

# Surveying Internal Customers to Identify Procurement Pain Points

*Peer Roundtable*

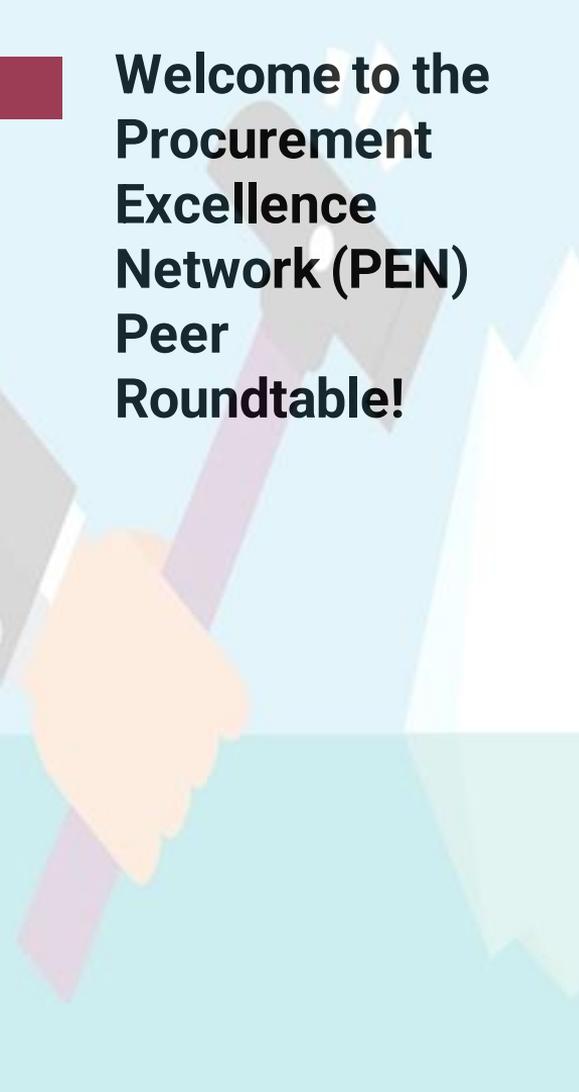
Procurement Excellence Network (PEN)

**May 25, 2023**



**HARVARD** Kennedy School

Government Performance Lab



Welcome to the  
Procurement  
Excellence  
Network (PEN)  
Peer  
Roundtable!

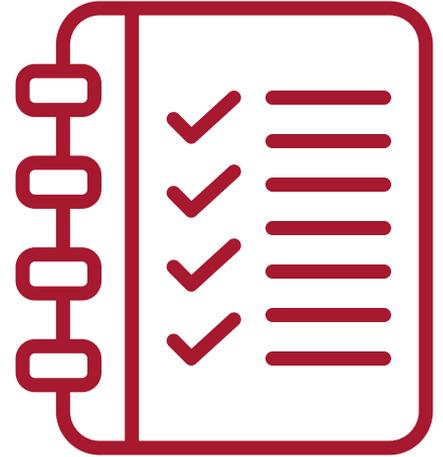
## Icebreaker

**POST IN THE CHAT!**

- **Share Your Name**
- **Government**
- ***Please provide an example of an internal survey your government has issued.***

# Agenda

- **Designing Effective Surveys**
- **The Psychology behind Survey Questions**
- **Common Challenges with Internal Surveys**
- **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

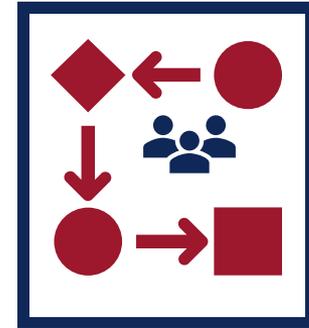
# Surveys are a feedback mechanism to drive change



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

## Survey Type

## Characteristics

### Annual Survey

**Summative and reflective** – 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.

### Pulse Survey

**Consistent and concise** – a short survey with static questions available for internal customers to respond to at any time following interaction with the purchasing office.

### Pre-RFP Survey

**Exploratory and strategic** – aims to understand past procurement pain points and goals before an upcoming RFP cycle to avoid prior mistakes.

