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# Emotional Intelligence and Leadership

Stephen B. Gordon, PhD, FNIGP, CPPO

Norma Hall, Martha Graham, and I facilitated a session on “Leading from Wherever You Are in the Procurement Program,” at the 2014 NIGP Forum in Philadelphia. The three of us argued that anyone who works in a procurement program can and should lead, regardless of their position or formal authority. We defined “leading” as anything that advances the strategic goals of the procurement program and, in turn, the strategic goals of the public enterprise as a whole. What Norma, Martha, and I argued in 2014 aligns with a growing current interest in considering more than general and technical competencies and experience when filling procurement and other positions in government.

Twenty-two years ago, Daniel Goleman (“What Makes a Leader” Harvard Business Review, June 1996) asserted that Emotional Intelligence (EI) is the sine qua non of leadership”. Goleman observed that “without [EI], a person can have the best training in the world, an incisive analytical mind, and an endless supply of smart ideas, but he [or she] still won’t make a great leader”. Based on his examination of “competency models” used by 188 companies for higher and lower-level positions, Goleman found that when he “calculated the ratio of technical skills, IQ, and emotional intelligence as ingredients of excellent performance, emotional intelligence proved to be twice as important as the others for jobs at all levels.”

According to Goleman, EI comprises “a group of five skills that enable the best leaders to maximize their own and their followers’ performance”. Those five skills are:

**Self-awareness** – knowing one’s strengths, weaknesses, drives, values, and impacts on others

**Self-regulation** – controlling or redirecting disruptive impulses and moods

**Motivation** – relishing achievement for its own sake

**Empathy** – understanding other peoples’ emotional makeup

**Rapport** – building rapport with others to move them in the right direction

Goleman stated that each of us is “born with certain levels of EI skills”, but “we can strengthen these abilities through persistence, practice, and feedback from colleagues or coaches”.

Find out, if you do not already know, how your entity is using EI to evaluate applicants for procurement and other positions.

Ask yourself if consideration of EI could improve the quality of your procurement program? Don’t let where you perch in the organization hold you back. Step forward and lead.

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# HOW MUCH CAN PUBLIC PROCUREMENT LEARN FROM MACHINE LEARNING AND OTHER MODERN TECH TOOLS? A LOT

By Jean Clark

**>** Artificial intelligence (AI) is often discussed in future terms, with many of its applications resembling something straight out of a sci-fi movie. However, as public sector procurement professionals are learning quickly, AI and machine-learning technologies are – quite literally as you read this – unlocking unprecedented spend intelligence and workflow efficiencies for buyers at the federal, state and local levels. These “futuristic” technologies are also facilitating valuable new supplier bidding capabilities that not only make it easier for businesses to sell to the government, but also make it easier for government buyers to connect with more qualified businesses that may be able to deliver the goods and services they need – which is clearly an ongoing challenge for many state and local agencies given how often vendor shortages have been at the center of news headlines recently.

## WHAT SUPPLIERS DON'T KNOW HURTS THEM – AND YOU

The problem is that traditional sourcing models require agencies to post solicitations online either on their own website or through a shared database with a select number of other agencies. (That’s assuming that every agency is posting solicitations online, which you’ll see below, they are not.) Given there are more than 90,000 public sector entities in North America, private sector businesses have long found it difficult to prioritize which agency sites to monitor as most don’t have the resources to monitor all sites. At the same time, most bid notification services that aggregate agency postings for users are unable to search for opportunities beyond the very specific keywords provided by vendors in their profile. As a result, they have been missing bid opportunities that align with their business capabilities, and you have been missing well-qualified vendors from your sourcing pool.

Fortunately, new supplier-side bidding sites are leveraging AI-powered search engines and machine-learning technology to look beyond limited profile keywords in users’ search for bid opportunities with your agency. By learning and factoring in suppliers’ bidding behavior – such as

the opportunities they ultimately bid on and those they don’t – these advanced search tools help users to find every single bid opportunity that aligns with their industry expertise. This drastically expands supplier visibility into your agency’s solicitations which, in turn, automatically recruits previously unknown suppliers for your agency. It also increases the volume – and quality – of bids you receive which, naturally, builds confidence that you are indeed securing the best value for every procurement and receiving the highest quality goods and services available on the market. However, these are not the only technology tools capable of effecting meaningful change on your sourcing efforts – or your entire procurement process, for that matter.

## BUYERS NEED BETTER INTELLIGENCE TOO

While the supplier-side application of AI and machine-learning technologies is proving to be a win-win approach for both the public and private sectors, more basic technology modernization efforts are required on the buyer side in the near term if agencies expect to meet their supplier diversity, waste eradication, and quality/value goals long term. Specifically, buyers that are being asked to increase competition for commodity solicitation or deliver specialized resources for the government’s digital transformation within strict cost and quality parameters will need a way to mine volumes of procurement data to identify vendor gaps and analyze historical spending trends. In fact, public procurement officials indicated in a recent NASPO report that “staying on top of IT procurement and emerging technologies, automation and data analytics is critical in 2018 and the near future.”

