



HARVARD Kennedy School
Government Performance Lab

**Procurement
Excellence Network**

How to Design and Deliver Effective Trainings

Procurement Excellence Network (PEN) Training

February 27, 2024

Learning Agenda & Objectives



Discuss common challenges and barriers impacting training processes.



Learn useful techniques to create effective trainings that support government procurement objectives.



Share training success stories, key insights, and lessons learned from peer governments.

PEN Pulse Poll



Given your current role, do you have any **training responsibilities**?



What **training topics** would be most useful to **upskill staff in your jurisdiction** to advance procurement objectives?

How can you engage in this session?



Please use the
“Raise Hand”
function on Zoom!



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



Join the
Q&A Conversation
after the event!

Using training to achieve procurement excellence

Training can be the key to more effective procurement!

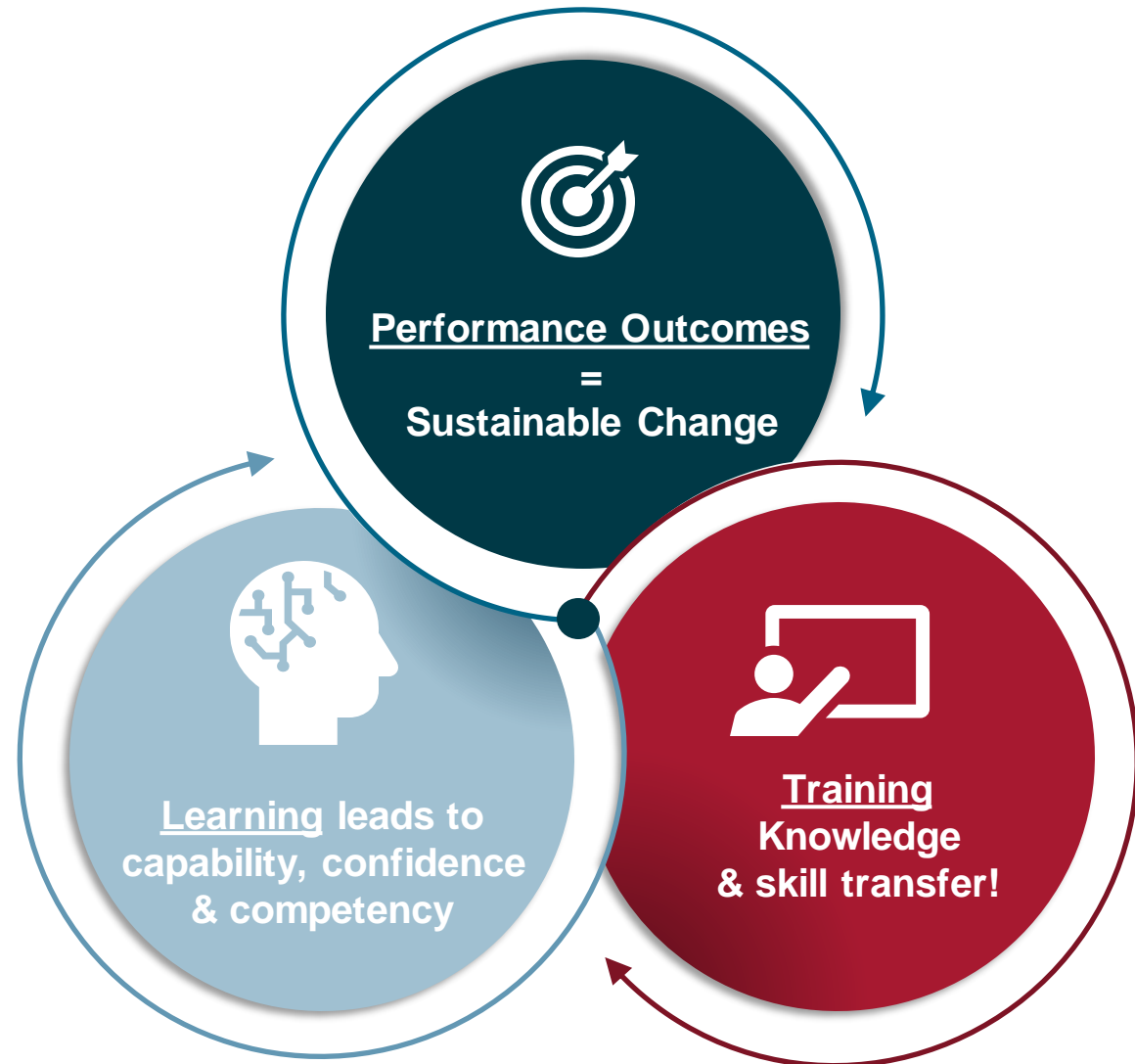


PEN Member Perspective

Training is a culture here that has become widely accepted and understood as a necessity to our everyday environment.

Krysta Batista

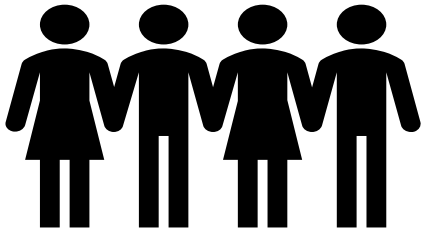
Procurement Systems Coordinator
Louisville Metro Government, KY



Why should governments focus on strengthening their internal training programs?

Procurement is an engine that powers communities.

**If procurement is the engine,
then properly trained staff are the fuel!**



Training + Learning = Capacity building

Shift in organizational attitudes, behaviors, and culture to empower staff to innovatively apply skills, knowledge, and resources to improve performance.

Training adds value – but what makes it challenging?

“Our process is broken, and so is our training. I left with more questions than answers.”

“There is a lot of resistance to change. It is hard to teach a dog new tricks.”

