



Demystifying Procurement:

Procurement 101 for New Staff and Key Stakeholders

Procurement Excellence Network (PEN) Training



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and **government!**

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January 23, 2025

How can you engage in this session?



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**discussions and
resources**
in the Zoom chat



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**discussions and
resources**
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Session Roadmap

1. Why Equipping Stakeholders with Essential Procurement Knowledge Matters
2. Teaching Procurement Basics to Government Stakeholders
3. Breaking Down Complex Procurement Topics with Practical Tools

Join us for a post-event session (30 minutes) to **learn about and share strategies, challenges, and insights related to designing and delivering Procurement 101 sessions!**

Section I: Why Equipping Stakeholders with Essential Procurement Knowledge is Important

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Today's Focus: Internal Stakeholders

Objectives for this Session

- Explore how procurement knowledge empowers internal stakeholders, including new staff, user depts, and elected officials.
- Strengthen collaboration and compliance through better understanding.

Why Focus on Internal Stakeholders

- Internal stakeholders drive day-to-day operations and interact directly with procurement processes.
- Communication and training approaches significantly vary for external audiences such as vendors.

Challenges in Internal Stakeholder Engagement



Perception Issues

Departments often view procurement as inefficient, difficult, or overly bureaucratic, viewing it as a hurdle rather than a strategic enabler.



Fragmented Communication

Lack of early collaboration and defined roles leads to rushed and non-compliant/poorly executed procurements.



Resistance to Change

Longstanding habits conflict with new strategic approaches championed by procurement teams.

“The perception was procurement staff **sitting behind computers rejecting purchase orders.”**

– Michelle Wilson | Long Beach, CA

The Importance of Building Internal Stakeholder Knowledge



Procurement is central to government success: Local governments spend 25-50% of their budgets on procured goods and services.



Processes are sticky: Once internal stakeholders buy-in to a prescribed approach, there is potential for sustained improvements.



Knowledge builds trust: Understanding fosters collaboration between stakeholders and reduces friction.



Strategic alignment leads to better results: Well-trained stakeholders help create fairer processes, faster cycle times, and higher-quality contracts.



Section II: Teaching Procurement Basics to Government Stakeholders

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Identifying Your Audience

Who are your stakeholders?



New Hires → Need foundational knowledge to quickly get up to speed and contribute to more complex procurement activities.



Elected Officials → Seek concise, big-picture overviews on procurement's role in promoting accountability, transparency, and efficient use of public resources.



User Departments → Need buy-in on the importance of procurement processes and policies, along with education on how to effectively engage with those processes to provide what's needed (e.g., drafting a usable scope of work).

Audience-Specific Training Promotes Relevance & Impact



Addresses Audience Needs: Tailored training supports the immediate needs and challenges of different stakeholders, prioritizing content that is relevant and actionable.