Yet, a recent Center for Digital Government survey of government, IT and procurement decision-makers found 31 percent of respondents still don’t have a portal or eProcurement system where they can post bids and RFPs online – a fundamental capability that is necessary to gather the business intelligence that buyers need to actively recruit new vendors, increase competition and ultimately improve sourcing processes from their side. Therefore, it is

important for agencies to stop and consider how cloud-based eProcurement technology systems can be introduced or refined within their IT architecture right now – before more advanced machine learning or AI technologies are integrated at the agency level. The application of data organization tools such as the NIGP Code should also be considered by those who want to easily derive the deep level of business intelligence that can bring about desired outcomes in a faster and more efficient manner.

Though eProcurement platforms interface with ERP and finance systems to facilitate cross-functional information sharing and create a single source of truth, improvements can and should be made to improve the data mining process. Just as AI and machine learning technologies are helping suppliers more effectively refine their search parameters to eliminate irrelevant data and quickly generate meaningful results, the use of a uniform transaction coding system and other data management mechanisms offered by the NIGP Code can make it far easier to organize the often-overwhelming quantities of data that must be analyzed to improve both buyer and supplier-side procurement performance. Specifically, it can help you organize and manage the suppliers with which you do business; the process of finding available suppliers for various products and services; and the evaluation of suppliers in each product or service area to ensure adequate competition.

Together with the right eProcurement technology system, the NIGP Code will also enable you to track spending to measure against diversity goals and reduce overall procurement risk by identifying spend areas where competition is weak and supplier recruitment is needed. In other words, every single public sector agency should prioritize its procurement technology and process modernization – and take care to select the right technology tools – to effectively increase supplier diversity and competition, improve the quality of procured goods and services, and extract maximum value for every taxpayer dollar spent.

To learn more about the business intelligence and process

improvements that new eProcurement technologies and the NIGP Code are generating for public sector agencies, visit [www.periscopeholdings.com](http://www.periscopeholdings.com).

**JEAN CLARK**, FNIGP, CPPO, C.P.M., CPM is President of NIGP Code and Consulting Services at Periscope Holdings, Inc. She is an NIGP Past President and former State of Arizona Procurement Administrator.



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## THE ENERGY BUYING MISTAKES YOU DIDN'T REALIZE YOU WERE MAKING (& HOW TO AVOID THEM)

By Bob Wooten

**> W**hat energy procurement mistakes have you made lately? While you may be saying to yourself ‘there are no mistakes I am making,’ the purpose of this series is to address unknown mistakes you don’t even know you’re making.

Not too many years ago, utilities in many parts of the US were still regulated. This has created an atmosphere in many organizations where electricity and natural gas are discussed, maybe negotiated, but not necessarily procured in a manner consistent with the stringent procurement process applied to other goods and services.

As a purchasing professional, or someone who is in the position of procuring energy supply for your organization, you may feel that everything is

working fine. There are no problems – that you’re aware of. But if you were tempted to pass over this article because you feel you have no issues when it comes to energy supply, please stay with us just a bit longer. This article, and subsequent installments in this extensive 10-part series will address what we consider the Top 10 mistakes made when procuring energy supply for an organization.

In each installment, we will consider a mistake that is often made without the purchasing professional even knowing it. We will then discuss the problems resulting from making such a mistake, and then how to fix it and avoid it altogether in the future. We start off by discussing the timing of the energy procurement process.

### THE MISTAKE: NOT PROCURING PROACTIVELY

It is a common practice when procuring goods and services for an organization to be reactive. This means that you are either responding to a request from an end user department for a particular product or service – or that you are planning the procurement process based on the expiration of the current contract.

Many organizations will procure electricity and natural gas in much this same manner. If the electricity contract for a particular facility expires at the end of the year, they will start the procurement process three to six months prior to expiration. This approach ensures that nothing falls through the cracks – and this is good news, right?

### WHY IT IS A PROBLEM: MISSING POTENTIAL SAVINGS

By not taking proactive steps, you will never know what opportunities you may have missed for additional savings. Sure, sometimes you will see savings when following this approach – but other times you will not. Your results will be solely based on where the market is at the time you finalize your procurement.

Reactively procuring energy supply based on the expiration of the current contract reduces opportunities to monitor the market for the best procurement windows. What you might not know is that electricity and natural gas contracts can be procured months or even years in advance of the actual start date. Much of this depends on the region and the market, but it is not unusual for an organization to procure a favorable energy supply contract 24 to 36 months ahead of time.

The reason for this advance procurement is that these “future contracts” are bought and sold on the wholesale market continually. This continual market movement results in volatility – meaning that the price for a 12-month electricity contract that doesn’t start until next year may be 5 cents in May but could rise to 6 cents in July.

So if you wait until right before the current contract expires, you will simply have to take whatever price the market is offering at that time. Even though you may feel you are getting a competitive rate because you had multiple suppliers competing for your business, the best offer you can get is still based on the energy market is at that time. Pricing and contracting when the market is up will always result in a higher price than when you contract when the market is down. But your reactionary status renders you unable to capture the best rate on your next energy contract.

### HOW TO FIX IT: ENTERING CONTRACTS IN ADVANCE

The bad news here is that there’s really no way to fix your current situation.

