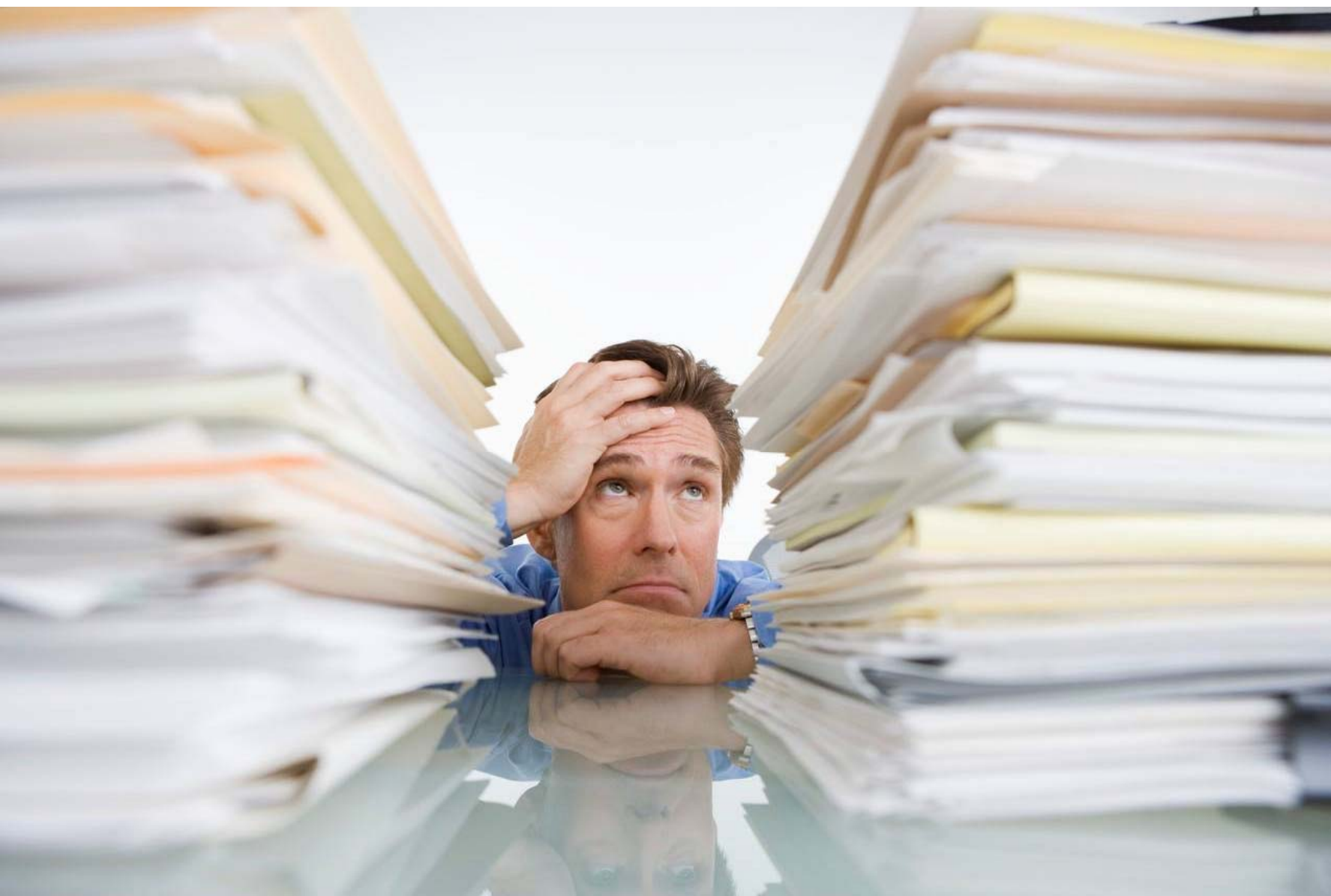


Using Technology to Create Work Efficiencies

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NPI Annual Conference, October 7, 2019






Goals and Objectives

- ▶ Identifying work processes where technology can create efficiencies
- ▶ Consider alternatives
- ▶ Selecting the best alternative
- ▶ Implementation of new technology
- ▶ Overcoming objections to change
- ▶ Report work efficiencies

Identifying work
processes where
technology can
create
efficiencies





Any work process that is
manual and/or time consuming
is a potential opportunity for
technology to create
efficiencies.