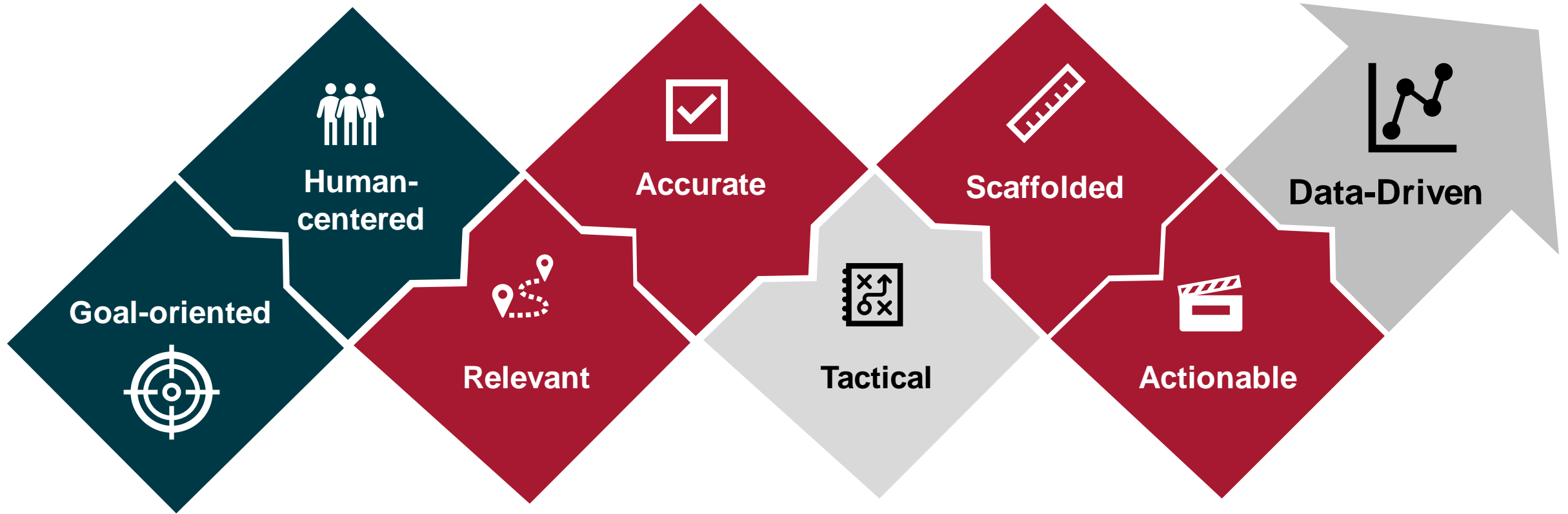
“My team does not have the skills to design or lead training so we hired consultants, but they did not tailor the training to our needs!”



*Have you ever experienced an ineffective training?
Why do you think the training was not successful?*

Addressing training challenges

Building blocks for impactful training



Strategies to address common training challenges

Proactively assess the motivations, dynamics, knowledge, and skill gaps of the audience.



Goal-Oriented



Human-Centered

- ❑ **Know-Wonder-Learn**
- ❑ **Audience Mapping**
- ❑ Prep “Stoplight” Responses

Breaking down complex topics into digestible content and delivering it clearly.



Relevant



Scaffolded



Accurate



Actionable

- ❑ **Micro-skills Mapping**
- ❑ Purposeful discussion questions
- ❑ Prepare Run of Show

Increasing engagement among the audience and measuring understanding.



Tactical



Data-Driven

- ❑ **Beta-testing**
- ❑ Jot down, pair up, share out
- ❑ Knowledge checks
- ❑ Simulations
- ❑ Start with a Hook
- ❑ Measuring Impact

Proactively assess the motivations, knowledge, and skill gaps of the audience

Using the “Know-Wonder-Learn” technique to craft your training goals

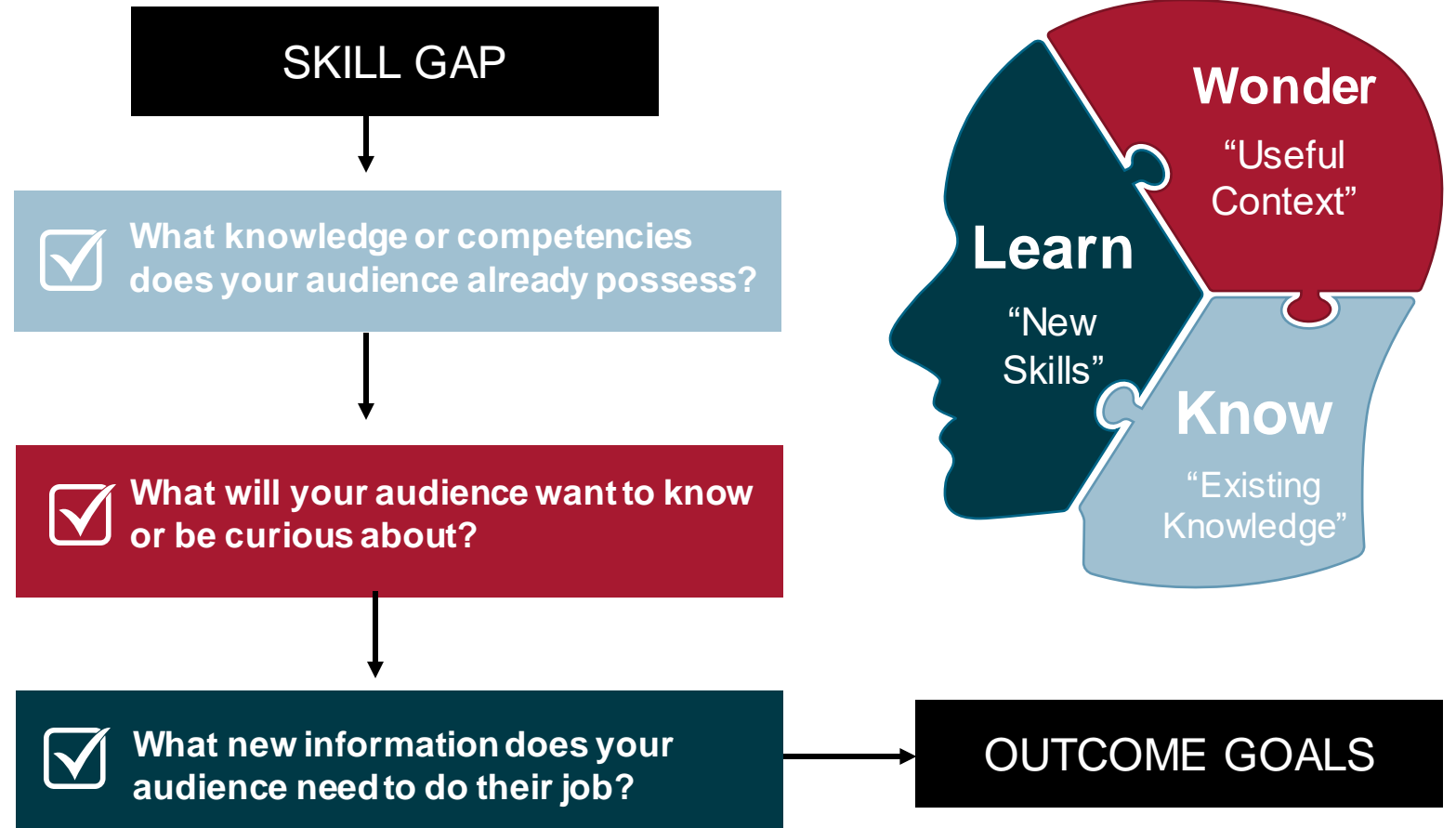
PEN Member Perspective

Knowledge is power. People need help sometimes to do their jobs at the optimal level, and that’s okay.