Fortunately, avoiding this mistake is fairly simple for your future contracts. Give yourself the maximum amount of time, ahead of current contract expiration, to monitor the market. If you have 36 months before the current contract expires, you should be monitoring the market the entire time. Nobody has a crystal ball, but you want to try to find the most advantageous dip in the market in which to competitively procure that future contract term.

A word of caution: The process is simple, but the tools to make the process work get much more complicated. Some organizations look at secondary sources such as market indices and reports. The best way to monitor the market is to be a participant in the market. Prices are developed through the buying and selling in the wholesale market; therefore, the best insight possible into market movement will be participation in the energy wholesale market. An outside consultant or advisor is a key tool in finding the most ideal market windows ahead of your current contract expiration. Energy consultants involved directly in the wholesale market will typically provide the most informative guidance.

### CONCLUSION: LOOKING LONG-TERM

Now that you’re aware of it, addressing the mistake of reactively procuring the upcoming contract at the end of the current contract has an easy fix. Proactively monitoring the market months – and even years – ahead of the current contract expiration will indicate an ideal dip or window in market pricing to secure the best rates. The tools used to monitor the market range from reviewing market reports to engaging the services of an energy consultant. Regardless of which method you choose, commit to starting your procurement process long ahead of your current contract expiration.

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## LANGUAGE MATTERS: THE PLACE OF PUBLIC PROCUREMENT

By Lisa Premo

> **A**t this year's NIGP Annual Forum, the topic of educating management on Procurement's value attracted passionate conversations. The public procurement practice on The Place of Public Procurement within the Entity describes and provides support for and strategies to achieve the optimal position, responsibility, and authority for Procurement. When procurement participates with other C-level executives such as the CIO, COO, and CFO in executive-level decisions and the development of the entity's strategic plan, knowledge gained from these discussions allows procurement to better plan for and align its purchases with the goals of the entity. With a "seat at the table," Procurement can contribute its unique perspective, experience, knowledge, and skills.

Strategies for achieving Procurement's optimal position, responsibility, and authority include understanding current policies and procedures,

the mother realizes she has no idea. The question is then posed to the daughter's grandmother who also had never questioned this practice. Finally, the great-grandmother is queried. "Oh," she smiles wistfully, "in those days, we had only one small roasting pan and cut off the ends so the meat would fit." Are your policies and processes enduring as unquestioned traditions? As you evaluate your policies and procedures, think about the intended and unintended consequences of any changes.

Procurement professionals can develop internal support by establishing, building and maintaining a service-oriented reputation. Procurement should be positioned within the entity to function as a liaison with all departments. By collaborating with and listening to client and end-user needs, Procurement can be viewed as a sought-after resource rather than a hurdle. Barbara Johnson, CPPO, CPPB, MPA, suggests that "Procurement professionals may concentrate on one client at a time to build their success story, e.g., how the client saved money; how the client found a solution. As these clients tell their stories, Procurement's value and reputation as a trusted partner increase. Procurement also may share these stories with their direct management."

Marcheta Gillespie, CPPO, CPPB, C.P.M., CPM, advises, "We must stress the importance of Procurement viewing the big picture and continually seeking opportunities to bring value to the entity above and beyond the knowledge of policy and process, source selection and contract administration." Value may come from maximizing return on investment, approaching procurement matters strategically, leveraging purchase volume, effectively leading standardization efforts and streamlining processes, and maximizing the accountability and transparency of the procurement process.

However, before Procurement can educate management and others about the value they contribute, procurement professionals must acknowledge the value in themselves. Values determine and drive actions in both our personal and professional lives. Communicating what we do carries no weight unless it is tied to why we do it.

To identify our personal values, try this simple exercise. Think back to last weekend's breakfast. Did you stay home, eat out, pick up fast food, eat with



building internal support, and focusing on the business case. The procurement professional should take time to understand how and why things are done before advocating for change. When we understand the original purpose for a policy or procedure, it is easier to show why it may or may not apply. There's an old story about a mother cooking a pot roast. Before placing the meat in the pan, she slices off the ends. Her daughter asks why she does this and

the family, eat alone, prepare a full-scale meal, eat the same meal that you eat every day? Each decision, even something that may seem minor, like breakfast, provides a clue to your values. If you eat a bowl of oatmeal every day, what's driving you: stability, predictability, health, frugality? What about decisions regarding how the table is set? Are you creating an atmosphere in which you and/or your family or guests can linger? Do you only cook breakfast for others, but not for yourself? Is time the overriding value that motivates you to a drive-thru for your meals?

Public procurement values and guiding principles are built on the three pillars of public service, public trust, and justice. We can see these pillars echoed in the values of Service, Ethics, Accountability, Professionalism, Transparency, and Impartiality. Procurement professionals don't just order uniforms, we save lives. We don't just select a construction project delivery method, we build schools, hospitals, and baseball stadiums that add vibrancy to a community.

There's an old story about two stone masons. When asked what they were doing, the first replied with great weariness that all day long, he

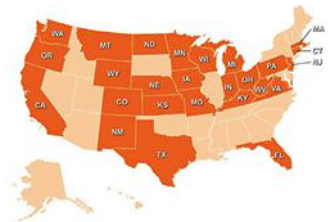
moved heavy stones from one area to another. The second mason, with energy and radiance, exclaimed that he was building a cathedral!

