



SoCal Procurement Alliance Meeting

October 17th, 2024

**Community Room
2800 Studebaker Road
Long Beach 90815**

Ice Breaker – What We Have In Common?

- Break into groups of 5
- Find (10) things you all have in common
- Commonalities can be personal or professional (like hobbies, music, food, work responsibilities, office location, etc.)
- First group to finish and share with the Alliance WINS



Happy National Pasta Day!



WELCOME SoCal Procurement Alliance



What's the latest in Long Beach?

- City of Long Beach received the 2024 AEP Award
- The Small Dollar threshold has been increased from \$25,000 to \$40,000
- City of Long Beach has introduced a local preference policy for RFPs & RFQs. This expansion allows local businesses and non-profits offering professional services to benefit from the local preference policy when awarding contracts





SoCal Procurement Alliance Status Overview

Congratulations

SoCal Procurement Alliance Executive Team

Chair: County of Orange

Co-Chair: City of Anaheim

Secretary: OC Sanitation District

Outreach/Events Coordinator: Inland Empire Health Plan

Legislation Coordinator: South Orange County Wastewater Authority



SoCal Procurement Alliance

Established:	March 2022, 2.5 Years
Current Member Count:	80 Public Agencies
Meetings Held:	9 quarterly meetings held across the region
Events:	3 Supplier Outreach Events (last event 1000 attendees) 2 Procurement Professionals Events



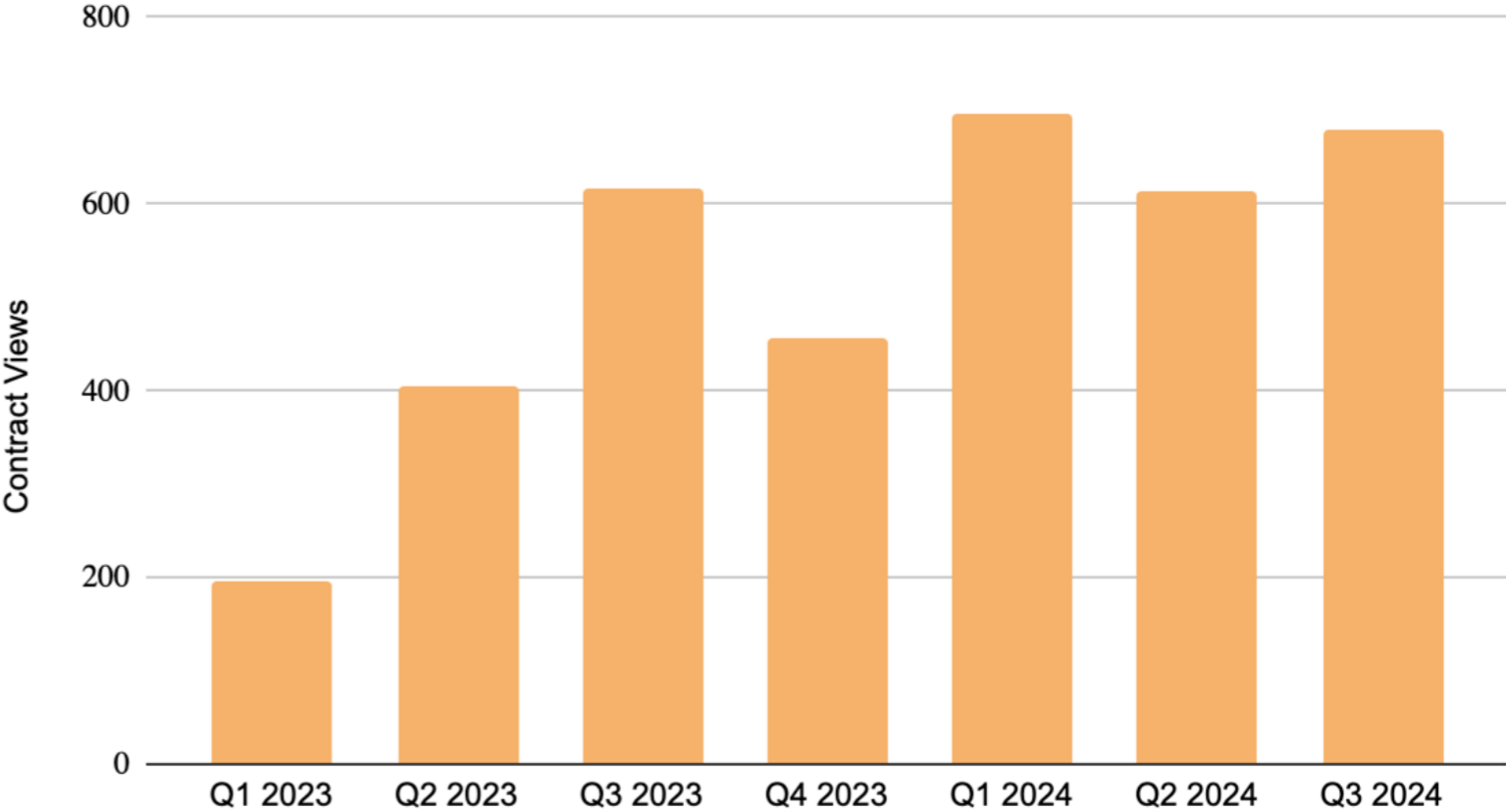
Alliance Pavilion Collaboration Review

- Phase I – Pavilion / County collaboration developed a platform to give us the ability to share contracts across the Region kicking off the OC Procurement Alliance
 - Currently over 2500 active County contracts searchable in Pavilion
- Phase II – County adds language requiring Suppliers to pay 2% administrative fee each time an entity piggybacks on a County contract (1% for Pavilion / 1% for County). Outreach conducted with Suppliers to ensure Suppliers were supportive of the initiative.
- Phase III – County / Pavilion will now share the administrative fee with your piggybacking entities (0.5%)

Contract sharing by-the-numbers

~3,664 views on Alliance contracts

~100 Piggybacks since kick off

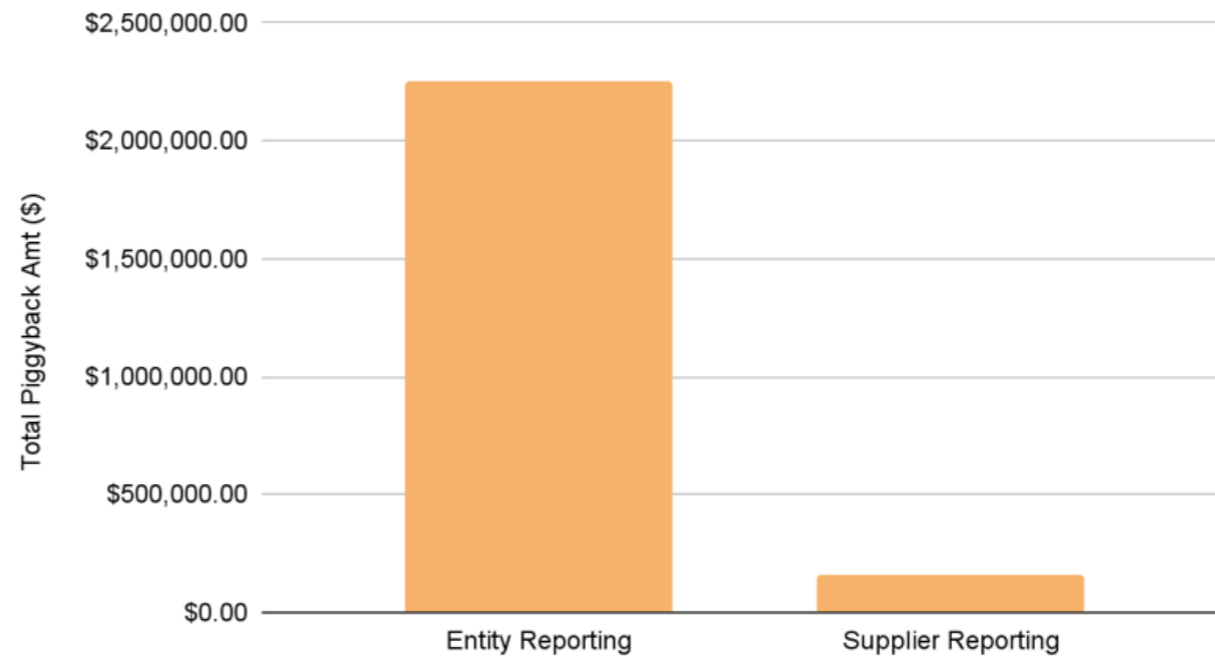


Alliance Pavilion Reporting

Entity Reporting Successes

- Entity reporting has been a smashing success so far - ***thank you!***
- 12 SoCal Alliance members reported to date
- 93% of piggyback contract volume (\$) to date or enrolled contracts has been from Entity Reporting (vs. Supplier Reporting)

Enrolled Piggyback Amt (\$) by Reporting Method





Bay Area Procurement Alliance

Bay Area Procurement Alliance (BAPA)

Highlights from a GREAT first meeting!

