

PROCUREMENT PROCESS WORKFLOW REDESIGN

City of Boston Strategic Procurement Team

Michael Miller — Director of Strategic Procurement

Jennifer Dufour — Deputy Director of Strategic Procurement



CALGARY HAINES-TRAUTMAN
Rhode Island School of Design
Master of Industrial Design '23

WHAT IS PROCUREMENT?

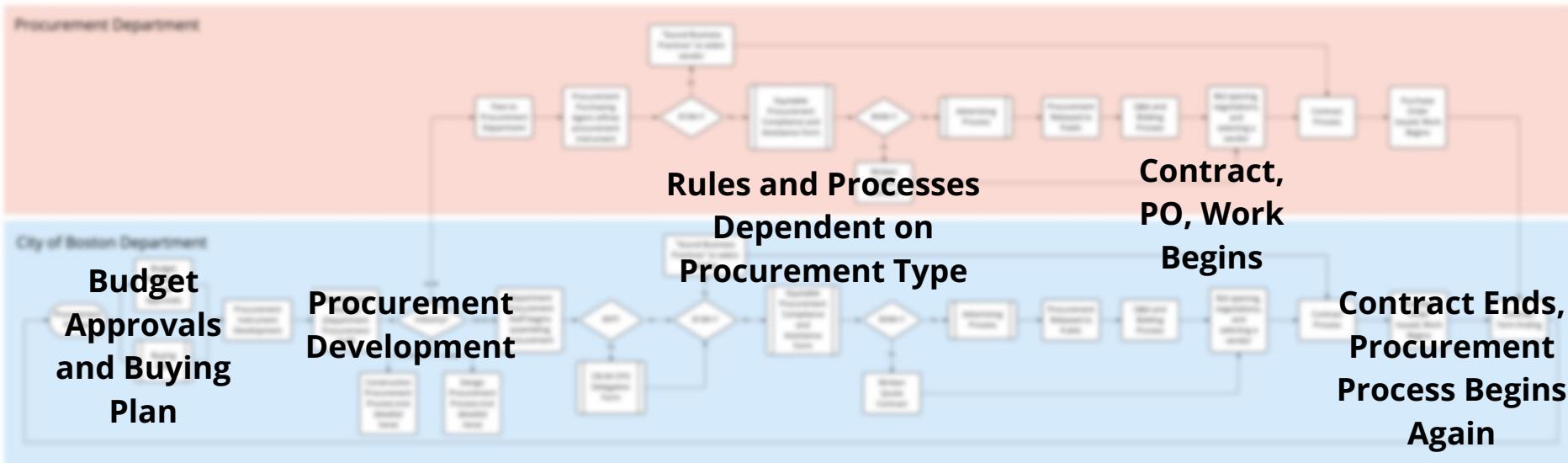
- Procurement is how governments buy and sell things
- Laws govern different types of procurements
 - What you're buying: goods, services, design, construction
 - Estimated cost: <\$10K, \$10K-\$50K, \$50K+
 - Whether factors beyond cost matter
- Spending taxpayer money—need to be responsible



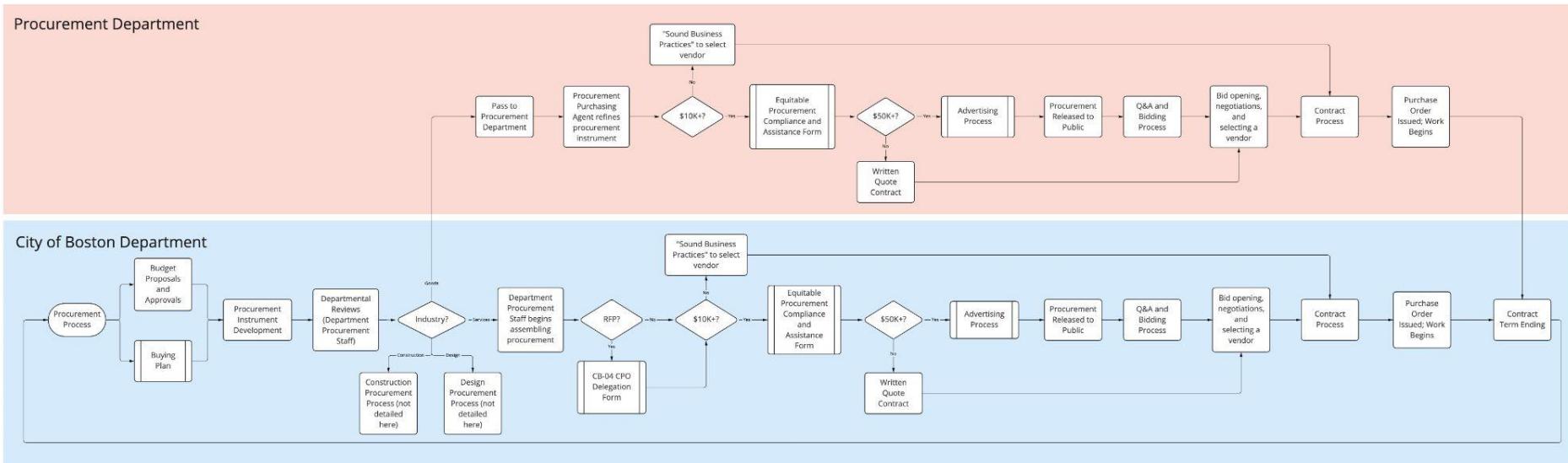
WHY DOES PROCUREMENT MATTER?

