How can you engage in this session?

Please use the **"Raise Hand"** function on Zoom!

If able, please **turn on your Zoom camera!**

Look out for **discussions and resources** in the Zoom chat!

Session Roadmap

01 — Why is it important to engage vendors? How can you build buy-in to use a survey as a diagnostic tool?

02 — What are characteristics of an effective vendor survey? How can you create "good" survey questions?

03 — What are creative outreach strategies? What are best practices to maximize survey responses?

04 — How can you use survey data to initiate change? How can you effectively communicate survey results?

PEN Pulse Poll

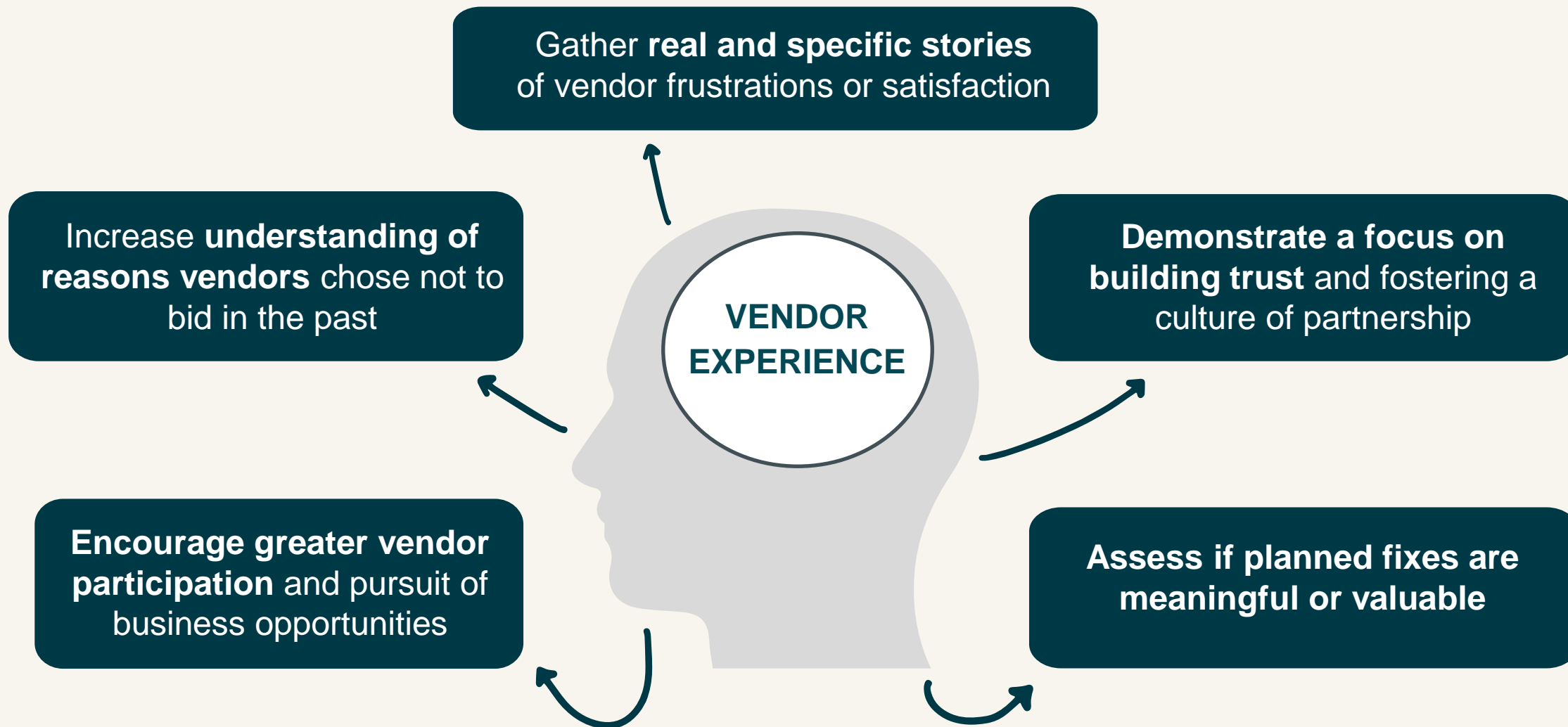**Which phase of launching a vendor survey are you currently in?**

What topic are you most interested in learning about related to vendor surveys?