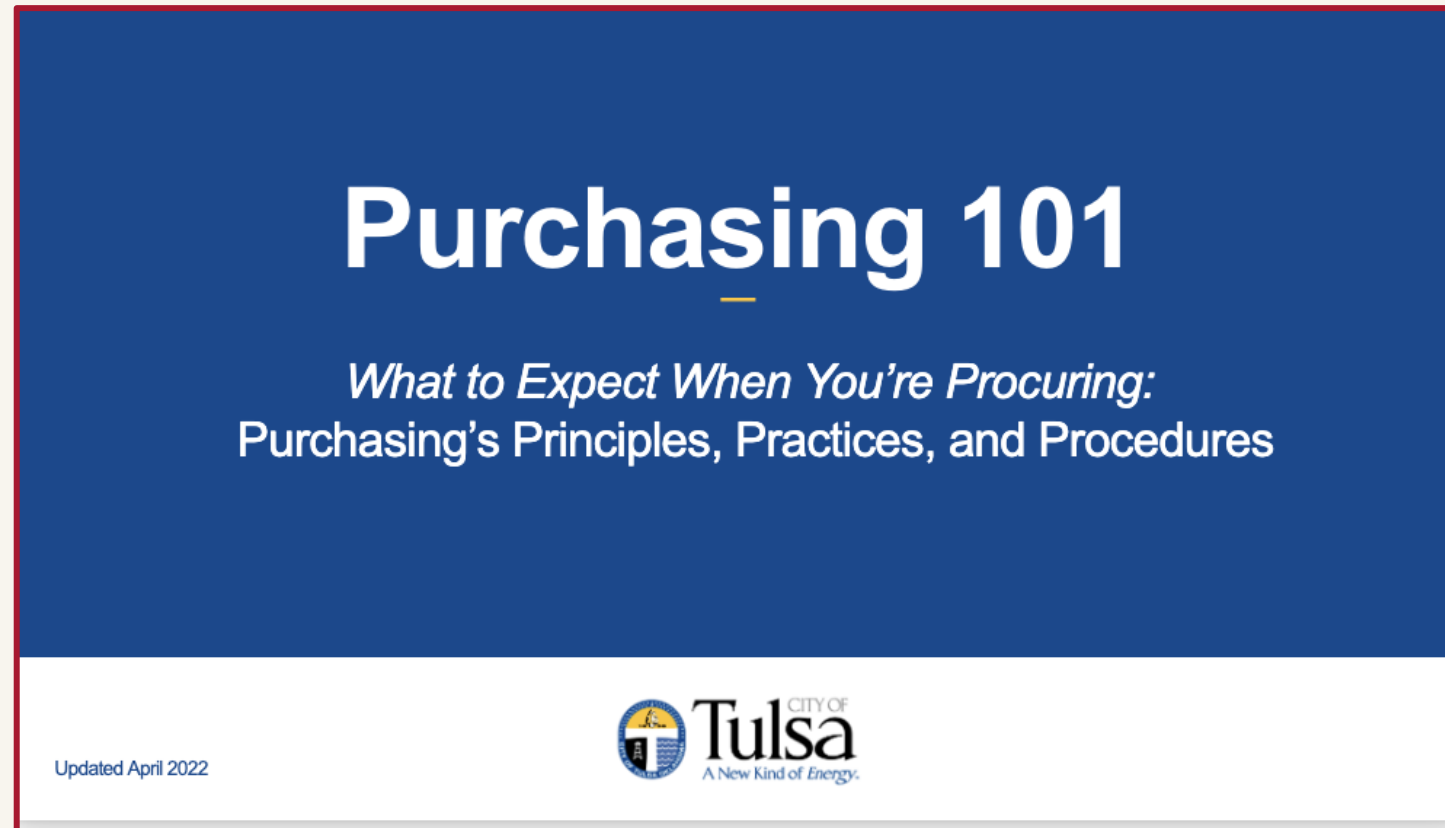


Builds Trust: Customizing content to address stakeholder concerns promotes confidence in procurement as a supportive, value-adding partner rather than just a compliance function.



Fosters Collaboration: Training that aligns with department goals encourages teamwork between procurement and internal staff, helping to solve challenges together and achieve better outcomes.

Example: Tulsa's Purchasing 101 Training



Tulsa's Purchasing 101 training **used a survey** to identify knowledge gaps and department-specific concerns, **tailoring content** to address real user needs and ensuring resources were easy to navigate and accessible.

Tailoring Training Content

Effective procurement training requires understanding your audience's unique needs and delivering content that resonates.



Foundational Knowledge

Example: New hires in Prince William County, VA learned about key procurement steps using interactive training modules



High-Level Overview

Example: Nashville, TN provided a policy-focused briefing for elected officials



Promoting Buy-In

Example: Little Rock, AR engaged department heads through cross-departmental “Procurement Day” sessions