- Opportunity for City to advance its strategic goals
 - Put money back into the community
 - Invest in small, local, and minority- and women-owned businesses
 - Provide better goods and services
 - Tap into creativity and innovation of Boston businesses
- 2020 Disparity Study
 - Substantial underutilization of minority- and women-owned businesses
 - Resulted in more research, new policies, and procurement reform

BOSTON PROCUREMENT OVERVIEW



BOSTON PROCUREMENT OVERVIEW

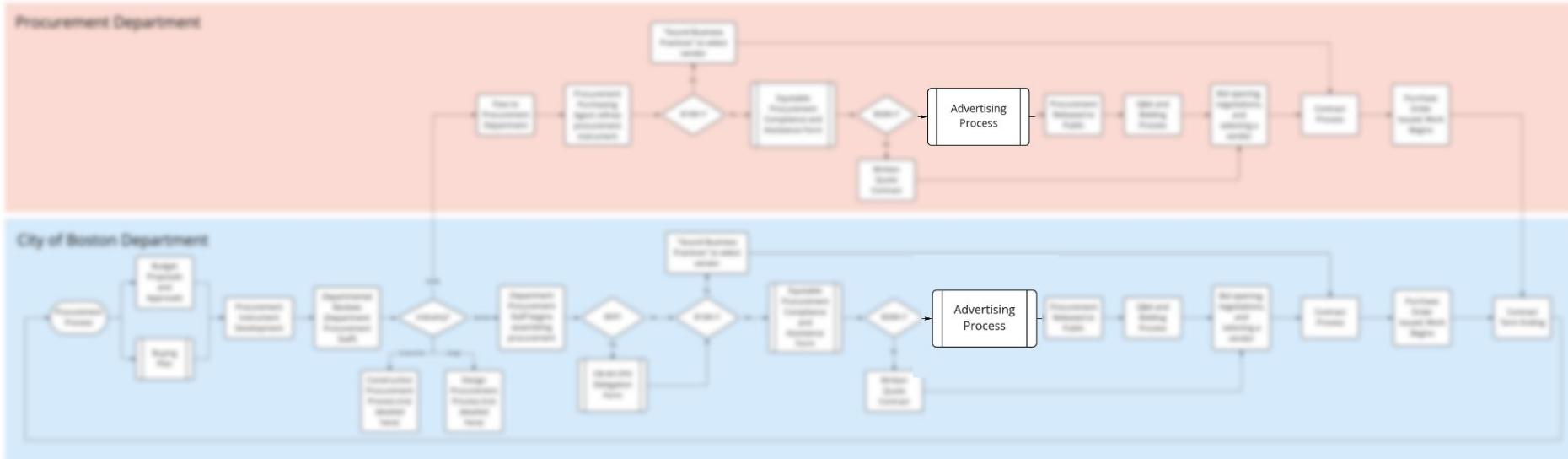


[Link to full-sized map](#)
(Download for full quality)