When creating training, think about ways to **empower staff, building upon their expertise.** Observe their needs, check your assumptions, then build and create from there.

Tresha Taylor

Contract Admin Specialist
Loudoun County, Leesburg, VA



Audience mapping – training personas

What it is: Crafting the structure, content and tone of training with your audience in mind.

Why do this?: Meet people where they are | Choose engagement tools that resonate.

“Technoid”

Inquisitive Nature

Analytical mindset and often asks tough questions

“Eager Beaver”

Fast Learner

Often the first to respond to or ask a question

“Quiet & Reserved”

Introverted & Shy

Likely will not engage unless prompted

“Resistant Skeptic”

Slow to Change

Needs to know “Why” a process needs to change

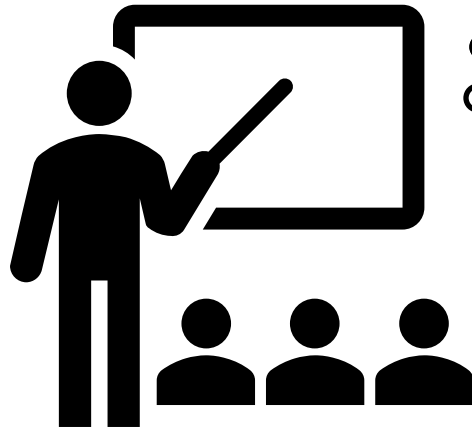
**Breaking down complex topics into digestible content
and delivering it clearly**

Reminder: training ≠ learning

Just because you train on something, doesn't mean your audience will learn it.

“OK folks, let's test your knowledge.

Write a paragraph about the barriers
MWBE firms face in securing a
performance bond as the contract
principal.”



What does MWBE
stand for again?

Wait, how many
sentences in this
paragraph?

Why is a school
principal involved??

What the heck is a
performance bond?

DELIVER TRAINING in a way that results in SUSTAINED LEARNING

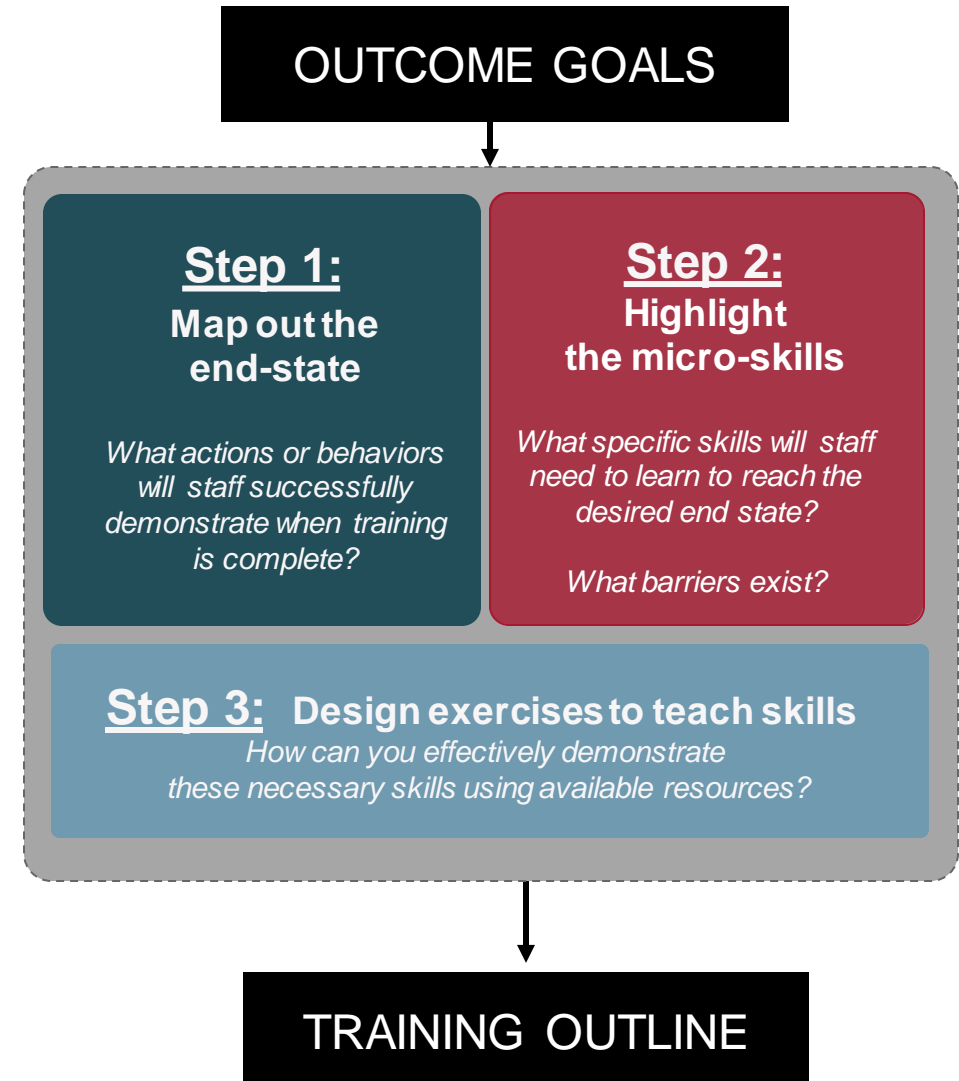
Use “Micro-skills Mapping” to develop an outline!

What do you do?

- Write out the **specific actions** you want staff to be able to **execute** at the end of training.

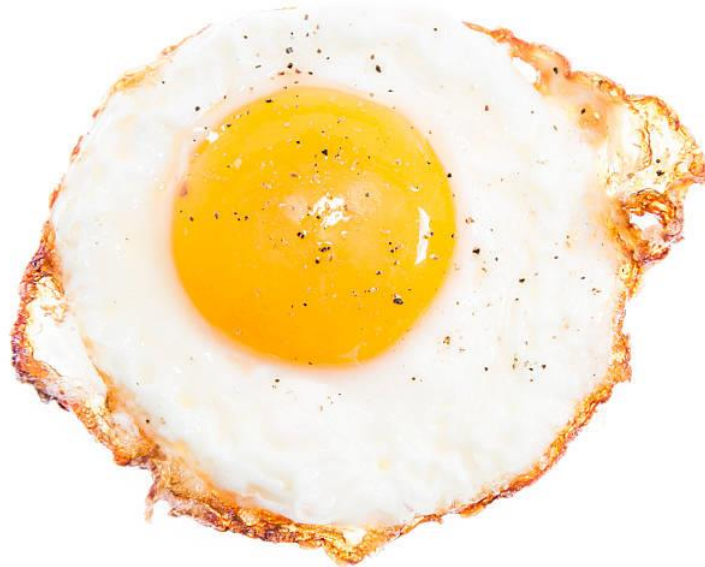
Why it's useful?