Section I: Why is it important to engage vendors? How can you build buy-in to use a survey as a diagnostic tool?

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If you aren't regularly soliciting feedback from the vendor community, your government is missing valuable input

Gather **real and specific stories** of vendor frustrations or satisfaction

Increase **understanding of reasons vendors** chose not to bid in the past

VENDOR EXPERIENCE

Demonstrate a focus on building trust and fostering a culture of partnership

Encourage greater vendor participation and pursuit of business opportunities

Assess if planned fixes are meaningful or valuable

Governments have tactically used surveys to improve process efficiency and build relationships

City of Tulsa Business Engagement Survey
May 2022

In partnership with the Harvard Kennedy School Government Performance Lab, the City of Tulsa is seeking to understand your experiences and suggestions related to how Tulsa purchases goods and services. All feedback is anonymous and will have no impact on any contracting you do with the City. If you have questions, email Charles Kargman at ckargman@cityoftulsa.org or Purchasing Director Steve Johnson at smjohnson@cityoftulsa.org.
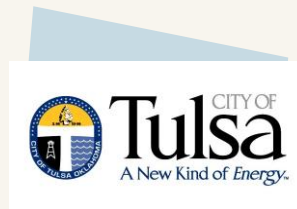
* Required

Opening

1. Have you ever done business with the City of Tulsa? *

○ Yes. I am or have been a vendor with the City of Tulsa.

○ Not yet. I have bid on a City of Tulsa contracting opportunity but have not been awarded the bid.

○ No. I have never bid on a City of Tulsa contracting opportunity.

Challenge:
- Low solicitation response rates
- Poor understanding of MWBE vendor experiences

Outcome/Impact:
- 200+ responses
- Clarity of vendors' needs
- 10% decrease in solicitations with 1 bid received
- 10-point decrease in the percentage of solicitations that receive just 1 bid.

Building buy-in is a necessary first step to launching an effective vendor survey

Understand the "WHY"
Before proposing a vendor survey, **map out intended goals, desired outcomes,** and any starting hypotheses!

Cultivate Champions and Collaborators Early
Consider **who should be involved** in developing, approving, and distributing the survey and **who could find value** in the output!

Assess the feasibility of success by mapping barriers
Identifying potential roadblocks to success (e.g., staff capacity, timing, approvals) to proactively identify solutions and overcome resistance.

Frame the survey as an opportunity, not a vulnerability
View **survey feedback as a valuable gift**, providing an opportunity to foster a culture of open communication and change.

Section Overview: Key Takeaways

01 | **Why is it important to engage vendors? How can you build buy-in to use a survey as a diagnostic tool?**

Collecting vendor feedback creates a call to action, signaling to vendors that improving their experience is top of mind.

Surveys offer an opportunity to understand the vendor perspective, shifting from anecdotal to data-driven evidence to quantify experiences.

Remember to **outline clear goals and identify champions** to help build buy-in.

Internal and external barriers can influence success – planning is key!

Section II: What are characteristics of an effective vendor survey? How can you create "good" survey questions?

How to get started crafting your vendor survey!

Problem Statement

- What processes or experiences do you want to learn more about?
- What is the current state vs. the desired end state?

Target Audience

- Whose experience or perspectives do you want to better understand?
- Who can add clarity or new insights on a particular topic?

Goal-Setting

- What information, insights, or perspectives are needed to achieve objectives or close knowledge gaps?
- How quickly should these insights be gathered?

Question Design

- What are the most critical questions to achieve our goals?
- Are these questions specific and clear enough to gain insights?
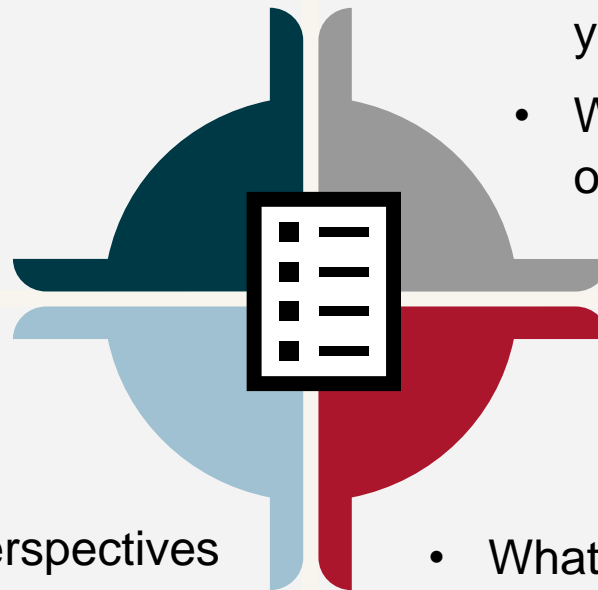
Long Beach, CA: Survey Problem Statement & Goals

