

# Surveying Internal Customers to Identify Procurement Pain Points

*Peer Roundtable*

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EXCELLENCE  
NETWORK

Partners for Public Good

May 25, 2023

1. Designing Effective Surveys
2. The Psychology Behind Survey Questions
3. Common Challenges with Internal Surveys
4. **Featured Government:** San Diego County, CA

# Session Objectives

- Discuss **strategies** to design impactful surveys that assess customer satisfaction and illuminate process pain points.
- Share **common challenges** that governments face when creating and deploying surveys.
- Highlight **examples of governments** implementing effective internal surveys and acting upon results.

# Designing Effective Surveys

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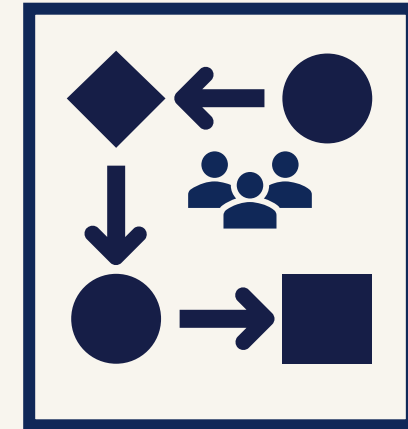
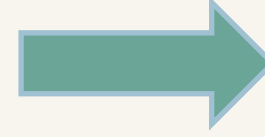
# Surveys are a feedback mechanism to drive change



**Develop Hypothesis**



**Solicit Feedback &  
Extract Themes**



**Drive Process  
Efficiency**

## Why surveys are useful:

- Determine **pain points** and identify **blind spots**
- Find **areas of success** to celebrate
- **Validate a hypothesis**, diagnosis or theme
- Demonstrate **prioritization of values** (e.g., *customer service, fairness, transparency, collaboration*)
- Contribute to a **culture of continuous learning** and improvement across the organization

## Consider these questions before launching a survey:

- Determine the **WHY** – what are the **purpose/goals** for the survey?
- **What do you want to learn?** What process are you focusing on?
- Whose experience do you want to better understand?  
**Who is your target audience?**
- How will you plan to use data? **How can this data help you to achieve your objectives?**

# Timing of survey should inform purpose and audience

<u>Survey Type</u>	<u>Characteristics</u>
<b>Annual Survey</b>	<b>Summative and reflective</b> – an annual survey can be an opportunity to do an in-depth diagnosis of major opportunities in your procurement operation and can be used to track progress year over year.
<b>Pulse Survey</b>	<b>Consistent and concise</b> – a short survey with static questions available for internal customers to respond to at any time following interaction with the purchasing office.
<b>Pre-RFP Survey</b>	<b>Exploratory and strategic</b> – aims to understand past procurement pain points and goals before an upcoming RFP cycle to avoid prior mistakes.
<b>Post-RFP Survey</b>	<b>Evaluative and elaborative</b> – a survey that assesses the perspectives of internal stakeholders who were closely involved in an RFP process at the end of a contracting cycle to understand their satisfaction with the solicitation.

# Procurement Transformation Internal Survey



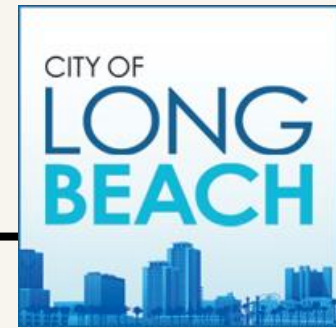
The City of Syracuse is invested in **transforming their procurement process**, shifting from a solely manual, paper-based compliance driven process to focus on prioritizing impact and efficiency. **The City launched a survey to elevate perspectives of procurement staff to diagnose challenges to solve in a procurement “makeover.”**

## Why this was important

- Surveyed 70 internal staff (*80% representation of “dept. staff with procurement responsibilities/functions/duties”*)
- Survey provided an opportunity to elevate perspectives of staff at various levels
  - 13% of staff viewed “procurement is efficient”
  - 32% of staff were “happy” with the results of solicitations and contracts

## Impacts & Outcomes

- 24 question survey that revealed internal department priorities for evaluation:
  - Lack of training*
  - Bid Requirements and Thresholds*
  - Coordination and Communication*
  - Approvals process*
  - Vendor Management & Payments*



The **Purchasing Division in the City of Long Beach, CA** has developed a post-RFP survey to hear from **customer departments** after the completion of a solicitation to gauge their **overall satisfaction and gather feedback**.