Procurement is a profession. However, it is done by people, procurement professionals. How do you view what you do? Are you issuing a request for proposals or inviting innovation for a needed project? Are you using the solicitation you used last time or conducting market research and analysis to learn more about the commodity you plan to procure? Which of your personal values do you show up with each morning? How do your personal values support your professional values? How do your values determine how you interact with suppliers, colleagues, end users, elected officials, and executives? How does your view of your values and contributions to the community as a public procurement professional influence how you educate others about the place of public procurement within the entity?

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**LISA PREMO**, NIGP Global Practices Manager, collaborates with public procurement practitioners and academics to conduct research and develop useful guidance on public procurement topics.

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recognizes public procurement professionals who have supervisory or management responsibilities. Public Procurement manager functions include responsibility of overall procurement/material management activities in a specific governmental entity, supervision of procurement personnel and/or the display of executive abilities involving economic/ financial, technical, statistical, legal, and administrative attributes.

### Buyer of the Year Award



**Emil C. Rosol**, CPPO, CPPB, Procurement Manager, Cleveland Metroparks, Ohio. This award recognizes buyers who have no supervisory or management responsibilities and have made significant contributions to the profession. The Buyer function involves the process of determining the customer requirements, reviewing specifications and requirements, developing and issuing bids, evaluating offers and selecting the vendor, arriving at fair and reasonable price and terms, preparing the contract or purchase order, vendor relations, following up to ensure timely delivery shipping/ receiving, inventory and warehousing, and contract administration provisions.

### Leadership Award



**William A. Lindsey**, CPPO, C.P.M., Purchasing Director, Gloucester County, Va.

### Integrity Award



**Lourdes Coss**, CPPO Chicago, Ill.

### Volunteer Award



**Lynn Farnham**, CPPO, CPPB Purchasing Agent, Roane County, Tenn.

### Young Professional Award



**Zulay Vincente Millan**, CPPO, CPPB, FCCM Procurement Administrator, Orange County, Fla.

### NIGP PARETO AWARD RECIPIENTS

Named after Vilfredo Pareto, the founder of the 80-20 rule, the Pareto Award is the most prestigious and highest award of agency achievement in the public procurement professional. Award is not easily earned due to the rigors inherent in the review process.

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# NIGP FORUM 2018 REVIEW

## Chapter of the Year Award Winners

The Chapter Awards Program recognizes Chapters who have developed programs that educate, provide professional support, and champion advocacy initiatives that benefit the membership, the profession, and constituents.



**SMALL CHAPTER OF THE YEAR** (less than 100 members)  
Idaho Public Purchasing Association



**MEDIUM CHAPTER OF THE YEAR**  
(less than 100 members)  
Columbia Chapter of NIGP



**LARGE CHAPTER OF THE YEAR** (201 - 350 members)  
Central Florida Chapter of NIGP



**X-LARGE CHAPTER OF THE YEAR** (351+ members)  
South Carolina Association of  
Governmental Purchasing Officials

## Chapter Excellence Awards

**EXCELLENCE IN MEMBERSHIP, RECRUITMENT,  
RETENTION AND ENGAGEMENT**

Tampa Bay Area Chapter

**EXCELLENCE IN EDUCATION &  
PROFESSIONAL DEVELOPMENT**

Oregon Public Purchasing Association

**EXCELLENCE IN ADVOCACY FOR  
MEMBERS AND THE PROFESSION**

Virginia Association of Governmental Purchasing, Inc.

**EXCELLENCE IN INSPIRING  
PROCUREMENT FOR THE FUTURE**

Carolinas Association of Governmental Purchasing

**ETHICS VIDEO CONTEST WINNER**

Carolinas Association of Governmental Purchasing

Submitted by: Grover Cleveland Haddock, Jr., CLGPO

**2018 INNOVATIONS AWARD RECIPIENT**

Oregon Department of Corrections

**NIGP OUTSTANDING AGENCY ACCREDITATION  
ACHIEVEMENT AWARD RECIPIENTS**

OA4 accreditation is realized upon successful completion of an agency self-evaluation process that assesses performance in 12 key functional areas. Obtaining OA4 accreditation is a prerequisite to qualifying for the pinnacle agency accreditation I public procurement, the Pareto Award of Excellence.