Identify most time consuming work processes

- ▶ Filing Paper / Retention
- ▶ Solicitation Development
- ▶ Solicitation Management
 - ▶ Advertising/Issue Bid
 - ▶ Receive Responses
 - ▶ Supplier Database Maintenance
 - ▶ Proposal Evaluations
- ▶ Reference Checks
- ▶ Pre-bid/Pre-Proposal Conferences
- ▶ Contract Signatures
- ▶ Award
- ▶ Contract Management
- ▶ Selling Surplus Property
- ▶ Customer Service Surveys
- ▶ General Communication and Documents to End Users
- ▶ Prevailing Wage/Davis Bacon Certified Payroll Tracking
- ▶ Construction Project Management
- ▶ Insurance Tracking
- ▶ State Legislature Bill Tracking
- ▶ Supplier Outreach and Training

Considering
alternatives



Filing Paper / Retention System

Traditional:

- ▶ File cabinets for project files
- ▶ When a project has been awarded, project file goes to the cabinet
- ▶ Whenever you have to touch the file, file is pulled out of the cabinet and file card is filled out and put in its place
- ▶ Whenever any correspondence, amendment, agenda item, insurance COI, or any other documentation is associated with the project, the paper is filed in the project file and put back in the cabinet

Consider:

- ▶ **Storing all files electronically on server**
 - ▶ Naming conventions for consistency
- ▶ **Document Management software**
 - ▶ Helps digitize paper records / imaging
 - ▶ Records retention
 - ▶ Automatic destruction

Organize ▾ Sync ▾ Work offline New folder

★ Favorites

Libraries

- Documents
- Music
- Pictures
- Videos

Computer

- OSDisk (C:)
- S14922H (\\homedir1\usr1) (F:)
- app1 (\\lvmpd.int\files3) (G:)
- files1 (\\lvmpd.int) (H:)
- Common (\\h1-f17) (W:)

Network

Name	Date modified
ACCREDITATION	3/2/2016 7:42 AM
ADMINISTRATION	10/16/2017 1:44 PM
AGENDA - FAC	4/25/2019 3:29 PM
AUDITS	11/15/2018 9:41 A...
BOILERPLATES	2/13/2019 11:41 A...
FORMS	5/9/2019 1:15 PM
LEGAL	1/31/2019 12:04 PM
LEGISLATIVE SESSIONS	12/3/2018 7:45 AM
LETTERS	5/1/2019 2:41 PM
MISC	5/10/2019 12:05 PM
OTHER AGENCIES	10/8/2018 2:47 PM
OUTREACH	1/11/2017 7:57 AM
PROCEDURES	3/28/2019 11:37 A...
PROCEDURES AND TRAINING	9/27/2018 8:11 AM
PROFESSIONAL ORGANIZATIONS	10/17/2016 8:59 A...
PROJECTS	
PUBLIC INFORMATION RE	
PURCHASING STAFF BRIEF	
REPORTS	
RESOLUTIONS	
SAP	
STAFF	
SUPPLY	
TRAINING	

1. CORRESPONDENCE

2. MISC	190416 BH-info for bid	4/17/2019 11:06 A...
3. RENEWALS	190416 SH-helping Beth out with bid, ne...	4/17/2019 11:06 A...
4. INSURANCE	190416 TS-Anya provide answers	4/17/2019 11:06 A...
5. AWARD	190417 AL-make site visit appt with Anya	4/17/2019 1:03 PM
6. CONTRACT	190417 AL-only have to sign in and recei...	4/17/2019 1:05 PM
7. EVALUATION	190417 AL-revised specs with comments	4/18/2019 9:59 AM
8. SUBMITTALS	190417 JN-info for FBI range	4/17/2019 1:07 PM
9. ADVERTISING	190417 SH-will escort bidders in Forensic...	4/17/2019 1:04 PM
10. SOLICITATION	190417 SH-will need a site visit	4/17/2019 1:06 PM
	190418 AL-walk through works for me	4/18/2019 2:25 PM
	190418 BH-bidders 1	4/18/2019 2:35 PM
	190418 BH-bidders 2	4/18/2019 2:35 PM
	190418 JN-ranges are blocked out for sit...	4/18/2019 2:23 PM
	190418 NGEM-bid issued	4/18/2019 2:22 PM
	190418 SH-Bid Issued - 605270	4/18/2019 2:27 PM
	190418 SH-set up Site Walk Through - Fo...	4/18/2019 2:27 PM
	190418 SH-set up site walk through - Ran...	4/18/2019 2:35 PM
	190430 AL-can take to Amigo if necessary	4/30/2019 3:23 PM
	190416 KM-tech specs	4/16/2019 8:08 AM