## Why this was important

- Mechanism to track progress in procurement excellence over time.
- Survey themes linked to key department priorities, such as service, transparency, and efficiency.
- Allows internal customers to express appreciation while flagging opportunities for improvement.

## Impacts & Outcomes

- Buyers/Purchasing Staff get real-time feedback on their performance
- Opened channels of communication between Purchasing and Department Staff.

**Challenge:**  
Survey is not automated. If Buyers forget to manually send, data is not captured. Division is working on building automation.



# The Psychology of Survey Questions

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# Survey Design Question Types

Response Type	Pros	Cons
<b>Open-Ended (Free Response)</b>	Respondent can share opinion in their own words.	Lengthy responses to analyze and no uniformity in data.
<b>Close-Ended (Yes/No)</b>	Yields structured data and limited options encourage decisiveness.	Respondents cannot elaborate on feedback.
<b>Likert Scale (“Agree to Disagree”)</b>	Measures subjective perspectives	Neutral responses may be difficult to interpret.
<b>Multiple Choice</b>	Responses can be grouped into pre-defined themes, yielding structured data.	Pre-populated multiple-choice options may be “leading” and not adequately represent perspectives.

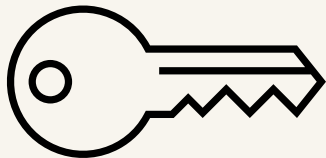
# Four Aspects of Highly Effective Internal Survey Questions

## 1. Actionable



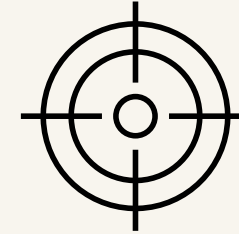
*Have an intention! Use only questions that collect actionable data tied to your survey's goals.*

## 3. Accessible



*Use simple language free of jargon. Stress test your survey with a second pair of eyes (or many pairs!).*

## 2. Specific



*Be precise in what information you collect from each respondent, category of respondent (department, type of user), or stage of the process.*

## 4. Quick



*Keep questions concise and surveys short. For open-ended questions, feel free to prepopulate or include sample "viral" responses to spur thinking.*

# Solicit actionable feedback

**Come off mute or post your feedback in the chat!**

**How could this survey question be improved?**

**What should change to make this question more impactful?**

## Draft Question

**What do you think is wrong with the solicitation drafting, bid award, and contracting processes?**

# Solicit actionable feedback

## Draft Question

What do you think is wrong with the solicitation drafting, bid award, and contracting processes?

## Better Question

*“When drafting an RFP, I understand what I should include in my solicitation and how to write each component (specifications, problem statement, etc.).”*

- Strongly agree*
- Agree*
- Neutral*
- Disagree*
- Strongly Disagree*

## Why It's Weak

- Asks about too many things in one question
- Respondents might not understand what you mean by “solicitation”
- Leads with a diagnosis that something is wrong

## What Works

- Asks about a specific experience with one part of the process.
- Uses a Likert scale to give a range of response options beyond “yes” or “no”.