### Post-RFP Survey

**Evaluative and elaborative** – 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.

**Post in the Chat:**

Which of these surveys have you found to be effective in your governments?

# 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.”**

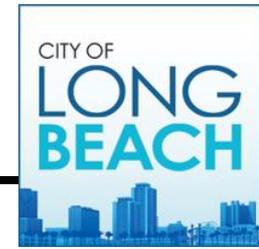
## Why this was important

- 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*

# Post-RFP Internal Survey



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: *Service, Transparency, Efficiency, Equity*
- 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

# 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.

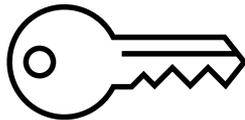
# 4 Aspects of Highly Effective Internal Survey Questions

## 1. Actionable



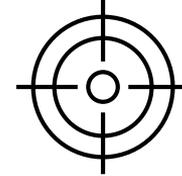
*Have an intention! Use only questions that collect actionable data tied to your survey's goals.*

## 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

# Common Challenges with surveys across governments

1	<b>Making data actionable and not letting feedback “sit on the shelf”!</b>	<ul style="list-style-type: none"><li>• Develop a <b>committee</b> focused on analyzing data</li><li>• View <b>implementing survey data</b> as a “<b>formal project</b>”</li></ul>
2	<b>Marketing the survey &amp; getting consistent “high” response rates</b>	<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	<b>Promotion of the survey (Pre &amp; Post)</b>	<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 in a <b>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**