- LVMPD_Bid_-_Instructions_to_Bidders_-_General
- LVMPD_Bid_-_General_Conditions
- 605270 Bid Invitation
- 605270 Bid Attachment - Insurance Requirements
- 605270 Bid - Specifications
- 605270 Bid - Specifications - ADDENDUM 1
- 605270 Bid - Instructions to Bidders - Project Specific
- 605270 Bid - Exhibit A - Site Pictures - ADDENDUM 1
- DRAFTS

Solicitation Development

Traditional:

- ▶ Emails requesting information, back and forth to end user
- ▶ Solicitation/contract drafts, back and forth to end user to modify through interoffice or email
- ▶ Specifications, back and forth to end user to modify through interoffice or email
- ▶ Mark up hard copy boilerplate
- ▶ Send mark up to clerical to type

Consider:

- ▶ **Procurement Initiator (Word or Excel)**
 - ▶ All information required from the end user to generate a solicitation
 - ▶ Form questions should be in the same order as the corresponding information in your bid boilerplates
- ▶ **Develop solicitation/contract using electronic boilerplates (Word)**
 - ▶ Buyers modify boilerplates to create their solicitation
- ▶ **Intranet (SharePoint)**
 - ▶ Instruct end user to check document out, put back when done

Solicitation Development (con't)

Consider:

▶ **Purchasing Checklist (Work or Excel)**

- ▶ Each step in the purchasing process is identified as a separate task

▶ **Project Traveler (Excel)**

- ▶ Workbook of all most commonly used forms included as separate worksheet, information is put in once and formulas embedded in the worksheets populate same info through each worksheet
- ▶ Started by the end user at the beginning of the procurement process
- ▶ Workbook includes Initiator, Checklist, Award, Assignment, Competitive Bidding Exception Justification, Pricing Template, Specifications Development, Scope of Work Development, Independent Cost Estimate, Cost Analysis, Federal Procurement History Memo



Las Vegas Metropolitan Police Department

Project Traveler Instructions

This electronic Project Traveler is designed to simplify the procurement process, gathering all the information for a project upfront from the Project Manager (PM) and traveling with the project through the procurement process. The Project Manager (designated end user representative) will initiate the procurement by filling out the applicable information on the worksheets in this workbook, then will email this Project Traveler to the applicable Purchasing Representative, along with any additional attachments, as required. At the same time, the Project Manager will cause to have a Purchase Requisition (PR) entered into SAP for the cost or estimated cost of the contract.

*The first step in the process will be to determine the procurement type or method of procurement, which will determine the type of information which the PM will need to provide Purchasing (second step) to assist in the procurement of the Good or Service. The procurement types are outlined below to help in the selection. **If PM is uncertain of the procurement type, Purchasing should be contacted at (702) 828-5788 or purchasing@lvmpd.com to help.***

STEP 1 : DETERMINATION OF APPLICABLE METHOD OF PROCUREMENT

Bid



Indicate the applicable method of procurement, based on the descriptions below.

METHOD OF PROCUREMENT

BID - GOODS AND SERVICES

The formal (advertised) Bid process is used when a product or general services (services which do not require a