# Strong questions are specific

**Come off mute or post your feedback in the chat!**

**How could this survey question be improved?**

**What should change to make this question more impactful?**

## Draft Question

**What activities, initiatives or programs would best promote procurement accessibility and greater collaboration between procurement and programmatic staff?**

# Strong questions are specific

## Draft Question

**What activities or initiatives or programs would best promote procurement accessibility and greater collaboration between procurement and programmatic staff?**

## Better Question

What kinds of tools or resources would make the procurement process easier for you to understand? (*For example, interactive training series, updated resource guides, regular office hours, infographics*)

## Why It's Weak

- Vague – unclear what any of this means!
- Filled with jargon

## What Works

- Uses concrete language and examples
- Uses straightforward descriptions instead of jurisdiction-specific terms

# Common Challenges with Internal Surveys

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# Common challenges with surveys across governments

1	<p><b>Making data actionable and not letting feedback “sit on the shelf”!</b></p>	<ul style="list-style-type: none"> <li>• Develop a <b>committee focused on</b> analyzing data</li> <li>• View <b>implementing survey data</b> as a <b>“formal project”</b></li> </ul>
2	<p><b>Marketing the survey &amp; getting consistent “high” response rates</b></p>	<ul style="list-style-type: none"> <li>• Build a <b>consistent cadence of surveying</b> – <i>be patient to change internal behaviors</i></li> <li>• Identify <b>“internal champion”</b> to serve as ambassador</li> </ul>
3	<p><b>Promotion of the survey (Pre &amp; Post)</b></p>	<ul style="list-style-type: none"> <li>• Send out <b>“Insights &amp; Actions”</b> email after survey to share outcomes</li> <li>• Publish results of the survey <b>in a dashboard</b> or resource with high visibility</li> </ul>

**Pro Tip: Consider using survey as marketing tool for focus group engagement:**

- Surveys could be viewed as “screaming into the void”
- Provide confirmation that responses are useful by engaging stakeholders in follow-up conversations to delve deeper into issues