- Develop a **human-centered, tactical and actionable** training outline.
- Present content in **logical and digestible** pieces (scaffolded).



Training Goal: Let's fry an egg!

Required Micro-skills:



- Cracking an egg
- Removing a broken shell from an egg
- Identifying the correct pan/skillet
- Different methods to fry an egg
- Proper usage of a spatula
- Turning on an electric and/or gas stove
- Managing the temperature
- Seasoning the egg
- And more...*

Even the simplest tasks require a number of skills

Let's try it together! Internal Policy Change

New Message – ↶ ✕

To **Citylandia Managers & Department Heads** Cc Bcc

Subject **URGENT: Change to Requisition Submission Policy**

The Citylandia Central Procurement Department has introduced a new policy for submitting requisitions. Effective February 27, 2024 employees will receive access to a new internal SharePoint site – Citylandia Requisition Portal (**CRP**). Each employee should have received an email with unique login credentials.

Going forward, employees must access the intake form from the CRP document library and send it to their direct manager for approval. A screenshot of all approved forms must be saved in your department's shared drive due to internal document retention policies.

Send 🗑️ | ▼

Let's try it together! Internal Policy Change

New Message

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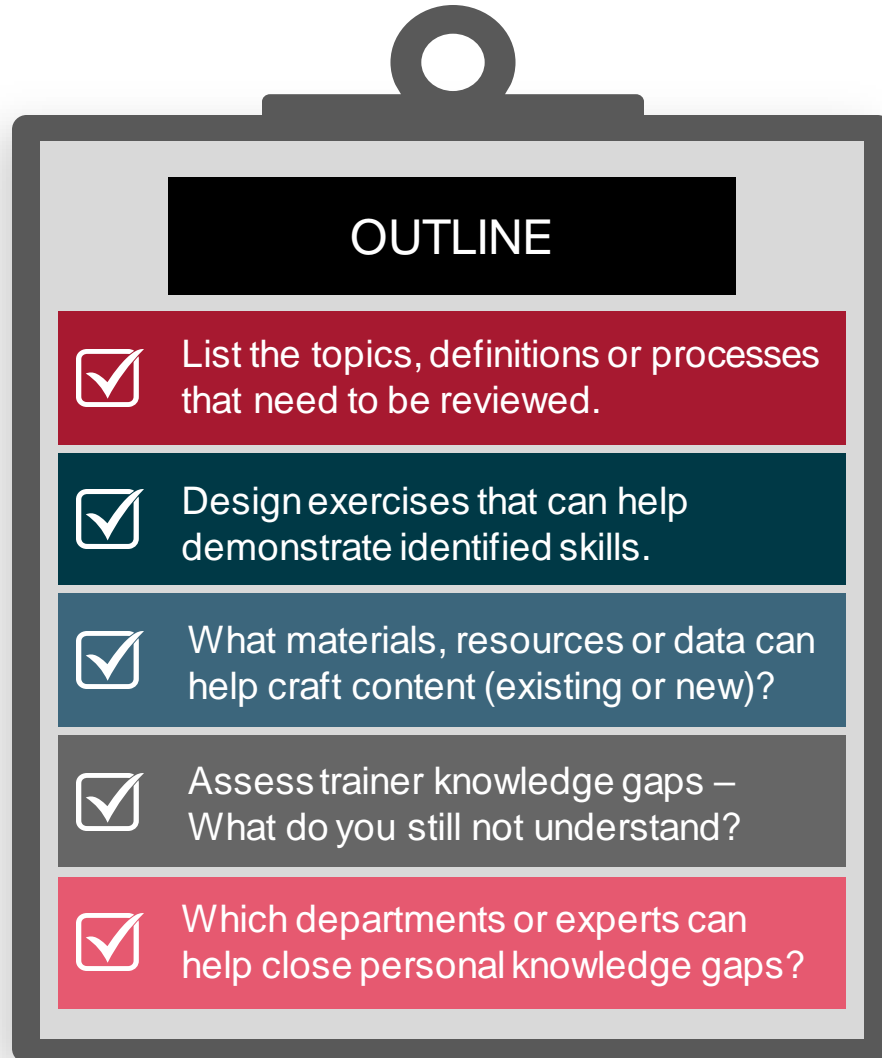
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Send

So, what now?

Organize the exercises for teaching each micro-skill into a plan!



*Turn implicit
knowledge into explicit
skills!*

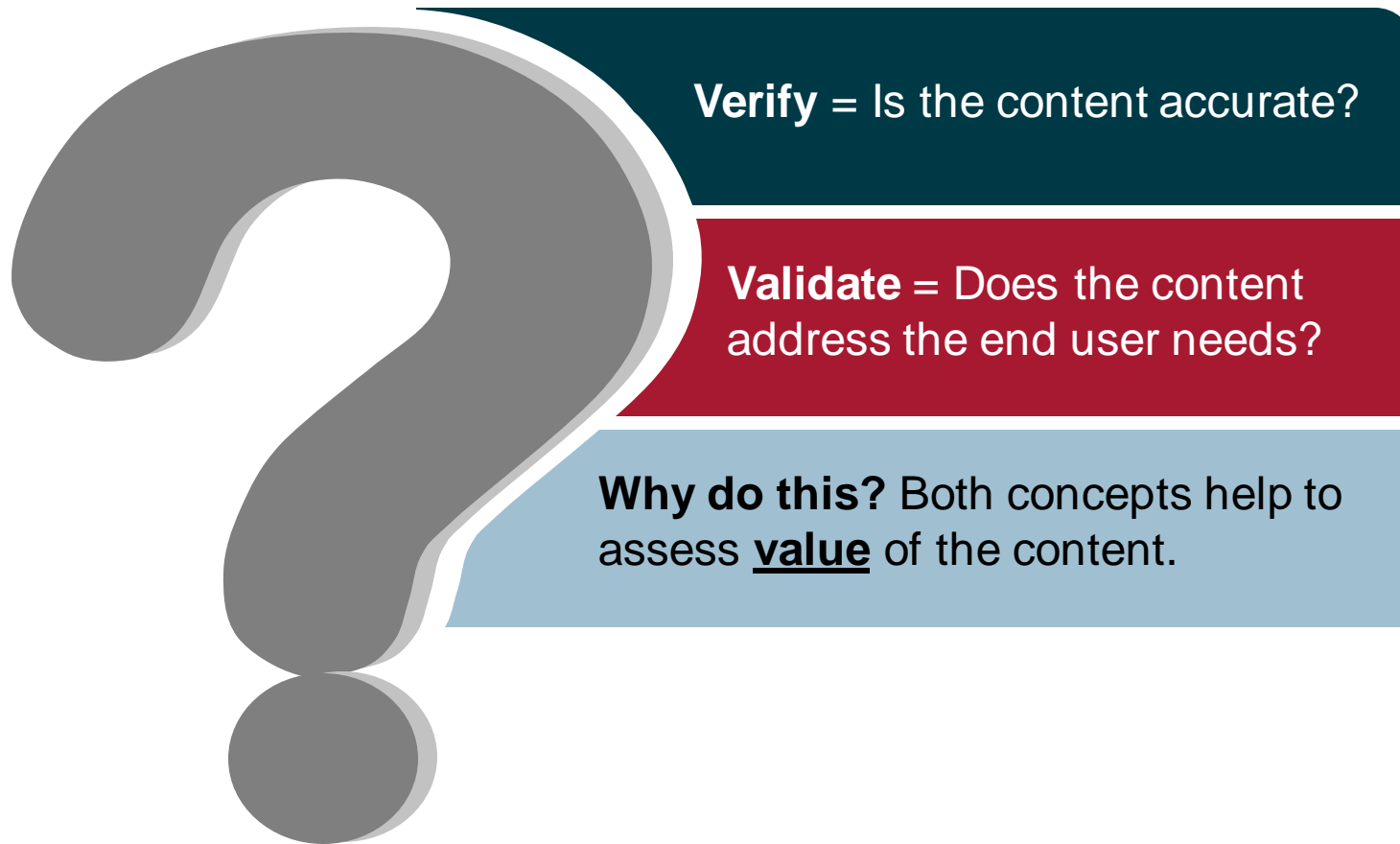
Increasing engagement among the audience and measuring understanding