- NIGP September 2023
- Director, City of San Jose – Albie Udom
- One year of planning to develop BAPA, launched October 2024
- SoCal Alliance was keynote speaker at BAPA Kick-off
- 35 Bay Area entities represented
- AI presentation by GovAI
- CAPPO, NIGP, NASPO all in attendance
- Collaborative activity to develop vision for BAPA
- They are starting to work on their own website as well as portal, for shareable/searchable contracts

Inspiring Collaboration





Hot Topics in Procurement

Human Service Contract Compliance and Oversight

Current Hot Topic, Presented by: Juan Corral, OC Health Care Agency

- Due Diligence
- Subrecipient and Contract Determination Form
- Contractor/Subrecipient Monitoring
 - Risk Assessment (Pre-Award & Annually)
 - Expenditure and Revenue Reports (E&Rs)
 - Monthly Contractor Meetings
 - Site Visits
 - Procurement Evaluation
 - Program Evaluation
 - Invoice Reviews
 - Contract Cost Close Out
 - Review of Single Audit/Audited Financials

SB 1383

Presented by: Andy Alimohammadi, OC Waste & Recycling

Environmentally Preferable Purchasing

Purpose

The OC Environmentally Preferable Purchasing (EPP) Policy is intended to assist in the procurement of goods, services, and materials that have the lowest life cycle cost. The regulation provides the basis for securing environmentally friendly and sustainable purchasing practices through the EPP Best Practices Guide

Objective

Environmentally Preferable Purchasing refers to the procurement of goods and services that have a lesser or reduced effect on human health and the environment when compared with competing goods or services that serve the same purpose. This comparison shall take into consideration such things as; raw materials acquisition, production, manufacturing, packaging, distribution, reuse, disposal, energy efficiency, performance, safety and cost.

This policy was updated to include Recovered Organic Waste Products language to meet SB 1383 requirements.

[County's Policy](#)

- IV. C. #5 on page 5

[County's User Guide](#)

- Organic Material on pages 25-26

SB 3130

- Commencing on January 1, 2025:
 - Pursuant to Government Code Section 26227.5, all contracts, sponsorship agreements or grant agreements with community organizations or nonprofit organizations, which are entered into at the discretion and at the direction of an individual member of the Board, shall require approval of a majority of the Board.
 - The Board shall post on its internet website a log of appropriated district discretionary funds at the end of each quarter.
 - The log shall list:
 - The planned and actual costs of the program or project, including the indirect costs, that the district discretionary funds cover.
 - The spending timeline of those funds.
 - The purpose of program funding.
 - The eligibility requirements to receive funding.
 - Total dollars awarded to the entity that is contracted with the county.



Procurement Systems

County Systems Update - OpenGov

- Solicitation and Contract Development – Live
- Grant Management – Went Live 9/1
- Asset Management – Deployment is expected in December
- OpenGov and Pavilion collaboration automating contracts upon execution to be fully searchable in both platforms
- Procurated (Yelp for Gov't contracting) - Fully integrated into OpenGov with automated reminders to staff to complete annual evaluations



Open Gov California Customers



- Annual User Conference
- Trainings / Use Cases
- Certification Programs

- 70 Agencies utilizing Procurement Suite
- 250 Agencies utilizing a variety of other Suites

Alliance Opportunity – Open Gov



Key Alliance Benefits using OpenGov

- 25% OC Alliance discount
- Shared access to OC jurisdictions' supplier network
- Pavilion co-op contract search integration
- Reduced onboarding cost and more consistent and compliant boilerplates due to shared templates
- Improved and consistent supplier response experience



DocuSign also willing to provide Alliance discounted pricing

Procurated - How It's Going

- Directive to enhance and automate Contractor Performance Evaluation process, manual form
- Introduced to Procurated at NIGP conference - YELP for government agencies
- Procurated and OpenGov integrated to automate reviews
- Developed County Landing Page auto and fully electronic process
- Update Policies, enhancing due diligence at Contract award and annually through the Contract life cycle
- Train Procurement staff and End Users
- Enhanced visibility for Board of Supervisors, Department Staff, and other government organizations/special districts

PROCURATED

America's Most Trusted Marketplace

Alliance Website Overview

- Enhancements to our Alliance Pavilion Search Capabilities
- Contracting Toolkit: Southern California Association of Governments (SCAG)
- Training Calendar through end of the year
- Updated 2024 County Policy Manual
- Alliance Infographic
- Supplier Outreach Events Calendar
- Expansion of the Evaluation Panel Index
- Environmentally Preferable Purchasing Policy

<https://cpo.ocgov.com/socal-procurement-alliance>

Available Surplus

Reminder:

County of Orange has Surplus available to any of your organizations or contracted non-profits

Contact Neil Jessen @ Niel.Jessen@ocgov.com for questions & guidance



The screenshot shows the 'Orange County Schools' surplus website. At the top right is the County of Orange logo. Below the header, there's a search bar with the text 'Search Orange County Schools Assets'. The main content area displays '12 Search Results in Orange County Schools'. The results are sorted by 'Best Fit' and show three items:

- (7) Bikes and red wagon**: Santa Ana, California, USA. Free. 1 D 15 H (October 18, 2024 12:34 PM PDT). LOT#: 8027-7021.
- Desk with riser**: Orange, California, USA. Free. 5 D 18 H (October 22, 2024 03:19 PM PDT). LOT#: 8027-7031.
- Stepping stools and ladders**: Orange, California, USA. Free. 5 D 19 H (October 22, 2024 04:17 PM PDT). LOT#: 8027-7034.

On the left side of the interface, there are filters for 'Shop by Category' (Consumer Goods (10), Consumer Electronics (1), Recovery (1)), 'Region & Radius' (Any, Within [US & Canada], Americas (12)), 'Currency' (USD - US Dollar (12)), 'Price' (5 & Below (12)), and 'Sale Type'.