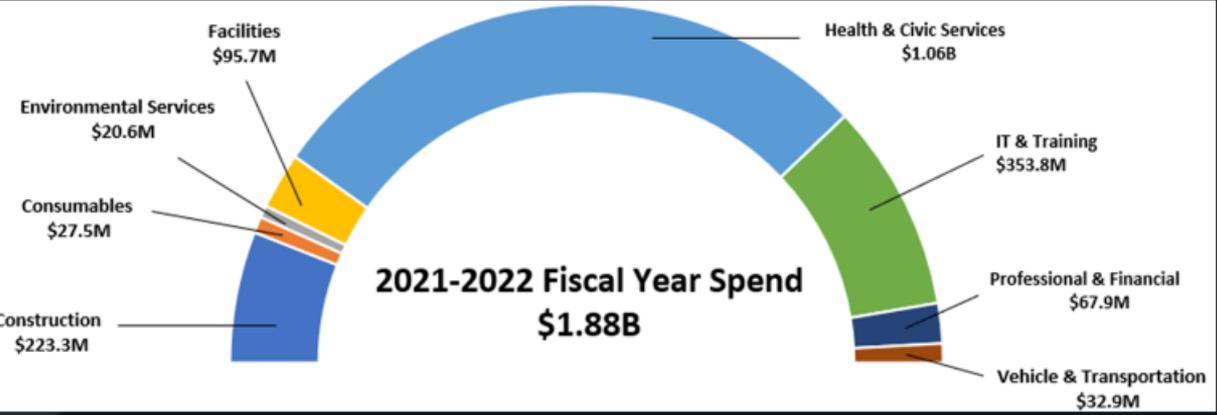


**Chief, Department of  
Purchasing and Contracting**

**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**



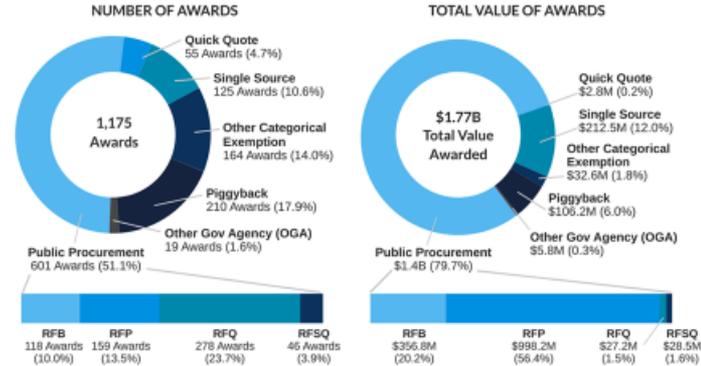
**Local**

# 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

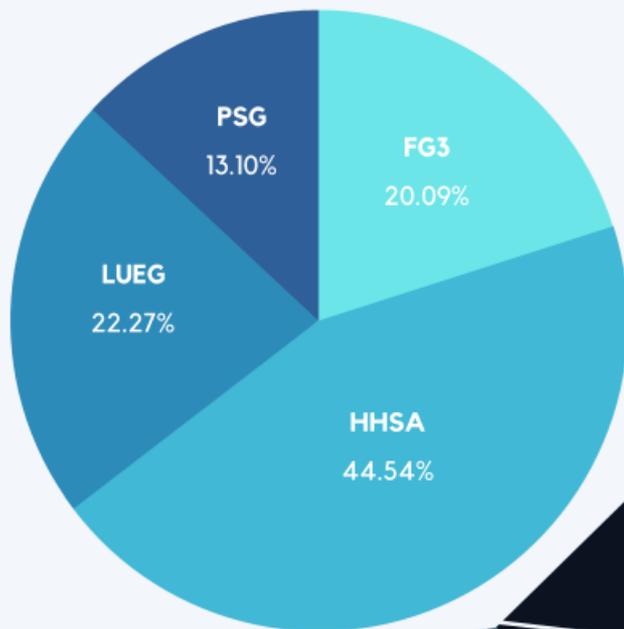
Additional comments

\* 7. Which Group do you belong to?

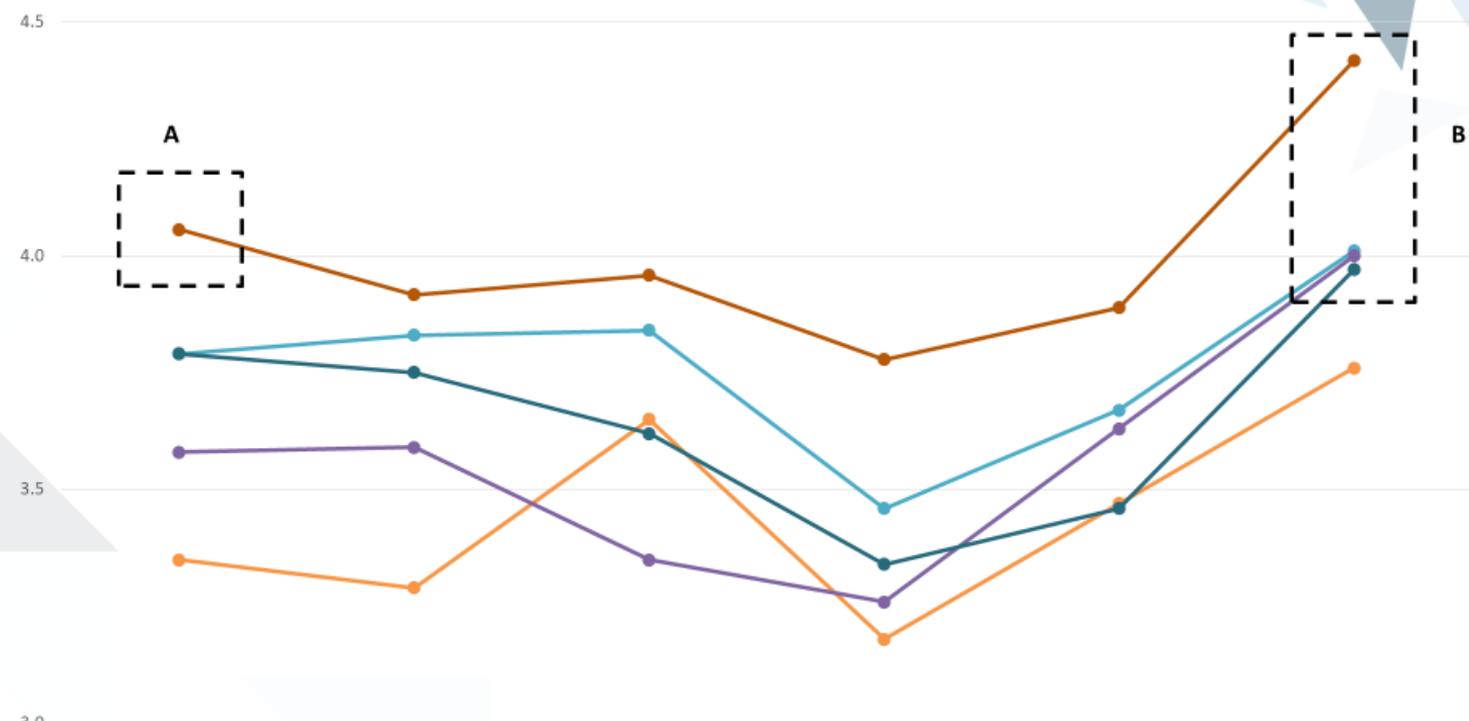
# What were the results?