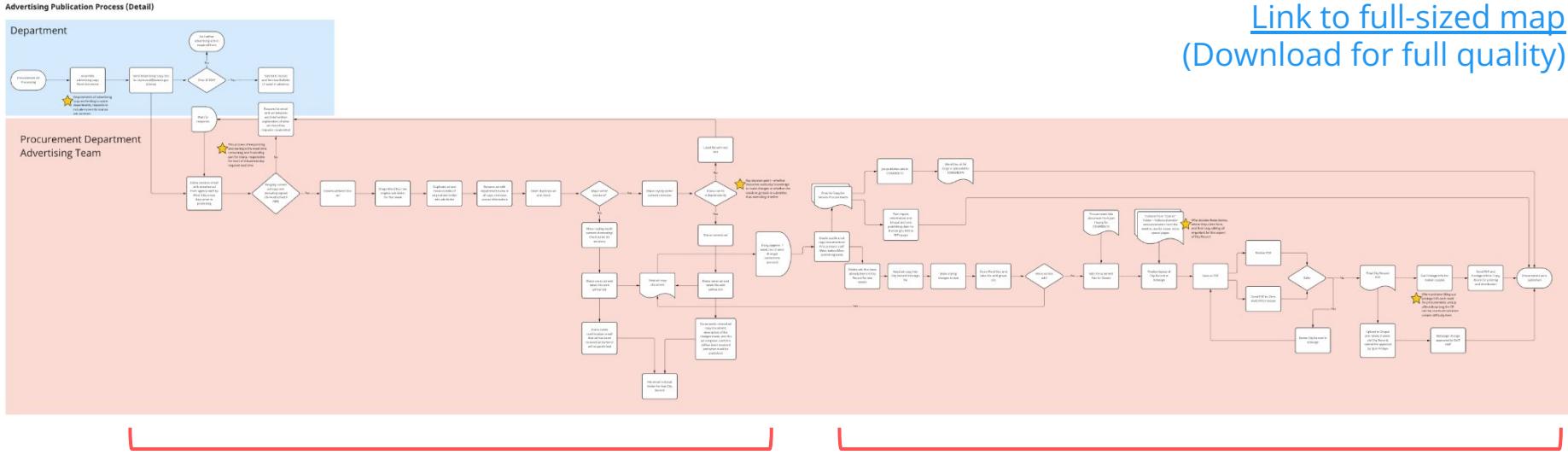
PROCUREMENT ADVERTISING

ADVERTISING FOCUS

- How might procurement ads be an efficient and effective tool for a wide range of City staff and local businesses?



ADVERTISING PROCESS



Copy submission and revisions:
bulk of time, effort, and
frustration for staff

Publishing: bulk of copy/pasting processes



ADVERTISING PROPOSAL—FORM

UNSPSC code 86101803

OFFICE OF HUMAN RESOURCES

REQUEST FOR PROPOSAL
WORKERS' COMPENSATION - VOCATIONAL REHABILITATION SERVICES

Re-Advertisement
EV00010899

Contact information
Patricia.garcia@boston.gov
(617) 635-2791 leave message

The City of Boston (the City), acting by its Human Resources Director (the Official), invites competent persons, firms or corporations to apply for prequalification on a bidder's list and thereafter enter into contract or contracts as may be requested from time to time by the Official. For Vocational Rehabilitation Services for self-insured and self-administered, workers' compensation program for the City of Boston.

To access details for this specific bid event, or to respond through electronic format, please visit the City's Purchasing website and Supplier Portal (<http://www.cityofboston.gov/procurement>) and access Event EV00010899 starting on Monday, June 20, 2022.

Applications to prequalify for contracts for such work will be accepted until **5 p.m., Boston time on Wednesday, July 6, 2022** at the above address or through electronic format on the Supplier Portal. Electronic format is strongly preferred.

The City and the Officials reserve the rights to contract only in those cases and in accordance with those applications as the Officials determine to be in the best interest of the City. Except in cases of emergency, contracts for individual purchases or instances of work will be awarded to the lowest responsible bidder after a solicitation of bids from qualified applicants.

Kerry Nero, Agent, Office of Human Resources
(June 20, June 27,2022)



Procurement Advertisement Submission Form

Use this form to submit advertisement information for your procurement.

You must submit this form by the Wednesday two weeks prior to the Monday your advertisement will be published. (For example, submit by Wednesday, June 15 so the advertisement can be published on Monday, June 27).

Questions? Contact XYZ at XYZ@boston.gov

[calgary.hainestrutman@boston.gov](#) [Switch account](#) 

Your email will be recorded when you submit this form

* Required

Type of procurement: *

- Invitation for Bids
- Request for Proposals
- Request for Qualifications

Headline *

(Keep this short. For example, "Repairs to Sports Lighting")

[Link to Google Form Prototype](#)

ADVERTISING PROPOSAL—OUTPUT

Parks & Recreation

INVITATION FOR BIDS
**IMPROVEMENTS TO WALNUT PARK,
ROXBURY, MA**

CONTACT INFORMATION
Lauren Bryant
617-961-3019
Lauren.Bryant@boston.gov

The City of Boston, acting by the Parks Commission, hereinafter referred to as the Awarding Authority, hereby invites sealed bids for the project listed above.

Bids shall be on a form supplied by the Parks and Recreation Department shall be clearly identified as a bid and signed by the bidder. Bids shall clearly be labeled with the project name. All bids for this project are subject to all applicable provisions of law and in accordance with the terms and provisions of the contract documents entitled: **IMPROVEMENTS TO WALNUT PARK**.

Bids shall be submitted **before 12:00 P.M., Boston time, Thursday, August 18, 2022**, at which time the bids will be opened read aloud through a virtual meeting. Interested parties will not be able to access the building for the bid opening but will be able to view the event live through a link provided on the City of Boston website: boston.gov/departments/parks-and-recreation/doing-business-parks-and-recreation. Bids shall be filed with the Awarding Authority, 1010 Massachusetts Ave 3rd Floor Boston Ma, 02118, accompanied by the bid deposit previous to the time named for opening of bid.

SPECIFICATIONS AND PLANS will be available on a USB Thumb Drive on or about **Monday, August 1, 2022, after 9:00 A.M., Boston time**, at 1010 Massachusetts Ave, 3rd floor Boston Ma 02118.