- AZ Department of Transportation
- Pima County, Ariz.
- Oakland County, Mich.
- Town of Ocean City, Md.
- City of Nashua, N.H.
- Gwinnett County Public Schools, Ga.
- Cherokee County, Ga.
- City and County of Honolulu, Hawaii
- Gwinnett County Board of Commissioners, Ga.
- Fulton County, Ga.
- Loudoun County, Va.
- Regional Municipality of Peel, Ontario
- Chesterfield County, Va.
- Old Dominion University, Va.
- Las Vegas Convention & Visitors Authority, Nev.
- Metropolitan Water Reclamation District of Greater Chicago, Ill.
- Village of Wellington, Fla.
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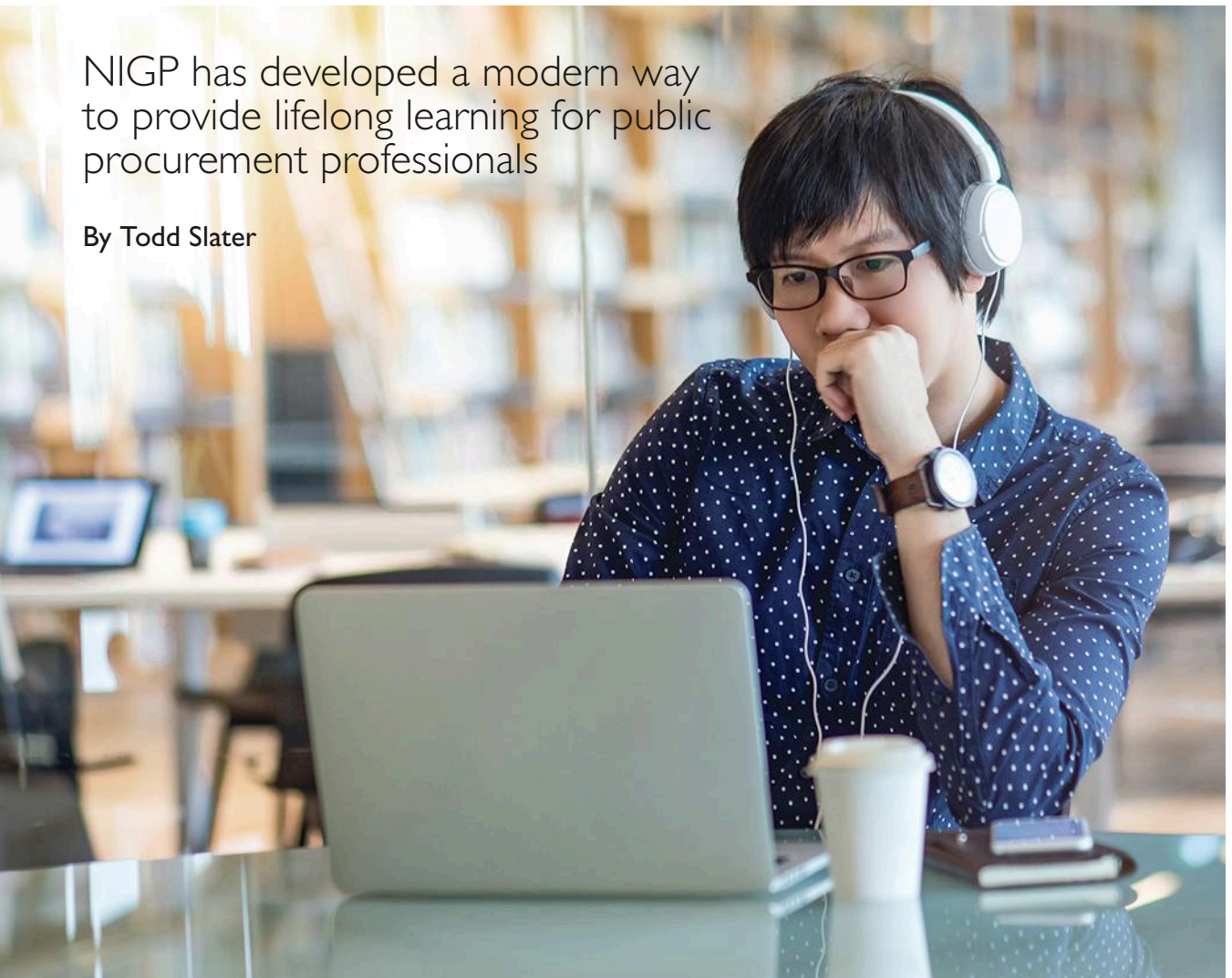
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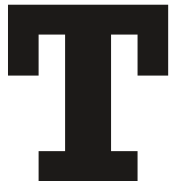
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# Learning Created for Today's Workforce

NIGP has developed a modern way to provide lifelong learning for public procurement professionals

By Todd Slater





Today's workforce is changing. Employees are part of a digital, global era that is as diverse as it is innovative. At the same time, educational expectations, needs, and demands are evolving faster than ever before with

information and cognitive overload obstructing our ability to clearly process much of the information.

The result is a workforce who is overtasked and struggling to find time to develop professionally. A 2017 report by Deloitte entitled Global Human Capital Trends reports that new rules need to be written for the digital age where the principle characteristic is not merely change but change at an accelerating rate, drastically impacting the concept of career. While employees now have the potential of 60-year careers, the half-life of skills is rapidly falling to roughly five years because of this accelerated change.

NIGP has set in motion a learning strategy designed to help procurement professionals grow and develop their careers in this time of rapid change. To guide the strategy, data from NIGP's organizational change study, completed in 2017 by M Powered Strategies, is being used to target the program needs of procurement professionals (see Graphic).

While these changes and needs offer challenges, they are an opportunity to reimagine how NIGP provides lifelong learning to public procurement professionals—an opportunity to create new platforms, processes, social networks, and cutting-edge offerings that prepare them for the work environment and careers of today and tomorrow. To accomplish this, NIGP is creating an environment focused on life-long learning and providing practitioners with content that is relevant, concise and easily accessible. Today's practitioner will be placed at the center of the learning experience, where they can create a personalized learning path targeted to their professional, career needs.