# SAN DIEGO COUNTY TEAM INTRODUCTIONS

**JACK PELLEGRINO**



**Director, Department of  
Purchasing and Contracting**

**RICHARD MCCARVELL**

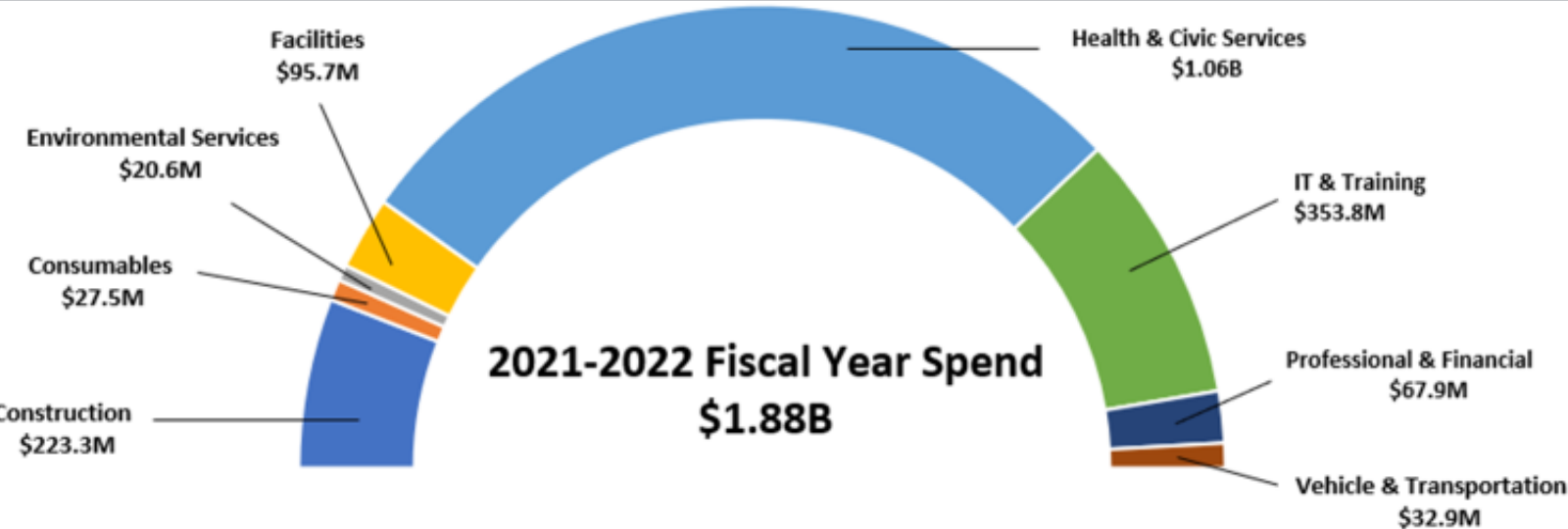


**Chief, Department of  
Purchasing and Contracting**

**PAOLA MUNOZ**



**Program Manager, Department of  
Purchasing and Contracting**



## WHAT THE COUNTY BUYS

The County procures a wide variety of goods and services. Significant spending occurs in health and civic services, information technology, and construction.

**Goal – Competitively award 90% of eligible dollars**

**YE 2021-2022 – 88% (\$1.52B of \$1.73B)**

		Awarded Contracts (in millions)		
Not Eligible to Compete	OGA	5.77		
	Other Cat. Exemption	32.62		
	<b>Subtotal</b>	<b>\$38.39</b>		
Eligible for Competition	BuyNet	1,410.69	81.4%	88%
	Cooperative Procurement	106.19	6.1%	
	Quick Quote	2.78	0.2%	
	Single Source	212.49	12.3%	
	<b>Subtotal</b>	<b>\$1,732.16</b>	<b>100%</b>	
<b>TOTAL Awarded</b>		<b>\$1,770.55</b>		

## HOW THE COUNTY BUYS

- Contract portfolio of over \$13 billion
- Over 2,500 active contracts managed
- 1,166 new contracts issued, valued at \$1.8 billion
- 1,504 contracts amended
- 668 public procurements posted to BuyNet (Record)
- Participated in 33 vendor outreach events

# WHO DOES THE COUNTY BUY FROM

## SMALL & DIVERSE SUPPLIER SPEND



Small Business/Provider



Non-Profit



Disabled Veteran Business



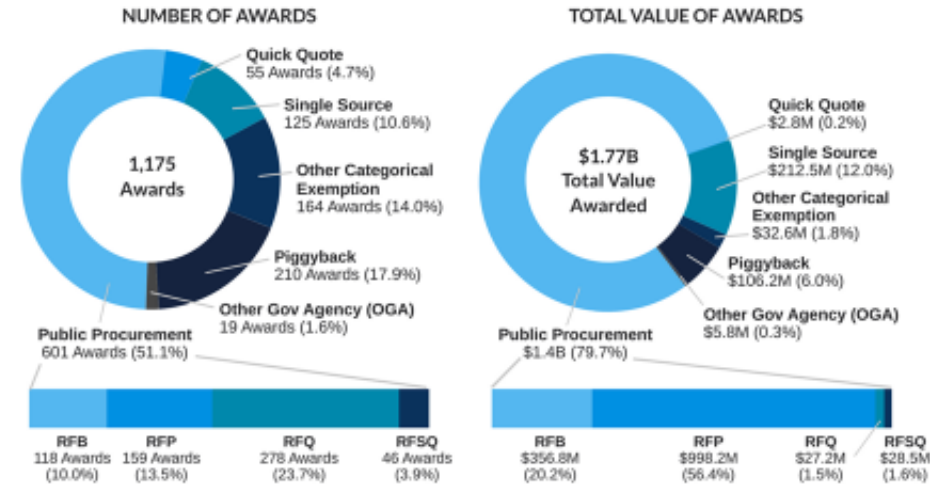
Local

# WHO DOES THE COUNTY AWARD TO?

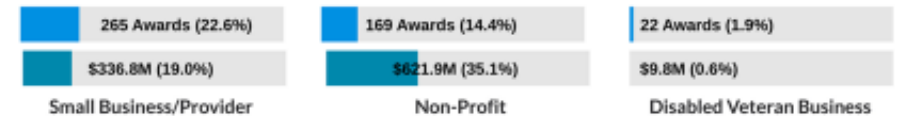
## COUNTY OF SAN DIEGO CONTRACT AWARDS FY2021-2022