Facilitation strategies & techniques

Preparation for Facilitation		Engagement	Start with a Hook	From the beginning, answer the question “ <i>what’s in it for me?</i> ” for your audience to get them invested.
Beta Testing	Create feedback loops with the intended audience and relevant stakeholders to verify and validate the content.		Jot, Pair & Share	Increasing collaboration among audience by demonstrating command of skill, sharing it with a partner, then reconvening to share as a group.
Prep “Stoplight” Responses	<p>Predicting questions that may arise from your audience during training and preparing for how you will respond to them.</p> <p><i>Consider questions with various degrees of difficulty (e.g., red, yellow or green.)</i></p>		Simulations	Activities that illustrate some relevant component of the process or skills you want your staff to learn.
Prepare Run of Show	Develop a purposeful, step-by-step plan for delivering your content mapping out activities, discussions, or breaks.	Evaluation	Knowledge Checks	Pausing to confirm that your audience has demonstrated a command of the material. <i>Note: Gauge competency of material vs. memorization</i>
			Measuring Impact	Identify metrics that can be used immediately to gauge engagement and impact of training.

Beta-testing content

Create feedback loops with the intended audience to verify and validate the content.



PEN Member Perspective

In our training design, the user is always in mind. They use each process, procedure, and tool we create in their jobs. So, we identify multiple opportunities to capture feedback while developing content.

This empowers the intended audience to have a say in the design and delivery. This improves the quality, experience, and learning.

Melisa Nelson

Director of Purchasing
Bellingham Technical College, WA
(a WA State Institution of Public Higher Ed)

Making your training fun & engaging

- ❑ Be **engaging!** Be your fun and personable self!
- ❑ Add **memes on slides** or thoughtful questions.
- ❑ Use **actual jokes** (if you are funny)!
- ❑ Identify and **create opportunities for collaboration** with other participants.
- ❑ Use **polls, quizzes, and icebreakers!**
- ❑ Create **roleplaying opportunities** with scripts, personas and scenarios.

EMPLOYEE TRAINING

PEN Member Perspective

Training should not feel like drudgery. Engagement is critical – *do not just read a PowerPoint*. Activate your personality. Be comical at times. Create a safe space for your audience to be comfortable.

Above all, know your audience! Align to what a department understands and “talk their language”.

Anthony Delgado

Assistant Administrative Analyst
City of Long Beach, CA

BIG DEAL

Navigating “surprises” during training

Training Scenario

How to Mitigate

How to Communicate

Despite your preparation, you receive difficult questions you did not anticipate

- Request an expert from key departments to attend training to address questions
- Share your “Stoplight” responses with peers to gauge if you missed anything

“That is a really good question, I do not know but I can reach out to [insert dept name] and get an answer for you!”

The audience is not passing the knowledge checks

- Ask targeted questions to the group to assess the root cause
- Check the “language” used to describe the concept – *was it too technical or jargony?*

“My goal is to ensure you leave this training with the necessary knowledge. Could you please jot down your understanding of the new process and then we can review together ?”

Case Study

Welcome, Julia Fusfeld!



Senior Associate Director

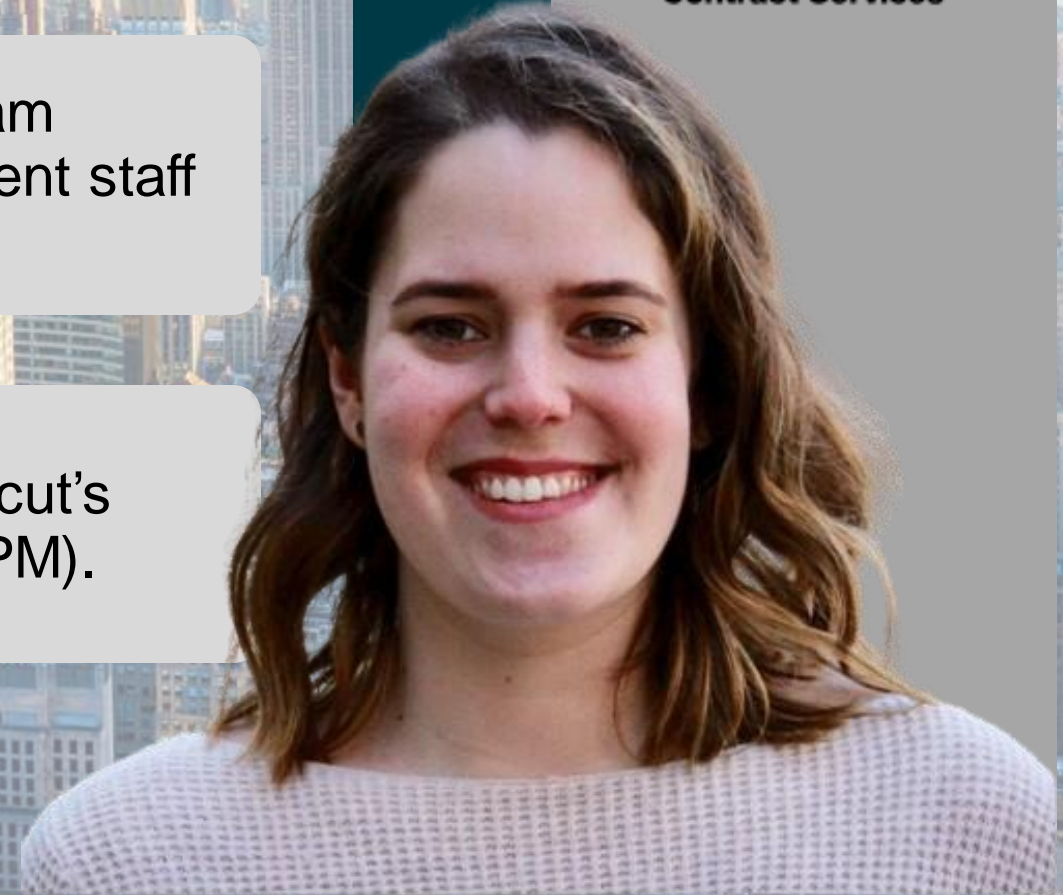
Mayor's Office of Contract Services (MOCS)
New York City, NY