CITY OF LONGBEACH

Problem Statement

Goal-Setting

Challenge: The City of Long Beach experienced low vendor participation, especially from small/local businesses.

Outcome: The City of Long Beach aims to accomplish the following:

- **Boost vendor participation** and contracting experiences for small and local businesses;

- Facilitate a seamless **transition to a new e-Procurement system**

1. **Understand vendor experience** and thought process when considering contracting with the city

2. **Identify any perceived obstacles or challenges** in the contracting process

3. **Generate new ideas or suggestions** for specific areas of improvement

Overall survey structure

I. Survey Opening – briefly explains the purpose of the survey and what you are seeking to learn

II. Survey Questions

❑ Specific questions related to your problem statement *(i.e., your vendors experience with your jurisdiction)*

❑ Mix of questions collecting basics about the vendors *(i.e., type of business, have they worked with your government previously)*

Elevate your survey by using **branching logic** to identify which questions apply to which category of respondents *(i.e., current vendor, former vendor, bidders who have never won)*

8 Characteristics of Effective Questions

Actionable. **Use only questions that collect actionable data** tied to your survey's goals.

Specific. **Be strategic and intentional about what information is collected** from each respondent.

Accessible. **Use simple language free of jargon**. Stress test your survey internally and externally.

Targeted. **Apply specific questions to the relevant audience** to extract the right insights!

Fast. **Keep questions concise and surveys short.** Try and keep surveys under 10 minutes to complete!

Unbiased. **Avoid including leading questions** in surveys that lack neutrality.

Clear. **Keep it simple!** Do not overcomplicate the questions so the respondents are confused.

Engaging. **Diversify the question format** to keep the respondent's focus and make the questions relevant.

Question Types

Binary Close-Ended

- **PRO:** Yields structured data

- **CON:** Respondents cannot elaborate on feedback

"Yes/No" or "Agree/Disagree"

Likert Scale

- **PRO:** measures subjective perspectives

- **CON:** Neutral answers could be difficult to interpret

On a scale of 1 to 5, how satisfied are you with bid opportunities?

?

Multiple Choice

- **PRO:** Fast to complete

- **CON**: Options could be "leading" and not adequately represent perspectives

More robust response options

Open-Ended

- **PRO:** Captures feedback from respondents in their "own words"

- **CON**: Lack of uniformity in data makes analysis difficult

Remember to avoid leading questions to eliminate bias

❑ A leading question "guides" the respondent towards a particular answer.

❑ Poorly designed questions can create bias since they may generate answers that do not reflect the respondent's true perspective.

❑ When able, use neutral phrasing! Or provide an option that says, "none of the above."

Avoid negative statements

Leading Question	Alternative Wording
What have been the primary **components of the contracting process that have left you frustrated?**	Do any of the following statements reflect your past experiences or interest in bidding on City contracting opportunities?
We encourage all prospective bidders to enhance their knowledge of the procurement process. **Would you be interested in attending more virtual pre-bid conferences?**	Please rate your interest in attending virtual pre-bid conferences.

Avoid coercive language.

Let's Practice: How could this question be improved?

Question 1 ✕

What activities, initiatives, or programs would best promote procurement innovation and vendor equality in Citylandia?

Unclear and broad ask; not personalized

Vague and redundant language:
- *Activities, initiatives, programs are synonymous*

Filled with jargon:
- *"procurement innovation"*
- *"vendor equality"*

Let's Practice: How could this question be modified?

> **✓ Question 1**
>
> What would make you more likely to recommend working with Citylandia?
>
> *(e.g., faster payments following invoice submission, removing a specific contracting requirement, or none of the above.)*

Uses targeted language that asks for a personal perspective

Short and direct question

Provides examples using **easy-to-understand language**, not government-specific terms, to spur ideas

Remember: Your responses are only as good as the questions you ask!