To manifest this new learning experience, NIGP created Aspire, where professionals engage with peers and develop their career through life-long learning opportunities that can be taken anywhere, anytime, and anyway.

### THE LEARNING JOURNEY

Why is focusing on life-long learning important? According to a 2016 Pew Research Center study, 73 percent of adults consider themselves lifelong learners whether for personal or professional growth. When looking at why those who are full or part-time in the workforce are engaged in learning, 55 percent are wanting to maintain or improve their job skills, 36 percent want to obtain a license or certification; while 24 percent want to upgrade their skills to help with a raise or promotion. The Pew Research Center also reports that government workers and educators are highly likely to be professional learners over other types of organizations. Therefore, creating an environment in which procurement professionals have access to content that spans a career

“Today's organizations need to not only build their current leaders but also empower a new generation of young, agile and digital leaders who are engaged and ready to act.”

allows NIGP to assist in meeting their learning needs.

As more procurement professionals move into retirement, retention and recruitment of new employees is critical. For Millennials, training and development are among the most coveted and desirable job benefits. Their ability to learn and progress is a key indicator of job satisfaction, and an organization's ability to provide such measures directly results in Millennials remaining with an organization over a prolonged period, according to a CGS 2017 Enterprise Learning Annual Report.

With careers now spanning longer, employees are expecting organizations to help them continually reinvent and transition into positions with new challenges, opportunities and rewards. Unfortunately, Deloitte's study highlights that only one-third of Millennials believe their organizations are using their skills well, and 42 percent say they are likely to leave because they are not learning fast enough. The institute's focus on life-long learning means that young professionals and others will be provided with learning mapped to career paths and job roles. This provides the structure and content to help fill the gap that is causing Millennials, in part, to seek other opportunities.

As we continue to explore ways to elevate the profession, it is important that our programs provide the value being requested by senior leaders along with increasing overall standards. NIGP is addressing this on a number of fronts. First, it is building learning that supports ones' career journey. Moving away from a focus on a single time-based event, the new learning opportunities are being designed to be active, impactful and reinforced well after the initial learning has occurred. These new experiences engage learners' days, weeks, and even months after the learning activity.

Leveraging this new design, we can ensure practitioners are impactfully applying theoretical concepts and case studies into their work, growing not just themselves but their organizations. Second, the content is expanding—moving from a focus on foundational procurement topics

# IN DEPTH [learning]

to a comprehensive suite of specialized concentration areas and competencies. This expansion provides the ability to better structure content around the competencies required to be successful while providing learning on the latest trends. Additionally, certificates are being created around concentrated areas of skills. These certificates may result in a digital badge(s) that highlight the employee's accomplishments over their career.

## APPLICATION, ACCESSIBILITY & AFFORDABILITY

Presently, organizations are moving towards "always-on" learning, allowing individuals to build skills quickly, easily and on their own terms. With the influx of technology, people today are embracing digital tools to access content that helps them learn on the job and on-the-go. According to LinkedIn Learning's 2017 Workplace Learning Report, the modern learner engages 42 percent at their desk, 27 percent on the way to and from work and 47 percent in the evenings and weekends through digital devices. However, instructor-led classes are still the number one-way people choose to learn.

To create an experience that supports the "always-on" mentality, our methodologies and tools are evolving to create and deliver best-in-class learning offerings. The new learning model facilitates the creation of content

"To create an experience that supports the "always-on" mentality, we are evolving our methodologies and tools to create and deliver best in class learning offerings."

in small "chunks" so that it can be taken and absorbed easily in a busy work environment. It also brings together the elements of formal, social and experiential learning to provide a holistic engagement approach.

Within this new learning environment, different modes of learning (online, classroom, blended, conferences,

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research, etc.) will be available, providing the ability to personalize the learning based on individual needs and interests. In support of the life-long learner, we are creating paths that fulfill not only immediate learning needs but intermediate, advanced, job-specific and transitional training as employees look to move to advance their careers.

Using the most innovative and new-age digital technologies NIGP is significantly expanding the way content is accessible from the desktop as well as on mobile devices. Our new virtual conferencing offering allows practitioners to take part in networking and educational sessions without the need to travel and be out of the office for long periods of time. Implementing digital learning provides greater flexibility for professionals to schedule their learning while reducing costs associated with travel and time away.

#### BUILDING FUTURE LEADERS

Around the world, leadership development and employee cultivation continue to be a significant challenge as organizations try to close the leadership gap of modern-day professionals. Today's organizations need to not only build their current leaders but also empower a new generation of young, agile and digital leaders who are engaged and ready to act.

To help close this gap, NIGP is embarking on a year-long project to create an innovative, leadership development offering targeted to the procurement professional. Focused not only on providing current leaders with new opportunities to build and enhance their skills, the institute is creating experiences that are impactful to experienced and emerging leaders alike, encouraging collaborative growth through shared opportunities.

Working together we will bring public procurement learning into the future, to ensure we create world-class learning designed to develop and expand procurement professional's careers. All of this, and so much more, starts with Aspire.

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**TODD SLATER** (tslater@nigp.org), PhD. is the Chief, Content Officer, for NIGP: The Institute for Public Procurement. He has over twenty years of experience transforming global learning programs using technology and innovative instructional methods. Todd holds a B.A. in Telecommunications from Michigan State University; an M.A. in Instructional Design from the University of Central Florida and a Ph.D. in Adult Education from Capella University. He also sits on several industry boards and speaks in both domestic and international settings.