RYAN WOODS, COMMISSIONER
(August 1, August 8, 2022)



B

Invitation for Bids / Request for Proposals / Request for Qualifications

HEADLINE FOR PROCUREMENT

Department Head Name, Title Department Name

Highlights

UNSPSC Code #####

Posted Time, Monday, Month Day, Year

Due Time, Monday, Month Day, Year

Maximum cost \$X0,000

Length of contract X months/years

Intended start date Month, Year

Contract previously held by
Company Name / N/A

Questions?
Contact FirstName LastName
Email address
Phone number

What we're looking for

- Brief description of the project
- Scale and scope

You are

- Insured with any necessary insurances (specific)
- (if RFP) general criteria/standards for the RFP

Next steps

Find complete bid information, the application packet, and submit applications:
procurement.cityofboston.gov

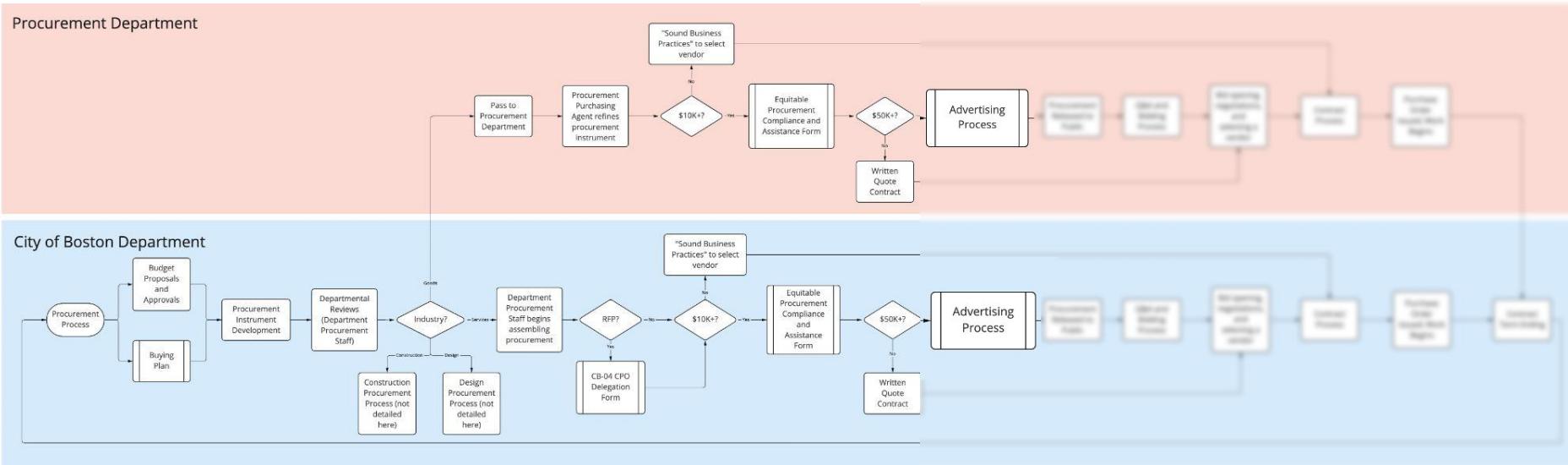
Search for Event ID #####
Direct link [EV#####](#)

Attend an info session:
Date and time
Location
RSVP information

CITY of BOSTON

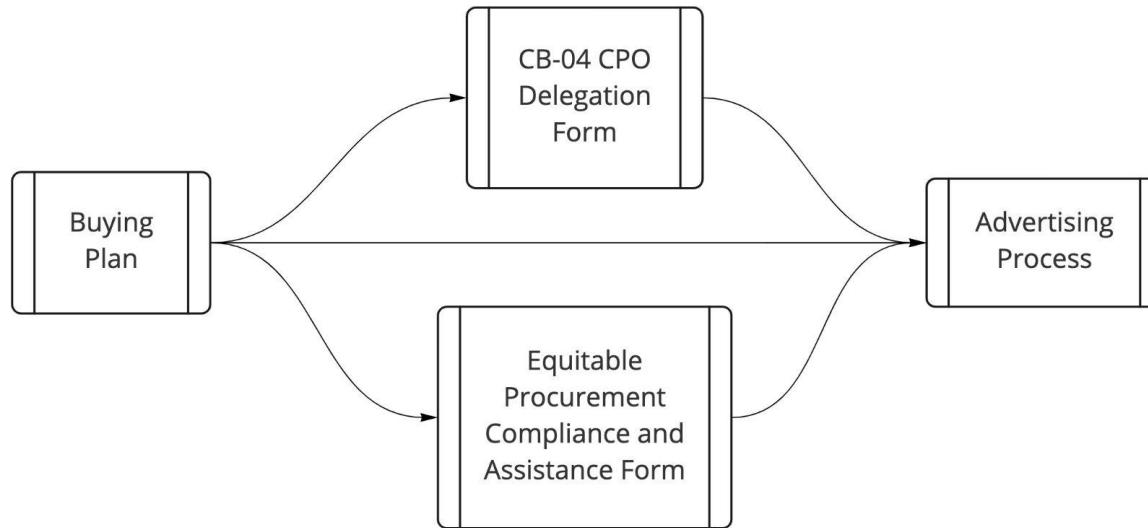
CONNECTING CONTENT THROUGHOUT DEVELOPMENT

- Bringing already-developed information about a procurement into the advertising form



CONNECTING CONTENT THROUGHOUT DEVELOPMENT

- Information is collected in Buying Plan, CPO Delegation, and Compliance and Assistance form—could we connect this information through a Knack form?



