can be implemented with reasonable resource requirements and can be tailored to diverse legal and structural frameworks. It stands as an ideal blueprint for other states, providing reassurance about its potential to enhance their procurement equity and transparency. Below are graphics that explain our current office structure.

Addendum explains dashboards and organizational structure in detail.

End of formal submission, graphics including information on office structure is below as a supplemental information addendum.

State of Texas

Texas Comptroller of Public Accounts
Statewide Procurement Division

2024 George Cronin
Awards for Procurement Excellence

Texas SmartBuy: The Gateway to Statewide Procurement

Executive Summary

"Take the weekend off." That was the instruction in a Friday email from the Texas Comptroller of Public Accounts (CPA) Statewide Procurement Division (SPD) to the procurement professionals at 200 state agencies and more than 1,800 local governments and other entities in Texas.

"And come back Monday morning, April 15, 2024, to the new Texas SmartBuy." And they did. Several years of ideas, development, more ideas, more development, testing, and tweaking all came together, and for most, navigating the redesigned platform to cut a purchase order (PO) on a statewide contract, post a solicitation, or enter a vendor performance report was a straightforward experience.

So, what is Texas SmartBuy?

The original and central function is the *ordering system* for purchasers to buy commodities and some services from SPD's contracts. Unique among state government e-commerce applications, it is built on NetSuite's Suite Commerce Advanced platform. It is the only location where SPD's portfolio of non-IT commodities and services contracts are listed for easy reference and where POs are issued to hundreds of prime contractors and dealers from among 1.3 million items.

And in 2024, Texas SmartBuy didn't just get a facelift, it gained improved functionality, newly updated user guides, a better-built search tool—with filterable search bar on every page—and more relevant results. In the 15 years since the Texas SmartBuy brand was launched, it has developed into a suite of tools that help purchasers navigate statutory responsibilities, including soliciting competitive procurements, finding best-value contracts, and buying from the state's preference programs for purchasing goods produced by disabled Texans and prison-made industries. The biggest change was a redesigned Vendor Performance Tracking System, generating vendor report grades tightly aligned with the A through F definitions in the Texas Administrative Code.

Innovation

All of us who have been involved with NASPO for a while have developed relationships with our peers in our region and across the country. Broadly speaking, we all do the same job for our states: we set up contracts for agencies to buy commodities and services, we promote opportunities for in-state businesses, we provide oversight or training, we may wield delegation authority. But, just as there are 50 state mottos, flowers, and flags (plus D.C. and the territories), there are 50 state procurement codes and contracting handbooks (plus D.C. and the territories), but *not* 50 terrific state purchasing platforms.

Following the 2015 launch of Texas SmartBuy's second iteration, the Comptroller's Data Management team of systems analysts, representatives of SPD's business teams, and the IT staff and contract NetSuite developers have collaborated to modernize statutory procurement processes and implement new ones, either built in or accessed through the Texas SmartBuy portal. It is a cloud-based environment, accessible via web browser from just about any type of desktop or mobile device. And the third generation was built on a newer toolset, offering increased security protocols and native functionality to support the user experience.

Texas SmartBuy shopping and ordering: Not just anyone can buy for the state. Smaller purchases up to $25,000 can be made by state employees who have completed SPD's basic purchasing class. Texas SmartBuy user permissions can limit employees to building a wish-list cart in the non-purchaser view or limit the purchasing cap to $5,000 for the basic purchaser. Open-market procurements and larger contract purchases require purchasers to earn the Certified Texas Contract Developer (CTCD) designation before their Superuser gives them access to buy from the entire Texas SmartBuy catalog.

Electronic State Business Daily (ESBD): By statute, this advertising platform is the central posting place for state procurement opportunities valued at $25,000 or more, as well as posting notifications for awards made on state cooperative contracts that exceeded $50,000, and 60-day pre-solicitation notifications for procurements exceeding $20 Million. Any state agency procurement that isn't being conducted under existing delegated authority is routed to the SPD Procurement Oversight and

Delegation (POD) for review and the multi-agency Contract Advisory Team (CAT) if over $5 million. Comments provided by these teams must be acknowledged before posting the solicitation.

Vendor Performance Tracking System: The idea of grading vendors is not unique to Texas, but in the 84th Texas Legislature, a Senate bill authored by a former schoolteacher instructed Texas procurement professionals to apply an A through F grading scale, just like you'd get in school. The twist, naturally, is best value. To get an A, B or C, the purchaser or contract manager must confirm the vendor met best value, where a D or F only goes to vendors who didn't meet the best value standard. Added to Texas SmartBuy in 2017, procurement professionals applied the best standard determination and selected performance factors to support the report grade entered. The vendor's reports in a rolling 4-year period are aggregated and averaged to produce a continually evolving vendor performance grade.

Texas Purchasing from People with Disabilities Reporting: Texas SmartBuy connects state and local government purchasers to the state's two purchasing preference programs. Prison-made goods are sold under the Texas Correctional Industries brand. Purchasing under the State Use Program—from more than 100 non-profit entities—supports work opportunities for Texans with disabilities. As part of continuous monitoring of the State Use Program's effectiveness conducted by the Texas Workforce Commission, SPD built a reporting tool in Texas SmartBuy where state agencies are required to report each month on their use of state use contracts, and when they have decided to buy from an alternative vendor when a product was available on state use—and why.

Texas SmartBuy Membership: The most recent tool built into Texas SmartBuy is the registration tool, including online payment of the $100 fee that allows eligible local governments and assistance organizations to efficiently maintain membership or register to access statewide contracts. In 2023, this tool replaced a printable form submitted with a paper check that could take weeks to complete as local governments processed their checks, mailed them in, and CPA deposited them. Now the process can be accomplished same day for new applicants, and within a few minutes for renewing applicants who make their payment and get automated access to the ordering platform and all of SPD's contracts.

Is Texas SmartBuy unique? It's hard to argue that it isn't. As an enterprise level suite of tools, Texas SmartBuy delivers the ordering capability from a disparate collection of non-IT commodities contracts, an easy to reference and searchable directory of non-IT services contracts, and the advertising platform to reach the state vendor community through the ESBD. Each state agency/Texas SmartBuy member is assigned one or more Superusers to manage access for the agency's procurement professionals. Combine those tools with access to the vendor performance reporting, portal access to other tools for reporting Historically Underutilized Business expenditures, and TPPD monthly reporting, and you have a set of tools developed to meet the needs of Texas public procurement professionals.

Texas SmartBuy doesn't have to be the lone star when it comes public purchasing platforms. Given that 50 states (plus D.C. and the territories) need to perform some version of these functions, you might think that an enterprising vendor would have cornered the market on State SmartBuy, the tools that every state's central procurement office needs to make ordering easy, advertising solicitations simple, and rate every vendor to ensure that only the good ones get identified for state business opportunities. That's not the case today. Without naming specific e-commerce vendors providing platforms for other states, each provides some aspects of the Texas SmartBuy toolset. But there is nothing that provides the combination of tools that the Texas Comptroller's office has built to support the statewide procurement enterprise.

Transferability

The biggest challenge for a state government wanting to replicate Texas SmartBuy is undoubtedly cost, but the good news is that replicating the 2024 edition of Texas SmartBuy is a less custom prospect than its predecessor. The now-retired second generation relied extensively on custom code and data fields developed specifically for SPD. The mantra for any smart IT procurement should be *configuration not customization*, unless you plan to spend big during development and big for life-cycle maintenance.

Replicating the Texas SmartBuy toolset or some components to plug gaps in your state's toolset may not require taking Texas SmartBuy on NetSuite and launching *Michigan SmartBuy*. But the ESBD, for example, has got workflows and features that could be copied for Michigan to build a better solicitation advertising portal. For example, before Texas agencies can post a procurement, the contract developer answers questions that will either document that delegation authority for the procurement is statutory, already authorized by SPD, or redirects the solicitation for be review by the Procurement Oversight and Delegation Team. Taking these Texas SmartBuy high-level requirements and drilling down into specific tools could help other states develop enterprise tools.

Looking at another toolset, the Texas SmartBuy ordering platform has carefully developed Term contract catalogs awarded against SPD-drafted specifications. The other aspect of the ordering platform is the TXMAS and cooperative contracts portfolio, where base contracts awarded by GSA, NASPO ValuePoint, and a handful of other sources feature catalogs populated by the awarded vendors. The are reviewed and validated by Systems Administrators and Contract Managers, then loaded into Texas SmartBuy. Many of these contractors are similarly producing catalogs for other ordering platforms including their own websites. Quality control of these vendor-submitted catalogs is essential to preserve accurate contract pricing and initiate reliable purchase orders.

For some states, they may not know it, but they are already leveraging data from the Texas Vendor Performance Tracking System, and that data improved with the new reporting tools launched in April. More than 11,000 vendor performance reports are submitted annually by Texas procurement professionals against purchase orders and contract milestones. Since 2021, a monthly scheduled script sends every new vendor performance record to Procurated, whose tools have been incorporated into several state's contract workflows. Procurated integrates these reports with its own directly submitted reports to provide valuable insight into vendors for procurement professionals. The new 2024 VPTS sends at least 6 performance factors (up from just 1) and a grade automatically correlated from the selected factors—not the previous free choice grade that may not have been supported by the inputs.

Service Improvement

Successfully launching a new platform requires a significant change management effort. From recognition of human nature's comfort with doing things the way we know, to dealing with mid-flight transition and making sure nothing is missed along the way, change is uncomfortable.

The CPA team charged with developing and deploying the third generation of Texas SmartBuy had several advantages at our disposal. We set the timeline. Although the project certainly couldn't last forever, developers built the system in parallel with existing system, replicating what was already working, and implementing both simple and complex enhancements based on requirements drafted by the SPD Data Management and Texas SmartBuy Support teams that interact every day with customers.

Moving to a more modern version of NetSuite Suite Commerce Advanced did create a project delivery challenge — the Agile method of deploying new applications as soon as they are ready wasn't an option; all tools had to move at once to the new environment. With a small development team, that meant building out certain features left sitting on the side for a period while other features and tools were developed. It also meant the existing system had to continue operating smoothly; to that end the CPA team assigned one developer to handle tickets that came in on the current system, while the rest of the team focused on the new application. When end-to-end testing started in earnest, issues were tagged as either *must-fix before go-live* or scheduled for *post-launch enhancement* work.

As the SPD team tested the new applications, they set to work capturing screenshots and rewriting the user guides that would be ready for day one in the new application. In addition to a set of guides for state procurement professionals, alternate versions were produced for the Texas SmartBuy Members who don't need or get access to every tool, and the contractor portal. Individual applications like ESBD and VPTS have their own quick guides, so do Quote Ordering processes.

For end users, SPD's systems were always accessible until the cutover weekend. The CPA team recognized that building on the Texas SmartBuy users' existing knowledge, finding ways to eliminate pain points and provide a better user experience, would deliver a more organic transition. And best of all, Friday's password and login was the same credential users entered on Monday morning post-launch.

Communicating that change was coming was handled in low-key fashion. SPD wanted the effort to speak for itself without overselling the changes. In interagency meetings, SPD announced the spring 2024 planned deployment, and in the final month of testing, select external users were engaged to test processes in a way that internal support staff don't perform day to day. And in the final week before go-live, GovDelivery emails to all users announced on Monday and reminded on Friday to finish up everything in the current system, because it would be switched off, records transitioned, and the new operating environment the only available tool on Monday morning. It's fair to say state purchasers were not entirely satisfied with the old Texas SmartBuy. Originally billed by as Amazon-like, unsurprisingly it didn't quite live up to that hype. But that didn't make it a bad tool. Setting realistic expectations that paid attention to past complaints proved a winning approach for 2024. Quickly following the release, all of SPD's training videos for the applications on Texas SmartBuy were refreshed on the SPD.EDU learning management platform, offering new continuing education credits for the certified procurement professionals.

Overall feedback from purchasers to SPD's Outreach team and trainers have been favorable. They like the functionality improvements, the new design, and didn't feel like they had to learn a brand-new system from scratch.

Savings & Efficiency

Texas SmartBuy is not a low-cost solution, but by expanding the number of tools and paying careful attention to the contract, CPA has increased the value proposition over time. In 2015 the e-commerce platform license cost $2 million per year. About 5 years ago, after Oracle acquired NetSuite and changed its service tiers, CPA analyzed Texas SmartBuy's transaction volume and cloud storage requirements and was able to cut its license costs by 25 percent annually.

Another SPD division built a grant processing system in NetSuite, sharing some of the cost. And CPA's decision to build out the additional statewide procurement applications and employ Texas SmartBuy as the access management entry point to several other SPD applications serving state agency users allowed us to retire a legacy on-premises system that had been deemed an information security risk.

The newest NetSuite contract signed last November has established a fixed cost for the first two years at $1.8 million, with increases capped at 4 percent annually through year five. This has created certainty in terms of costs and continuity for CPA to continue to operate and enhance an enterprise platform that meets the needs of procurement professionals across state government.