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# Transit Authority Leverages Procurement Technology

The site supports online supplier registration, solicitation document downloads, and online submittal of bids

By Masih Bahadori and Darin Matthews

**W**ith the power of the Internet, web-enabled systems not only offer the opportunity for procurement departments to obtain products and services at lightning fast speed, but they literally transform how money is spent in the public sector. A case in point is the Orange County Transportation Authority's (OCTA) Contract Administration and Materials Management (CAMM) NET e-Procurement website.

The CAMM Net website is owned exclusively by OCTA and one of the first procurement websites to be developed, designed and implemented by a Special District in the United States. Since its inception, all OCTA procurements have been posted on CAMM NET and the site supports online supplier registration, solicitation document downloads, and online submittal of bids. CAMM NET automatically communicates with registered suppliers by immediately notifying them of new solicitations, addenda and award notices via email.

## WHY WAS THE TECHNOLOGY WAS IMPLEMENTED?

The technology was brought on for a number of reasons. First, there had been many staff reductions over the years, so there simply weren't people available to perform these manual tasks. It made sense that outdated processes were replaced to increase efficiency.

## EFFICIENCY AND COST REDUCTION

- > Excessive time and labor was involved in manually contacting suppliers to solicit responses
- > An estimated \$170,000 per year was spent on copies and mailing costs for sending out solicitation packages, so OCTA looked to simplify the solicitation process and save money by utilizing a web-based and email notification process

## RETURN ON INVESTMENT

Developing an e-procurement system was seen as an investment to leverage technology in

order to streamline the procurement process for both OCTA and suppliers by providing:

- > Increased competition
- > Lowered administrative costs
- > Faster exchange of information
- > Database of supplier records
- > Central communication portal

## HOW DID THEY GO ABOUT DEVELOPING THE E-BIDDING SYSTEM?

CAMM management met with representatives of other OCTA departments in a joint-application development session to discuss improvements to the agency's procurement process. The project team met weekly over the following months to develop the scope of work and content for the system. As part of the team's research process, a visit to San Diego County was conducted to gain more insight into the use of online bidding and e-procurement systems.

A procurement was then conducted and an information technology (IT) consulting firm was brought on to program the system around OCTA's specifications. The IT consulting firm's technical team worked onsite alongside OCTA's project team to develop and refine the system to handle both internal OCTA needs and external communications with suppliers. Every component was thoroughly tested and refined before going live with the system.

The system cost OCTA \$180,000 to develop and reached its payback point in just over one year based on savings in paper costs, copying and postage.

## WHAT OTHER AREAS OF PROCUREMENT EMPLOY TECHNOLOGY?

- > CAMM NET automatically generates Plan Holders Lists for suppliers by requiring them to answer a short online questionnaire before downloading a formal solicitation document. Suppliers are first required to indicate if they are intending to participate in the solicitation and are then required to indicate if they will be participating as Prime or

a Subcontractor. The responses are used to create an online Planholder's List of names and contact information, which can be filtered, printed, and downloaded as a .csv file so that both Prime and Subcontractors can connect with each other and develop partnering relationships on OCTA projects.

> CAMM NET is integrated with Facebook. When a formal solicitation is posted on the CAMM NET website the system automatically interfaces with Facebook and creates a wall posting on the CAMM NET Connect Facebook page, each of which is directly related to an OCTA solicitation opportunity posted on the CAMM NET website. Suppliers who like the CAMM NET Connect Facebook page receive email notifications to their phone and have the opportunity to network with other suppliers interested in a particular solicitation by commenting on a CAMM NET Connect wall post. Suppliers can also learn more about a particular solicitation posted on CAMM NET Connect by clicking on the wall post to view the CAMM NET procurement detail page where they can download the solicitation documents for that procurement.

> The CAMM NET's "Doing Business with OCTA" section of the webpage has recently been updated with enhanced content and an accordion style navigation to make it easy to find out how to successfully participate in OCTA procurements. Topics include information on: How to Do Business with OCTA, The Procurement Process, Common Solicitation Elements, Responding to an OCTA Procurement, Responding to a Request for Proposals (RFP), OCTA's Online Networking Tools, and Public Auctions of Surplus Equipment. The accordion navigation features makes drilling down to subtopics easy for suppliers wanting to learn more about OCTA's procurement process.

#### RELEVANT STATISTICS ON LEADING TECHNOLOGY TRENDS AND BEST PRACTICES

- > A 2010 survey of 34 OECD members as well as Brazil, Egypt and Ukraine indicates that 90 percent of the countries use websites to provide solicitation announcements and procurement-related information.
- > Despite the significant investments in e-procurement,



procurement platforms failed to accomplish real transformative effects and simply automate existing administrative processes. Furthermore, implementing e-procurement projects have regularly led to unproductive systems and a waste of financial investments.

- > Results from a 2010 survey of American and Canadian procurement specialists indicated that e-procurement has yet to achieve any notable changes as 45 percent of the 499 respondents indicated that their agencies did not use any of the main e-procurement systems.