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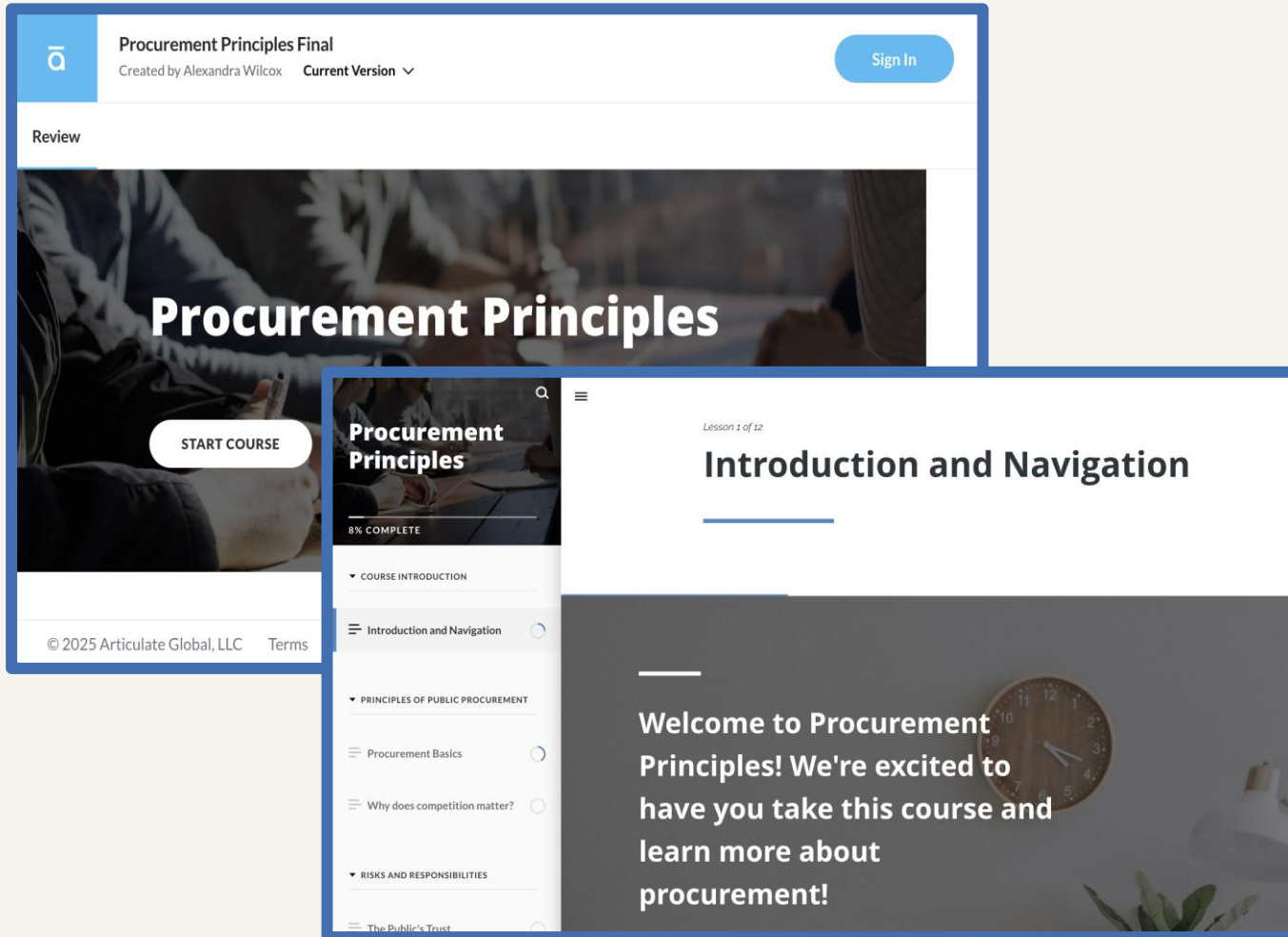
Promoting Buy-In

Example: Little Rock, AR engaged department heads through cross-departmental “Procurement Day” sessions

Example: Prince William County, VA's Interactive Training Module

Key Topics Covered:

- ☐ Course Introduction and Navigation
- ☐ Basics of Procurement, Competition, and Public Trust
- ☐ Roles in Procurement: Procurement Services and Departments
- ☐ Factors Influencing Purchasing Decisions
- ☐ Risk Management, Responsibilities, and Compliance
- ☐ Practical Application: Questions to Evaluate Purchases.
- ☐ Course Wrap-Up Summarizing Key Lessons.



Example: Long Beach, CA's "Queen of Fair"



Purchasing Agent Michelle Wilson's portrayal as the "Queen of Fair" during a staff training **exemplifies the power of blending humor to make complex topics memorable.** By injecting creativity into procurement basics, this approach not only **demystifies processes** but also **fosters knowledge retention.**

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Example: Nashville's Training for City Council Officials



Key Topics Covered:

- ☐ Introduction to Procurement
- ☐ Legal Framework
- ☐ Roles and Responsibilities
- ☐ Centralized Procurement System
- ☐ Interactive Example: Dog Treat Dispensers:
 - *Features staff member's very cute dog and a detailed requisition process to demonstrate how technical requirements align with procurement goals*
- ☐ Evaluation and Contracting
- ☐ Protests and Legal Considerations
- ☐ Closing Remarks

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Featured Speaker: Vitesh Patel (Little Rock, AR)

Engaging Stakeholders through Training: A Case Study from Little Rock



Section III: Breaking Down Complex Procurement Topics with Practical Tools

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Simplifying Procurement Concepts



Use straightforward language to explain processes.