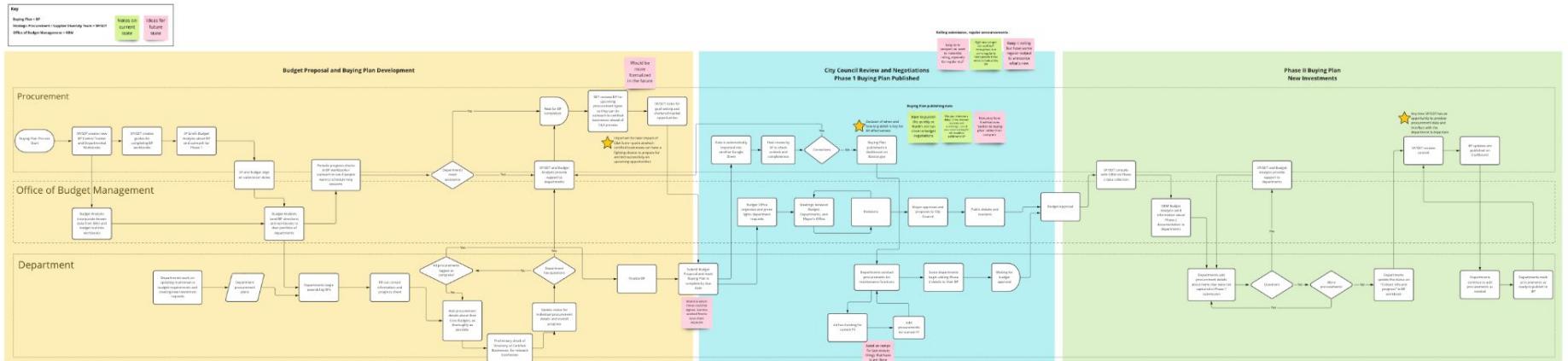
MIDPOINT PIVOT—ADS TO FULL PROCESS

- Shift from quick-fixes in Knack/Google Suite to long-term BAIS modernization
- Shift from technology focus to people and process focus
 - Opportunity to consider procurement development process overall
- Conducted additional interviews and created process maps
 - Understand the full landscape and pain points of different stakeholders
 - Spoke with over 30 City staff across Procurement, Law, Department of Innovation and Technology, Mayor's Office of Economic Opportunity and Inclusion, and various departments

PROCUREMENT PROCESS MAPPING

BUYING PLAN PROCESS MAP

- In second year of development, still working out details of publishing and timing
 - Opportunity to give businesses extra time to prepare, and for Supplier Diversity Team and Strategic Procurement Team to identify opportunities to work with departments on their procurements

