



Proposal

Prepared 8 January 2013 at request of Jenti Vandertuig, head of Procurement for Santa Clara County.

Introduction

We understand you would like our assistance in improving operations within Procurement. The normal practices of on-the-job coaching and workflow organization have not produced the fluency and the capacity desired. Internal conflict and inefficiencies clearly structural impediments rather than just a need for training.

The recent Seven Samurai class and work with other County agencies has suggested three possibly useful new ideas:

- Surfacing the mental models that shape how people even perceive issues, and can undermine their attempts to improve matters.
- Taking a process perspective on work flow, which is in contrast to the more typical focus on job descriptions and divisional/departmental organization.
- Projects can vary in their essential nature, which can support a more sophisticated triage of projects and more effective assignment to staff

Scope

The recent Seven Samurai training for your managers seemed to strike a chord, sparking some useful discussions and new insights. So the First Phase of this work is to expand the circle of engaged managers. We plan to invite the same round of managers (plus 1-2 that were absent the first time around) along with 1 or 2 of their direct reports. The content would be the following:

1. Repeating the call from Jeff Smith for dramatic improvements in County operations
2. The concept of Mental Models
3. A process perspective on work and how it contrasts with more traditional approaches
4. The 5 project types evident in County work, and the different management strategies associated with each
5. Applying these ideas to the work in Procurement

The Second Phase is to prepare for an All-Hands meeting. Part of this phase is to work with small groups to build a process macro map for Procurement.

The Third Phase is the All-Hands meeting. The participants from the first meeting will be drafted as facilitators to lead small-group discussions as a complement to the large group presentations. The goal is to use the Map to support less defensive explorations with the entire staff about sticking points in the flow of work and identification of potential process

improvement targets. We also plan to introduce the project typology and get samples from staff within each category.

The Fourth Phase is to take all the inputs from the previous work and map out an improvement strategy for Procurement. The issues to explore include (but are not limited to) the following:

- Do people need training in how to manage projects in some of the more unusual types?
- How might the divisional structure of the department be modified to better support greater cooperation and efficiency?
- Restructuring how projects are assigned to Procurement staff, possibly using features of the Requestor rather than the commodity or the source.
- How to prevent a service model from sliding down into a servant model? And how can we get Requesters to see us as process partners rather than as "support staff"?

In parallel to these efforts, Michael Singh will work with Jenti and others to better understand the Keirsey temperament configuration of the staff groups. His insights should provide managers a better sense of how to work with their staff and how to enable greater cooperation.

Staffing

I will be the principal consultant for this effort, and will also engage the services of Michael Singh, a colleague and friend. He will be a subcontractor to me as he has his own professional practice.

Schedule and Costs

Phase of Work	Deliverable	Cost
Project Initiation	Consultants are fully oriented and ready to run the project.	
Phase 1: Mgrs Workshop	Half-day workshop with ~12 key staff	\$2935
Phase 2: Macro Maps	Process macro map for Procurement	\$1140
Phase 3: All Hands Mtg	Half-day workshop with entire Procurement staff; consensus on process map for department; identified areas for process improvement	\$2720
Phase 4: Planning Ahead	Meeting with Jenti and key staff to set priorities for process improvement work into the future; could also generate ideas for new structures, policies, or training priorities.	\$1640
Temperament Assessment	Map of temperaments and interpersonal styles for most of the department; identified areas for coaching and training for improved interpersonal effectiveness	\$1950
	ESTIMATED PROJECT TOTAL:	\$10,385

We would prefer to bill each month for the actual time spent. The work will not be strictly sequential as suggested above. For example, the work on the temperament assessment would be happening all through the other activities. It would contribute to the project in almost any phase.

We anticipate the Phase 1 workshop for January 24th or 25th. After that the speed of the project will be more constrained by staff availability than by the consultants. Scheduling meetings with substantial number of staff almost always requires planning ahead 3-4 weeks.