Break steps into smaller, actionable parts.

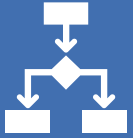


Include relatable analogies (e.g., "shopping with a purpose").

EXAMPLES:

- **Using mock scenarios:** A "Citylandia" case study mimics real solicitations, guiding choices between using RFPs vs. RFQs.
- **Reframing procurement:** Nashville's elected officials' roadshow explains checks and balances with fun examples.
- **Simplifying compliance:** Little Rock's Procurement Day engages staff through interactive sessions and analogies

Practical Tools to Simplify Procurement Concepts



Flowcharts and Decision Trees

Visualize procurement workflows to clarify roles and decision points



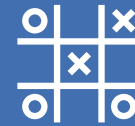
Role-Responsibility Charts

Clarify who does what at each stage of the procurement lifecycle



Storytelling and Analogies

Use relatable stories or analogies to demystify technical concepts



Interactive Scenarios

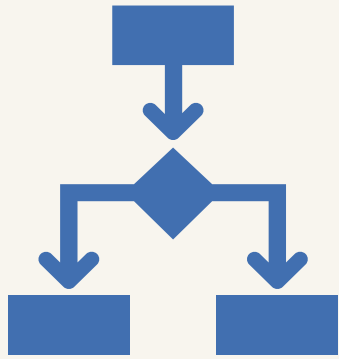
Engage learners with realistic exercises (choosing the right procurement method for specific purchases)



Practical Step-by-Step Guidance

Provide step-by-step guidance for tasks like bid evaluations or contract compliance

1. Flowcharts and Decision Trees



Approach: Use visual workflows to break down procurement processes and streamline decision-making. Flowcharts make it easier to understand each step, such as submit a requisition, draft a solicitation, promote an RFP/Bid, and award a contract.

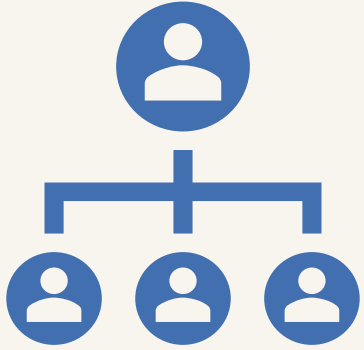
Example: Use a flowchart to simplify bid evaluation procedures, highlighting key decision points and ensuring compliance with procurement policies.

Flowcharts help **simplify complex processes**, making procurement steps intuitive for new staff and fostering consistent understanding across teams!

Example Procurement Process Flowchart Slide



2. Role Responsibility Charts



Approach: Use visual tools like charts or infographics to map out the roles and responsibilities of all stakeholders involved in the procurement lifecycle. This promotes clarity about who does what at each stage, reducing confusion and inefficiencies.

Example: Create a role-responsibility chart that defines the duties of key stakeholders—buyers, approvers, and end-users—and maps how they interact during different procurement stages and processes.

This tool is invaluable for **clarifying "who" is responsible for each task**, helping teams align their efforts and avoid gaps in accountability.

Who does the purchasing?

Example Role Responsibility Slide

Purchasing Agent

Insert name



Insert photo of executive here

AGENCY EXECUTIVE – signs
contract

Buyers



Name



Name



Name



Name

The Purchasing team also includes:

- **TEAM MEMBER** – *Title* – short description of their role
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3. Storytelling and Analogies



Approach: Use stories and analogies to make complex procurement concepts relatable and easy to remember. Connect processes like requisitioning or evaluation to everyday tasks to enhance understanding and engagement.

Example: Explain procurement through grocery shopping:

- **Requisition** = Listing ingredients
- **Solicitation** = Comparing store prices
- **Evaluation** = Choosing the best value option

Storytelling helps demystify jargon and makes training memorable, especially for stakeholders unfamiliar with technical procurement terms. Use relatable, everyday examples for maximum clarity.