Regional Cooperatives Available to Alliance

New County Partnerships



Countywide Cooperative Contracts

New Contracts

- Lumber
- Heavy & Light Duty Tires
- Steel
- Hazardous Waste Disposal Services
- Live Scan Digital Fingerprinting
- Rideshare Transportation Services

Solicitations in Progress

- Rideshare Transportation Services – Uber in negotiations
- Data Breach Response Services
- On-Line Marketplace for Cloud Services and Software Products
- Legal Processing Services
- Consultant Services for Solicitations Application Development
- Recycling and Confidential Document and Media Destruction Services
- Unarmed Security Guard Services
- Graffiti Removal Services

Countywide Cooperative Contracts

Upcoming Solicitations

- Medical Staffing
- Cost Recovery and Reduction Services
- HVAC Maintenance and Equipment
- Data Analytics/Data Mining Services
- Corrections Supplies
- Signs and Sign Installation
- Bee Removal/Relocation Services
- Blinds



Pavilion OC Contracts

Cooperative Contracts

- The County wants to know what other Regional Cooperatives would benefit your organizations. Share today or reach out anytime!
- Does your organization have any issues or piggybacking policy limitations we should be aware of to make our Regional Cooperatives more usable for you??
 - *Example: City of Newport Beach can only piggyback on cooperatives competitively bid in the last two years.*



Supplier Engagement

Vendor Information Day

- The county hosts an open house to educate vendors on how to register and do business with the County and other entities

1st Thursday of every month, 9-10 am
County Admin North,
400 W. Civic Center Drive, 1st floor

- County Departments and Any Other Public Agency
- Event is marketed on various websites and LinkedIn

Next Meeting: November 7th

REGISTER NOW



Questions: Helen at Helen.hernandez@ocgov.com

Supplier Outreach Events

AMERICA'S
SBDC
CALIFORNIA
ORANGE COUNTY | INLAND EMPIRE



EMERGENCY AND DISASTER CONTRACT OPPORTUNITIES CONFERENCE

Thursday, November 7 | 8 a.m. – 2 p.m. | Temecula, CA

Gain increased visibility, access to government contracts, and economic opportunities, while supporting recovery efforts.

REGISTER NOW | [Emergency-Conference.eventbrite.com](https://www.eventbrite.com/e/emergency-conference)

Temecula Entrepreneurial Resource Center
43200 Business Park Drive Temecula, CA 92590

For more information, reach out to
Karla V Gonzalez
karla.gonzalez@ociesbdc.org

Supplier Outreach Events



Hispanic Heritage Month

2024

Latinicima
Rumbo a la Cima

AWARDING COMMUNITY OF SMALL BUSINESSES

HCSB
AWARDING SMALL BUSINESS COMMUNITIES

Awards

SATURDAY, OCTOBER 12, 2024
Riverside Convention Center

5:00 pm - 5:30 pm - Registration
5:30 pm - 6:30 pm - Reception
6:30 pm - 7:30 pm - Dinner
7:30 pm - 8:30 pm - Program
8:30 pm - 10:30 pm - Dance

Register Here: 

www.hcsb-us.org

HCSB Latinicima 2024



SBDN
SMALL BUSINESS DIVERSITY NETWORK

Join our Business Community for our

LUNCH & LEARN
Networking

Friday, Nov 1st 2024
From 11:00 am - 1:00 pm
Spoons Santa Ana
2601 Hotel Terrace, Santa Ana, CA 92705

Join Us For Our Lunch and Learn Networking Event!

Event Highlights

- ✓ Networking
- ✓ Small Business Resources
- ✓ 30-second member pitches
- ✓ Member showcase

On behalf of SBDN we are delighted to invite you to our Lunch & Learn event. We believe in the power of collaboration, learning, and building meaningful connections in the small business community. This event is designed to provide an opportunity for entrepreneurs, small business owners, and professionals to come together and network, share knowledge and expand their networks.

Seating is limited so make sure to **REGISTER today!!**

 Resource Sponsor
Livi Kerszenbaum
Your Corporate Social Responsibility Partner

 Member Showcase Sponsor
Joseph Joseph
Spoton Transit, LLC



November 1st Lunch & Learn Networking event!

Small Business Diversity Network:

biznet.mislam@gmail.com

Supplier Outreach Events

Home Agenda Pricing/Sponsorships Hotel/Golf/Awards Speakers/Sessions Connect with... Epic Networking+
Exhibitor Info FAQ

[Register Here](#)

[Already Registered?](#)



NOVEMBER 13-14, 2024 • SAN DIEGO



VIB Network: The Voice for Veteran Businesses

Title Sponsor:

T Mobile

Veterans in Business Network

www.vibnetwork.org

Nov 13-14, 2024 - 8th Annual National VIB Conference - San Diego, CA

Register today at
www.vibconference.com

8th Annual Veterans In Business Network National Conference:

Supplier Outreach Events

The screenshot shows the OC Procurement website's Outreach Events page. The navigation bar includes links for ABOUT US, DOING BUSINESS WITH OC, SOCIAL PROCUREMENT ALLIANCE, GREEN PROCUREMENT, COUNTY SURPLUS, OPEN BIDS, and OUTREACH EVENTS. The page title is "OUTREACH EVENTS". A left sidebar contains a menu with "Outreach Events" highlighted. The main content area features a table with two columns: "Outreach Events Partners" and "Events Calendars".

Outreach Events Partners	Events Calendars
California Department of General Services (DGS) Procurement Division	DGS Procurement Division
Small Business Diversity Network (SBDN)	SBDN
Veterans In Business (VIB) Network	VIB Network
Orange County Inland Empire Small Business Development Center (OCIESBDC) Network	https://ociesmallbusiness.org/events

Please share any events in your area and we will add to the Alliance calendar and would love to attend



Procurement Professionals Program

Training Calendar

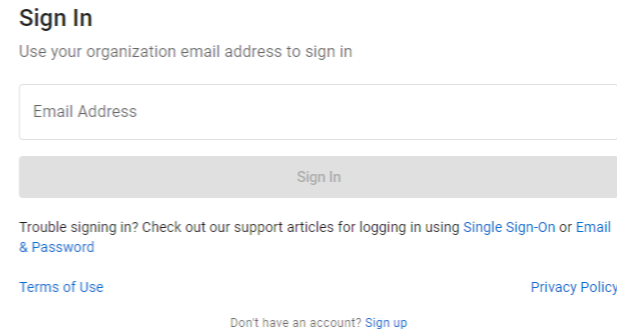
We Welcome our Alliance

Date	Time	Training	Where?
10/23/24	12:00PM-1:00PM	Transform Your Career: Become a Certified Professional in Supply Management	CAPPO
11/7/24	9:00AM-4:00PM	Labor Compliance Seminar Presented by Center for Contract Compliance & CA Labor Commissioners Office	Riverside Convention Center
11/7/24	10:00AM-11:00AM	Improving Vendor Certification Programs to Advance Procurement Equity	Harvard PEN
11/13/24	12:00PM-1:00PM	Elevating Public Procurement: Innovative Approaches to Compliance and Vendor Sourcing	CAPPO
11/14/24	9:00AM – 10:00AM	From Manual to Modern: An Examination of the Public Procurement Maturity Model	CAPPO
11/21/24	10:00AM – 11:00AM	Ask the RFP Doctor: Re-Thinking Contract Negotiations	Center 4 Procurement

BLAZEforward Mentorship Program

in partnership with NIGP

- Custom Profile Matching Database
- 6-month Program
- Professional Development
- Pre-Generated Agendas
- Scheduling Assistance



PROFESSIONAL DEVELOPMENT MENTORSHIP PROGRAM



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6-Month Program
Goal setting
Professional Development
Custom Profile Matching Database
Pre-Generated Agendas & Scheduling

Sign up Now!



Prize for Alliance Member who can get the most sign-ups!

For any questions, please contact
Nicole.Swain@ocgov.com

Over 30 successful Alliance mentorships to date!!

Trailblazer Internship Program

Over 12 interns successfully placed across County and Alliance!