By the numbers:

- **Contract Hosting:** Texas SmartBuy currently hosts 1.3 million catalog items for more than 450 contracts.
- **Purchase Orders:** In FY 24, purchasers issued more than 305,000 purchase orders that generated $442 million in state agency purchases and $68 million in Member purchases.
- **Vendor Grades:** More than 11,000 Vendor Performance Reports are submitted annually.
- **Advertising Procurements:** In the 12 months ending in April 2024, 115 state agencies and 117 local governments posted 9,000 solicitations. Around 35 percent came from Texas Department of Transportation using automated posting from two systems. (SPD is working with Bonfire to offer this process to several state agencies using the same process later in 2024.)

Thousands of Texas government users come to Texas SmartBuy every day to leverage a statewide toolset that has been built to meet their needs. The institutional knowledge developed by SPD and CPA's IT team has responded to statutory changes, acknowledged requests from our end users, and increased the value of this enterprise operation.

Texas SmartBuy Home Page - www.TxSmartBuy.com

Glenn Hegar
Texas Comptroller of Public Accounts

HOME | CONTRACTS ▾ | **VENDOR ▾** | GOVERNMENT ▾ | TRANSPARENCY ▾ | HELP ▾

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VENDOR menu:
- View Bid Opportunities
- TXMAS
- CMBL
- HUB
- NIGP Codebook
- DIR

Doing Business With Texas
- How To Apply for a TXMAS Contract
- IT Contracts With DIR
- Centralized Master Bidders List (CMBL)
- Electronic State Business Daily Search (ESBD)
- Historically Underutilized Business (HUB)
- Vendor Performace Tracking System (VPTS)

Application Help Guides
- How To Use Texas SmartBuy
- VPTS Guide
- ESBD Guide
- POD Guide
- Texas SmartBuy Membership Guide

Purchaser Quick Links
- Browse Contracts
- TPPD Reporting
- ESBD Search
- Search VPTS
- Order History
- PO Look Up
- Texas SmartBuy Membership Search
- Texas SmartBuy Membership Program
- Statewide Travel Contracts

Upcoming Events
- Education and Outreach Forums
- Training & Policy Development
- In Person Certification Training
- Continuing Education Catalog
- Texas SmartBuy Member Events

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Statewide Procurement Division: Recent Updates

SPD Contract Updates (New Contracts, Renewals, Modifications, Expirations, Terminations)
Published: 5/23/2024

SPD Contract Updates (New Contract, Renewal, Modifications)
Published: 5/10/2024

SPD Contract Updates (New Contracts, Renewals, Modifications, Expiration, Termination)
Published: 5/3/2024

SPD Contract Updates (New Contracts, Renewal, Modifications, Expirations, Termination)
Published: 4/19/2024

Vendor Performance Tracking System Update!
Published: 4/15/2024

The New and Improved Texas SmartBuy is Here
Published: 4/15/2024

Take the Weekend: Texas SmartBuy Shutting Down Ahead of Monday Relaunch
Published: 4/12/2024

Subject: Save the Date: Texas SmartBuy Relaunch Coming April 15
Date: Tuesday, April 9, 2024 at 9:04:28 AM Central Daylight Time
From: Texas Comptroller of Public Accounts
To: Gerard MacCrossan
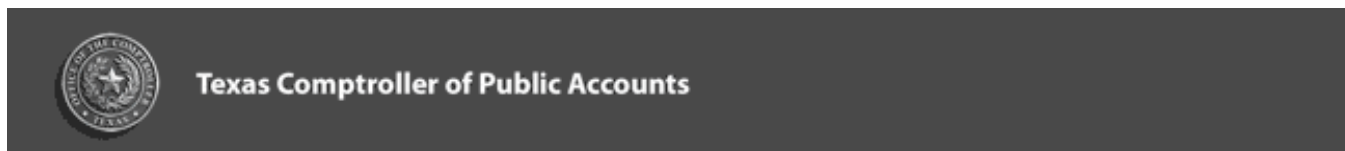
Texas SmartBuy Relaunch Coming April 15

Texas state government purchasers will see a fresh new look when they log into [Texas SmartBuy](#) on April 15. With a new design, the suite of tools brings not only familiarity, but also improved search, site organization and shopping cart management tools.
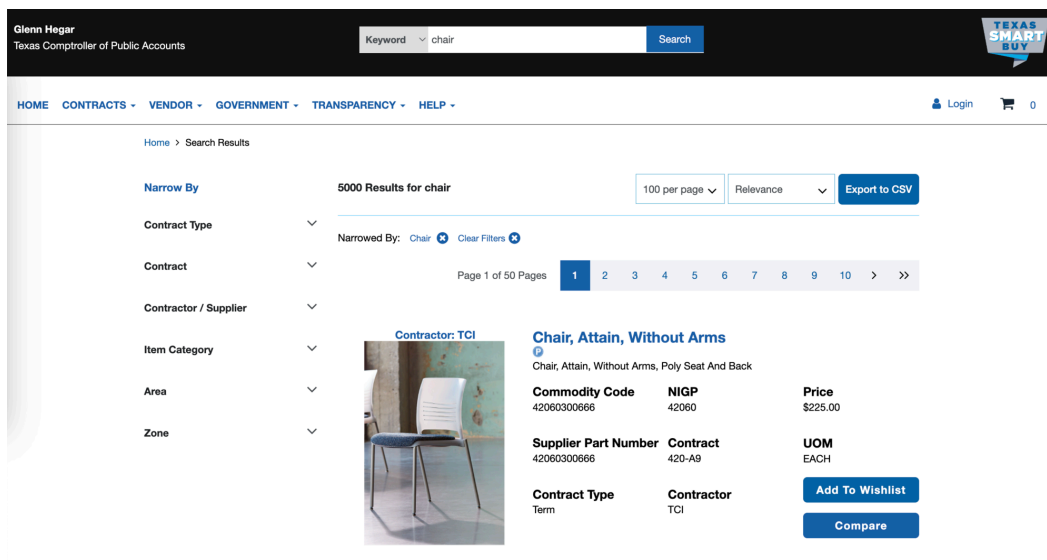
The Comptroller's office will temporarily shut down the current Texas SmartBuy site on Friday, April 12, at 5 p.m. Please complete purchase orders by that time, or wait until the morning of Monday, April 15, when the new site is live.

The new site doesn't just bring updates to the Texas SmartBuy shopping experience: All applications have been redesigned. The Electronic State Business Daily (ESBD) now has three posting types

including pre-solicitation notices. The Texas Purchasing for People with Disabilities program has a new view and sort functionality, as well as improved file downloads.

The biggest changes are in the Vendor Performance Tracking System. Performance criteria have been divided into different groups, each requiring a minimum of one input. These criteria selections, combined with the best value determination, will drive each report's final grade on the A-F scale, removing the risk of procurement professionals selecting a grade that isn't supported by the reported inputs.

Newly revised guides will be available to help users navigate the different applications. Existing users should be able to jump right in, using the same login credentials as before, and see all their previous purchase orders, ESBD postings and vendor performance reports.

Remember, this Friday at 5 p.m., Texas SmartBuy will shut down for the weekend, and the new Texas SmartBuy will be open for business next Monday.

Subject: Take the Weekend: Texas SmartBuy Shutting Down Ahead of Monday Relaunch: TEST
Date: Friday, April 12, 2024 at 8:22:04 AM Central Daylight Time
From: Texas Comptroller of Public Accounts
To: Devin Monk, Gerard MacCrossan

Texas Comptroller of Public Accounts

Texas SmartBuy Shutting Down at 5 p.m. Friday, April 12; Relaunch Coming Monday, April 15

Today at 5 p.m., Texas SmartBuy will shut down for the weekend, and the site will reopen for business Monday with a new look. Texas state government purchasers will see a new and improved search, updated site organization and additional shopping cart management tools.

The temporary shutdown of the Texas SmartBuy site will include the shopping site and other statewide applications. Please plan to complete purchase orders by that time or wait until the morning of Monday, April 15, when the new site is live.

Look for a help section with newly revised system guides that will assist in navigating the different applications. Existing users should be able to jump right in, using the same login credentials as before to see previous purchase orders, Electronic State Business Daily postings and vendor performance reports.

TEXAS SMART BUY

Subject: Courtesy Copy: The New and Improved Texas SmartBuy is Here

Date: Monday, April 15, 2024 at 8:30:34 AM Central Daylight Time

From: Texas Comptroller of Public Accounts

To: Melissa Honeycutt, Kristin Smith, Nikki Cobb, Sheryl Perry, Jessica Donald, Kelly Langford, Leslie Lawson, Peggy Fikac, Jose Leal, Gerard MacCrossan, Laura Pelech, Leticia Torres, James Tanguma, Tosca Mccormick, Yvette M. Marietta, Karen Hudgins, Kevin Lyons, Lauren Mulverhill, Karen Winters, Chris Bryan, Stephanie Alvarez, Devin Monk, Brynne Harder, Corey Korn, Ramsey Abarca, Brittany Maldonado, Karen Cyphers, Brian Wellborn

This is a courtesy copy of an email bulletin sent by Devin Monk.

This bulletin was sent to the following groups of people:

Subscribers of Contract Management Office, SPD: Agency Address authorized access, SPD: Agency Purchasing Heads 2/9/24, SPD: Certified Purchasers and Contract Managers (State agencies only) 5/5/23, SPD: Management Team, SPD: SuperUsers - Agency (Jan 2023), SPD: Superusers - Texas SmartBuy Members (Jan 2023), SPD: Term Contractors, SPD: Texas SmartBuy Membership Program 3/11/21, State Contracting, or TxSmartBuy: Purchasers/Users 06-2022 (24712 recipients)
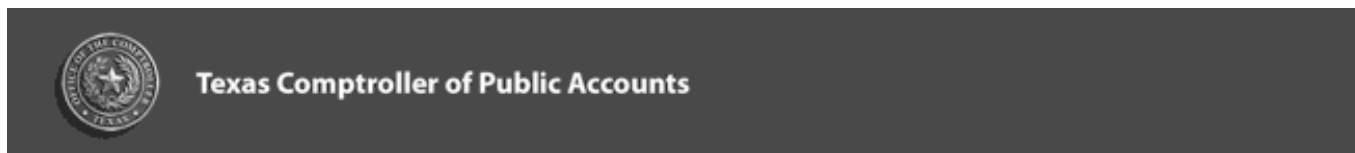
Check out the New Texas SmartBuy

Texas state government purchasers will see a fresh new look when they log into Texas SmartBuy. With a new design and updated .gov domain name, the suite of tools brings not only familiarity, but also improved search, site organization and shopping cart management tools.
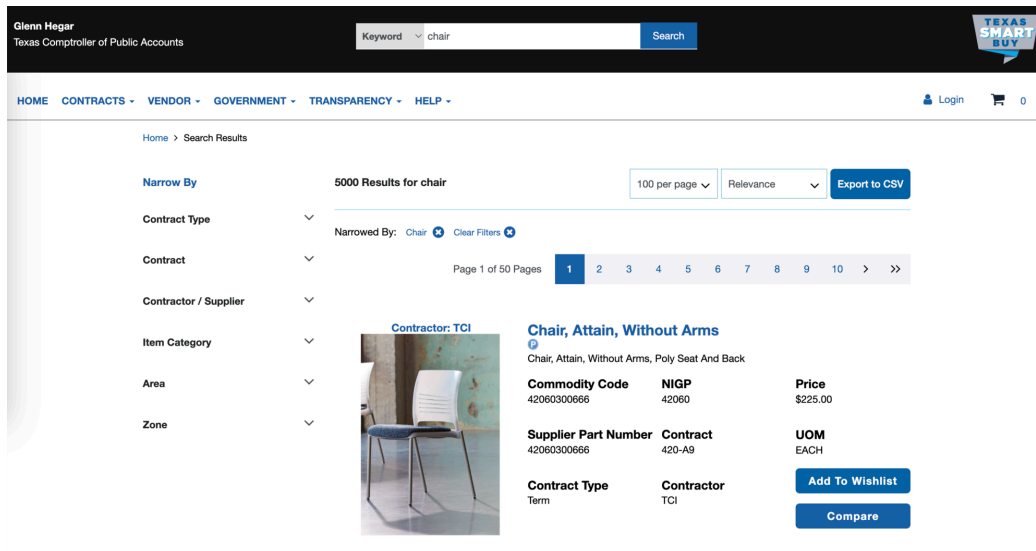
The new site doesn't just update the Texas SmartBuy shopping experience: All the applications have been redesigned. Electronic State Business Daily (ESBD) now has three posting types, including pre-solicitation notices. The Texas Purchasing for People with Disabilities program has a new view and sort functionality, as well as improved file downloads.

The biggest changes are in the Vendor Performance Tracking System. Performance criteria have been divided into different groups, each requiring a minimum of one input. These criteria selections combined with the best value determination will drive each report's final grade on the A-F scale, removing the risk of procurement professionals selecting a grade that isn't supported by the reported inputs.

Newly revised guides are available to help users navigate the different applications. Existing users should be able to jump right in, using the same login credentials as before to see previous purchase orders, ESBD postings and vendor performance reports.