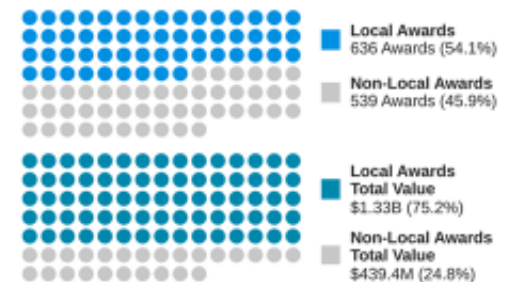
**NEW CONTRACT AWARDS.** In FY2021-2022, the County awarded 1,175 new contracts with a total value of \$1.77 billion. Awards are made primarily via competitive procurement methods.



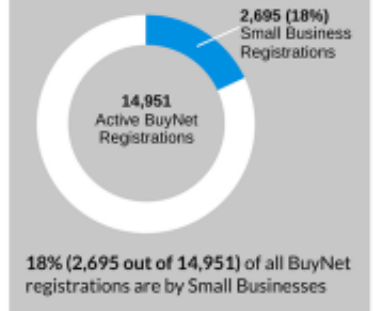
**SMALL & DIVERSE SUPPLIER AWARDS.** Percentages are based on the total awards and total value awarded. Categories may overlap as individual suppliers may belong to more than one category.



**LOCAL AWARDS.** In FY2021-2022, the County awarded 636 contracts with a total value of \$1.33 billion to local suppliers.



### BUYNET REGISTRATIONS



# What was the "why"?

To understand the current perception of how our customers currently view our department and to identify areas of potential improvement.

**Purpose**

The results of the DPC Customer Service Survey is to be used to benchmark DPC performance.

**Function**

# Process Development - How was it made?

## Model



The initial questions developed in 2013 were modeled after an existing County of San Diego Customer Experience Survey and modified to fit DPC's business needs.

## Design



DPC Executive Management Team was involved in the process to develop the survey questions; a practice continued today. Additionally, the survey was approved by the Chief Administrative Officer, as part of the County's standard business practice.

# Survey Questions

\* 1. DPC generally understands my Department's procurement needs.

Strongly Agree    Agree    Neutral    Disagree    Strongly Disagree

Additional comments

\* 2. Procurement questions or concerns are fully addressed by DPC.

Strongly Agree    Agree    Neutral    Disagree    Strongly Disagree

Additional comments

\* 3. DPC communicates clearly about policies, procedures or business rules that affect my service requests and offers alternatives to resolve potential issues.

Strongly Agree    Agree    Neutral    Disagree    Strongly Disagree

Additional comments

\* 4. I receive timely and consistent information from DPC.

Strongly Agree    Agree    Neutral    Disagree    Strongly Disagree

Additional comments



# Survey Questions

\* 5. DPC encourages continuous collaboration across the County Enterprise by working with and connecting relevant departments together throughout the procurement process.

- Strongly Agree    Agree    Neutral    Disagree    Strongly Disagree

Additional comments

\* 6. Please rate DPC's overall professionalism (Strongly Agree is the highest rating).