- Collaboration with local Universities/Colleges
- Marketing the Opportunity (LinkedIn, Govjobs, College postings)
- Maintaining Internship Candidate Index with pre-interviewed and readily available Interns
- On-Boarding Support, we can help

If you're interested in an intern, please reach out to Nicole Swain at nicole.swain@ocgov.com

NAME (Last)	NAME (First, Middle)	HOME PHONE	EMAIL	NOTIFICATION PREFERENCE	APP SUBMITTED DATE	APP RECEIVED by CPO DATE	INTERVIEW DATE	DATE CONTACTED DEPARTMENT	LIVE SCAN DATE	START DATE	LAST DATE	NOTES
Alvarez	Luis	310-835-2083	alvarez.luis1238@yahoo.com	Email/Phone		10/11/2023	10/13/2024		3/26/2024	4/22/2024	8/27/2024	8/27/2024 Internship concluded with a total of 141.35 hours. 3/28/24 Contacted Nick M. & Christina R. @ CPO to coordinate a start date (pending 2/29/24 Contacted candidate again to see if still interested.
Le	Thang Long	213-453-1922	pho.le3043@gmail.com	Email/Phone		10/19/2023	11/7/2023	1/25/2024	1/25/2024			Available anytime. In school remotely. *** Candidate no longer replied to email
Tevin	Bowie	949-310-2193	tevinbowie13@yahoo.com	Email/Phone	3/18/2024	3/21/2024	4/2/2024					4/2/24 Interview completed on this day; Bowie is available from 8:00-2:00PM Monday 3/29/24 Internship Screening interview scheduled with CPO at 2:00PM on 4/2/24.
Chhoeung	Randy	951-396-9462	andychoeung2003@gmail.com	Email/Phone	3/27/2024	3/28/2024						4/16/24 Interview completed on this day; Randy is available from 8:00-5:00PM Monday 4/9/24 Internship Screening interview scheduled with CPO at 2:30PM on 4/16/24.
Solis	Andrew	714-510-5653	Solace@yahoo.com	Email/Phone	3/22/2024	3/28/2024						4/16/24 Interview completed on this day; Andrew is available from 9:00-5:00PM Monday 4/9/24 Internship Screening interview scheduled with CPO at 3:00PM on 4/16/24.
Lopez	Alberto	714-499-6712	al3849al@gmail.com	Email/Phone	3/21/2024	3/28/2024						4/16/24 Received Email requesting to be withdrawn from Consideration. 4/9/24 Internship Screening interview scheduled with CPO at 3:30PM on 4/16/24.
Peters	Belyn	909-374-3759	belynpeters2000@gmail.com	Email/Phone	9/5/2024	9/17/2024	TBD					
Rivera	Martin	562-266-8581	rivera.martin1009@gmail.com	Email/Phone	8/29/2024	9/17/2024	TBD					
Woo	Hannah	714-737-1692	woohj1@uci.edu	Email/Phone	9/13/2024	9/17/2024	TBD					

The Alliance will have our own "team", so we need a TEAM name

Let's Vote

1. Procurement Pacers
2. Contract Crushers
3. Procurement Powerhouse
4. Buyers on the Run



5K RUN/WALK

Don't miss out on the Surf City fun! If you can't do the longer distance, take part in the 5K and keep a part of the action! Enjoy ocean views throughout your race and enjoy the beer garden before the marathon and half marathons make their way back to the finish line!

Date: February 2, 2025

Start Time: 7:00am

Start Location: intersection of Pacific Coast Highway & Huntington Street

Finish Location: 1 block north of intersection of Pacific Coast Highway & Huntington Street

5K Packet Pick-up

Friday, January 31st

12:00pm - 6:00pm

Huntington Beach Parking Lots - 21291 Pacific Coast Highway, Huntington Beach, CA 92648

Saturday, February 1st

10:00am - 4:00pm

Huntington Beach Parking Lots - 21291 Pacific Coast Highway, Huntington Beach, CA 92648

Runner Perks

- Surf City-themed finisher medal
- Premium event shirt
- Surf City Marathon tote bag
- (1) complimentary beer at the Finish Festival
- Aid station along the course
- Finish-area refreshments

Register Now!
Contact Nicole Swain
Nicole.swain@ocgov.com

SoCal Alliance Group Ride Event

Hosted in collaboration with the City of Buena Park

**We are looking to collect some information, as we plan our
SoCal Alliance Group Ride Event.**

Please complete the survey on your table, if you are interested in joining us!

Meet up will be in Newport Beach

Looking for Ride destination suggestions!

No Bike? No Problem...Meet us at the final destination for Networking & Fun!

SoCal Alliance Events

Hosted in collaboration with CAPPO and NIGP Local Chapters

December 5, 2024 (Tentative)
Location TBD – Looking for Suggestions



February 27, 2025 (Tentative) – 3-year Alliance Anniversary & Kick-off of Procurement Professional Month

May 2025 (Tentative) – Supplier Outreach Event



Shout out for volunteers!!
We Need You!!

NIGP Business

➤ Chapter Health:

- As of Wednesday, 10/16/24, the So Cal Chapter has \$9,448 in the bank
- Member total: 334

➤ Chapter Updates:

- Elections will be conducted in September 2025, per the Chapter Bylaws, however more information will be shared in the months leading up
- We have 1-2 webinars a month, all members are welcome
- California NIGP Chapter included in the SoCal Alliance Holiday Luncheon scheduled for December, more information forthcoming

JOIN US! NIGP Leadership Summit



IMPACT

For mid to senior-level procurement leaders, the Impact program dives into the most sought-after topics, enhancing the skills you need to excel in your role.



EDGE

For emerging leaders, the Edge program offers a transformative learning experience to elevate your leadership skills and potential.



ACADEMY

For NIGP Chapter Leaders, the Academy program focuses on strengthening chapter operations, increasing member engagement, and elevating member services.

February 20-22 in Chicago, Illinois

NIGP - California Chapter

California
Official Chapter

NIGP The Institute for
Public Procurement



JOIN THE LOCAL CHAPTER TODAY!

Member Benefits

- ✓ NIGP-CPP Certification Support
 - ✓ Trainings/Webinars
- ✓ Professional Networking Opportunities
 - ✓ Document Library
 - ✓ Mentorship
- ✓ Regional Collaboration
- ✓ Latest and Greatest National Best Practices Shared

NASPO

- Now engaging local Government (previously only States)
 - Events / Conferences
 - RFX is new Collaborative Contracting utilizing local Governments as leads
- Procurement U has a library of several free courses
 - Foundations of Public Procurement
 - Negotiation Strategies
 - AI & Legal Implications for Public Procurement
 - Managing Open Records Requests
 - The Future of Procurement



<https://procurementu.myabsorb.com/>

CAPPO - Orange County Chapter

CAPPO Chapter Elections - Call For Nominations

Beginning this year, we will be holding chapter elections simultaneously with the main CAPPO board elections. The following chapters are seeking nominations for Chair, Vice Chair, and Secretary/Treasurer.

- Gateway
- Inland Empire
- Orange County
- San Diego

These positions help lead the chapter with networking and educational events at a local level. If you have questions about running for the chapter positions, please contact the appropriate chapter chair.

Nomination deadline is 5:00 PM Pacific Time Monday, October 31, 2024.

If you are interested in getting involved at the local level this is a great opportunity. Positions begin at the conclusion of the CAPPO 2025 Conference.



Call for Chapter Nominations –
Submit Nominations to admin@cappo.org

Special call for Second Vice President –
Nominations open 10/15 through 11/15.

- [CAPPO Special Call for Nomination - 2nd Vice President](#)



Let's take SoCal Procurement Alliance to CAPPO 2025



Sacramento Convention Center, More information can be found at [CAPPO 2025 Conference](#)

JOIN US for a special Alliance cocktail hour after the sessions on Tuesday, January 14th!

CAPPO Resources

Topic	Description
<u>Business Writing Insights for Procurement Pros</u>	Sourcewell's guide offers practical insight to help business writing, sharpen your skills, and communicate with confidence
<u>Unlocking the Future of Procurement with Beacon Bid's Procure AI</u>	This human-centered approach to AI helps public agencies and procurement teams quickly generate well-crafted scopes of work, specifications, and RFPs.
Investing in Yourself – University of San Diego Hybrid 22-Month Master of Science in Supply Chain Management	Schedule a MS Supply Chain Management meeting <u>here</u> Dianne Simpson Assistant Director of Outreach and Recruitment Knauss School of Business University of San Diego
<u>State of Public Procurement 2024: The Rise of Network-Powered Procurement</u>	The 2024 report highlights the rise of network-powered procurement, where procurement teams leverage peer resources, insights, and larger supplier networks to address some of the most significant challenges they face.
<u>OpenGov Procurement's AI Scope Builder</u>	Watch OpenGov Procurement's AI Scope Builder write a scope draft in under 15 seconds.