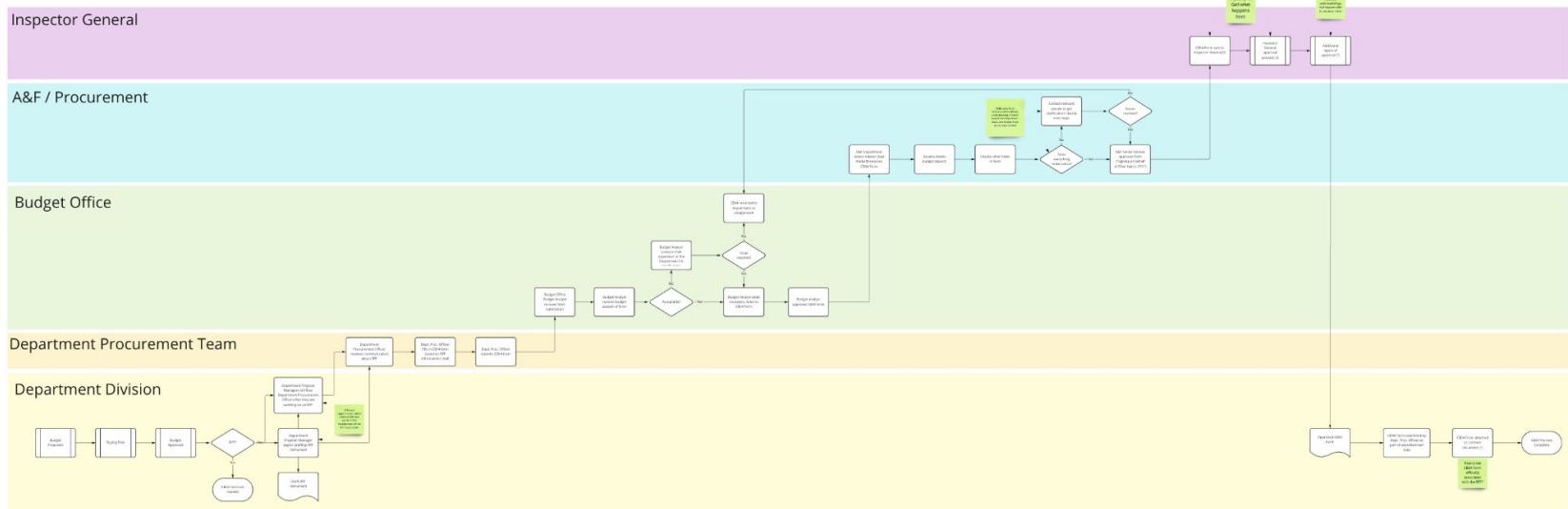


[Link to full-sized map](#)
(Download for full quality)



CPO DELEGATION PROCESS MAP

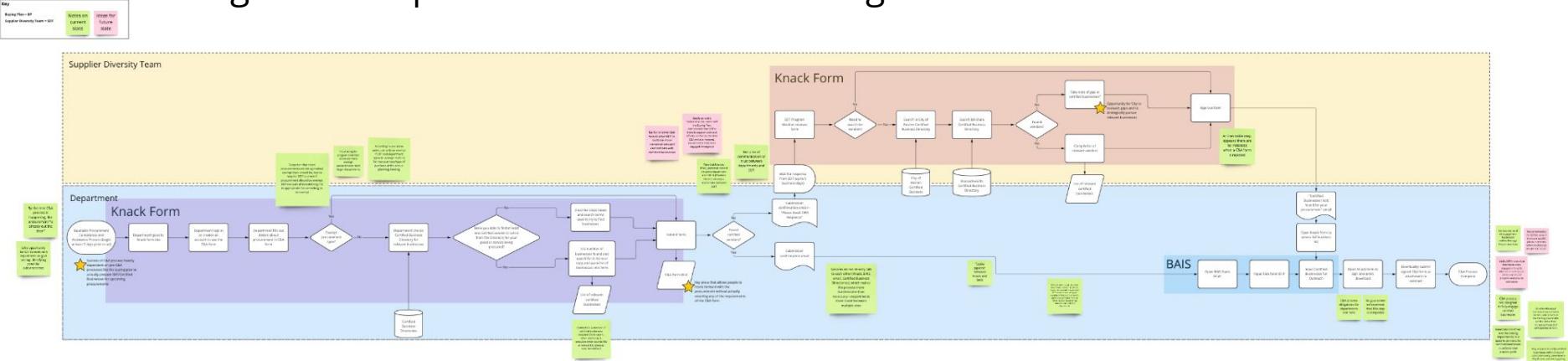
- Form to request permission to do an RFP instead of an IFB
 - Many layers of approval; confusion about where form goes after each step



[Link to full-sized map](#)
(Download for full quality)