✕ Question 1

What activities, initiatives, or programs would best promote procurement innovation and vendor equality in Citylandia?

✓ Question 1

What would make you more likely to recommend working with Citylandia?

(e.g., faster payments following invoice submission, more feedback on work quality, or none of the above.)

Let's Practice: How could this question be modified?

Question 2

What do you think is wrong with the bidding, procurement, contracting, and payment processes?

Too broad and asks about too many things in one question

Leads with a diagnosis that something is wrong

Let's Practice: How could this question be improved?

✓ Question 2

"When bidding on a contracting opportunity with Citylandia, I understood what to submit as part of my bid."

__Strongly agree
__Agree
__Neutral
__Disagree
__Strongly Disagree

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".

Remember: Your responses are only as good as the questions you ask!

✕ Question 2

What do you think is wrong with the bidding, procurement, contracting, and payment processes?

✓ Question 2

"When bidding on a contracting opportunity with Citylandia, I understood what to submit as part of my bid."

__Strongly agree
__Agree
__Neutral
__Disagree
__Strongly Disagree

Interactive Activity – Writing Good Questions

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Let's Practice! Writing good survey questions

❑ **Breakout Rooms**: We will be dividing into breakout rooms to **practice crafting survey questions** following the principles we just discussed *(e.g., actionable, specific, accessible, concise, unbiased).*

❑ **Challenge:** Each breakout room will be **assigned one of the challenges below to draft 3 questions** aimed at understanding why the challenge.

❑ **Share Out:** We will reconvene and discuss **one question from each category.**

Challenge 1:

Local vendors are not registering for your local business certification

Challenge 2:

You are receiving a very low number of responses to your solicitations

Challenge 3:

You are receiving complaints from vendors that your e-Procurement system is difficult to use

Welcome back – let's discuss!

Challenge 1:

Local vendors are not registering for your local business certification

Challenge 2:

You are receiving a very low number of responses to your solicitations

Challenge 3:

You are receiving complaints from vendors that your e-Procurement system is difficult to use

One drafted question will be shared from each challenge

✓ **Question Review**

– Is this question easy for a vendor to answer? Why?

– Will this question help you to better understand or solve the challenge?

– What feedback do you have to improve this question?

We'll take some feedback live by coming off mute, but feel free to write any feedback on the question in the chat!

Section Overview: Key Takeaways

02 What are characteristics of an effective vendor survey and how can you create a "good" survey question? **?**

? **Define your problem statement, goals, and target audience** before writing survey questions.

? **Diversify your question types and avoid using leading language** to solicit better responses from vendors.

? **Review characteristics of effective questions** when designing your survey: »

Actionable	Specific	Accessible	Targeted
Short	Unbiased	Clear	Engaging

Section III: What are creative outreach strategies? What are best practices to maximize survey responses?

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Considerations when selecting the platform to host survey and collect responses

❑Does my jurisdiction have an existing account with a survey tool?

❑Is this an easy tool to train team members to use?

❑Do I need high customization like skip logic and question branching?

❑Is there a budget for advanced features or do I need a free tool?

Example Tools

Google Forms	Microsoft Forms	SurveyMonkey	qualtrics
User-friendly, free, limited customization	*User-friendly, integration with Microsoft*	*Advanced features, paid plans, better for analysis*	*Highly customizable, advanced analysis, expensive*

Getting creative with vendor outreach

Find current and past vendors through payment lists, contracts, e-procurement, CRM and ERP systems.
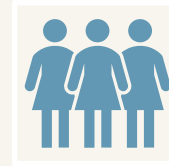
Reach out to community partners to spread the word.

Leverage all communications channels (i.e., email, social media, press releases, mail, paid advertising).
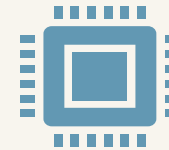
Design your survey to be compatible with mobile devices.

Partner with other government agencies, including executive branch, to highlight the importance of this effort.

Consider translating your survey and outreach material into other languages.

Sample vendor survey email communications

Sample Vendor Survey Communications

Outreach Email to Vendors

SUBJECT: [insert jurisdiction] Business Engagement Survey - Share Your Feedback!