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Subject:	Courtesy Copy: Vendor Performance Tracking System Update!
Date:	Monday, April 15, 2024 at 4:01:34 PM Central Daylight Time
From:	Texas Comptroller of Public Accounts
To:	Melissa Honeycutt, Kristin Smith, Nikki Cobb, Jessica Donald, Devin Monk, Peggy Fikac, Jose Leal, Leticia Torres, Leslie Lawson, Yvette M. Marietta, Gerard MacCrossan, Tosca Mccormick, James Tanguma, Laura Pelech, Karen Cyphers, Kelly Langford, Karen Hudgins, Lauren Mulverhill, Karen Winters, Chris Bryan, Brynne Harder, Corey Korn, Stephanie Alvarez, Kevin Lyons, Sheryl Perry, Brittany Maldonado, Brian Wellborn, Ramsey Abarca

This is a courtesy copy of an email bulletin sent by Karen Cyphers.

This bulletin was sent to the following groups of people:

Subscribers of SPD: Agency Purchasing Heads 2/9/24, SPD: Certified Purchasers and Contract Managers (State agencies only) 5/5/23, SPD: Management Team, State Contracting, or TxSmartBuy: Purchasers/Users 06-2022 (21309 recipients)

Texas Comptroller of Public Accounts

Texas SmartBuy Includes Updated Vendor Performance Tracking System

With the relaunch of Texas SmartBuy, the Statewide Procurement Division has released a new Vendor Performance Tracking System (VPTS) that conforms to recent audit findings.

The new vendor performance reports incorporate performance criteria that have been divided into different categories, each requiring a minimum of one selection. These criteria selections, combined with the best value determination, will drive each report's final grade on the A-F scale, ensuring the report selections create the overall report grade.

A revised VPTS guide is available on Texas SmartBuy to help users navigate the application. Existing users can use the same login credentials as before and see all their previous vendor performance reports.

Please email us with any questions you may have about the VPTS updates.

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Texas Comptroller of Public Accounts

Texas SmartBuy Online Ordering System

User Guide

March 2024

Contents

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Texas SmartBuy Overview and Resources

This guide documents the high-level steps for using the Texas SmartBuy system. In order to view more detail and screenshots for the subjects covered in this guide, reference the guides mentioned in each section.

Who can use this system?

1. State and local government employees can search Texas SmartBuy for items they need and if registered as purchasers, they can create purchase orders against statewide contracts. Anyone can look at items offered in the system.

2. State agency purchasers and local government purchasers who belong to the Texas SmartBuy Membership Program can place orders in the system.

How can a Local Government get access?
Become a Texas SmartBuy Member and for a $100 annual cost recovery fee, your entity can purchase off Texas SmartBuy and TXMAS contracts and Managed contracts.

System Requirements and Browser Compatibility

Browser Version
Google Chrome 34+ (Recommended)
Firefox 26+
Edge
Safari

NOTES:

- *Allow pop-ups to support several features in the Texas SmartBuy system, including the Add to Cart view, Item Comparison view and more.*

- *System features are best viewed in the browser versions listed above. Other browser versions may not display correctly.*

Navigating Texas SmartBuy
On Texas SmartBuy there are a couple of ways to find information.
- The top header navigation is grouped based on the type of user searching for the information.

- CONTRACTS links to statewide contracts issued by the Statewide Procurement Division.
- VENDOR contains links find information like bid opportunities and how to sign up to the Centralized Master Bidders List (CMBL) to receive bid notifications.
- GOVERNMENT has links that government users need.
- TRANSPARENCY contains publicly available data reports.
- HELP contains contact information and user guides.
- Within the dropdown, the links with square containing the arrow indicates the link will redirect elsewhere on the Comptroller's website.
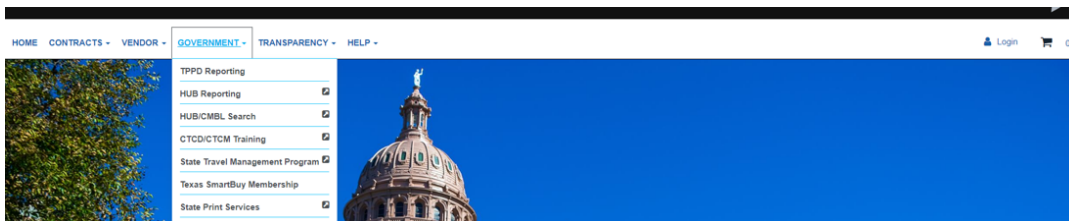
Below the image of the capitol there is more guidance.
1. For a high-level view of information about the topics in the tile, click the blue title to view the information splash page. From there it is easy to navigate to more in depth information into the desired topic.
2. Otherwise, use the direct links below the title to navigate directly to a specific topic.

Below the tiles is a sign up to receive notifications on contract activities though GovDelivery, and view recent notifications in the live news feed.

Public Purchase Order Search

From the Transparency tab on the top navigation, non-logged in users can search for specific purchase orders purchased through Texas SmartBuy systems. On the navigation bar, clicking the Transparency drop down menu and selecting PO Lookup users can enter the purchase order number to begin a search.

After clicking search, the purchase order will be displayed and the purchase order number and clicking the purchase order number the user can download a PDF copy.

Login

Logging in:

1. Click Login in the upper righthand corner of the navigation bar.
2. Enter your user ID and password.
3. Click the Log In button.
4. If you need login access, view your agency's superusers who can set up your access.
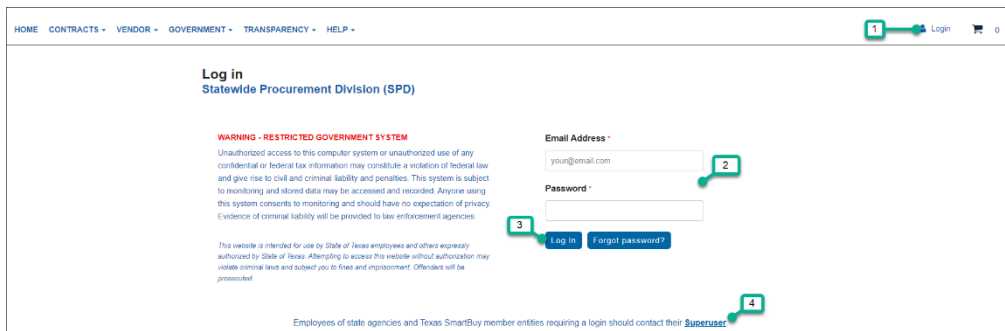
After logging in you will be taken to My Account Overview page you can:

- View purchase order and purchase requisitions
- Manage account settings
- View agency address book and set default shipping and billing addresses
- Cart Management allows users manage, re-name, delete saved carts and favorite carts
- Users is only visible for those with Superuser access
- Depending on your level of access in the system, you may have less options on the left side navigation than is shown below.
- You can get back to this page at any time by hovering your mouse over you name in the header and choosing My Account.

Searching for items

Search Bar

On Texas SmartBuy, the search bar is used in a variety of ways to locate items for purchasing. Users may search for items based on commodity code, supplier part number, NIGP code, or by keyword. On the left side of the search bar users can select to search by TXMAS, Term, WorkQuest, and TCI items in addition to other options.

On the home page, the search bar is located directly at the top in the center of the header bar which can be used publicly, without logging in as a purchaser.

The following filters can be used in the pull down in the search box to indicate what field you want to search to help narrow your search results:
- Keyword
- TXMAS
- Term
- TCI
- WorkQuest, Inc
- NIGP
- Commodity code
- Part #
-

TIPS:
If a specific commodity code or part number is not available, enter in as much detail about the item for the best group of results.

Browse items by contract

At the upper left of the Texas SmartBuy home page under the Contracts menu, users can select the "Browse Contracts" link to view a list of all statewide contracts administered by the Comptroller's office.

Search among the list of all contracts by the contract number, contractor/dealer, the base contract number, the contract category, GSA Schedule, keywords, the Vendor ID, or the NIGP Code.

1. Narrow your results by filtering by contract type
2. View the contract by clicking on the linked contract number
3. Clicking on the items link it will return all the items on the selected contract

Each contract number links to a Contract Details page.

On the **Contract Details** page for any Texas SmartBuy Term and TXMAS contracts, a button titled "Search for items in this contract" is available under the Contract heading.

Select that button to create a search narrowed to o n l y   items available on that contract.

Filters

Using filters is a fast and easy way to narrow down a large amount of search results to a more manageable sample. Once a user has searched for an item on the web store, filters are available on the left-hand side of the webpage.

Available filters include:

- Contract Type
- Contract Number
- Contractor
- Item Category
- Zone

TIP: Multiple filters can be used to further narrow down search results.

Narrow By

Contract Type ⌄

Contract ⌄

Contractor / Supplier ⌄

Item Category ⌄

Zone ⌄

Sorting

Sorting allows users to manipulate the search results and organize the data based on certain criteria. By using the Sort function, users can easily locate items based on:

- Preferred Vendor
- Price, Low to High
- Price, High to Low
- Relevance

The Sort drop-down menu is available directly below the Results Found heading. To use the sorting function, simply click on the arrow next to the "Sort By:" drop-down menu and select the desired criteria.

5000 Products   100 per page ⌄   Preferred Vendor ⌄   **Export to CSV**

Page organization of search results

When there are several pages of results, page links appear at the top of the search results page. Users can view all of the search results by navigating through the various pages.

Page 1 of 50 Pages   **1**   2   3   4   5   6   7   8   9   10   >   >>

Note: If item search results include TCI or WorkQuest items, the first 5 items will be TCI and WorkQuest. There may be additional items for them farther down in the list of returned items to use the contractor filter on the left-hand side of the page to view all their item results.

Display number of results per page

Users can expand the number of search results shown on the page from 50 to 100. This can be helpful for printing results for procurement files and more.

100 per page ⌄

Item Comparison

On the search results page, users can compare up to five items side-by-side to determine the best value item for purchase, or to see any differences between two or more items.

The compare tool allows users to compare various item criteria such as price, contract type, and description on one screen.

STEP 1: Below the "Add to Cart" button on every search result item, select the "Compare" button for items of interest. For users that are not logged in, the compare button will appear beneath the "Add to Wish List" button.

Price
$69.89
UOM
EACH

[Add To Wishlist]

[Compare]

STEP 2: Once two or more items have been selected, click on the red "Compare Items" button located at the right of the item selected to compare.

Price
$66.37
UOM
EACH

[Add To Wishlist]

[Compare Items]

STEP 3: Review the results. Remember to check zones, areas, and highway districts to confirm item availability.

STEP 4: Use the Add to Cart button at the bottom of an item's column to add that item to the cart. Remove the item from comparison by selecting the remove button at the bottom. Or simply close the comparison window in the upper right corner.


Download Search Results

The Export to CSV function creates a data file in the CSV (comma delimited) format for users to save to their local device and view the search results in spreadsheet software such as Microsoft Excel or Apple Numbers. When comparing a large number of items on a search, it may be easier for users to export the results and review them in a spreadsheet format.

STEP 1: Search for any item(s) using the search bar and click the search icon.

STEP 2: On the search results page, click the blue "Export to CSV" button. This will automatically download a CSV file.
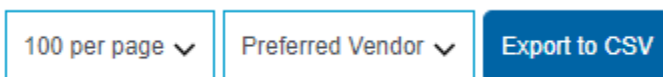
STEP 3: The export can be viewed either using Excel or a text application like Note Pad.

Add to Wish List

The "Add to wish list" feature is useful for employees to compile specific items, options, and pricing they want to request. A list of several items can be created and printed or saved as a PDF to email. Items on a wish list **cannot** be ordered without a Texas SmartBuy username and password the carts can be shared with a user who has purchasing access.

Contractors are encouraged to use this feature to support communication with Agency/SmartBuy Members to help compile item information for purchasing requests and orders.

The steps for adding items to your cart are the same if a user is a logged in purchaser or a public user.

Shopping for items

All visitors to Texas SmartBuy can search and add items to a wish list. Authorized Purchasers are able to log in with a username and password to Add to Cart, checkout and finalize purchases. Public users will have the ability to Add to Wishlist. The shopping steps are the same for both types of users, but the buttons will be labeled differently.

The "Add to ..." button is accessible to all site visitors from the:
1. Search Results page
2. Item Details page
3. Item Comparison view

Item Information

Attributes

When viewing certain items, users can customize their item by selecting various item attributes, such as item color, size, finish, and more.

Dealers

Items available on certain TXMAS contracts may be fulfilled by local dealers. The dealer list will be displayed as a drop-down list beneath the quantity in the "Add Item to Wish List" view.

Users may select a specific dealer *(if applicable)* and should advise their purchaser colleagues to call in advance to the specific dealer to confirm availability before placing an order on Texas SmartBuy.

Additional Charges, Priced Options, TXMAS Incidentals

Additional Options

Pre-defined charges associated with specific contract items may appear as a drop-down list on the "Charges" tab in the Additional Charges area of the Add Item to Wish List view. Some examples of "Charges" include freight, installation, removal, and inside delivery.

Additional charges may be added by selecting the "Add New" button beneath the charge line. Edits can be made to each line as often as needed. A charge may also be removed by selecting the black "X" button to the right of the charge.

The subtotal of the price for the Charge items will appear to the right of the tabs.