A	B	C	D	E	F	G	H	I	J
SECTION 1: PROJECT BACKGROUND									
Complete the general project information in Section 1, then, depending on the method of procurement selected below, you will complete the applicable additional section of this Procurement Initiator.									
METHOD OF PROCUREMENT									
Indicate below which method of procurement applies (if uncertain, contact Purchasing at (702) 828-5788 or purchasing@lvmpd.com):									
<input checked="" type="checkbox"/>	Bid - Goods and Services (Section 2)	Sealed Bid process (>\$50,000) Complete Sections 1 and 2 of this Procurement Initiator.							
<input type="checkbox"/>	Bid - Construction (Section 3)	Sealed Bid process (>\$100,000 local or >\$10,000 Federal funds) Complete Sections 1 and 3 of this Procurement Initiator.							
<input type="checkbox"/>	RFP - Goods and Services (Section 4)	Not suited to sealed bid process (i.e., competitive bidding exceptions which you would like to compete) (>\$50,000) Complete Sections 1 and 4 of this Procurement Initiator.							
<input type="checkbox"/>	Contract - Noncompetitive Proposal (Section 5)	Goods or Services, which are to be purchased without competitive solicitation process (any amount) (i.e., sole source, professional service, competitive bidding exceptions, etc.) Complete Sections 1 and 5 of this Procurement Initiator.							
GENERAL PROJECT DESCRIPTION / LVMPD PROJECT MANAGER (PM)									
Project No. (Purchasing will issue)		685199							
Project Title		High Speed Camera and Lenses							
Date		April 30, 2019							
Material Group (SAP)		February 2, 1915							
SAP Purchase Requisition No.		Purchasing cannot start the project without an app							
LVMPD Project Manager (PM) (during solicitation and after award)		Jason Moyer							
PM Title		PO							
PM Telephone No.		702-828-8520							
PM Email		j7905m@lvmpd.com							
Using Bureau / Section		ARMOR							
Bureau Head Name		Jack Owen							
Purpose and Background for		Instructions: Define below major elements or work to communicate skills required and material needs, estimated quantities or size, to give potential suppliers a high-							



Las Vegas Metropolitan Police Department
Purchasing Process Checklist



GENERAL PROJECT DESCRIPTION / LVMPD PROJECT MANAGER (PM)		
Project No. (Purchasing will issue)	605199	
Project Title	High Speed Camera and Lenses	
Project Start Date	April 30, 2019	
Material Group (SAP)	February 2, 1915	
SAP Purchase Requisition No.	0	Purchasing cannot start the project without an approved PR.
LVMPD Project Manager (PM)	Jason Moyer	
PM Title	PO	
PM Telephone No.	702-828-8520	
PM Email	j7905m@lvmpd.com	
Using Bureau / Section	ARMOR	
Bureau Head Name	Jack Owen	
Purpose and Background for Project (Brief Scope)		
<p>This purchase is for a high speed camera system that will enable the ARMOR section to record and demonstrate explosive or reactionary combustion in a visual representation in order to enhance investigative and prosecutorial capability. This enhancement in the ability to record the ignition, combustion, and explosive nature of volatile substance and devices will assist prosecution by providing frame by frame examples of the compounds and the damage resulting from ignition. In utilizing this technology (on actual device or reconstruction), ARMOR will be able to show the concept and destructive nature of the material utilized by suspects that result in more effective prosecution. This concept evolved from discussions with the DA's office regarding past cases and events.</p>		

 ='Procurement Initiator'ID20

Solicitation Management

Traditional:

- ▶ Maintain bidders list
- ▶ Proof solicitation, advertise, issue
- ▶ Send (mail, fax, email) notification to prospective bidders
- ▶ Make copies of solicitation
- ▶ Distribute solicitation to planholders (collect \$?)
- ▶ Track planholders list
- ▶ Develop and issue addendum, send to planholders and make extra addendum copies for extra copies of solicitation
- ▶ Manually open bids
- ▶ Manually tabulate bids
- ▶ Send results to interested parties

Consider:

- ▶ **Post solicitations on your website or FTP site**
- ▶ **Electronic Bidding (E-Procurement) Software - SAAS**
 - ▶ Post solicitations
 - ▶ Receive bids/proposals
 - ▶ Maintain supplier database
 - ▶ Evaluation module
 - ▶ Post awards
 - ▶ Reduces supplier errors
 - ▶ Solicitation templates saved for reuse
 - ▶ Forms library
 - ▶ Audit function
 - ▶ Bid Tabulation

[Bid Events](#) [Auction Events](#) [Admin](#)

Edit Bid Response - 605199 Addendum 1

[Return](#) [No Bid](#) [Documents](#) [Response History](#) [Bid History](#) [Error Check Response](#)

Information has been changed as part of an addendum. See 'Bid History' for details.