Next Meeting

- February 2025 - Alliance Anniversary Meeting
- Thank you to our Long Beach Alliance partners!
- Don't forget to follow the County's LinkedIn page for event updates, solicitations, employment opportunities, etc.
- *Goal for next quarter is to establish an OC Procurement Alliance LinkedIn profile*





Questions??
Thank you!!



Picture and Lunch Presentation



Trends in Public Procurement

Presented by: Laura Merryfield & Amanda Jaffe,
Government Innovation Fellow
Harvard PEN



Trends in Public Procurement

Laura Merryfield and Amanda Jaffe

SoCal Procurement Alliance

October 17, 2024



HARVARD Kennedy School
Government Performance Lab

Agenda

- Introduce the Government Performance Lab (GPL)
- Explore Trends In...
 - Staffing and Hiring
 - Generative AI
 - Innovative Construction Procurement
 - Problem-Based Procurement
 - From our Procurement Excellence Network (PEN) Community

About the Government Performance Lab (GPL)

We support governments in building just and effective service systems that deliver better outcomes for the people they serve.

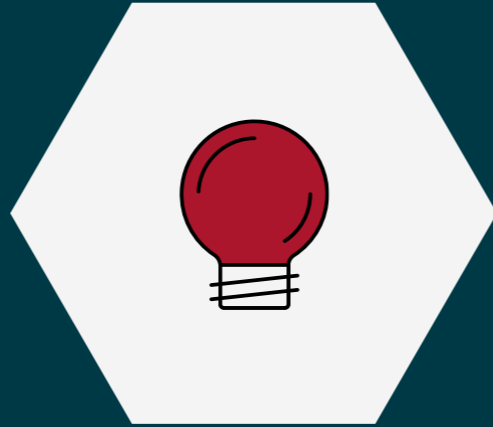


GPL's Procurement Practice

- We have **partnered with 90+ governments** in the US, Canada, and Latin America on **200+ hands-on procurement improvement projects**.
- Our Procurement Excellence Network (PEN) has connected **2000+ government staff from 600+ unique jurisdictions** to procurement resources, best practices, and community support.

We do this by...

Investing in public servants to create long-lasting capacity to sustain change



Working closely with state and local governments to develop and test promising practices



Spreading those practices to communities across the country



Trends in...

Staffing and Hiring

The COVID-19 Pandemic changed the way we work – and the way we hire

The Great Resignation and Labor Shortages

- More than [47 million people](#) quit their jobs in 2021 during the Great Resignation
- Public sector employment has not quite recovered to [pre-pandemic employment levels](#) (unlike the private sector)
- [77%](#) of surveyed public sector employers say turnover has put a significant workload burden on their existing staff

Skills, and Job Description, Shift

- A new way of working requires different skills: adaptability, technology capabilities
- Of surveyed state and local governments in 2023, [65%](#) performed compensation or classification studies, [42%](#) updated specifications for requisite education and skills, and [29%](#) dropped degree requirements for some positions

Changing Work, Changing Workforce

- Younger workers may have different expectations for what they get out of work
- An employee wellbeing [report](#) found that fostering belonging and providing opportunities to learn and grow are most important post-COVID
- Of surveyed state and local governments in 2023, [10%](#) hired fully remote staff

Strategies from Industry Research and Case Studies

On Your Team

1 Provide Support to Offset Burnout

Receiving emails that provided support to reflect on work and similar experiences of coworkers reduced burnout and turnover in 911 dispatchers ([The People Lab](#)).

2 Showcase Your Positive Impact

Employees who believe their work has a positive impact are happier and more productive ([Knowledge at Wharton](#)) and less likely to experience burnout ([The People Lab](#)).

3 Learn from Your Current Staff

Long Beach created an online survey for their purchasing staff to learn about their workload, job satisfaction, and top traits for success in their position.

During Hiring

4 Seek Out Desired Soft Skills

Almost two-thirds of job postings across the US include soft skills like collaboration, dependability, and adaptability in their qualifications ([America Succeeds](#)).

5 Revisit Limiting Requirements

Orange County allows certifications like CPPO, CPPB, or CPM to substitute for work experience ([Orange County Procurement Buyer Job Description](#)).

6 Use Strategic Recruitment Language

Recruitment messages that framed government as the best place to make a large-scale impact were the most effective at attracting young talent ([The People Lab](#)).

Example: Long Beach's Hiring Revamp

Project Objective: Update hiring process and materials (including job description, minimum requirements, and recruitment process)

- Arose from internal frustrations and anecdotal reflections
- Part of the close-out of the GPL's three-year technical assistance engagement supporting procurement transformation, so designing a process that attracted staff to sustain procurement excellence was a priority



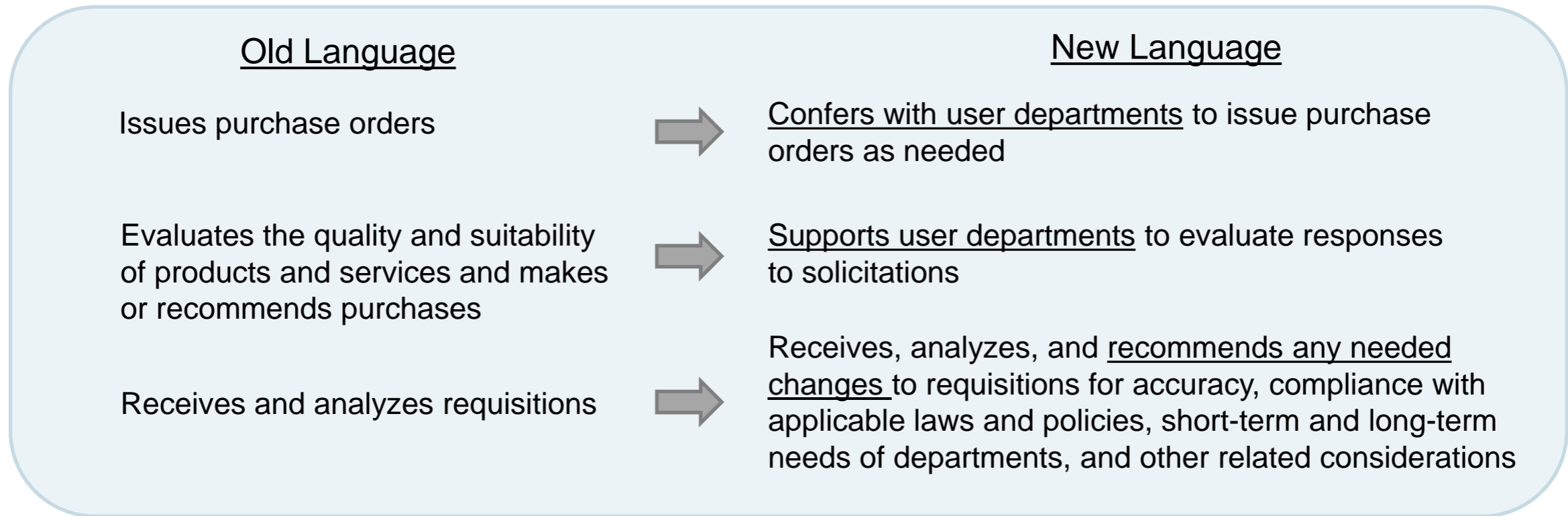
Steps Completed

1. Defined research objectives
 - Example: what are the skills and responsibilities for desired staff?
2. Investigated how things were currently operating
 - Identified what was working well and where there were opportunities for improvement
3. Started with a team-wide survey and follow-up interviews
 - Identified key traits that make staff successful (ex: collaborative) and not successful (ex: unaccommodating)
4. Conducted benchmarking of peer cities and interviews with user departments
 - Pulled buyer job descriptions from 10 peer cities to review their responsibilities, minimum requirements, and processes
5. Formed recommendations based on findings

Adjusting language in Long Beach

Recommendation: Align job description language with desired duties and values for position

Example: Better depict responsibilities, and expectations for relationship, between buyers and departments



Revisiting minimum requirements in Long Beach

Recommendation: Revisit minimum requirements to better represent needed qualifications

Example: Allow more pathways to qualify for the position without a four-year degree

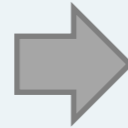
Old Minimum Requirements

A. Graduation from a four-year accredited college or university with major work in business or public administration or closely related field;

AND

B. Two years of full-time experience in purchasing a wide variety of industrial and governmental equipment, supplies, and materials for use rather than for resale.