Analogy Example: Dog Treat Dispensers in Nashville

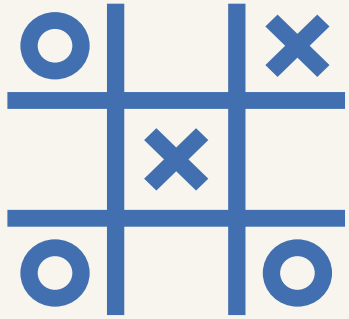


Treat Dispensers & Associated Services

- Submit Requisition
 - **Scope:** Treat Dispensers + Treats + Restock
 - **Technical Requirements:** No cat treats. No veggies. Stock weekly.
 - **Term:** 60-months
 - **Budget:** \$2 billion

Zak Kelly, Nashville's Special Advisor for Procurement Innovation, engaged City Council by simplifying procurement through "Good Dog Phoebe's" journey to procure treat dispensers, making complex steps like requisitioning and solicitation more relatable and memorable.

4. Interactive Scenarios

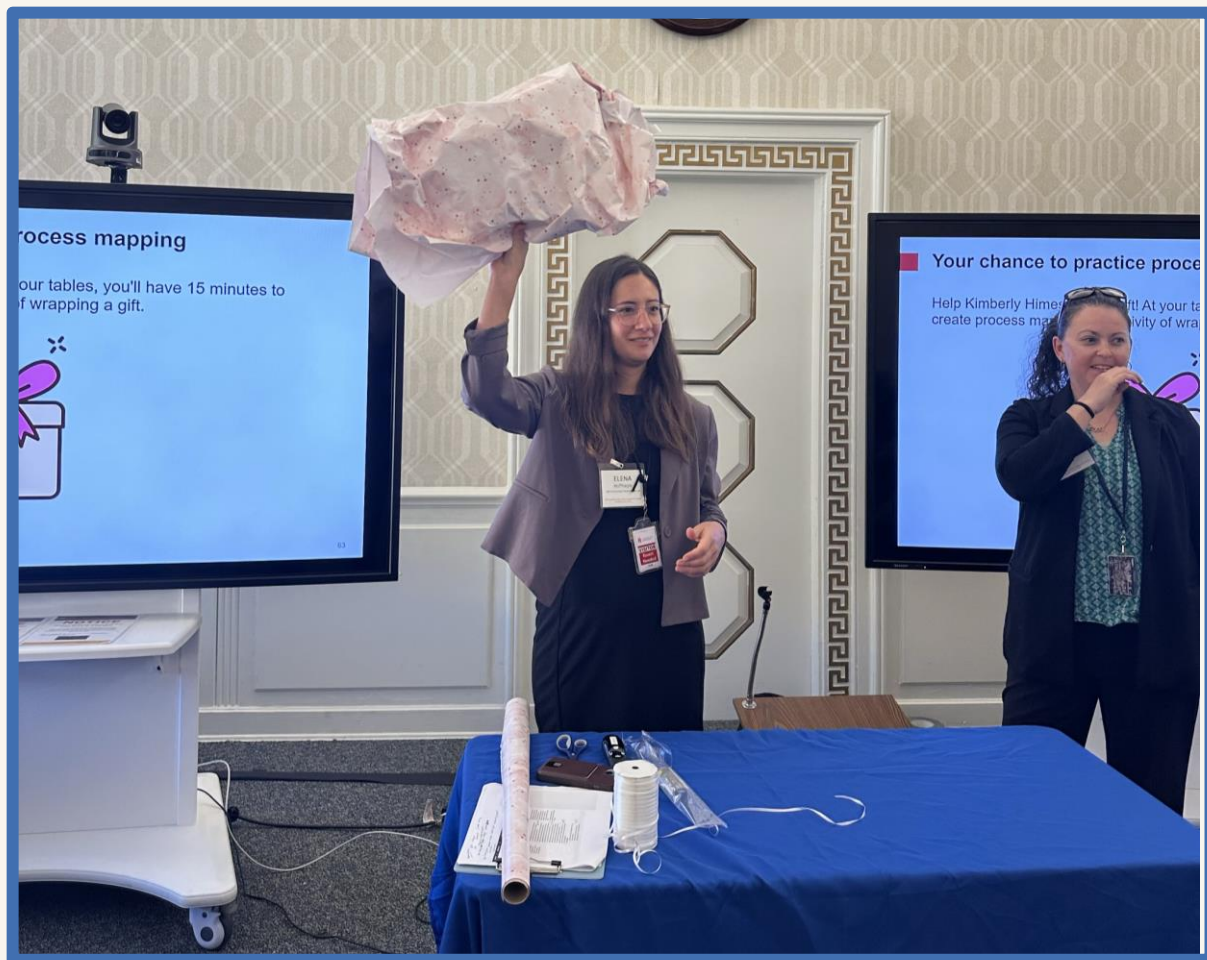


Approach: Use realistic scenarios to help participants apply procurement principles in practical contexts, such as choosing the most appropriate procurement method or evaluating solicitations. This encourages critical thinking and knowledge retention.