TXMAS Incidentals

For TXMAS contract items, various incidental charges may be associated with an item. "TXMAS Incidentals" appears as a tab. Incidentals should only be utilized when the necessary charges are not available on the "Charges" tab.

Enter the *Price* and *Description* of the incidental and select the "Add New" button to include an incidental. The subtotal of the price for the incidental items will be added to the total.

Additional Options

Additional Options are items that are linked to your primary item. You are not required to add any of these items, but they are available to be added if needed.

Options typically have a cost that will increase or decrease the primary item price. For example, a passenger van could have several options that customize the van to match the procurement requirements.

To add a linked item, go to the Additional Options tab. All applicable options will be shown. Select the "Add New" button to create another line. Additional lines can only be added for each available option. To delete a linked option, select the blue X at the right end of the row.

The subtotal for all charges will show to the right of the Additional Charges header. In this example there are $70 of additional charges and $50 of TXMAS incidentals which add up to the $120 subtotal.

How to use your Wish List

A Wish Lists from a non-logged in user can print, export as a .csv or PDF, or share the wish list with an authorized purchaser to complete the order.

Print Wish List or Export to a PDF

Use the "Print" button at the bottom of the Wish List to open the browser's software print window. Users can export the Wish List as a PDF to save and send to others via email. Contractors are encouraged to use this feature to support communication with Agency/SmartBuy Members to help compile item information for purchasing requests and orders.

To share your Wish List

- Select Share
- Choose either option 1 that will generate an email using your default email application or option 2 and copy the URL listed into your email
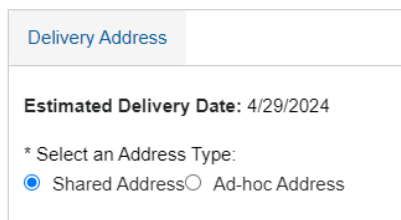
The email will contain a link for the purchaser to use to create the shared cart. When they click the link, they will be asked to login to Texas SmartBuy. Once they log in, their cart will be populated with the shared items.

Estimated Delivery Date

As users add items to the cart, they will see an estimated delivery dates of certain items to meet their specific needs. This allows purchasers to anticipate not only the location, but the time at which their purchased items are delivered.

Note: When starting a cart, it will have the default address in your account added to the item. If this is not the correct delivery location for the item, you will need to change it. After checking out if a new cart is started, it will retain your previous entered address.

Make sure to verify the cart has correct shipping addresses before completing the order.
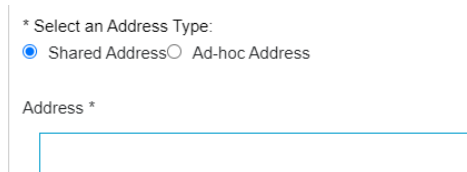

Ship-To Addresses

Shared addresses

Each state agency or SmartBuy Member account has pre-established addresses for shipping and billing stored In the Address Book available in the My Account section. Purchasers can set their preferred billing and shipping addresses as defaults within the Address Book. This feature allows purchasers to add items to the cart and check out quickly by selecting from these saved addresses in the Add to Cart view.

Superusers can add and remove addresses in the shared address book after they login and go to addresses in My Account.

Ad-hoc addresses

Selecting the "Ad-hoc address" option allows purchasers to enter in a different address than those listed on the pre-defined address list. This is useful for purchases delivered to a location not typically used in the normal course of business.

NOTE: Ad-hoc addresses are saved to the line item only and are not stored in your Address Book. To add or make changes to a regularly used address, contact your Superuser.

* Select an Address Type:
○ Shared Address ● Ad-hoc Address

Address Details:

[*Street Address (Required)]

[Bldg/Apt/Suite]

[*City (Required)]

[State ∨] [*Zip Code (Required)]

Additional Address Details:

[Addressee]

[Phone]

My Cart View

Once items are added, they will appear in total on the shopping cart

Edit/Remove Item(s)

1. Users can make edits to an item after adding them to a wish list. Use the "Edit" button located next to each item in the list to change item information such as quantity, charges, and options.
2. Use the "Remove" button to quickly remove items from your cart.

Note the max number of items you can put in a cart is 40 items, incidentals and optional items will count toward the total number of items.

Item		Shipping	Price	Qty	UOM	Total
Quote TXMAS-20-51V05 - Vans		, TX	$1.00	5000	DAY	$5,000.00
Fuel			$50.00	1		$50.00
Pickup & Delivery			$20.00	1		$20.00
Incidental Item			$50.00	1		$50.00

Order Details ⌄

Note	Actions
	1 Edit
	2 Remove

Add Note

For each individual line item, the "Add Note" text field is available for purchasers to enter any extra instructions and details regarding the purchase, or the item itself. This text field is located at the bottom of each item added to a cart.

TIPS:
- *A note can display up to 300 characters and will appear with the line item on the purchase order form.*
- *To add a note that will appear at the top of the purchase order (rather than at line level), please refer to the "Checkout" section..*

IMPORTANT: Please allow the page to store the note and refresh before selecting the "Proceed to Checkout" button. A spinning wheel will show until the note is submitted. This process may take up to 30 seconds.

Add Attachment

After an item is added to a cart, users can add an attachment to the purchase order to be submitted to the Contractor (or Dealer). This functionality allows the purchaser to include pertinent information such as delivery location, price sheet, dimensions, or any other additional details regarding the order.

If an order has multiple items for multiple Contractors (or Dealers), users can add an attachment for each line item so that only the specified Contractor is sent the attached file.

IMPORTANT: Please allow the page refresh before continuing – A spinning wheel will show until the attachment is submitted. This process may take up to 30 seconds.

Edit/Remove Item(s)

Purchasers can make edits to an item after adding them to a cart. The quantity can be updated on the My Cart screen. By using the "Edit" button located next to each item in a cart, purchasers can easily edit item information such as quantity, delivery date, miles to deliver, shipping address, and charges and options.

Purchasers can use the "Remove" button to quickly remove items from their cart and check out without having to create a brand-new cart.

Checkout

Once items are reviewed, proceed to checkout.

- After adding an item to the cart there will be an option to continue shopping or view cart and checkout.
- View your cart at any time by hovering over the mini cart in the upper right corner of the page and choose view cart. Review the cart once more and complete checkout.

Billing Address

- After choosing checkout the user will be taken to the final checkout page. The Default Billing Address will be displayed, but the user can change it by typing in the Billing Address box and the type ahead will present alternative billing addresses from the agency's address book.

Tracking Number

- This field can be any value; however, most purchasers place their internal requisition number here. It will appear on the Purchase Order.

Save As Favorite (Optional)

- This feature allows the user to save a cart to use repeatedly if it something that user plans purchase frequently. Fill in the name of the Favorite Cart and after checking out it will be available in Cart Management which can be accessed through My Account or through My Carts.

Multi-Cart Functionality

Purchasers can save multiple shopping carts in Texas SmartBuy to support internal decision-making and save work-in-progress. These carts can be saved under different names, added, shared with others, or deleted at the purchaser's discretion.

Starting a New Cart

Once logged into Texas SmartBuy, from any page, click the "Saved Carts" dropdown menu. Here view all of the Saved Carts that the user currently has. Select "New Cart" to create a new Cart.

Upon selecting "New Cart," the current page will be refreshed a new Cart will be created. By default, this new cart will be named "My Cart" and will now be selected as the Current Cart. The cart will display a message that the new cart is empty.

Note: At any time, only one Cart is marked "(current)." This indicates which Cart items will fall into when shopping. Also, the cart designated as "current" contains the items that are being displayed in the mini cart count.

Renaming a Cart

IMPORTANT: To change the name of a Cart, at least one item must be in the Cart.

To rename name cart select view cart after hovering over the cart icon.
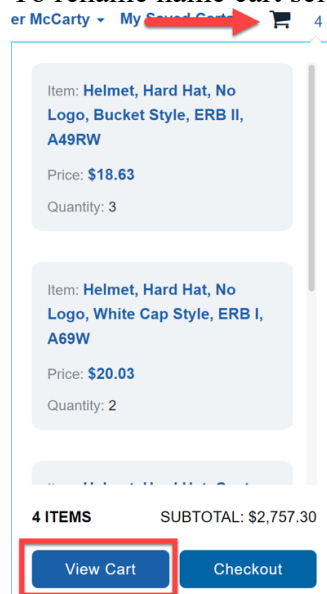
Within the View Cart screen there is a button near the top right of the page called Save Cart As, select this button to rename your cart.

Save Cart As

Download PDF   Download CSV   Share/Email

Delete Cart

Checkout

Enter the Name for the cart and submit in the pop-up modal.

Edit Cart Name   ×

Saved Cart Name *

Users First Saved Cart

Submit

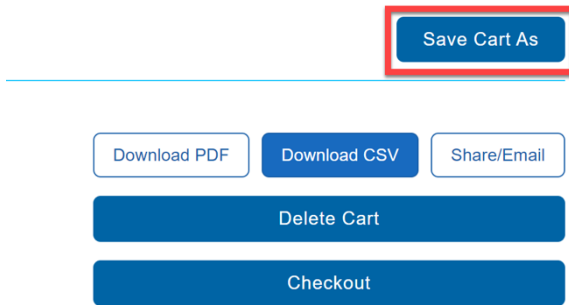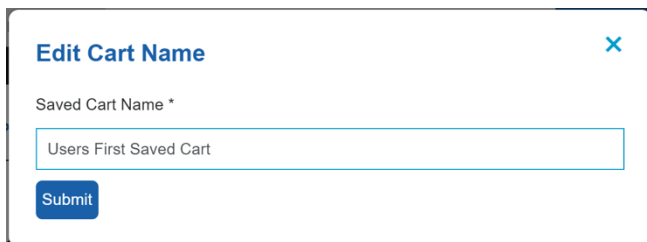An alternative way to rename is cart is to navigate to the Saved Cart page under Cart Management. On the Cart page, click the edit button next to the cart to change its name.

	Cart Name	Total Lines	Cart Total	Last Used
	My New Cart (New Site)	2	$117.06	3/11/2024 1:54 pm

Items   ⌄

Proceed to checkout
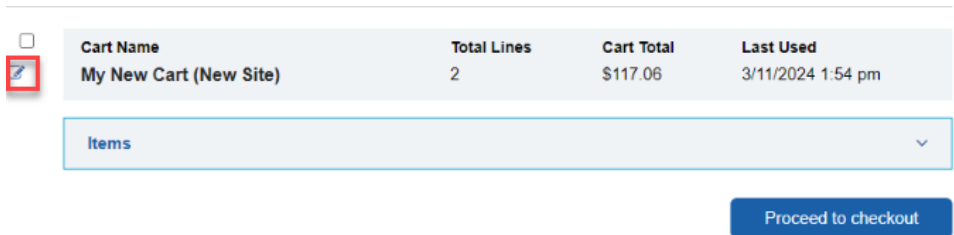
Upon clicking this button, a modal will pop up prompting you to change the name. Type in the desired name,   and then click the "Submit" button.

Edit Cart   ×

Saved Cart Name *

Help Documentation Cart

Submit

Sharing a Cart

To share a Cart, navigate to the cart's page. Click the **Share/Email** option.
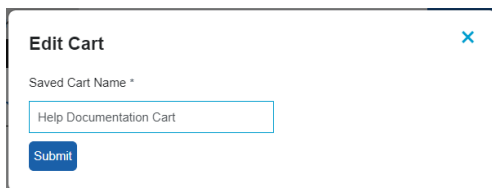
IMPORTANT: Check out is complete, the current cart will be removed. To save your order to re-order at another time, use the Favorite Order feature on the Check Out screen.

Upon selecting this option, a modal will pop up with 2 different options.

Option 1 – Share the Cart through an email client. With this option, click the "Share Cart" button and your default email client will pop up with a new email being drafted. The subject line will be automatically populated, and the body of the email will contain the URL to the saved Cart.

Option 2 – Manually share the Cart. If Option 1 is not working properly with the users defaulted email client, simply copy the URL provided in the box, paste it in the body of an email, and manually send the cart to the preferred recipients.

Deleting a Cart

There does not have to be any items in the Cart to delete it. To delete a Cart, navigate to that cart's page, select the button that says "Delete Cart" to permanently delete the cart.

TXMAS Quotes

All TXMAS purchase orders must be issued from the Texas SmartBuy system to be eligible for contract pricing. The Contractor will not ship any products or provide related services until receipt of a Purchase Order generated by the Texas SmartBuy system.

PO's containing quotes will be placed on hold before generating a PO and reviewed by SPD Contract Management. They will contact you with any questions about the quote and the system will notify you once it has been approved and the PO is generated. While it is being reviewed it will show in the My Account area under Purchase Requisitions with the status of Requisition on Hold.

For certain TXMAS contracts, purchasers will need to add quote items to cart to create a Texas SmartBuy purchase order.

STEP 1: Search for quote item(s) on TXMAS contracts by using the keyword QUOTE in search bar.

STEP 2: Find the service quote or other quote item available from the TXMAS Contractor and add that item to cart.

STEP 3: In the Add to Cart view, update the Item Quantity to the dollar amount of the quote and select Add to Cart.