Hello,

[insert jurisdiction] invites you to take a business engagement survey to share your experiences and suggestions on how [insert jurisdiction] purchases goods and services. **Please complete this 10-minute survey (linked here) by DAY, MONTH DATE.**

The survey is open to businesses and organizations of any sector or size, whether or not you have been a vendor with [jurisdiction].

All responses are anonymous and will have no impact on any business you do with [insert jurisdiction]. If you have questions about this survey, email [jurisdiction contact].

Thanks – we greatly appreciate your feedback.

[insert jurisdiction]

Email correspondence should be short and straight to the point!

Telling vendors approximately how long it takes may increase responses!

Include a contact person versus a generic email so it feels personal!

Example outreach strategy from Long Beach, CA

- ❑ Attached flyers to **e-Procurement notification system** and social media

- ❑ **Mailed 5,000 physical postcards** with QR code to local business owners

- ❑ Sent flyers to **targeted community-based organizations** in languages relevant to their work

- ❑ **Developed survey** and outreach materials in **English, Spanish, Khmer, and Tagalog** (symbol of inclusion to different Limited English Proficient communities)

Section Overview: Key Takeaways

03 What are creative outreach strategies? What are best practices to maximize survey responses?

Research and choose the right platform that is user-friendly and meets functional needs.

Beta Test the survey with group of trusted staff and vendors to assess any potential issues.

Translate surveys and outreach materials to reach the vendor community.

Engage community organizations and entrepreneur support groups to develop innovative outreach strategies.

Section IV: How can you use survey data to initiate change? How can you effectively communicate survey results?

Do not be afraid to dive into your survey data!

You don't need to be a data analyst to show powerful insight!

❑ **Calculate summary statistics:**
- ✓ For example, how many vendors responded?

❑ **Disaggregate answers to questions, aiming to understand trends among specific groups:**
- ✓ Do common themes come up for one category of respondents, but not another?

❑ **Review free response answers for recurring themes and powerful quotes?**
- ✓ What topics do respondents keep bringing up?
- ✓ What quotes encapsulate common pain points?

Simple analysis from strategically worded survey questions can lead to helpful insights

Q: Have you experienced difficulties with any of the following items using our e-procurement system? *(Select all that apply)*

Item	Marked as Difficult
Logging in	2
Creating a profile	4
Navigating the system	8
Finding open solicitations	4
Understand solicitation requirements	18
Responding to a solicitation	16
Uploading supporting documentation	35
Confirming proper submission	5
Accessing updates	12
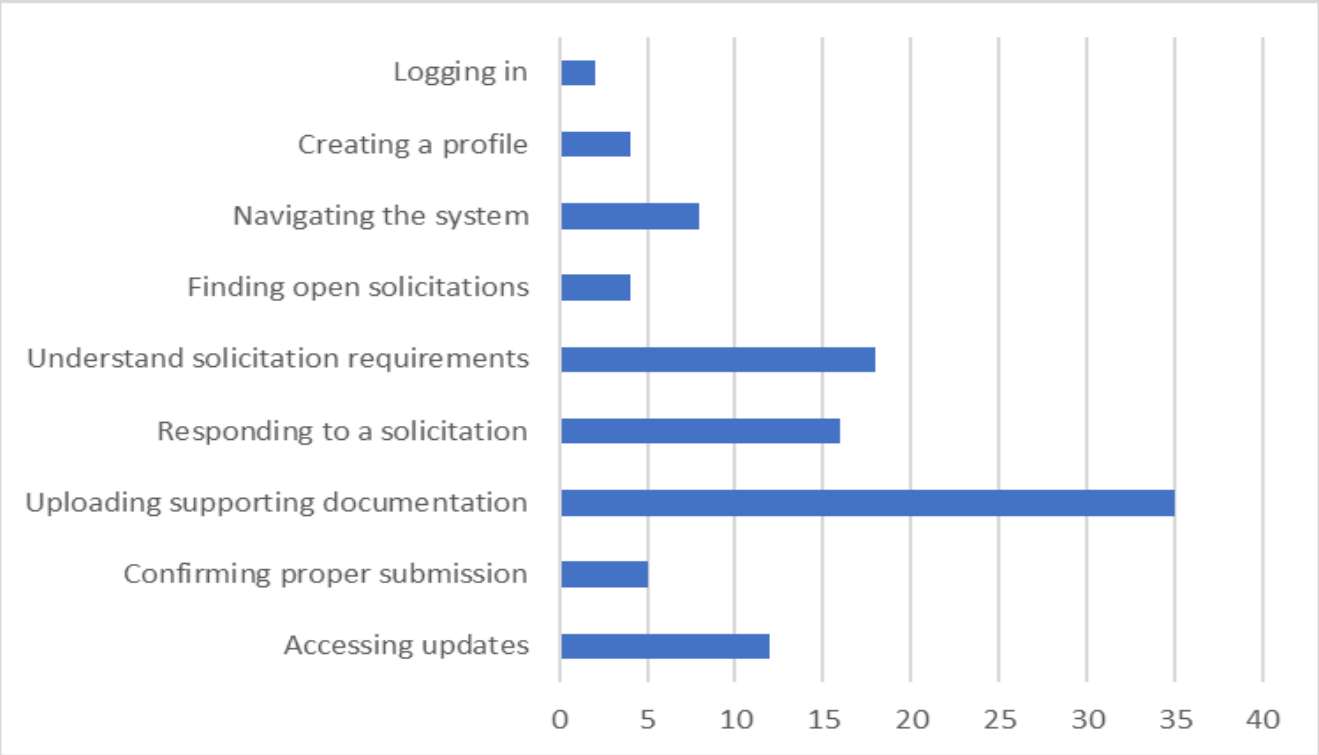
Keep on the lookout for useful insights hidden below the surface of your data