#### WHAT TANGIBLE BENEFITS HAVE BEEN REALIZED?

- > Faster Solicitation Notification - Suppliers are notified of solicitations within minutes via email.
- > Easier Access to Solicitation Documents - Suppliers are now able to download and print out Formal IFB and RFP documents.
- > Increased Competition - With over 20,000 registered suppliers, more suppliers are notified of more bids than ever before, which translates into more competition. On average, 1,500 suppliers are sent email notifications for each solicitation.
- > More Accurate Supplier Database - Suppliers register themselves online and can update their supplier profile 24 hours a day, 7 days a week.
- > Increased Transparency - All suppliers are emailed information on which supplier(s) were awarded the solicitation and the total dollar amount awarded. For bids



# IN DEPTH [e-procurement]

that were submitted online, the unit prices for each item bid are included as well. Award information is also posted on the CAMM NET website and is accessible to anyone.

- > Greater Availability – Suppliers can submit bids and download solicitation documents 24 hours a day, 7 days a week.
- > Postage and Reproduction Savings – All solicitation notices and documents are provided electronically.
- > Customer Satisfaction – A survey of 393 CAMM NET users indicated the following about the website:

- > 88.3 percent of respondents found it easy to accomplish their purpose of visiting the website
- > 79.4 percent claimed they were able to accomplish their intended purposes on CAMM NET in the amount of time they expected to a lot less time than expected
- > 59.6 percent reported the information on CAMM NET to be very understandable

## RECOGNITION OF INNOVATION

The CAMM NET website was awarded Silver by W3

Awards for 2013. The W3 Awards is a yearly competition conducted by the International Academy of the Visual Arts (IAVA) to honor creative excellence on the web. The IAVA is composed of top professionals invited from a variety of leading creative organizations. Awards for websites are judged on creativity, usability, navigation, functionality, visual design, and ease of use. This competition is open to all involved in creating content for the web. The CAMM NET website was awarded the Silver for Website Features in Structure and Navigation. OCTA's CAMM NET website was also awarded the Standard of Excellence Web Award in the Transportation category for the 2014 Web Awards. More than 1,500 entries from 40 countries were adjudicated in 96 industry categories. Entries were judged on design, copywriting, innovation, content, interactivity, navigation, and use of technology.

**MASIH BAHADORI** is a senior contracts administrator for Orange County Transportation, a world-class organization that supports 34 California cities. He brings significant experience in procurement, supply chain management, and contract negotiation. Masih manages a variety of complex solicitations for OCT including transportation solutions that leverage current technologies. **DARIN MATTHEWS, FNIGP, CPPO, CPSM**, is the director of procurement for the University of California, Santa Cruz. He has extensive management experience, speaks throughout the world on procurement issues, and has published several books and articles on supply chain management.

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# Advice to my younger self

> **F**rancisco is a good friend of mine. Although just in his twenties, he is a successful business person, responsible pet owner, and one heck of a bartender. He is a member of the Aranda family that owns several restaurants and bars in Central California. A very impressive young man.

Recently I found myself giving him advice and had to pause for a second. What advice would I give to myself when I was at his age? I started in public procurement when I was in my twenties, and have always felt blessed to have worked in such a rewarding field. But after thirty years, surely there is something I have learned that I could pass on to my feathered-hair, 170 pound self? Here is what I came up with:

Although it is an overused expression, time will go by faster than you can imagine.

**Complete your education while you can.** Don't have too much fun in college and neglect your studies. Find a good program that you like, listen to your counselor, and pay attention to your professors. If you wait until you have children, a mortgage, and a car payment, it only gets harder to get that degree.

**Take advantage of your professional network.** Don't be afraid to approach those experienced professionals and learn all you can from them. They are actually eager to share their knowledge and be part of your success. They were a junior buyer once too.

**Find the time to volunteer and give back to your community.**

Taking on a role with your local NIGP chapter can be very rewarding, but so can volunteering for those causes you believe in. Public procurement, homeless youth, environmental protection, affordable housing? Spend your time and energy where your heart takes you, and you will receive so much more in return.

**Now is the time to pursue your dreams, both personally and professionally.** Whether it is obtaining professional certification, traveling to the country your ancestors came from, or applying for that dream job, don't wait around for "someday." Although it is an overused expression, time will go by faster than you can imagine. Before you know it, you will be recertifying your CPPO for the fifth time and wondering where the time has gone.

While I'm not ready to be put out to pasture just quite yet, I am making retirement plans. This profession has been very good to me, but before too long it will be time to hand the reigns over to the next generation of procurement professionals. When I see the caliber of people entering the profession today, I am quite sure we are in good hands.

Francisco and I then contemplated going to the Santa Cruz Beach Boardwalk. I hesitated about going out, told him I needed to get to bed early, and then reminded him I was nearly 55. Then he said something that made my day. "Really? You don't seem that old."

We then went to the Boardwalk where I gave him some more advice.



**DARIN MATTHEWS**, FNIGP, CPPO, CPSM, is the director of procurement for the University of California, Santa Cruz. He has extensive management experience, speaks throughout the world on procurement issues, and has published several books and articles on supply chain management. Contact Matthews at [darin@ucsc.edu](mailto:darin@ucsc.edu)



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