STEP 4: On the My Cart screen, add the contractor quote as an attachment and add a note, if needed. To remove an attachment, select the black X button to the right of the attachment link.

IMPORTANT: Please allow the page to store the attachment and/or note and refresh before selecting the "Proceed to Checkout" button. A spinning wheel will show until the note is submitted. This process may take up to 30 seconds.

Checkout

After a user selects their preferred items and fills their cart, they are now ready to check out. The "Checkout" screen in Texas SmartBuy allows the purchaser to purchase items, select destinations for billing, and provide shipment tracking information. To continue to Checkout, select the "Proceed to Checkout" button at the bottom of the Cart screen.
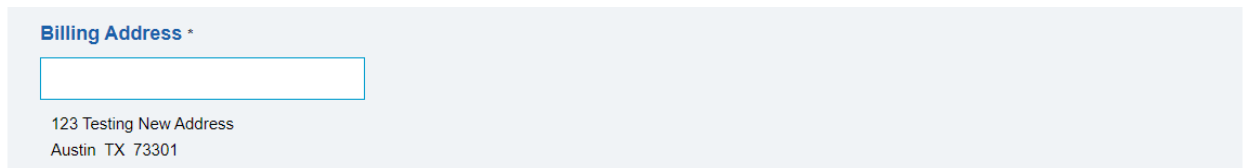
Select Billing Address

Texas SmartBuy allows users to define a *Default Billing Address* for the most common transactions. On the Checkout page, purchasers can use their default billing address or select from other designated billing addresses. Ad hoc billing addresses are not allowed. Purchasers should contact their Agency/SmartBuy Members superuser to request additional billing addresses or revisions.

Default Billing Address

The pre-defined billing address, or *Default Billing Address,* is the address that will be automatically loaded onto the checkout screen...

Billing Address *

123 Testing New Address
Austin TX 73301

NOTE: The Default Billing Address can be updated on the Addresses page in the My Account area.

Internal Tracking Number
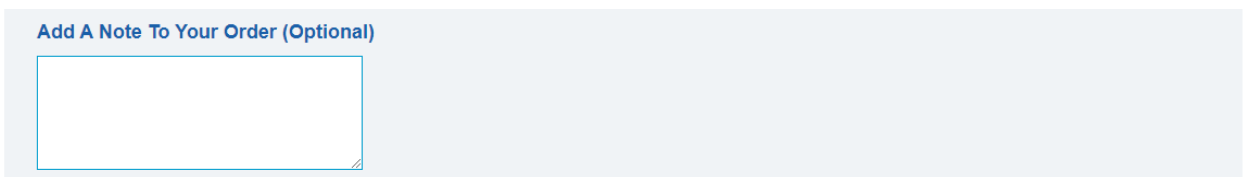
The Internal Tracking Number is a required field that allows the purchaser to easily track a Texas SmartBuy purchase order using an internally assigned requisition or purchase order number or another designation that can help the purchaser identify a purchase. The Internal Tracking Number input field is found in the center of the checkout screen. This number is also listed on each PO record in the Purchase Orders section under My Account.

Tracking Number *

Add Note to entire order

A purchaser can add a custom note to the entire order as opposed to the line item level. Header-level notes will print on each resulting PO and can be helpful for providing additional information - other than the item list, address, or tracking number - to multiple contractors. If the notes are longer than the allowed space, attach a document containing the information and it will be included with the PO to the Contractor.

Add A Note To Your Order (Optional)

My Account

Agency and SmartBuy Members sign in to TxSmartBuy.com using an e-mail address and password. All purchasers will be required to log in before checking out. The sign-in button can be found at the top right of the home page.

HOME CONTRACTS ▾ VENDOR ▾ GOVERNMENT ▾ TRANSPARENCY ▾ HELP ▾   👤 Login   🛒 0

Update Your Password

Agency and SmartBuy Member purchasers may change or update their password at any time through the My Account section of Texas SmartBuy.

STEP 1: Click on your name on the header bar, on the top right side of the screen, then click My Account. This will take you to an overview of your account.

STEP 2: Under settings, select the "Update Your Password" option.

STEP 3: Enter your current password, followed by the new password of your choice. Confirm your new password once more to ensure accuracy and update your account.

My Account

| OVERVIEW |
| PURCHASES ⌄ |
| SETTINGS ⌃ |
| Update Your Password |
| Update Security Questions |
| ADDRESS BOOK |
| CART MANAGEMENT ⌄ |
| MY APPLICATIONS ⌄ |
| USERS |

Security questions

The security questions linked to your account may also be changed in the "My Account" page in the "Update Security Questions" under the settings section.

Purchase Requisitions list view

After the checkout process is completed, a new requisition will be added in the Purchase Requisitions section. If the status shows Pending Approval, the requisition may be on hold for approval. You can the Purchase Requisitions on the My Account Page under Purchases select Purchase Requisition

Purchase Orders list view

Purchasers can view Purchase Orders submitted by going to My Account and select Purchase Orders found under Purchases.

Purchase Order Filters

The Purchase Orders list view can be narrowed to search for a specific purchase order or group of purchase orders by using the filters at the top of the list. Filters can be used individually or in combination to create custom lists of purchase orders.

The filters available are:

Purchase Order Number
Enter an 8-digit purchase order to find a specific purchase order.

Contractor

Enter any portion, or group of letters, of a Contractor's name to narrow the list of purchase orders to contractors containing the information entered. (E.g. entering "Industries" will return results for any contractor whose name contains the word "Industries," whereas entering "Ind" will return results for any contractor whose name contains the "Ind" letter combination.)

Internal Tracking Number

Enter the Internal Tracking Number used on any purchase order to find that specific purchase order.

Purchaser

Enter the name of a purchaser to see any purchase orders associated with their name.

Date Range

Using the Date Range filter will narrow the list of purchase orders to orders created within that specific date range. Ranges include: this week, this month, this fiscal year, last week, last month, last fiscal year, and custom.

Start Date/End Date

By selecting custom in the Date Range, the list can be filtered to narrow the list to any date range. Enter the start and end dates of the range desired.

After entering all the required filters, click the Search button to filter the purchase order list. To return to the unfiltered list, click Clear Filters.

Purchase Order Change Notice / PO Cancellation

A purchase order change notice, or POCN, is created when a purchaser goes back to a previous order and makes changes to an order. Purchasers can edit purchase order details, including quantity, delivery date, and shipping address. The following sections go into further detail about the specific changes.

Changes to quantity, delivery date, shipping address, and more

STEP 1: Navigate to the Purchase Orders screen.

STEP 2: Select the PO Number to access the details of the PO.

PO #	Order Date	Contractor	Status	Tracking #	Purchaser	Total
24091587	3/14/2024	Sid Tool Co., Inc. dba MSC Industrial Supply Co.	PO Issued	12123321321321	Christopher McCarty	$445.45

STEP 3: On the Purchase Order Details screen, click "Edit" on the line item to make changes.

Purchase Order Details - 24091587

Back to results

PO Header   Edit

PO Number: 24091587 - View PDF

Tracking Number:12123321321321

PO Notes:

Upload a file (optional)

[Choose File] No file chosen

Order Date	3/14/2024
Order Status	PO Issued
Order Total	$445.45
Purchaser	Christopher McCarty
Agency/Member	Comptroller Of Public Accounts - 304
Contractor	Sid Tool Co., Inc. dba MSC Industrial Supply Co.

[Reorder PO]   [Share PO]

[Submit PO Changes]   [Cancel PO]

Item	Commodity	Address	QTY	UOM	Price	Total	Edit
Safety	44580	Comptroller Of Public Accounts - 304 Abilene, TX 79606	15	EACH	$31.83	$477.45	
Volume Disc. Enter Total -$ Amount			1		$-33.00	$-33.00	
Incidental Item		working fee	1		$1.00	$1.00	

STEP 4: On the pop-up window, make the necessary changes to quantity and select "Update".

STEP 5: Once the update has been made the Purchase Order, select Submit PO Changes to submit all changes made.

PO Header   Edit

PO Number: 24091587 - View PDF

Tracking Number:12123321321321

PO Notes:

Upload a file (optional)

[Choose File] No file chosen

Order Date	3/14/2024
Order Status	PO Issued
Order Total	$445.45
Purchaser	Christopher McCarty
Agency/Member	Comptroller Of Public Accounts - 304
Contractor	Sid Tool Co., Inc. dba MSC Industrial Supply Co.

[Reorder PO]   [Share PO]

[Submit PO Changes]   [Cancel PO]

TIP: Purchase Order Change Notices take up to 15 minutes to generate. The Purchaser and Contractor will receive an email with a PDF attachment of the POCN.

TIP: Once all updates have been made, please allow up to 30 seconds for the page to submit.

If your PO delivery date is more than a year old or if it contains quote hold items you will request a POCN. Instead of a "Submit PO Changes" button, it will be "Request Changes."

PO Header   Edit

PO Number: 24091594 - View PDF

Tracking Number:Quote Items

PO Notes:

Upload a file (optional)

[Choose File] No file chosen
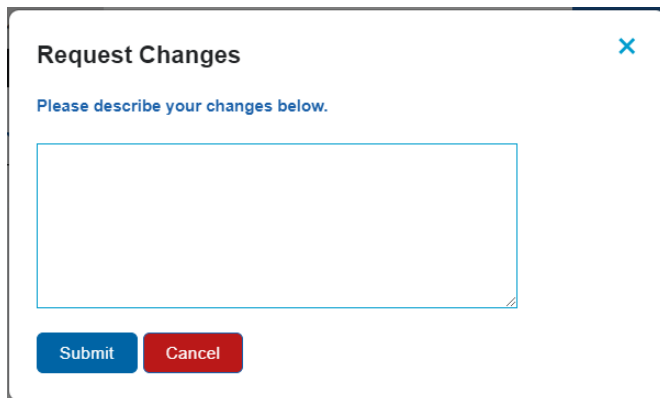
Order Date	3/14/2024
Order Status	PO Issued
Order Total	$10,000.00
Purchaser	Nathan Thompson
Agency/Member	Comptroller Of Public Accounts - 304
Contractor	TCI

[Reorder PO]   [Share PO]

[Request Changes]   [Cancel PO]

For the Requested POCN Changes

Include:

- **Item(s) that need to be changed current value-> new value**
- **Items that need to cancelled if applicable**
- **Current PO value->new PO total amount**
- **Any notes that need to be updated**

SPD Contract Management will review the POCN request and contact the purchaser with any questions or request any additional quote documentation from the contractor to support the changes to the PO.
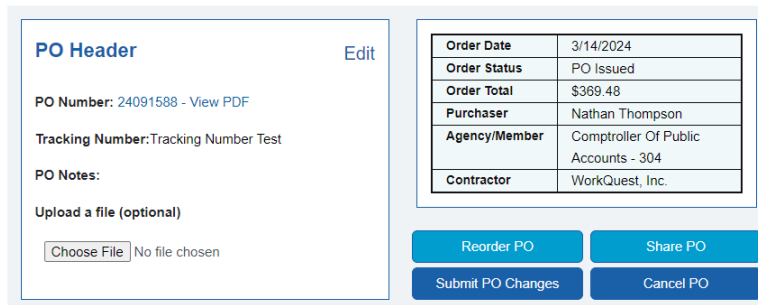
Request Changes ✕

Please describe your changes below.

[Submit] [Cancel]

Cancel entire PO and Cancellation reason

To cancel a Purchase Order:

STEP 1: Click on Purchase Orders under Purchases in the left-hand menu within My Account.

STEP 2: Click on Cancel PO
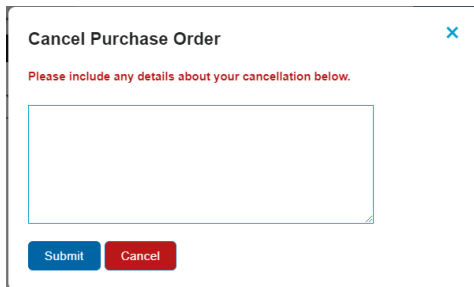
PO Header   Edit

PO Number: 24091588 - View PDF

Tracking Number:Tracking Number Test

PO Notes:

Upload a file (optional)

[Choose File] No file chosen

Order Date	3/14/2024
Order Status	PO Issued
Order Total	$369.48
Purchaser	Nathan Thompson
Agency/Member	Comptroller Of Public Accounts - 304
Contractor	WorkQuest, Inc.

[Reorder PO] [Share PO]
[Submit PO Changes] [Cancel PO]

STEP 3: When the cancellation pop-up appears, must enter a cancellation reason and select the "Cancel Purchase Order" button. The reason entered here will appear on the Purchase Order Cancellation PDF emailed to the Contractor.

NOTE: Please wait for the cancellation pop-up window to disappear. Do not click the Cancel Purchase Order button twice -- the pop-up will disappear automatically once the cancellation has been executed.

STEP 4: An email will immediately be sent to the Purchaser and Contractor that the order has been cancelled. The status of the Purchase Order will change to CANCELLED in the Purchase Orders List.