Leads Learning and Development team
responsible for training city procurement staff
and vendors.



Formerly worked in State of Connecticut's
Office of Policy and Management (OPM).



NYC Procurement Training Institute (PTI)

Purpose & Process

- **Elevating procurement functions** in NYC
- **Align on strategic objectives of procurement** and how processes help us achieve objectives
- Providing **tools for citywide procurement staff** to build capacity

Challenges

- **Availability of staff** to develop and deliver trainings
- **Working with a centralized training agency** to schedule and publicize trainings
- Balancing between **rules/theory and process** in content

Outcomes

- **Surveys** after each training to determine the utility of training
- **Registration numbers** to understand whether topics are of interest
- **Anecdotal evidence of improved performance** in areas trained (*hope to move to better data collection in future*)

CT OPM Procurement 101 Training Series

Purpose & Process

- **Elevate the role of procurement in the State** by explaining how procurement is a strategic function
- **Equip procurement staff with skills** to successfully complete procurement actions

Challenges

- **Culture change** in how procurement staff see themselves and why training is important
- **Oversight** – carefully wording content to avoid garnering interest from oversight committees
- **Technology** – establishing appropriate tools and infrastructure to deliver trainings

Outcomes

- **Surveys** after each training to determine the utility of training
- **Registration and attendance numbers** to understand whether topics are of interest

Key Learnings & Insights



Training must be a priority to encourage staff to develop the most robust and useful content possible.



Measuring impact should ideally go beyond post-training surveys and attendance numbers.



Tailor content and meeting format to different levels of procurement professionals and learners.

Feedback Poll

Channeling the Power of Data to Achieve Your Procurement Goals



March 26, 2024 | 1:00-2:00 pm ET

Post-event Q&A | 2:00-2:30pm ET

Data provides a reflective mirror,
revealing how well an organization is
meeting its performance goals.

Join us for a roundtable discussion as we
discuss how to **strategically use metrics
and KPIs to diagnose challenges** to
improve outcomes in your purchasing office.

NEW Opportunity: PEN Member Survey!

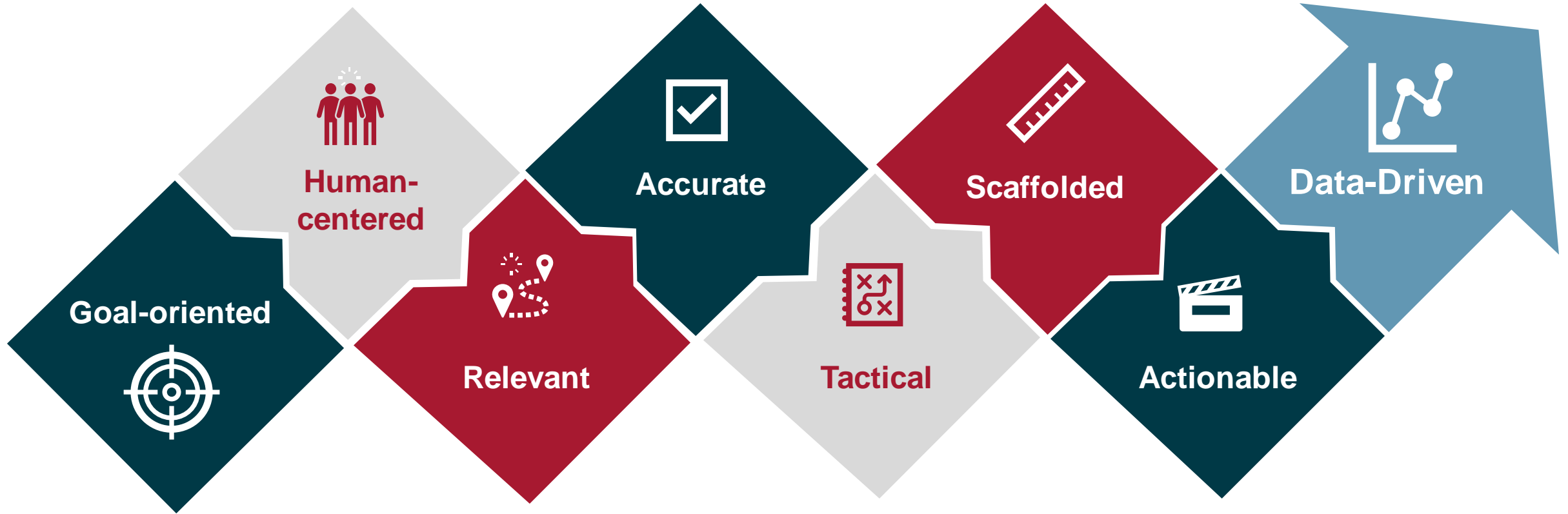
Calling all PEN members! This week we are releasing a brief member survey that asks for your feedback and input. Your insights are extremely valuable to us and will play a crucial role in shaping the future of PEN.











We hope you will participate!

Appendix: Additional Resources & Templates

Building blocks for impactful training



Building blocks for impactful training

-  **Goal-Oriented.** What is the purpose and desired outcome?
-  **Human-Centered.** Understand the needs, experiences, and challenges of the targeted audience.
-  **Relevant.** Clarify the value proposition. How will this content help them in their scope of work?
-  **Accurate.** If a process is incorrectly interpreted or communicated, it undermines the value of training and could cause serious issues. The information in the content should be validated!
-  **Tactical.** Training is strategic. How can you convey policies, procedures or processes in a framework that nets the optimal results in the most efficient way possible?
-  **Scaffolded.** Break down information in digestible, logical, intuitive sections that is easy to grasp.
-  **Actionable.** Upon completion of the training, are there clear instructions, protocols or techniques that can be applied to their work?
-  **Data-Driven.** Have you identified quality metrics to measure progress toward desired outcomes?