Rate on a scale of 1 – 5 how much you agree with the following statement: "I am consistently notified about upcoming bidding opportunities ."

| Average rating of all 50 respondents:	3

? Is there more to this data that could make it more useful to take action?

Disaggregating data can lead to better insight

Rate on a scale of 1 – 5 how much you agree with the following statement: "I am consistently notified about upcoming bidding opportunities ."

Vendor Type	Average Rating
Currently hold a contract	4.9
Have previously held a contract but not currently	4.7
Have responded to bids but never won a contract	3.5
Have never responded to an opportunity	1.1

Average Rating of Different Vendors
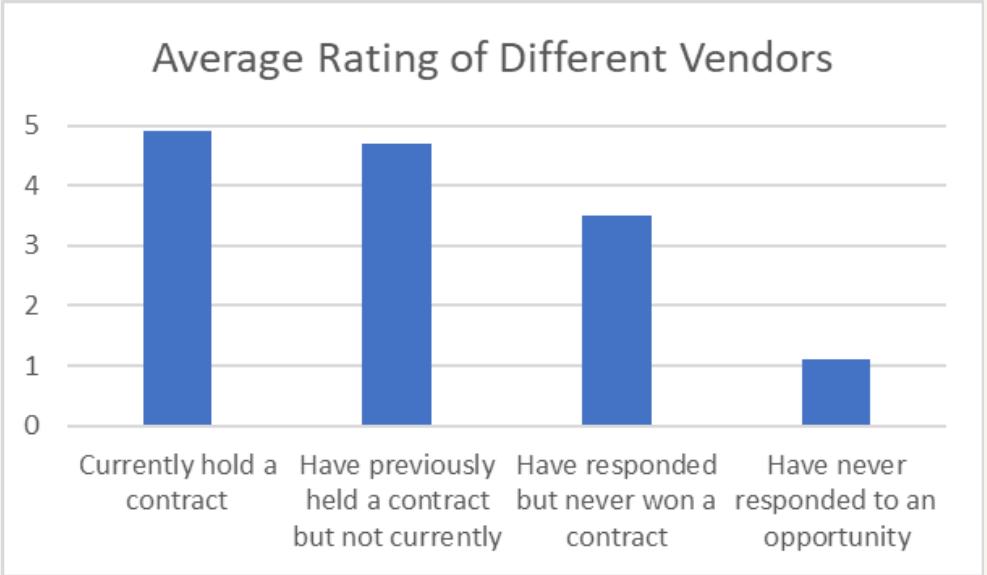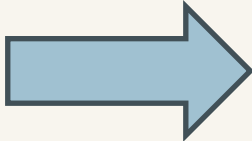
⚠ Looks like we should prioritize improving outreach for new vendors!