Commonwealth of Virginia

Department of General Services
Division of Purchases and Supply

2024 George Cronin
Awards for Procurement Excellence

Next-Gen eProcurement:

Innovation Drives

Efficiency in Virginia

Executive Summary

The Commonwealth of Virginia's Next-Gen eVA platform revolutionizes government procurement, delivering efficiency, transparency, and significant cost savings. This Executive Summary showcases the program's transformative impact and its potential to serve as a model for other states.

Challenge: Ensure fair, transparent, and efficient procurement for all Virginia entities and suppliers.

Solution: The Next-Gen eVA platform offers a robust, user-centric solution with:

- Seamless user adoption: A staged rollout and ongoing engagement minimized disruption and fostered a high 85% adoption rate.

- Enhanced functionality: Features like supplier self-registration and machine learning-powered sourcing streamline processes and optimize outcomes.

- Focus on training: The "Learning as a Journey" program provides a flexible, blended learning approach to empower users of all experience levels.

- Cost savings: In FY23 alone, eVA generated over $5.8 million in cost reductions.

Key Benefits:

- Increased transparency: Publicly accessible reports and dashboards ensure accountability.

- Expanded opportunities: The platform welcomes businesses of all nationalities, fostering global competition for a wider supplier base (now over 193,000 vendors).

- Improved services: Features like eInvoicing will go live in June 2024, and entity-specific workflows enhance communication and user experience.

Transferable success: Virginia's innovative approach offers a roadmap for other states. Key elements for replication include:

- Stakeholder engagement: Early and continuous engagement with all stakeholders is crucial.

- Uninterrupted implementation: Ivalua provided a continuation of existing eVA services for end users while the project team was able to support a one-time transition of the eVA program to the Next-Gen eVA program.

- Focus on training and support: Invest in a well-rounded training program.

- Technology with a human touch: Prioritize clear communication, intuitive design, and ongoing support.

Virginia's Next-Gen eVA platform is a model for excellence in government procurement. By adopting these core principles, other states can achieve similar success.

Innovation

The Commonwealth of Virginia is streamlining procurement from start to finish.

The Next-Gen eVA program isn't just an upgrade, it's a revolution in government procurement. We understand that a smooth transition and innovative solutions are key to user adoption and program success. Here's what sets us apart:

Seamless onboarding and increased user base: We prioritized a user-friendly experience from the get-go. Our innovative approach minimized disruption during the transition, evidenced by a 5.1% increase in vendors (over 11,000) and a 12.9% growth in active users (over 1,400) since the November 2022 launch (See Exhibit #1). This signifies not only ease of use but also the program's growing appeal.

One-stop procurement hub: Imagine a future where requisitioning, purchasing, receiving, paying through a procurement card, and accounting for goods and services happen seamlessly in one system. That's the revolutionary P2P (Procure-to-Pay) process we are integrating. This innovation streamlines accounts payable, enhances auditing capabilities, and saves valuable time and resources.

Future-proofing with digitized training: We recognized the need for robust training to empower users in the Next-Gen environment. The Virginia Institute of Procurement's (VIP) "Learning as a Journey" program bridges the digital learning gap. This blended approach offers a comprehensive curriculum – over 18,771 learners – through 32 eLearning, videos, instructor-led sessions, and more. This ensures everyone has the skills to thrive in the new system.

Empowering suppliers of all sizes: The Next-Gen eVA platform prioritizes accessibility for suppliers. Our innovative features simplify business opportunity identification, contract management, purchase order processing, and procurement card payments – making it easier than ever for businesses of all sizes to work with the Commonwealth. This has translated to serving a wider supplier base – currently supporting over 193,000 vendors across 216 Commonwealth entities and over 800 local public bodies.

The Next-Gen eVA program doesn't just modernize procurement; it revolutionizes it. Through innovation and a user-centric approach, we're fostering efficiency, transparency, and inclusivity for all stakeholders.

Transferability

The Commonwealth of Virginia's Next-Gen eVA platform offers a groundbreaking model for transferable government procurement innovation. Virginia wants to share our eVA success story. Here's how Virginia achieved success and how other states can replicate it:

Innovation in Two Key Areas:

- Seamless user adoption: Transitioning to a new system can be disruptive. Virginia addressed this by prioritizing user experience. A key innovation was the continuation of the system while the support team completed a one-time transition with ongoing engagement. This allowed users to familiarize themselves with the new system while minimizing disruption to existing workflows. The 5.1% increase in vendors (over 11,000) and 12.9% growth in active users (over 1,400) since launch are testaments to this success (See Exhibit #1).

- Focus on continuous learning: Traditional, one-time training often proves insufficient for complex new systems. Virginia adopted a blended learning approach called "Learning as a Journey." This offers a flexible curriculum with eLearning modules, videos, instructor-led sessions, and more (See https://eva.virginia.gov/eva-learning-pathways.html). This ensures users of all experience levels have the ongoing support they need to thrive in the new environment.

Key elements for replication by other states:

- Stakeholder engagement: Early and continuous engagement with all stakeholders (agencies, suppliers, and citizens) is crucial. Virginia conducted extensive requirements-gathering sessions to understand the diverse needs of its user base. This informed the development of the eVA RFP and ensured the new platform addressed user pain points.

- Uninterrupted implementation: A continuation of the existing system allowed the support team to focus on a one-time transition to the Next-Gen eVA system. Virginia's approach minimized disruption and facilitated user familiarization with the new system.

- Focus on training and support: Investing in a well-rounded training program is essential for user adoption. Virginia's "Learning as a Journey" program provides a flexible, user-centric approach that caters to diverse learning styles and ongoing support needs.

- Technology with a human touch: While technology is a key driver, user experience is paramount. Virginia's focus on clear communication, intuitive design, and ongoing support ensures a smooth transition for all stakeholders.

By adopting these core principles and tailoring them to their specific needs, other states can leverage Virginia's eVA success story as a roadmap for implementing their own innovative and transferable government procurement solutions.

Service Improvement

The Commonwealth of Virginia is committed to continuous improvement. It is a hub for enhanced services, and the Next-Gen eVA platform reflects that dedication. We've gone beyond simply updating technology – we've transformed the user experience and service delivery. Here's how:

Revolutionizing training: Gone are the days of location-specific, instructor-led training. We understand the power of digital learning, so we've partnered with the Virginia Institute of Procurement (VIP) to create a robust online training platform. The "Learning as a Journey" program offers a flexible, user-friendly approach with eLearning modules, video tutorials, and virtual instructor-led sessions (VILT). This ensures convenient access to training for all users, regardless of location or experience level. Learn more about Learning as a Journey: https://eva.virginia.gov/eva-learning-pathways.html

Empowering users with control: We recognize that different entities have specific needs. The Next-Gen eVA platform offers entity-specific user and reference data management. Authorized users now can delegate maintenance tasks and manage large data sets more efficiently. Additionally, entity-specific requisition approval workflows provide greater control and customization over the procurement process.

Global reach, and seamless transactions: The Next-Gen eVA platform welcomes businesses of all nationalities. Our foreign supplier support feature simplifies registration by dynamically adjusting the process based on location. This fosters global competition and expands opportunities for qualified vendors.

Transparency at your fingertips: We prioritize open and transparent procurement practices. The platform provides publicly accessible reports and dashboards, allowing stakeholders to monitor procurement activity easily. This fosters trust and accountability within the system.

Streamlining the procurement cycle: Imagine a world where requisitioning, purchasing, receiving, paying for, and accounting for goods and services happen seamlessly. That's the vision behind our P2P (Procure-to-Pay) integration initiative. This innovative feature streamlines workflows, minimizes errors, and frees up valuable time and resources.

Simplifying invoice management: We understand the importance of efficient invoice processing for both buyers and suppliers. The Next-Gen eVA platform will introduce eInvoicing in June 2024, a feature that will allow authorized users to track and manage invoices directly within the system. This will enhance communication, transparency, and timeliness in the payment process.

By focusing on user-centric design, innovation, and accessibility, the Next-Gen eVA platform offers a new era of service delivery for government procurement. We're confident that this comprehensive suite of improvements will make eVA an even more valuable resource for all stakeholders.

Cost Reduction

Beyond efficiency and improved services, the Next-Gen eVA platform delivers significant cost reductions for the Commonwealth and its suppliers. Here's how:

Harnessing the power of sourcing tools: Our innovative sourcing tools help agencies find the best value for their procurement needs. In FY23 alone, these tools facilitated $44.5 million in total awards with an average cost savings of 13.1%. This translates to $5.8 million in direct savings for the Commonwealth.

The bottom line: In FY23 alone, the Next-Gen eVA platform generated over $5.8 million in cost reductions for the Commonwealth. These savings translate directly into more efficient use of taxpayer dollars and increased resources for vital government services.

By focusing on smart sourcing tools and process automation, the Next-Gen eVA platform delivers a compelling return on investment. We are committed to continuous improvement and finding new ways to leverage innovation for cost-effective procurement.

Conclusion

By successfully launching the Next-Gen eVA platform, the Commonwealth of Virginia has established itself as a leader in innovative and efficient government procurement. This robust solution delivers a trifecta of benefits: increased transparency, expanded opportunities for suppliers (supporting over 193,000!), and significant cost savings of $5.8 million in total annually. With an impressive 85% adoption rate and a self-supporting "software-as-a-service" model, eVA positions Virginia for continued scalability and best-in-class procurement practices well into the future. We are confident that eVA serves as a model for excellence in government procurement.

Exhibit #1
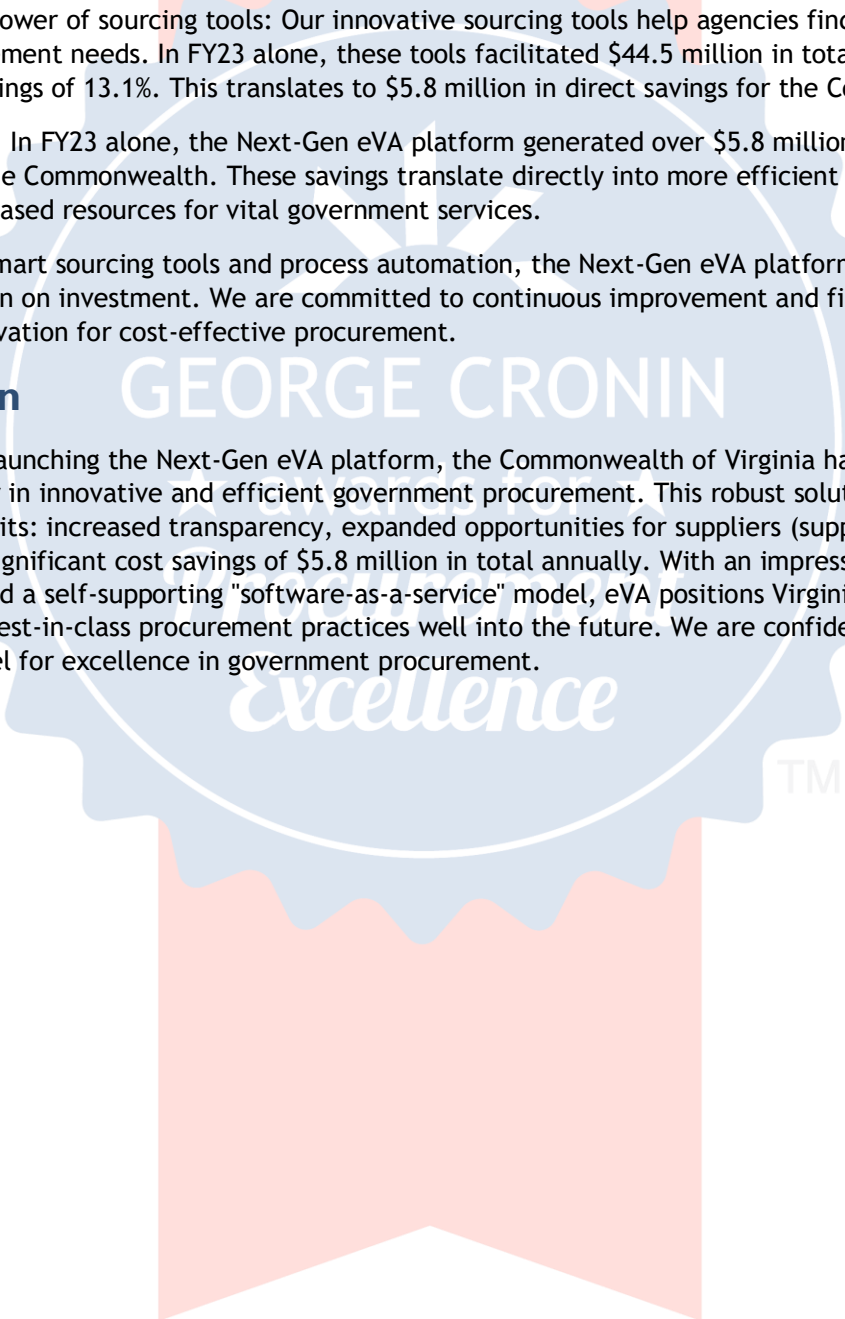
Fiscal Year
2023 Report

eVA FY23 Summary Report

Data Range: July 1, 2022 - June 30, 2023

Analyzed by Jonathan Eisenman
Strategic Data Analyst

Purchase Order Snapshot

Count of PO Transactions	Net Spend of PO Transactions	Cumulative
646,763	**$10.7 Billion**	**12,525,453 PO'S** **$156 Billion**
↓ 0.7% from FY2022	↑ 8.1% from FY2022	**Since eVA's Launch**