Example: A scenario-based question like, "You need to procure software for \$70,000. Should this be an RFQ, RFP, or ITB, and why?"

Grounding examples in real-world scenarios **bridges the gap between theory and practice**, helping learners make informed, context-specific decisions.

Interactive Scenario Example: Wrapping a Present Using Simple Instructions



In a training, we used gift-wrapping as a fun and relatable exercise to highlight the importance of clear and effective communication in process mapping.

This example demonstrates that **overly simplistic instructions often fail to capture the complexities of a task, emphasizing the need for clear, descriptive steps when developing process maps.**

5. Practical Step-by-Step Guidance




Approach: Provide clear, actionable instructions to guide stakeholders through procurement tasks like bid evaluations, vendor outreach, or contract compliance. This promoted clarity and consistency, especially for complex processes.






Example: Develop a checklist for RFP evaluations that includes steps for scoring, criteria verification, and consensus meetings.

Providing clear, step-by-step guidance helps every stakeholder understand their role and contribute effectively, minimizing errors and inefficiencies.

Example Step-by-Step Guidance Slide



Explaining the Procurement Process in 5 Steps

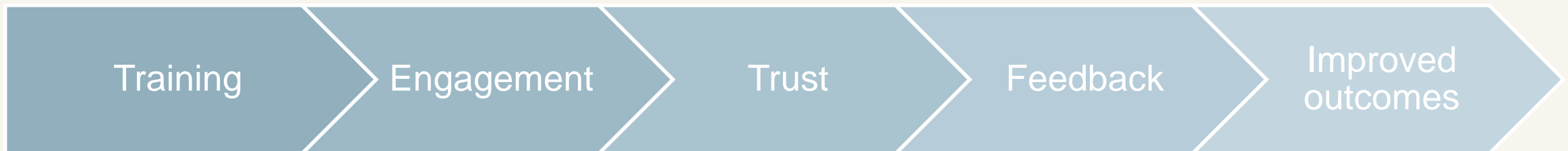
I. Enter a MUNIS Requisition	DEPARTMENT identifies goals, specifications, and budget line for product or service to be purchased.	
II. Draft a Solicitation	BUYER determines the appropriate competitive process and drafts solicitation with customer department.	
III. Promote Solicitation	PURCHASING promotes the solicitation such that the right vendors pursue opportunities with COT.	
IV. Evaluate Bids	DEPARTMENT AND BUYER review bids and determine which vendor offers the "lowest secure bid."	
V. Finalize the Award and Issue the PO	PURCHASING documents bid award, finalizes contract (if \$100k or more) with Legal, and processes purchase order.	

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The Role of Long-Term Engagement

- **Build trust** through consistent and actionable communication
- **Create follow-up opportunities** (e.g., office hours, refresher sessions)
- **Establish a culture of learning** with ongoing training initiatives

Buy-in isn't achieved in a single training session. It requires ongoing reinforcement and stakeholder engagement.



Interactive Activity: Simplifying Procurement Concepts

10-Minute Self-Guided Activity

Objective: Break down a complex procurement topic into simple, clear explanations tailored to different audiences. Use relatable analogies and step-by-step guidance to make the topic accessible.

After the activity, we'll ask few of you to share your "training idea" in the main session!

Instructions:

1. **Choose a Topic** (e.g. Bid Evaluation, Writing an RFP, etc.)
2. **Identify Your Audience** (e.g. New Staff, Department Leaders, or Elected Officials)
3. **Simplify the Concept:** Explain the "how", "what", or "why"
4. **Add a Visual or Analogy to Clarify**
5. **Share and Reflect**

Conclusion

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Recap: What We've Covered Today



The Strategic Role of Procurement Knowledge: Building trust and enabling strategic collaboration by aligning internal stakeholders around shared goals like fairness, efficiency, and high-quality contracts.



Tailoring Training to Your Audience: Addressing unique needs of new hires, department staff, and elected officials for better engagement and impact.



Simplifying Complex Procurement Topics: Breaking down processes with analogies, real-world examples, and practical tools.



Engaging Training Techniques: Using interactive methods, human-centered design, and sustained engagement strategies to create lasting stakeholder buy-in.