- Strongly Agree    Agree    Neutral    Disagree    Strongly Disagree

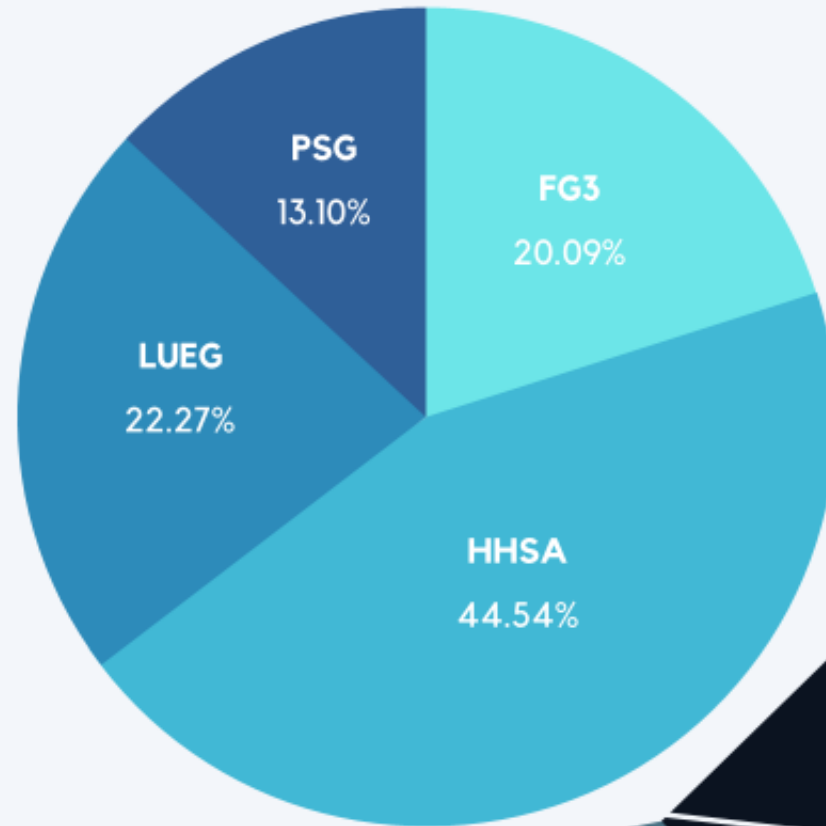
Additional comments

\* 7. Which Group do you belong to?

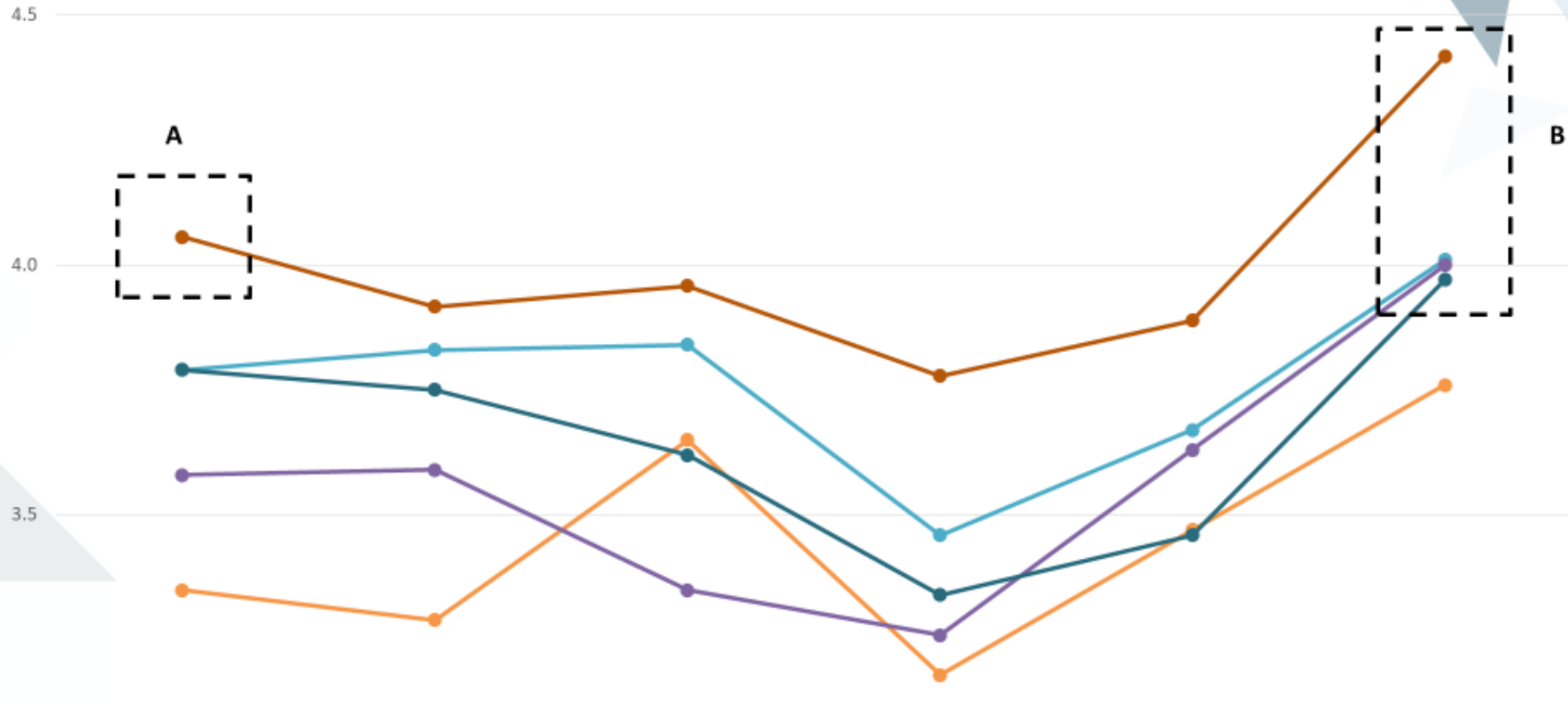
# What were the results?