SWaM Metrics

	SWaM (all certifications)		Small (Includes Micro)		Micro	
Count of PO Transactions	**186,099**	↓ 4.4% FY22	**175,097**	↓ 2.3% FY22	**72,973**	↓ 5.9% FY22
Net Spend of PO Transactions	**$2.5 Billion**	↓ 2.6% FY22	**$2.3 Billion**	↓ 5.8% FY22	**$442 Million**	↑ 6.2% FY22

Solicitations

	VBO Buyer + S/C	Quick Quote	Total	
Count	5,468	2,868	8,336	↑ 1% FY22
Electronic Responses	5,631	10,218	15,849	↓ 11% FY22

eVA's Savings Highlights

eVA delivers savings and value to the Commonwealth of Virginia

$5.8 Million
In Savings

From small-dollar sourcing and
increased competition through **QUICK QUOTE**

eVA FY23 Vendor Report

Data Range: July 1, 2022 - June 30, 2023

Analyzed by Jonathan Eisenman
Strategic Data Analyst

66,883
Active
State-Entered
Vendors

28,885
Vendors
received at least
1 order in FY23

▲ 4.7% Change
over FY22

127,004
Active
Self-Registered
Vendors

11,165
New Vendor
Registrations

▲ 5.1% Change
over FY22

193,840
Vendors
with active registration
during FY 2023

97.4% Retention Rate
Retention rate of
SWaM Vendors with
active certification

SWaM Vendors

▼ 0.1% Change
over FY22

4,545
SWaM Vendors
received at least
1 order
in FY23

7,662
Micro
Certified

With an active
Certification
during FY23

12,739
Small
Certified

With an active
Certification
during FY23
(includes Micro)

13,178
SWaM Certified Vendors
(All SWam Values)
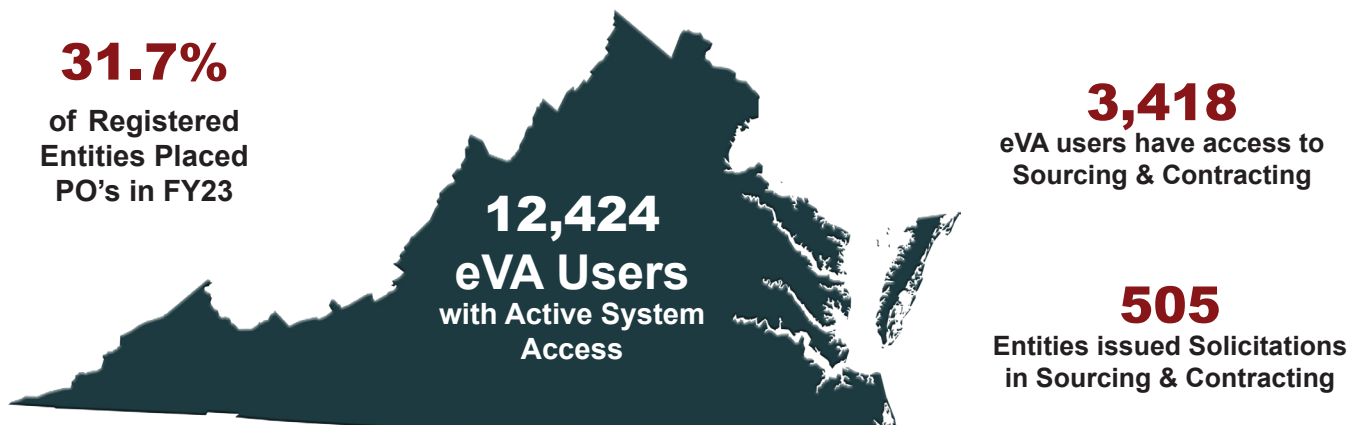
eVA FY23 Entity Spend Report

Data Range: July 1, 2022 - June 30, 2023

Analyzed by Jonathan Eisenman
Strategic Data Analyst

Composition of eVA Community & PO Spend

Entity Category	Entity Count	FY23 Spend	Percent of Total Spend	FY23 PO Transaction Count
State Agencies (Includes Executive, Legislative and Judicial)	173	$7.4 Billion	69.5%	217,591
Institutions for Higher Education	43	$3.1 Billion	29.3%	426,799
Local Bodies (Centralized & Decentralized Client Count)	808	$128 Million	1.2%	2,373
Private Universities	20	$0	0%	0
Grand Total	**1045**	**$10.7 Billion**	**100.00%**	**646,763**

31.7%
of Registered Entities Placed PO's in FY23

12,424 eVA Users
with Active System Access

3,418
eVA users have access to Sourcing & Contracting

505
Entities issued Solicitations in Sourcing & Contracting

Facts about eVA Activity

Top 3 Commodity Parent Classes with Highest Spend
005 - Abrasives
010 - Acoustical Tile, Insulating Materials, and Supplies
015 - Duplicating machine supplies: chemicals, ink, paper, etc.

Top 3 Commodities with Highest Spend
91371 - Maintenance & Repair, Hwy & Road
91327 - Construction, Hwy & Road
91200 - Maintenance and Repair Services

VDOT was the highest PO entity spend in FY2023

UVA was the entity with the most PO's issued in FY2023

3,599
All Socilition type Entities Awarded issued in FY2023

eVA FY23 Quick Quote Savings Analysis

Data Range: July 1, 2022 - June 30, 2023

Analyzed by Jonathan Eisenman
Strategic Data Analyst

13.1%
Average Savings

$5.8 Million
In Total Savings

$44.5 Million
In total awards
out of **1,358 awarded** Quick Quotes

QQ Responses
11,044 Electronic Responses
16,905 Total Bids by Line Item

Top 10 Entities with Highest Total Savings

Entity	Total Savings
Department of General Services	$957,369
Virginia Department of Transportation	$779,217
Virginia Department of Health	$334,227
Hanover County	$236,106
Department of Housing and Community Development	$217,620
Arlington County Government	$213,453
Virginia State Police	$201,573
Virginia Community College Shared Services Center	$151,014
Department of Forensic Science	$147,894
Indigent Defense Commision	$134,079

Total Savings from Awards to SWaM Businesses		Average QQ Savings by Solicitation	Average QQ Award by Solicitation	Average QQ # of Line Items
Micro	$0.5 M	$3,505	$27,987	3.6
Small	$2.1M			
Non-SWaM	$3.2 M			

eVA FY2 Cycle Time Analysis
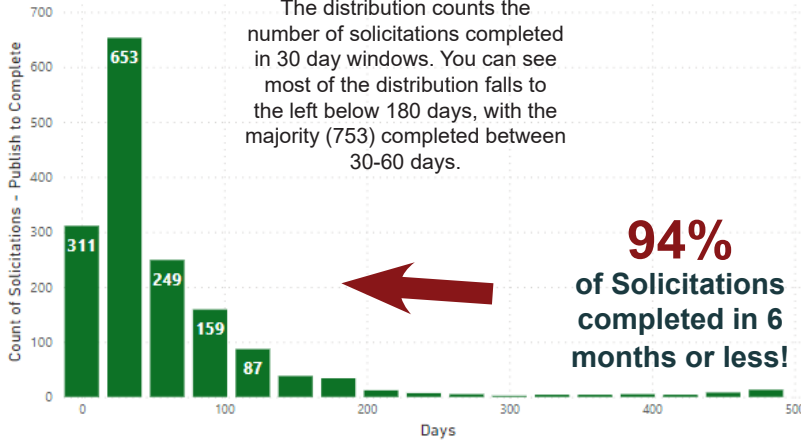
Data Range: July 1, 2022 - June 30, 2023

eVA
DGS

Analyzed by Jonathan Eisenman
Strategic Data Analyst

## 1,594 Solicitations reviewed (IFB & RFP) during FY23

Count of Solicitations by Duration

The distribution counts the number of solicitations completed in 30 day windows. You can see most of the distribution falls to the left below 180 days, with the majority (753) completed between 30-60 days.
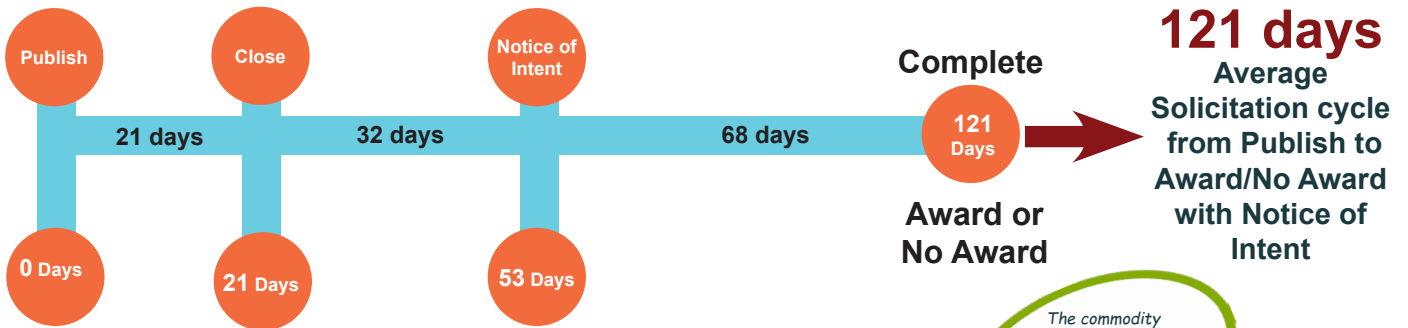
94% of Solicitations completed in 6 months or less!
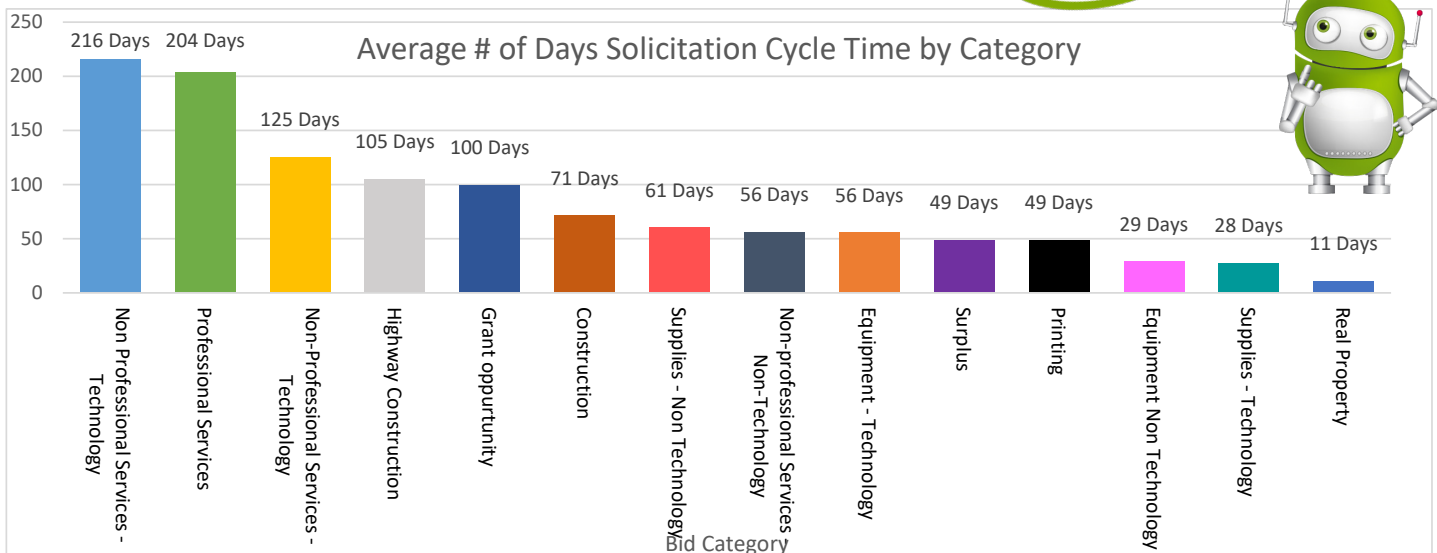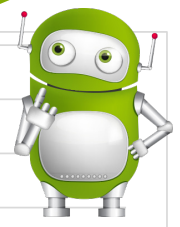
Average Cycle Time of IFB vs. RFP
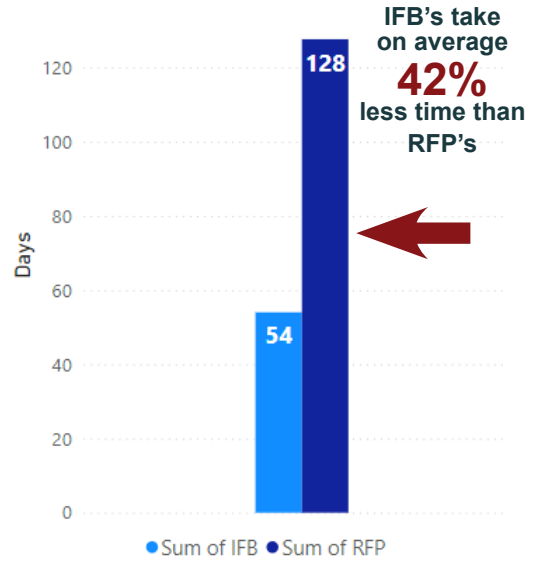
IFB's take on average 42% less time than RFP's