## 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 B
— 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**

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

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

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

**H.E.A.R.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)

# Feedback Poll

# Join the Procurement Excellence Network (PEN)!

## Procurement Excellence Network reaches 600 members!

The Procurement Excellence Network (PEN) is a community for procurement professionals, for innovators and changemakers, for those who believe procurement is a powerful tool for good.

**OVER 600  
MEMBERS**

[gplpen.hks.harvard.edu](http://gplpen.hks.harvard.edu)



# PEN Resources

## Gathering Feedback from Internal Customers via Surveys

Authors: Rebecca Graffy and Damonique Sonnier

Contributors: Elena Hoffnagle, Charles Kargman, and Hope Patterson

### Feedback Is a Call to Action

Are you interested in improving how your purchasing office operates? Gathering feedback from your internal collaborators—customer departments, finance, legal, and others—can help surface bottlenecks and inefficiencies in the procurement process and enable you to better understand how these key stakeholders experience the procurement journey. Surveys can also help you track progress over time, while signaling that you are committed to continuous improvement and to building trusting relationships with collaborators.

Feedback isn't always easy to ask for, but it is a gift to receive. It requires your customer departments taking time out of their busy days, if only for a few minutes, to think about how you can improve. For customer departments to be invested enough in improving procurement operations to give you candid, actionable feedback, they need to believe it will be well-received and that it will lead to change. Surveys elicit the best feedback when the purchasing office also establishes a culture of open communication, a willingness to participate in challenging conversations in good faith, and a commitment to making change based on the feedback received.

[Resource Link](#)



How-To Guide

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

Authors: Elena Hoffnagle, Charley Kargman, and Laura Merryfield

Contributors: Kailey Burger Ayogu, Hanna Azemati, and Hope Patterson

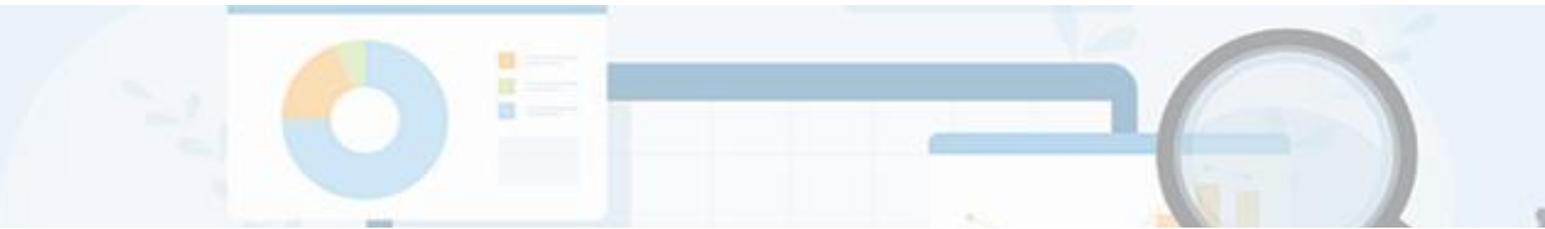


This publication has sample questions for your use!

### In this how-to guide, you will:

- Understand how hearing from current and prospective vendors can provide valuable feedback on your procurement process.
- Learn how to design and implement a survey to understand challenges that businesses — especially those that are small, local, and minority-owned face —when interacting with your government.
- Read about concrete examples and promising practices in vendor survey implementation across governments.

[Resource Link](#)



### Open Data: A Powerful Tool for Governments Looking to Transform Procurement

**June 6**  
12- 1 pm ET

Posting procurement data publicly is a powerful tool for governments looking to transform their procurement processes. In this workshop, we will explore how the principles of the open data movement—which aims to make government data available to the public, free of charge, with no restrictions on use, and easy to access—apply to procurement data.