Communicate your findings effectively

Example: Pennsylvania sent the below email to all respondents of their vendor survey outlining what they are planning to do as a result of it

Thank you for participating in the Pennsylvania Department of Labor & Industry (L&I)'s Workforce Grants Survey in September 2022. Over 173 organizations across 38 counties responded to our survey. Over 80% have been in business for over 15 years and more than a third (34%) were small businesses. We have received your valuable feedback and have spent the last couple of months reading your responses, analyzing the data, and codifying our learnings.

What We Learned
Respondents identified areas of growth and strength for L&I:
- They craved **more communication** around future grant opportunities, application timelines, and feedback on rejected applications. Over 75% of respondents said forecasting grant opportunities would make them more likely to respond.
- They struggled with intensive invoicing documentation, reimbursement, **and reporting requirements**. Tight **timelines** were also a challenge.
- They felt that their **request for technical assistance (TA)** was not always answered in a timely manner. Almost a third of the respondents emphasized improvements in providing technical assistance.
- They emphasized the **positive experience working with L&I staff**. Two thirds of respondents found it easy and straightforward to highlight their organization's story in grant applications. Over 90% of respondents recommended working with L+I.

What We Plan to Do
In response, in the coming year, we plan to implement the following solutions to address respondents' concerns around communication and transparency.
- **Email outreach with grant forecasting:** We will standardize email communications and include a continually updated seasonal forecast of grant opportunities.
- **Pre-submittal webinar:** We will standardize bidders' conferences to explain grant opportunities and application process. We will also use this time to provide additional TA to the applicants.
- **Invoicing guide:** We will update the existing version of the invoicing guide to assist grantees with navigating reimbursements and advances. We will also ensure that the guide is more accessible, especially to the new grantees.

Section Overview: Key Takeaways

04 How can you use survey data to initiate change? How can you effectively communicate survey results?

Examine the data from your survey to understand how your vendors feel. You don't have to conduct complicated analyses to find useful insights!

Take your data review a step further by **disaggregating** responses to identify trends and insights by different groups.

Share takeaways and actions you are planning to take in response to the survey with vendors, community groups, and the public.

Use learnings from survey as an opportunity to **engage leadership** and solicit buy-in on future actions.

Section V: Actionable Next Steps

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Review this PEN Publication

**Surveying Your Vendor Community
to Assess Satisfaction and
Identify Pain Points**

In this how-to guide, you will:

- Learn how to design and implement an effective survey

- Read about concrete examples and promising practices in vendor survey implementation across governments.

Starting on Page 13 of the *Vendor Survey How-to-Guide* is a bank of suggested survey questions for you to utilize.

Best Practices from Vendor Bootcamp Participants

CITY OF SIOUX FALLS

> **If you are thinking about a survey, just do it! It's a valuable baseline to have!**
>
> However, **communicate the reason behind the survey** and what you plan to do with the information clearly with the vendors!

CITY OF ORLANDO PROCUREMENT AND CONTRACTS

> **It is critical to get the buy-in from different stakeholders!**
>
> If our team had developed this survey in a silo, our questions would have been one-dimensional.
>
> PEN helped us **think of sophisticated, purpose-driven questions.**

Appendix

Ask specific questions for different audiences using conditional branching

- Apply specific questions to the relevant audience (e.g., never bidders).

- If you'd like to ask different questions to different categories of respondents (current vendors vs. those who have never held a contract, for instance), consider adding **"conditional branching"** that creates a custom path through the survey based on respondents' answers.

  o For example, a question that identifies prospective vendors who have never bid could then put those respondents on a path to only see questions about why they have never pursued a contract, rather than asking them about their experience as vendors, which would not be relevant to them.

Once you analyze the data, don't forget to turn your findings into action!

Louisville Metro Government

Finding	Action
A majority of respondents indicated their desire for a portal to track the processing of invoices and the submission of payments.	Used survey results to make the case to leadership to justify paying to add this feature to their Workday system.

Boston Planning & Development Agency

Finding	Action
Respondents identified lack of awareness as a barrier, despite the team's belief they had effective outreach.	Expanded outreach of business opportunities to include new formats indicated by respondents as desired like social media.

City of Syracuse

Finding	Action
Half of the survey respondents were from Syracuse. These small and local businesses wanted to engage with the city but rarely had the chance to.	Prioritized supplier communication on its website and department initiatives and greater partnerships with local organizations.