Additional experience of the specified type may be substituted on a year-for-year basis for up to two years of the required education



New Minimum Requirements

Applicants must meet one of the following options:

A. Graduation from a four-year accredited college or university with major work in business or public administration or closely related field; and two years of full-time experience in purchasing a wide variety of materials for use rather than for resale

OR

B. One year of satisfactory performance as an Assistant Buyer with the City of Long Beach

OR

C. A current certification as a "Certified Public Procurement Officer" (CPPO), "Certified Professional Public Buyer" (CPPB), or "Certified Purchasing Manager" (CPM) by the National Association of Purchasing Managers (NAPM), or the National Institute of Governmental Purchasing (NIGP) or equivalent professional certification.

Additional experience of the specified type may be substituted on a year-for-year basis for the required education

Trends in...

Use of Generative AI

Interest in and use of Generative AI in procurement is on the rise

- In a 2023 [survey](#) of procurement executives, generative AI is listed as the top emerging technology expected to impact procurement over the next five years.
- Subject matter experts predict generative AI will eventually automate [50%-80%](#) of procurement functions.
- Many public procurement teams are starting to experiment with pilot initiatives that transform aspects of the end-to-end procurement process.
- But Generative AI's impact on procurement capabilities is not clear – we do not yet have fully deployed government examples or evidence of large-scale benefits.

Challenges and Concerns

One key concern is uncertainty related to how to integrate the technology safely and responsibly.

Others include:

- Data privacy and security
- Accuracy of AI content or unforeseen biases
- Vendors using AI on their proposals and overselling their capabilities
- Needed staffing and training resources to implement these tools effectively
- Risk aversion – afraid to be first

Ways Generative AI is being used to strengthen public procurement



AI Chatbots: Help program staff identify proper procurement vehicles, navigate jurisdiction procurement requirements, and other task-oriented Q&A



Market Research: Support research for making a new purchase including finding the most up-to-date specs and analyzing vendor performance data



Creating First Drafts: Pull the best language from past effective RFPs and other jurisdiction materials to generate initial solicitation documents



Expedite Compliance Reviews: Determine initial responsiveness of a proposal before sending it to the official evaluation committee



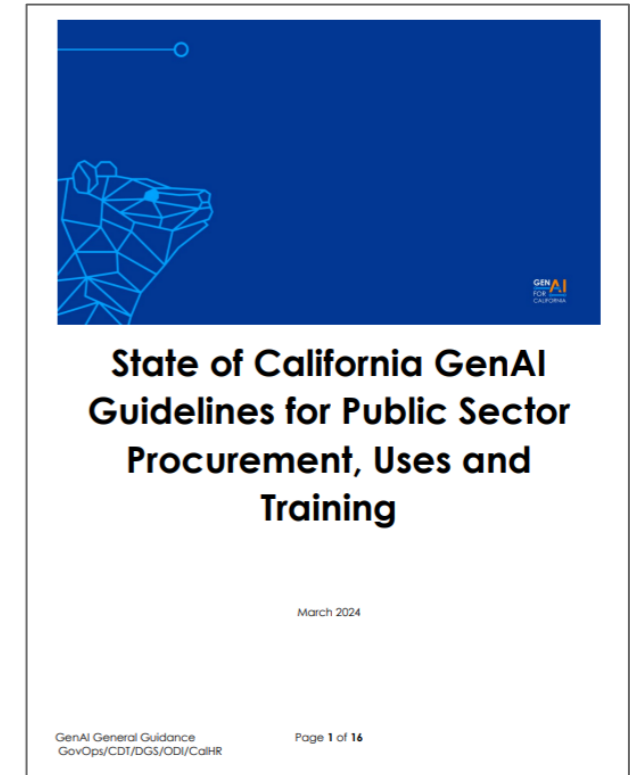
Contract Monitoring: Identify and track key contract milestones like expiration dates, mandatory deliverables, and upcoming renewal periods

State of California's GenAI Guidelines

California released [guidelines](#) in March 2024 for the state's procurement, use, and deployment of generative AI technologies.

This guidance:

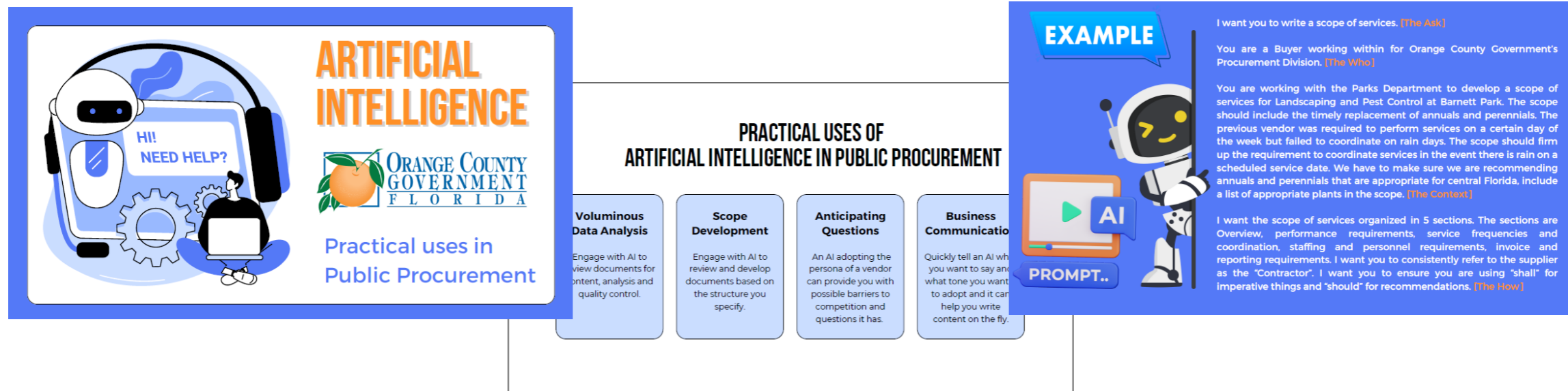
- Imposes state government-wide responsibilities to monitor generative AI tools incidentally purchased, including continuous evaluation and additional staff trainings
- Creates specific procurement requirements for state agencies seeking out generative AI technologies including (1) a pre-procurement assessment of what agency problems a generative AI tool is meant to address, (2) an AI risk assessment, (3) pre-deployment testing and evaluation, and (4) ongoing monitoring that may include additional human review of the AI model
- Requires generative AI procurement and risk assessment training for state employees, covering everything from general AI education to risk identification and technical skill-building



Example: Orange County, Florida's GenAI Training

Orange County in Florida created a training to introduce its purchasing staff and city leadership to using GenAI in procurement. The training includes:

- Basic introduction of GenAI
- Practical uses for GenAI in public procurement
- Addressing anticipated challenges and assuaging fears over job replacement
- Interactive activity for using GenAI to write a scope



Trends in...