## Total Responses: 229

- FG3 = 46 (20.09%)
- HHSA = 102 (44.54%)
- LUEG = 51 (22.27%)
- PSG = 30 (13.10%)



# SURVEY RESULTS – ALL COUNTY GROUPS



SCALE:

5 – STRONGLY AGREE

4 – AGREE

3 – NEUTRAL

2 – DISAGREE

1 – STRONGLY DISAGREE

	Understands Needs	Questions Addressed	Clear Communication	Consistent Information	Continuous Collaboration	Professionalism
— COSD 15-16	3.35	3.29	3.65	3.18	3.47	3.76
— COSD 16-17	3.79	3.83	3.84	3.46	3.67	4.01
— COSD 19-20	3.58	3.59	3.35	3.26	3.63	4.00
— COSD 21-22	A 4.06	3.92	3.96	3.78	3.89	4.42
— COSD 22-23	3.79	3.75	3.62	3.34	3.46	3.97

# Feedback Summary



## General Themes - Areas Improvement

- Consistency in process and level of service from procurement staff.
- Procurement timelines remains an issue.
- Communication of policies and procedures.
- Continuous collaboration across County Enterprise.



## General Themes - Positive Feedback

- Consistently high scores and positive comments regarding professionalism in all interactions.
- Willingness and desire to help.
- Knowledgeable on procurement industry topics.

# Tangible Outcomes

Re-aligned organization into customer focused support teams.

**Organization**

Implementation of H.E.A.R.T. and "Positive Approach = Positive Experience Customer Service Commitment".

**H.E.A.R.T**

Established Procurement Action Lead Time (P.A.L.T.).

**P.A.L.T.**

Revised Staff Development Training Program to include fundamental procurement process for new staff to ensure consistency in process and level of service.

**Training**

# Actionable Insights

- Develop measurable survey questions.
- Keep survey length short.
- Be consistent with the questions asked and frequency in conducting the survey.
- Engage customers to encourage.
- Embrace feedback/constructive criticism.

DEPARTMENT OF  
PURCHASING &  
CONTRACTING

# Thank You



Questions? Contact:

[DPCOutreach.FGG@sdcounty.ca.gov](mailto:DPCOutreach.FGG@sdcounty.ca.gov)