Louisville Metro Government : P-Card Policy Training



The Louisville Metro Government saw an emerging need to educate cardholders and approvers on proper usage and rules/regulations around the procurement process.

The city increased P-card issuance from 20 to 400+ staff in 6 years!

- Developed 2 modules for targeted audiences
- Beta-tested training with 28 users
- Trained nearly 1200 staff
- Data measured impact
- Provided access to ongoing training support

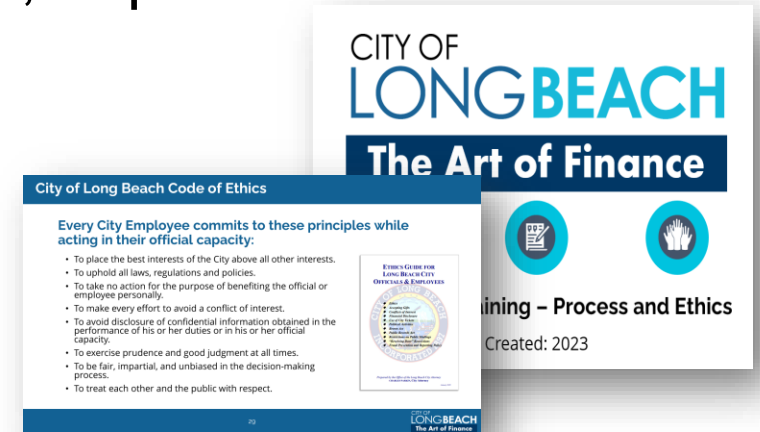
Key to Success: *“Provide the information in a manner that was not intimidating or overbearing while still impressing on cardholders the importance of understanding the training.”*

City of Long Beach, CA: *Process & Ethics Training*

The Finance Department created the Process and Ethics Training in response to inquiries related to approved purchasing thresholds, department responsibilities, and ethical considerations, such as:

What should I do if a contractor wants to give me a gift?

What is the threshold for micro-purchases?



Impact: Change in Behavior

- Reduced inquiries
- Other departments proactively requested training

Key to Success: *“Our module was anchored in interactivity and tactile discussions about relevant real scenarios and concepts that apply to their work!”*

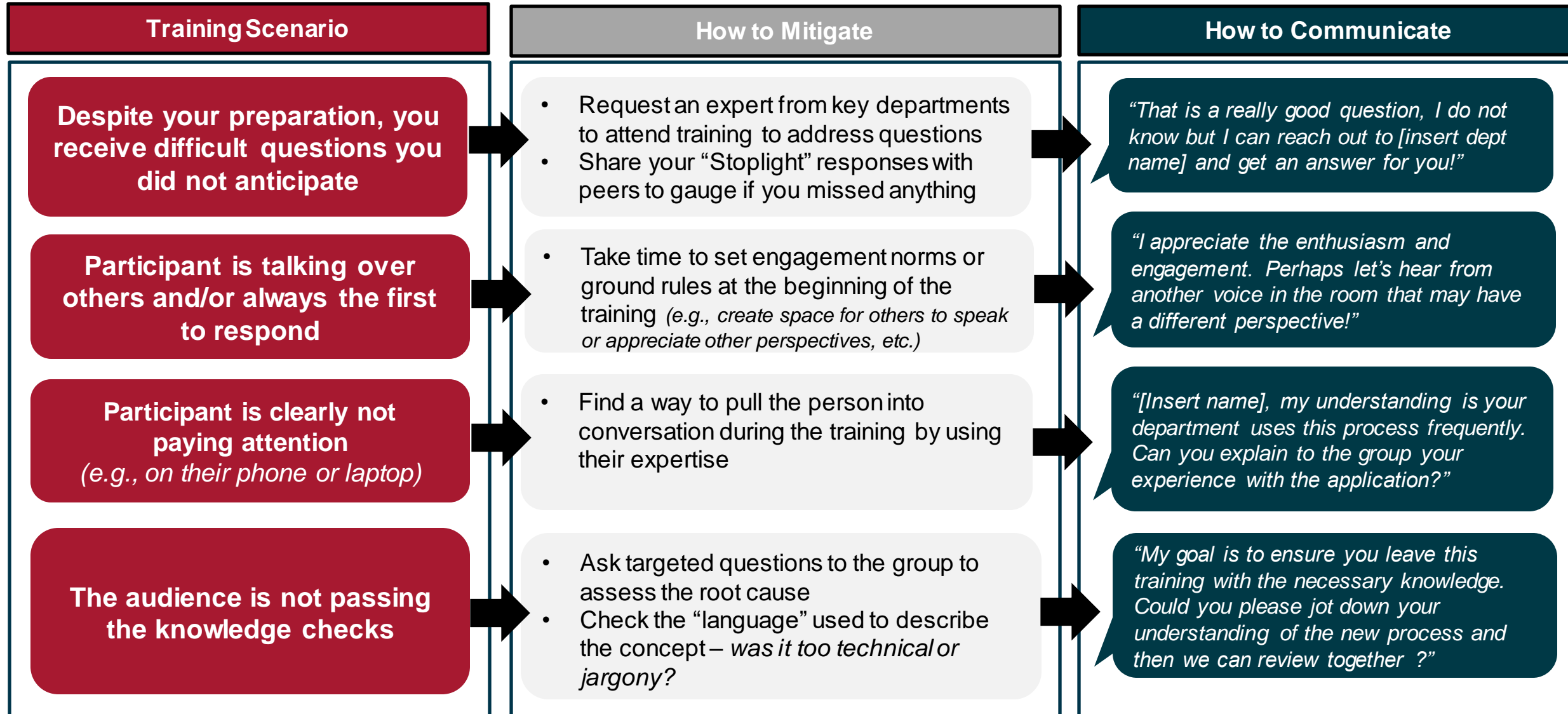
Audience mapping – user persona/avatar (cont.)

What it is: Prepping the content, questions, structure and tone of your training with your audience in mind.

Why do this?: Allows you to meet people where they are and choose engagement tools that will resonate.

Name	Title	Relationships (formal and informal)	How will this person likely receive the training? What pre-conceived notions do they have? What questions are they likely to ask?
Michael	Procurement Manager	Oversees all staff in Contract Management Dept	Enthusiastic about the training topic and requested additional support for this team based on recent compliance metrics. Will likely benefit from a quick refresher on the topic. Will not be available for the whole training.
Jermaine	Contract Admin Manager	Reports to Michael. Works closely with Janet.	Extremely data-oriented and often asks a lot of technical questions due to his data analyst background. Be prepared to explain any functionality, workflows, or metrics that are related to a process or policy change.
Janet	Contract Admin Manager II	Reports to Michael. Works closely with Jermaine.	Very experienced staff with broad institutional knowledge – is sometimes resistant to change and will often refer to “old ways” of doing things. <i>She needs to understand “why” something needs to change not just “how”.</i>
Latoya	Analyst III	Officially reports to Jermaine, but work is more guided by Janet.	Extremely fast learner - Will probably quickly grasp the material. Sometimes jumps in to answer questions while others are still thinking. Be deliberate about creating think time for everyone.
Tito	Analyst I	Same as above – recently started with agency.	No read on this person yet. May be quiet, since new – create opportunities for them to engage.