Innovative Construction

Procurement

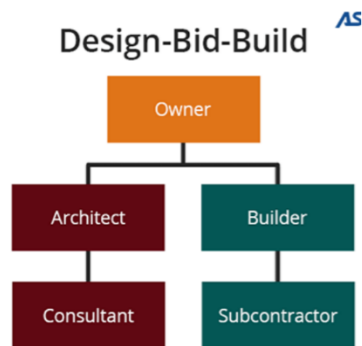
Rise in Alternative Construction Procurement Methods

The most common method to procure construction contracts is through *design-bid-build*. But alternative methods that allow for more collaboration, like **design-build** and **progressive design-build**, are gaining popularity due to increased familiarity with the methods and new legislation allowing their use.

- More than [160](#) design-build-related bills were introduced across the US in 2023, a 25% increase from 2022
- Projections indicate that design-build will account for over [47%](#) of construction spending by 2026

Design-Bid-Build

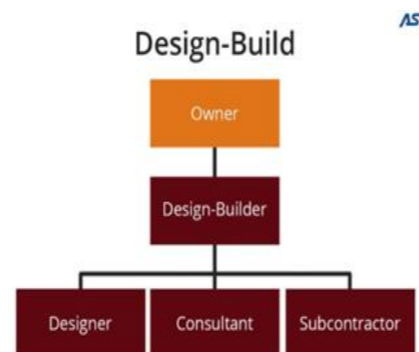
Project design and construction are done by two separate vendors and bid separately



[Image Source](#)

Design-Build

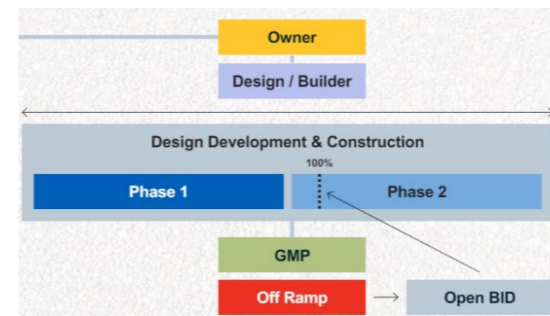
Project design and construction are combined into a single contract with one vendor



[Image Source](#)

Progressive Design-Build

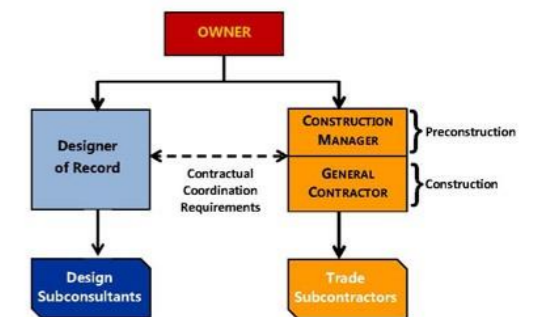
Design-build approach with “off-ramp” to bid out the construction phase if needed



[Image Source](#)

Construction Manager At Risk

A hired construction manager oversees design-bid-build process and takes on financial “risk”




Also known as Construction Manager/ General Contractor (CM/GC) [Image Source](#)

Government Examples

San Mateo County

Design-Build

County Board of Supervisors approved [\\$6M](#) to build more safe and affordable housing for coastal farmworkers through a design-build contract.



**REQUEST FOR PROPOSAL
DESIGN-BUILD SERVICES FOR
STONE PINE COVE
FARMWORKER HOUSING PROJECT**

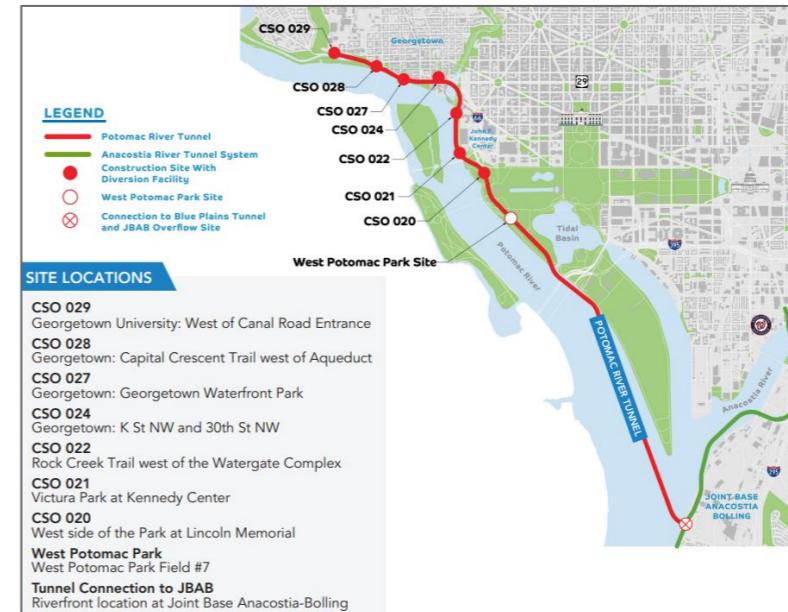
The County of San Mateo – County Executive’s Office

The County of San Mateo (“County”) is seeking to proposals from prequalified Respondents to design, construct, deliver, and install (47) forty-seven Manufactured Housing and Urban Development Homes (“HUD”) for the Stone Pine Cove Farmworker Housing Project located at 880 Stone Pine Road, Half Moon Bay, CA 94019 (“Project”). Pursuant to Section 22164 of the California Public Contract Code, only respondents that have been prequalified by the County in response to the Request for Qualifications (“RFQ”) will be eligible to submit proposals in response to the Request for Proposals (“RFP”) for the Project.

Washington, DC

Progressive-Design Build

DC Water and Sewer Authority approved [\\$819M](#) for the construction of the Potomac River Tunnel through a progressive design-build contract.



New California Construction Legislation

SB 706: Local Agencies Progressive Design-Build

- Provides additional authority for cities, counties, or special districts to use the progressive design-build process for up to 10 public works projects (not limited to water-related projects) in excess of \$5,000,000 until Jan 2030
- Impacts Public Contract Code Chapter 4.1 (starting with §22170) and Chapter 4.7 (starting with §22185)
- Progressive design-build method can provide more transparency on the guaranteed maximum price and decrease risk and need for change orders

AB 1957: Best Value Construction for Counties

- Expands a pilot program to allow any county to select a contractor on the basis of “best value” (selection representing the best combination of price and qualifications) for construction projects in excess of \$1,000,000 until Jan 2030
- Pilot program also allows any county to award JOC contracts on the basis of “best value”
- Los Angeles, Riverside, San Bernardino, and San Diego counties were in original pilot

AB 2192: Cost Accounting Standards

- Amends the Uniform Public Construction Cost Accounting Act and only applies to public agencies that have adopted it (Orange County has)
- Adds “installation” to the definition of “public project” in PCC §22002(c)
- Increases limits when determining if informal bidding or formal bidding is required for public projects in PCC §22032 (\$60,000 raised to \$75,000 for purchase order threshold, \$200,000 raised to \$220,000 for informal/formal threshold)

Trends in...

Problem-Based Procurement

What is Problem-Based Procurement?

Local governments having been trying new ways to connect actors inside and outside the government to surface new solutions – one promising way is through **problem-based procurement**



- Instead of seeking the best price for a defined product, problem-based procurement identifies a need but does not specify what a solution looks like
- A way to flip the script on the procurement process to invite idea generators rather than implementers of familiar solutions
- This method is a good fit for projects where technology is rapidly evolving, no preferred approach has been identified, or where past contracts have repeatedly fallen short
- Key component: the Problem Statement
 - Clearly laying out in the solicitation the challenge the procurement is meant to address, and acknowledge the need for new ideas
 - Pushes a prospective vendor to think deeply about the challenge and context

Example: State of California's RFI2 Model

The State of California has a solicitation type called the **Request for Innovative Ideas (RFI2)** to conduct problem-based procurement.