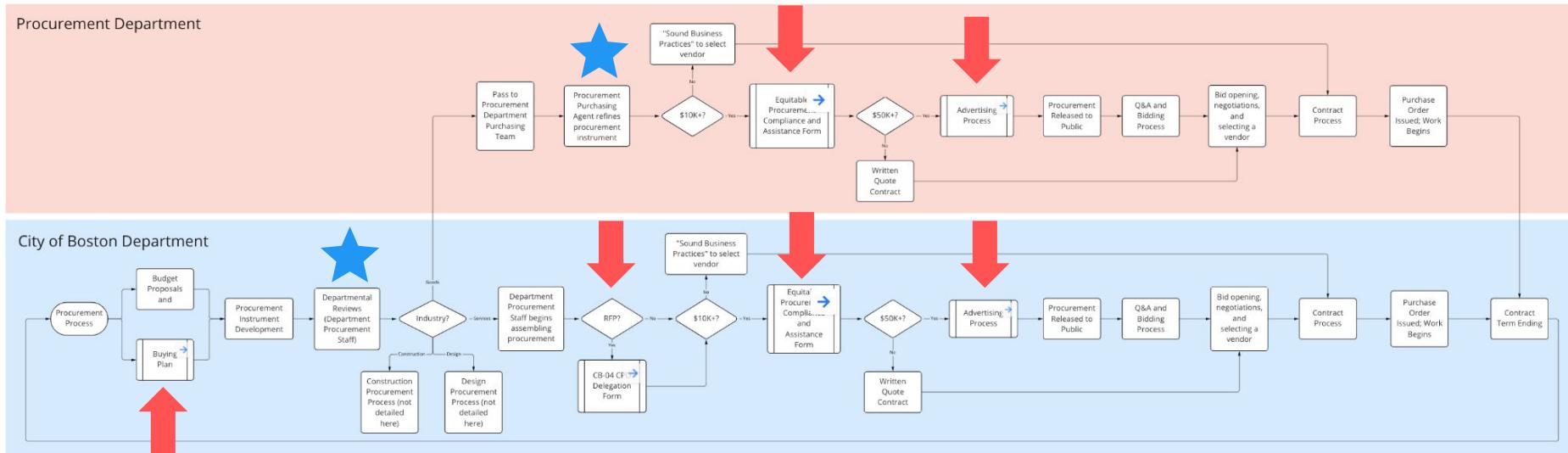
COMPLIANCE AND ASSISTANCE PROCESS MAP

- Form to identify certified businesses to notify when a procurement is published
- Treated as a checkbox by most departments; does not give certified businesses the tools or time they need to successfully bid on a procurement in most cases
- Moving between platforms is time consuming and loses data

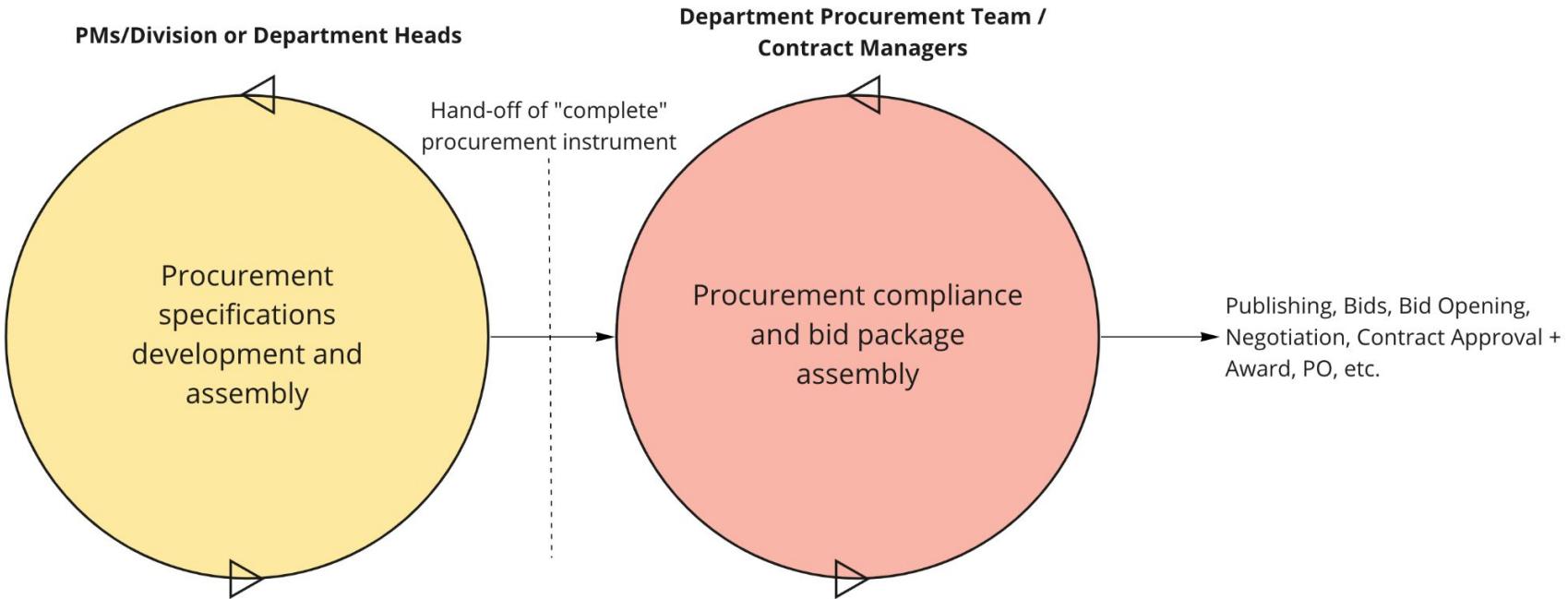


STRATEGIC PROCUREMENT TOUCHPOINTS

- Strategic touchpoints largely happen after procurement contents are finalized. Little can be changed at later points. Departments see checks as roadblocks rather than opportunities to improve a procurement