Solicitation Timeline with Notice of Intent (in average number of days)

Publish	Close	Notice of Intent	Complete
21 days	32 days	68 days	121 Days
0 Days	**21** Days	**53** Days	Award or No Award

121 days
Average Solicitation cycle from Publish to Award/No Award with Notice of Intent

The commodity purchased makes a difference in procurement time

Average # of Days Solicitation Cycle Time by Category

Bid Category	Days
Non Professional Services - Technology	216 Days
Professional Services	204 Days
Non-Professional Services - Technology	125 Days
Highway Construction	105 Days
Grant oppurtunity	100 Days
Construction	71 Days
Supplies - Non Technology	61 Days
Non-professional Services Non-Technology	56 Days
Equipment - Technology	56 Days
Surplus	49 Days
Printing	49 Days
Equipment Non Technology	29 Days
Supplies - Technology	28 Days
Real Property	11 Days

Purchase Order by Month

Quick Quote & Solicitation Volume by Month

● Sum of SO_COUNT ● Sum of QQ_COUNT
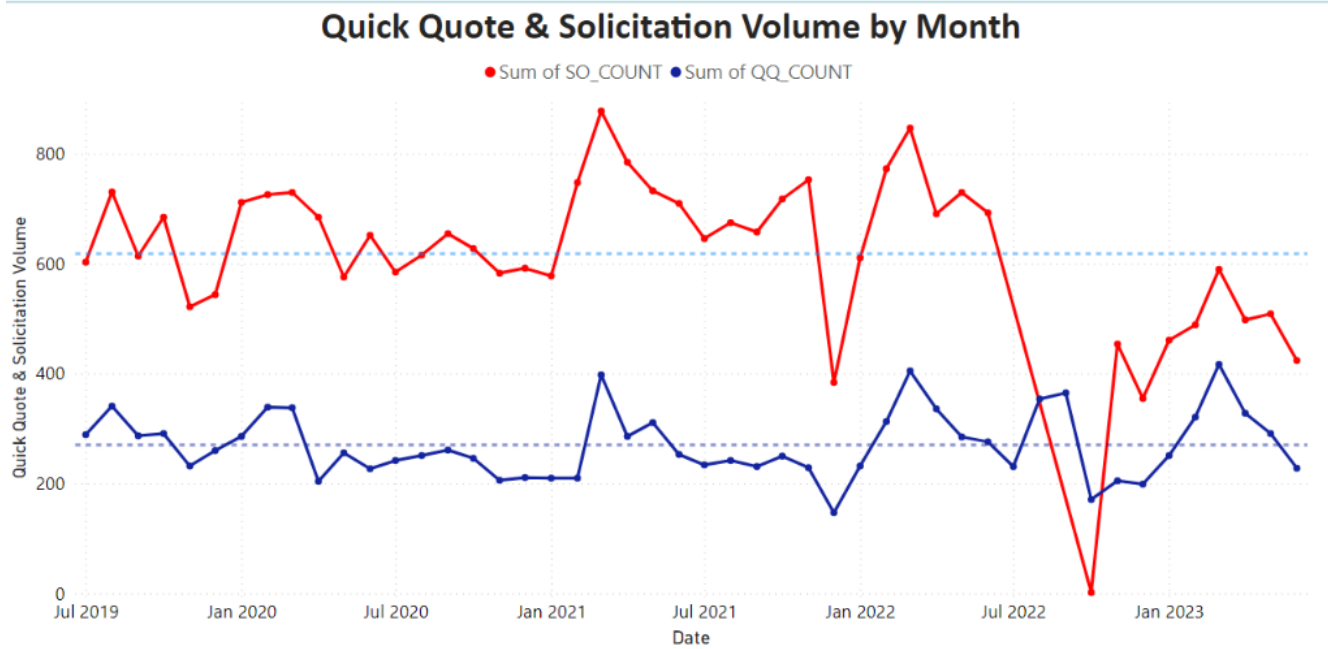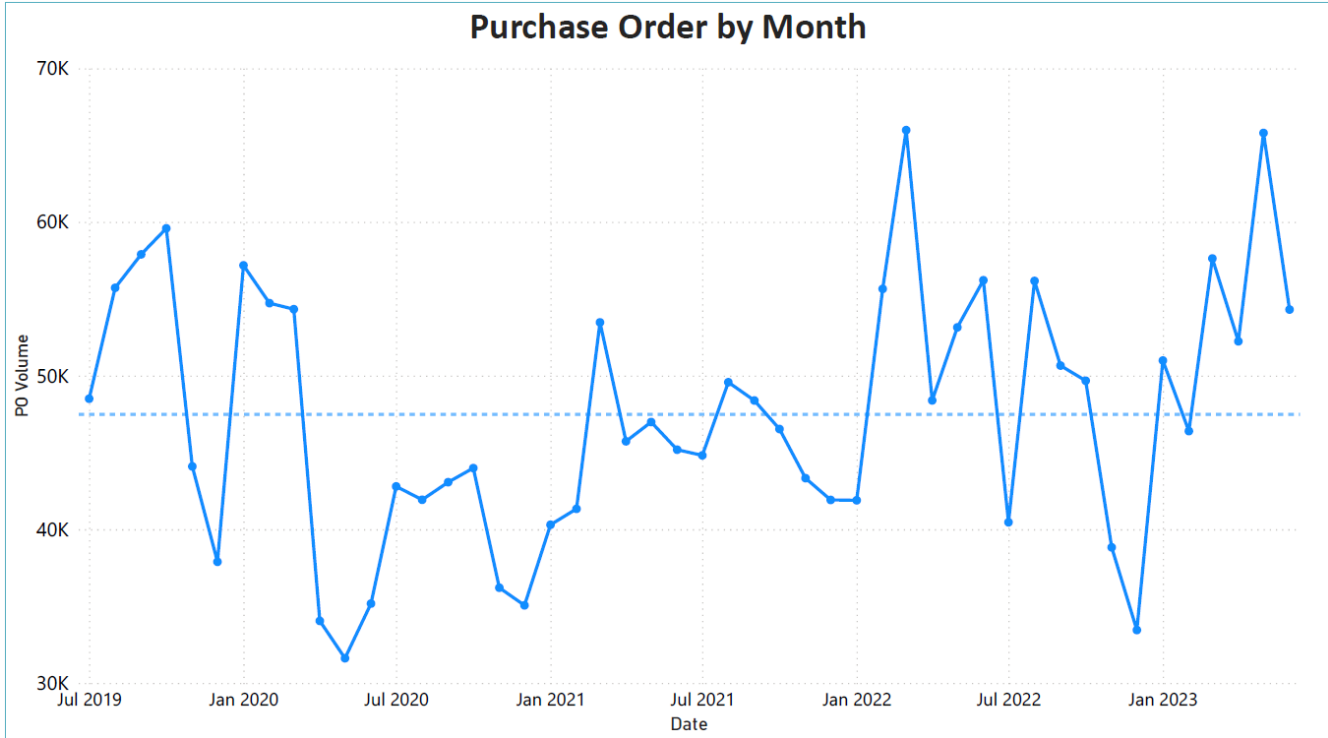
State of Washington

Department of Enterprise Services
Contracts & Procurement Division

2024 George Cronin

Awards for Procurement Excellence

New Virtual Washington State

Procurement Manual Providing Tools Public Procurement Staff Need for Success

Executive Summary

PROVIDING TOOLS PUBLIC PROCUREMENT STAFF NEED FOR SUCCESS.

Today's public procurement staff come into our profession from an array of backgrounds, without procurement specific education or training. Yet they join a critical, restrictive, public role with very precise processes, policies and procedures. It is estimated that Washington has 46,247* procurement, contracting and purchasing professionals across state agencies, higher education and political subdivisions that need proper tools and training to be good stewards of taxpayer funds. It is our responsibility to provide what they need.

The new Washington State Procurement Manual helps public procurement professionals use and manage contracts on behalf of their organizations. The tools and templates help agencies comply with state procurement laws and policies that were updated under WA Procurement Reform.

Since the inception of Washington's 2013 Procurement Reform, all procurement and contracting activities moved under the new laws of Chapter 39.26 RCW. The Department of Enterprise Services (DES) immediately rolled out new enterprise policies and requirements, updated templates, and developed and launched mandatory Procurement and Contracts trainings for over 46,000 state employees. We now have a new Washington Procurement Manual that encapsulates everything needed to purchase or procure, with a future Procurement Academy to guide users through.

Innovation

The old original WA Procurement Manual was a thick, hard copy run-on book that was a lot to read through to find what you needed. Updating the old document was challenging without completely rewriting, republishing, and redistributing due to procurement reform, process improvements, or ever-changing laws and policies.

DES updates the documents and processes as public procurement evolves.

- Laws and policies
- Resources for agencies and purchasers
- Purchasing methods process charts
- Statewide contracts
- Considerations for all purchases
- Competitive procurement
- Competitive procurement exceptions
  - Sole source
  - Direct buy
  - Emergency contracts
  - Inter-agency agreements
  - Client services
- Convenience contracts
- Contract management
- Procurement guidance/FAQ

The new more innovative web-based model is easier to navigate, with accessible links that take readers directly to the chapter they need. With this modern platform, DES will also now be able to easily keep everything current with a quick web-based edit, removing challenges of the past.

The development approach was also innovative and iterative. Instead of simply transferring the laws, policies and processes into a new web-based guide and telling state procurement, contracting and purchasing professionals to use it, DES applied a collaborative, stakeholder-driven method across 32 agencies and political subdivisions to ensure the tools would meet the needs of its diverse end-users throughout Washington. The team also worked closely with subject matter experts in DES Contracts & Procurement, IT, and Communications to incorporate fine details and key priority specialty topics such as supplier diversity, environmentally preferred purchasing, preference policies, and training and accessibility.

Transferability

As others have stated, the development of public procurement tools and guidance is challenging. Every state procurement office must provide the above information to public procurement staff. The body of work Washington has released is readily transferable by simply copying the links from our web page to their own state and incorporating their specific state laws policies and processes. DES is happy to help states by walking them through the web-based guidance and talking through how their own laws and policies apply.

Service Improvement

The Washington State Procurement manual was a critical service improvement longtime in the making. Thousands of external statewide procurement staff and leaders went without current centralized tools, templates and guidance for years. Relying on historic information, documents, and individual interpretation of new laws, agency procurement professionals across WA each worked on their own to create templates, processes and information. DES has always been a dedicated resource for them to assist, but has not had current, efficient, streamlined statewide tools and guidance available to refer them to. Now we do again.

Developed in-house by a dedicated team of procurement experts, in conjunction with public procurement stakeholders doing the work across our state, together they worked to improve the service statewide as they provided staff with the competencies, tools, guidance and knowledge required to perform their jobs, to fulfill their individual agency missions and provide best value to their leaders and customers in the best, most efficient and effective manner, while helping them comply with WA procurement laws and policies.

By improving this important service offered by DES to WA state procurement professionals, it:

- ✓ Provides service to its customer agencies by offering current centralized procurement information
- ✓ Helps agencies ensure their staff have the tools, templates and guidance required to do the work
- ✓ Provides key information to agency staff so they are prepared for their duties and responsibilities
- ✓ Helps agencies reduce audit findings while increasing compliance with state laws and policies
- ✓ Assists with employee retention by increasing knowledge, resources available, and expands their competencies for positive evaluations, and subsequent promotion and growth

Savings & Efficiency

Providing adequate tools and guidance to WA state procurement professionals is the service goal of the new Washington State Procurement Manual. In doing so, staff are more likely to achieve best-value contracts saving the state money, time, resources, and hard dollars through procuring lower-priced goods and services. It reduces audit findings, fines and costly errors on multi-million-dollar public procurement projects, avoiding wasting taxpayer dollars.

We can attempt to quantify cost avoidance based on resources, hours and budget dollars saved by its creation. By utilizing the Washington State Procurement Manual instead of creating their own individual guides, tools and templates, it is estimated that agencies avoided thousands by not expending those resources or hours to develop it themselves. In addition, by utilizing the new Manual in their daily work, 46,247 Washington procurement, contracting, and purchasing professionals (across state agencies, higher ed and polisubs) are able to avoid approximately 2 hours a week by not having to search, reinvent, or create things from scratch, for an estimated total time savings across the state of 92,494 hours per week (or 4.8 million hours annually), which equates to significant annual cost avoidance for our state and any state who uses the new virtual Washington State Procurement Manual.

Conclusion

In today's complicated public procurement world, staff need to continually learn and keep themselves aware of the vast, complex procurement law and policy landscape to remain current do their jobs effectively, to remain on top of their game, and to be successful in today's climate, for themselves and to meet rising customer demands.