- This model was recently used to solicit GenAI solutions for Caltrans for increasing street safety including investigating near misses of injuries/fatalities and processing and interpreting complex data to improve traffic pattern analysis.
- Received proposals in response to a released RFI2 that contained a problem statement, problem objectives, and minimum requirements.
- Selected vendors will collaborate with Caltrans to test their technology in a controlled environment with publicly available data to determine if it can help find innovative solutions to the defined challenges.

STATE OF CALIFORNIA IN PARTNERSHIP BETWEEN THE DEPARTMENT OF GENERAL SERVICES AND THE CALIFORNIA DEPARTMENT OF TECHNOLOGY ON BEHALF OF CALIFORNIA DEPARTMENT OF TRANSPORTATION	
REQUEST FOR INNOVATIVE IDEAS (RFI ²) Generative Artificial Intelligence (GenAI) Solution for Traffic Mobility Insights	
RFI ² # 29442	
Evaluation Criteria	
The Idea	The idea is articulate and comprehensive and specifically provides a clear understanding of the problem statement.
	The idea addresses the complete problem statement.
	The idea is feasible, clear, and valid. The idea demonstrates value to California and benefits to the end user.
The Solution	The solution identifies potential integration points to external processes and/or systems and data interfaces.
	The solution is scalable to accommodate additional data sets (e.g., statewide deployment).
	The solution provides a simplified platform for ease of use (e.g., simple commands and prompts).
The Approach	The approach represents a realistic and practical method to leverage/implement the idea that is clear, valid, and logical.
	The approach is capable of continuous training as more data becomes available in the future.
	The approach has identified and appropriately addressed relevant key success factors including handling multimodal data for training and inferencing.

Example: Long Beach's Problem-Based Programs

LB Co-Lab

- Based on the principles of problem-based procurement
- Residents involved in determining both the problems and the new ideas to pursue
- Currently piloting a series of smart lights powered by wind and solar



Pitch Long Beach!

- Formalizes pitches without a formal procurement
- Invites pitches that meet any need, then determines whether a new idea is consistent with a local priority and worth piloting
- Recently accepted a pitch for devices that send alerts when vehicle tires are losing pressure to reduce breakdowns on the city's fleet



Trends from...
**our Procurement Excellence
Network (PEN) Members**

Trends from our PEN Members: Top Priorities

Infrastructure and **IT** are the most common topic areas for upcoming priority procurements



Top Upcoming High-Priority Procurements:

1. Safe Streets/Multi-Modal Transportation Projects
2. ERP, Procurement, and Other Financial Systems Purchases
3. Water Systems Purchases
4. Managed Services (Including Help Desk, Datacenter, etc.)
5. Electric Vehicle Charging Infrastructure

Targeted procurement reform projects are being prioritized and gaining support



Top Prioritized Procurement Reform Initiatives:

1. Revision of procurement policies, codes, and procedures
2. Digitizing procurement processes (e.g., e-procurement systems or ERP systems)
3. Implementing supplier diversity equity initiatives and outreach

Trends from our PEN Members: Top Challenges



Most Common Challenge: Staff turnover, finding qualified staff, or limited staff capacity to focus on procurement

Other Reported Challenges:

- | | |
|--|--|
| <ul style="list-style-type: none">• Inconsistency across departments in following purchasing procedures• Low M/WBE, local, and small business participation• Cumbersome procurement software or software not having all desired functionality• Budget restrictions and lack of resources• Unclear procurement authority, roles, and responsibilities• Creating clear and appropriate specifications/scope | <ul style="list-style-type: none">• Lengthy purchase approval process or delays in getting needed approval from certain stakeholders• Inadequate or rushed timeline to create scopes• Getting buy-in for procurement changes/change management• Risk aversion towards adopting innovative strategies• Lacking data collection capabilities• Supply chain issues |
|--|--|

Join the **Procurement Excellence Network** today!

Trainings and Roundtables on trending procurement topics



Growing library of **best practice publications and templates**



Coaching opportunities with GPL experts to workshop procurement challenges



Directory and Discussion Board to facilitate connections with peers



The **Procurement Excellence Network (PEN)** is a **FREE** community built by and for government professionals.

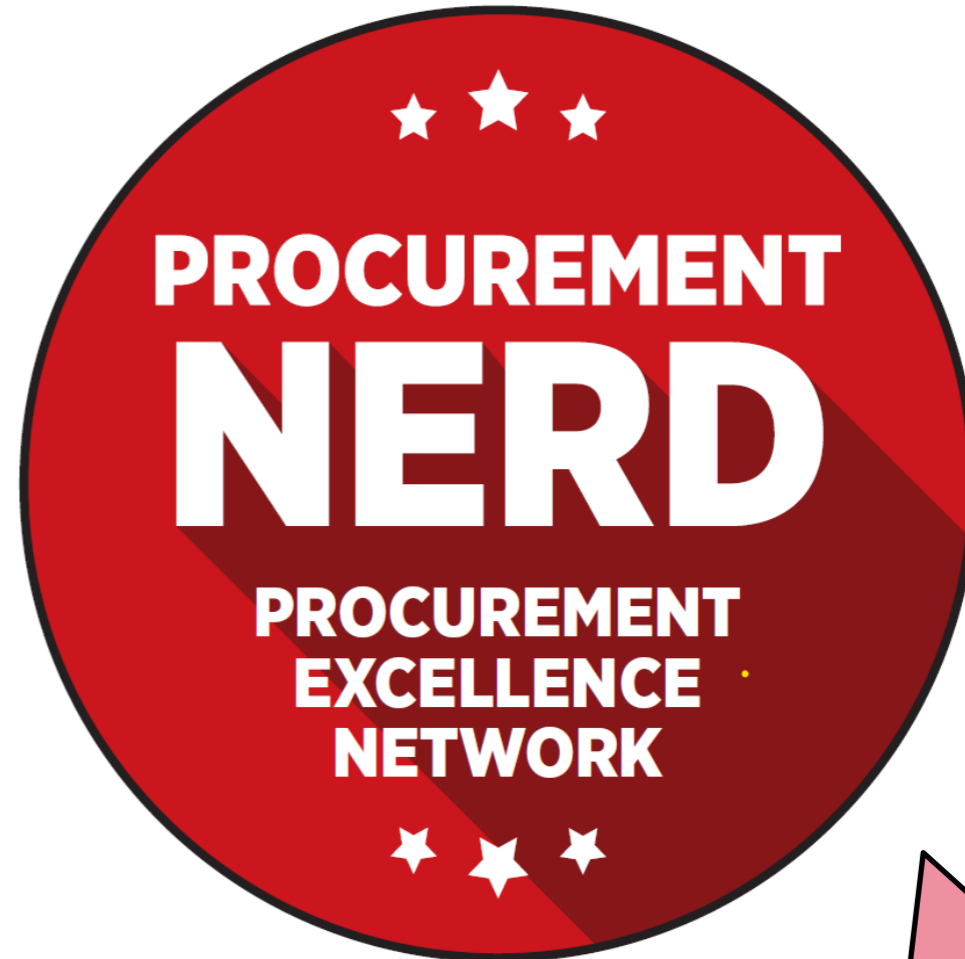
With more than **2,000 members**, PEN offers resources to help your government take its procurement practice to the next level.

Next Steps: Sign-up for PEN today!



Please take 2 minutes to join this FREE online community!

<https://gplpen.hks.harvard.edu/sign-up/>



Please come grab a pin from us after the session!

Join us for our next free PEN event!

Improving Vendor Certification Programs to Advance Procurement Equity

Thursday, November 7 | 1-2p ET



Join PEN for an interactive session that explores the **benefits and challenges of vendor certification programs.**

During this training, we'll explore tactical strategies that will help your government:

- Assess whether to launch a new certification program
- Streamline existing certification processes
- Help certified firms meaningfully participate in solicitation opportunities

We look forward to seeing you there!

Thank You!



**Please take a moment to take our very quick
3 question survey!**

Thank you!!