Bid Number 605199 Addendum 1 (High Speed Camera and Lenses)

Close Date & Time 6/6/2019 02:00:00 PM (PT)

Time Left 23 days 5 hours 15 minutes 3 seconds

Response Status **NOT SUBMITTED** - To complete your response, you must click 'Submit Response' in the Response Submission tab.

[Event Details](#) [Questions](#) [Activities](#) [Attachments](#) [Attributes](#) [Line Items](#) [Response Submission](#)

Supplier Response Summary

[Save](#) [Error Check](#)

Response Total: \$0.00

When you have completed your response, click the 'Submit Response' button below.

General/Corporate Address

Supplier Name LVMPD
Address 400B S. MLK Blvd
4th Floor
Las Vegas, NV 89131
Phone (702) 828-3944
Fax
Contact Name
Email

Your User Profile

Title
Name Mrs. Beth Hurley
Office Phone (702) 828-3944
Fax Phone
Mobile Phone
Email b14587h@lvmpd.com

Supplier Note to Buyer

Supplier Notes

Digital Signature

By submitting your response, you certify that you are authorized to represent and bind your company.

* Your Full Name:

* Your Email Address:

Submit Response

Sealed S

← Return

[illegible]

Close Dat

Time Left

11

Respon

Line Item

Bid Mess

 New

No Bid Mes

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100

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100

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Reference Checks

Traditional:

- ▶ Call references and ask list of questions
- ▶ Mail, fax or email list of questions to referenced

Consider:

- ▶ **Boilerplate list of questions + project-specific questions**
- ▶ **Use Survey software to send to references and receive responses**
 - ▶ Free – 10 questions
 - ▶ Provides analytics

Pre-bid/Pre-Proposal Conferences

Traditional:

- ▶ Post conference date in solicitation
- ▶ Prospective bidders/proposers attend conference at your place of business
- ▶ Teleconference?
- ▶ (?) Security check in
- ▶ (?) Attendees require escort

Consider:

- ▶ **Online Meeting / Web Conferencing software - SAAS**
 - ▶ Attendees attend webinar virtually
 - ▶ No need to drive or fly in
 - ▶ Can attend conference from anywhere in the world with wifi access
 - ▶ Can attend via computer, tablet, mobile phone or telephone
 - ▶ Interactive
 - ▶ Share screen (show solicitation document)

Contract Signatures

Traditional:

- ▶ Print contract (in duplicate)
- ▶ Route for wet signatures – interoffice, mail or overnight service (\$\$)
- ▶ Administratively had to keep track of where documents were at
- ▶ Paper, toner and postage costs



Consider:

▶ **Esignature - SAAS**

- ▶ Legal in all 50 states and many countries
- ▶ More secure with multiple levels of encryption
- ▶ Higher visibility into status of approval process
- ▶ Can be signed using computer, tablet or mobile phone
- ▶ Multiple signatures can be obtained in a matter of minutes
- ▶ Saves paper, toner, postage costs and TIME!

Award

Traditional:

- ▶ Type agenda item
- ▶ Submit to Agenda Coordinator
- ▶ Agenda Coordinator sends agenda items to print and make copies for Board / citizens
- ▶ Agenda Coordinator records and transcribes meeting
- ▶ Posts pdf online for citizens

Consider:

- ▶ If law allows, **resolution to governing body delegating award authority** to CFO or Purchasing Manager
- ▶ **Agenda Management software**
 - ▶ Agendas created online
 - ▶ Standardize workflows and approvals
 - ▶ Run meeting, capture motions and votes and generate minutes in seconds
 - ▶ Shares content with citizens, increasing transparency

Contract Management

Traditional:

- ▶ Excel spreadsheets
- ▶ Financial software

Consider:

- ▶ Access Database
- ▶ Contract Management module of eSourcing software

Selling Surplus Property

Traditional:

- ▶ Traditional bid, sell to the highest bidder
- ▶ Live auction



Consider:

- ▶ **Online auction – SAAS**
 - ▶ Free to agencies
 - ▶ Sell new/used surplus items
 - ▶ Buyer coordinates pick up
 - ▶ Auction company sends you check or ACH monthly

Customer Service Surveys

Traditional:

- ▶ Didn't do at all
- ▶ Sent out email, interoffice or mail

Consider:

- ▶ **Online Survey – SAAS**
 - ▶ Free – 10 questions
 - ▶ Provides analytics



General Communication and Frequently Requested Documents to End Users

Traditional:

- ▶ Interoffice Memo
- ▶ Email



Consider:

- ▶ **Everyone Post** (i.e., LVMPD Everyone)
- ▶ **Intranet – SharePoint – Post:**
 - ▶ Calendar - Agenda deadlines
 - ▶ Purchasing staff contact information
 - ▶ Potential supplier information and diverse supplier lists
 - ▶ Links to Purchasing Cooperatives
 - ▶ Commonly used forms
 - ▶ Reference materials (i.e., Purchasing Procedures Manual)
 - ▶ Frequently requested contracts



Prevailing Wage / Davis Bacon Wage Certified Payroll Tracking

Traditional:

- ▶ Paperwork nightmare – set up files by project, contractor and subcontractors
- ▶ Receive certified payrolls monthly
- ▶ File paperwork by project, by contractor, by subcontractor
- ▶ Follow up with non-compliant companies

Consider:

- ▶ **FTP site** set up with electronic file cabinet
 - ▶ Contractors post to file cabinet
- ▶ **Labor Compliance Software**
 - ▶ Collects, verifies and manages labor compliance
 - ▶ Variety of reports available to help assure compliance
 - ▶ Reduces risk of audit failure and fines
 - ▶ Can collect data – DBE, ethnicity, gender, veteran status
 - ▶ Pay by bulk dollar volume or by project

Construction Project Management

Traditional:

- ▶ Hard copy documents
 - ▶ Bids
 - ▶ Subcontractor lists
 - ▶ RFIs
 - ▶ Submittals
 - ▶ Jobsite logs
 - ▶ Schedules
- ▶ Email communication
- ▶ Filing in overflowing file cabinets

Consider:

- ▶ **FTP site** set up with electronic file cabinet
- ▶ **Construction Management Software - SAAS**
 - ▶ Document Tracking and Management
 - ▶ Photo storage
 - ▶ Permissions to control access
 - ▶ Bid Management/Submittals
 - ▶ Jobsite Logs
 - ▶ Scheduling
 - ▶ Estimation
 - ▶ Email Communication / Doc Sharing

Insurance Tracking

Traditional:

- ▶ Don't track at all
- ▶ Request COIs after award
- ▶ Receive COIs
- ▶ Review COIs
- ▶ Document and notify supplier of non-compliances
- ▶ File acceptable COI in project file
- ▶ (?) Document in financial software expiration dates

Consider:

- ▶ **Third party insurance document tracking service**
 - ▶ Track insurance requirement compliance
 - ▶ Timely communications to suppliers
 - ▶ Track expirations
 - ▶ Online compliance reporting
 - ▶ Online file cabinet – Certificate Library

State Legislature Bill Tracking

Traditional:

- ▶ Didn't track at all
- ▶ Wait for agency lobbyist to brief
- ▶ If online, print bills, file in binder, check legislature website daily for updates

Consider:

- ▶ If offered, sign up and use the **Personalized Tracking Service**
 - ▶ Tag bills you want to watch
 - ▶ Calendar meetings of watched bills





Supplier Outreach and “How to do Business” Training

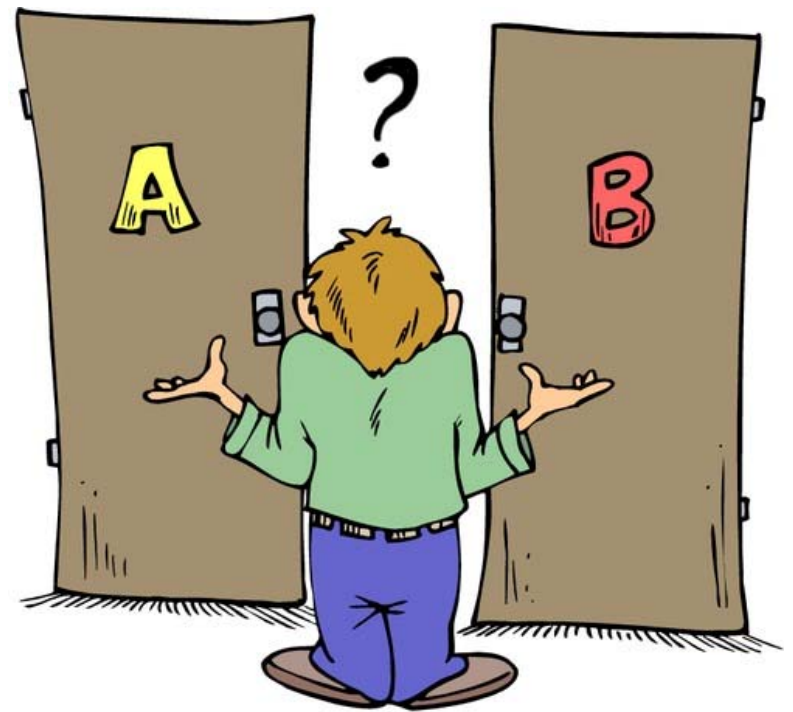
Traditional:

- ▶ Schedule room
- ▶ Send invites to selection off bidder's lists
- ▶ Track RSVPs (room capacity)
- ▶ Generate attendee list / sign in sheet
- ▶ Make copies of training Powerpoint to distribute to attendees
- ▶ Hold in-person meeting

Consider:

- ▶ **Record Powerpoint and put on website**
 - ▶ 24/7/365 access to training
- ▶ **Digital Training – via Web Conferencing software – SAAS**
 - ▶ Advertise via Bid Solicitation software - Automatic invitation to specific commodity or service providers
 - ▶ Schedule virtual meeting room online
 - ▶ No limit to attendees
 - ▶ Auto attendee list
 - ▶ Screen Sharing of training Powerpoint
 - ▶ Interactivity and collaboration

Selecting the Best Alternative





How should I select an alternative?

- ▶ RFP
- ▶ Google internet, request demo
- ▶ Colleagues / Joinder

Implementation of new technology





Implementation Steps

- ▶ Think through possible objections ahead of time and come up with ready-made counter measures
- ▶ Initial event should be town-hall type information event, presenting rationale and plan for change
- ▶ Listen to objections with an open mind
- ▶ Explain the benefits of the change
- ▶ Specify next steps
- ▶ Outline future communications channels for questions
- ▶ Communicate how people will learn the specifics of what will be required of them, from whom and when
- ▶ Training program implemented and evaluated

Overcoming Objections to Change





Fear of Change

Objection

- ▶ Lack of Competence
- ▶ Loss of Status
- ▶ Overloaded and Overwhelmed
- ▶ Will I lose my job?

How to overcome

- ▶ Assure will be brought to competence
- ▶ Inevitability of change and offer to help adjust
- ▶ Re-emphasize why change is needed, praise and be patient
- ▶ Reassure, if applicable



The Skeptic

Objection

- ▶ Not convinced
- ▶ No role model
- ▶ Distrust of change agents

How to overcome

- ▶ Listen, vet and change the idea, as needed
- ▶ Pilot program - small successes others can see
- ▶ Open with information and communication



Risk of Change > Risk of Standing Still

Objection

- ▶ This is the way we've always done it
- ▶ If it ain't broke, don't fix it
- ▶ Loyal to people connected with the old way
- ▶ May really believe proposed change is a bad idea

How to overcome

- ▶ We reserve the right to improve
- ▶ Eliminate the mundane, time consuming tasks, so time is better spent
- ▶ Diplomacy honoring past contributors to the old process can help with resistance
- ▶ Listen to the naysayers; ask for advise, assign responsibility

Report increases
to work
efficiencies





Spread the Good News

- ▶ Track costs and report cost savings to management
- ▶ Post on Intranet for users
 - ▶ New procedures / instructions
 - ▶ New forms
 - ▶ Cost savings
- ▶ Celebrate!



In Summary

- ▶ Identified work processes where technology can create efficiencies
- ▶ Considered work process/technology change alternatives
- ▶ Ways to choose the best alternative
- ▶ Ways how to best implement new technology
- ▶ Prepared for objections to change
- ▶ Ideas to report work efficiencies

References

- ▶ Overcoming Resistance to Change: Top Ten Reasons for Change Resistance, by A. J. Schuler, Psy.D., Dr. A. J. Schuler is an expert in leadership and organizational change. To find out more about his programs and services, visit www.SchulerSolutions.com or call (703) 370-6545.
- ▶ Change Management: Overcoming Objections, www.projectmangementportmanteau.com



Questions?