Navigating “surprises” during training (cont.)

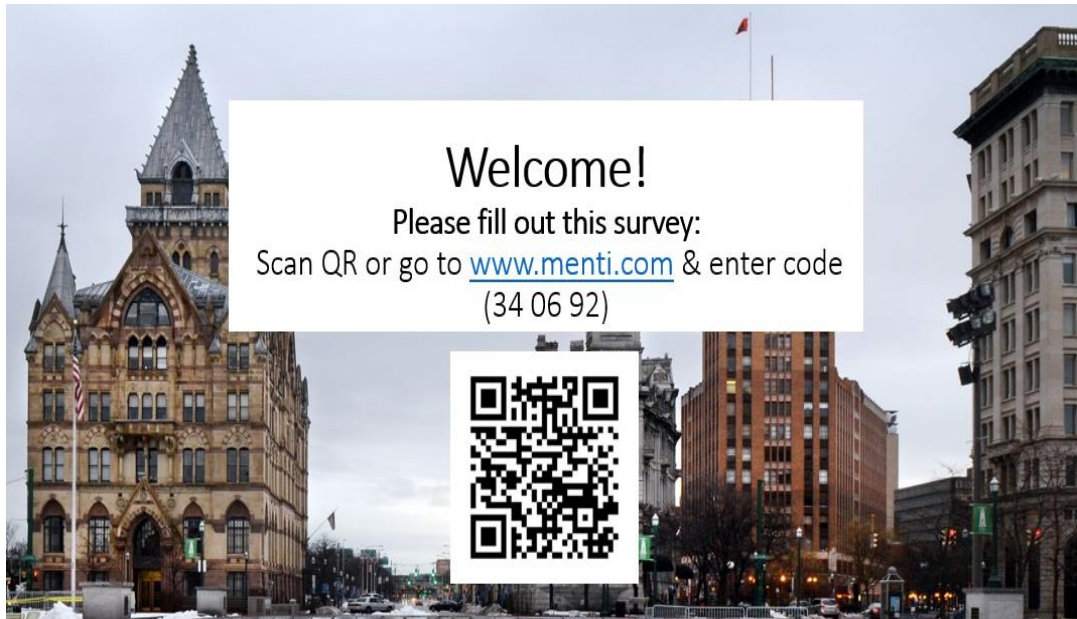


Pro Tip: Use technology to boost training engagement

SYRACUSE, NY



While beta-testing the training module for their revised Procurement Manual, Syracuse staff used **Mentimeter** to collect baseline data and feedback from the user working group.



LONG BEACH, CA



During their Process and Ethics Training, city of Long Beach staff used **AHASLIDES** to create icebreaker activities and test knowledge throughout the 90-minute session.

Let's practice



Join at:
[ahaslides.com/
8145P](http://ahaslides.com/8145P)

At what dollar threshold should you issue a competitive solicitation to make a purchase?

- A. >\$2,500
- B. >\$25,000
- C. >\$100,000
- D. >\$200,000

Comparing training delivery methods



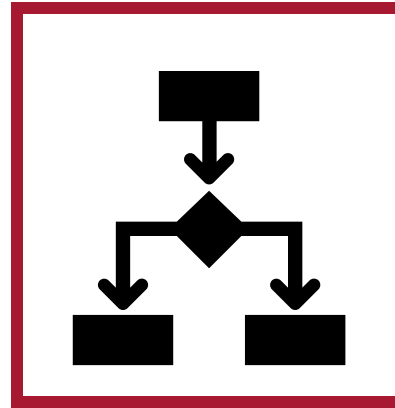
❑ **Consider a blended approach of these methods to maximize impact:**

- ✓ How many staff members people need to be trained?
- ✓ Which method may facilitate the most understanding quickly for your audience?
- ✓ Is there time-sensitive material that needs to be shared?
- ✓ Is this a topic that requires demonstrations for understanding?

Evaluating training impact by measuring outcomes



Training



Knowledge
(Outputs)



Outcomes

Outputs are the activities themselves

- **What did your staff learn that will equip them to perform their work more efficiently?**
- They help you **track progress** and **diagnose** whether you need to make changes to your training content or delivery.
- They are often ready to evaluate immediately or in the short-term.

Examples: # of departments trained, # of training requests, new processes implemented, fewer troubleshooting calls...

Outcomes are the ultimate result

- **What changes in behaviors, relationships and resident-impact are you trying to accomplish?**
- They help you capture the **WHY** – the reason we're doing these trainings.
- Can be challenging to measure, as it is mostly available in the **long-term**.

Examples: reduced cycle times, increased morale, improved staff performance, improved vendor relationships with the city ...

Using data to measure learning

Training Topics	SHORT-TERM METRICS	LONG-TERM METRICS
Purchase Card Utilization	<ul style="list-style-type: none"> • # of departments trained • # of P-Card users trained • # of inquiries from P-card users that attended the training vs. Those that did not. • Amount of time it takes to resolve the transactions • # of flags/P-card misuse per month, department, user 	<ul style="list-style-type: none"> • Quarterly and annual audits reporting little to zero misuse • All P-card users going through the training
Active Contract Management	<ul style="list-style-type: none"> • # of solicitations with clear performance metrics • # of departments practicing active contract management • # of kickoff calls/meetings with vendors • # of solicitations including performance check-ins with vendors 	<ul style="list-style-type: none"> • Better vendor performance • Positive impacts for residents • Improved relationships with vendor community • Cost-savings effects
Writing Results-Driven RFPs	<ul style="list-style-type: none"> • Length of RFP (# of pages) • Amount of time it takes staff to write RFP • # of responses to RFP • # of questions submitted by respondents 	<ul style="list-style-type: none"> • Quality of selected vendors • # of dollars saved • Quality of service provided • Innovative solutions to problems • Diversity of selected vendors
Procurement Forecasting	<ul style="list-style-type: none"> • # of procurements identified for forecasting • # of participating departments • Implementation of forecasting process • # of users • Level of detail of department submissions 	<ul style="list-style-type: none"> • Increased dept. collaboration on purchasing needs • Frequency of forecast planning meetings • Increased efficiency • Improved allocation of funds • Reduced cycle times