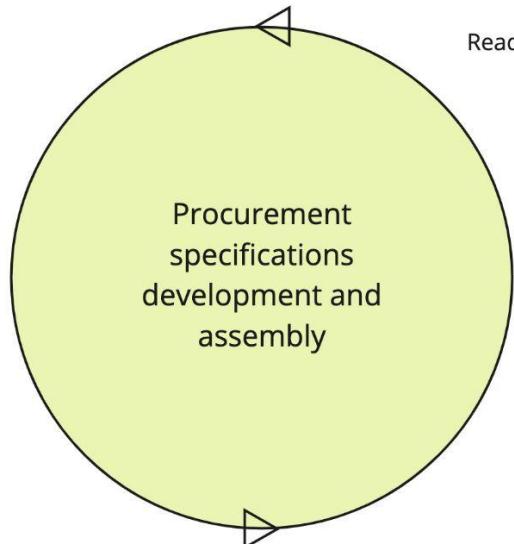


PROCUREMENT IN LARGE DEPARTMENTS



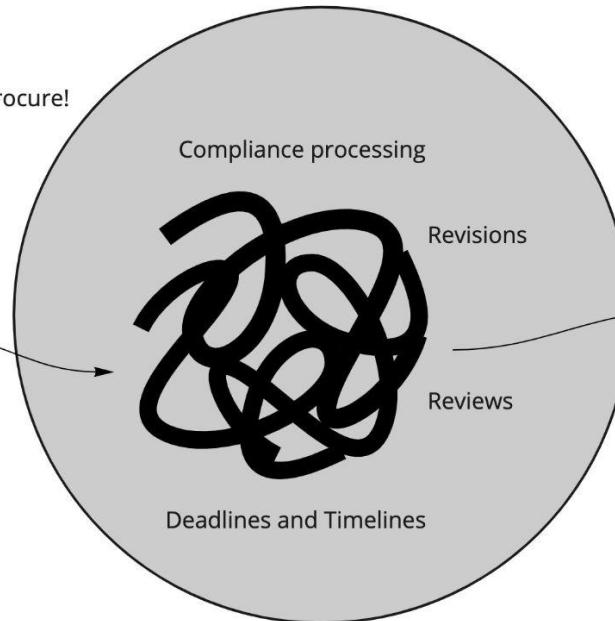
PROCUREMENT IN SMALL DEPARTMENTS

PMs/Division or Department Heads



Ready to procure!

PMs/Division or Department Heads



Publishing, Bids, Bid Opening,
Negotiation, Contract Approval +
Award, PO, etc.

PROCUREMENT CHALLENGES

Multi-step, disjointed process

Reliant on individual knowledge

Procurements siloed

Wastes resources on inaccessible outputs

Favors established vendors

PROCUREMENT PROCESS PROPOSAL

PROCUREMENT PROCESS PROPOSAL

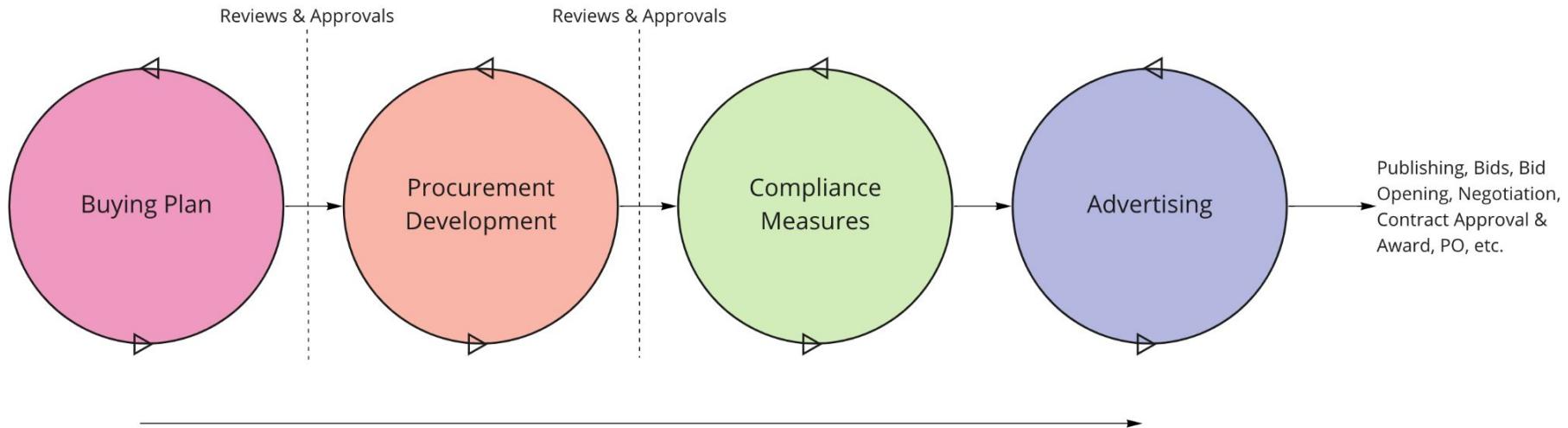
- How might the procurement development and publishing process facilitate compliance and help departments and the City achieve their strategic goals?

PROCUREMENT PROCESS PROPOSAL

- **For Departments:**
 - single source of truth on procurement
 - clearer understanding of the process and timeline
 - create procurements that meet strategic goals
- **For Strategic Procurement/Office of Economic Opportunity and Inclusion:**
 - opportunities for earlier insight
 - propose revisions and feedback
 - help create procurements that meet strategic goals

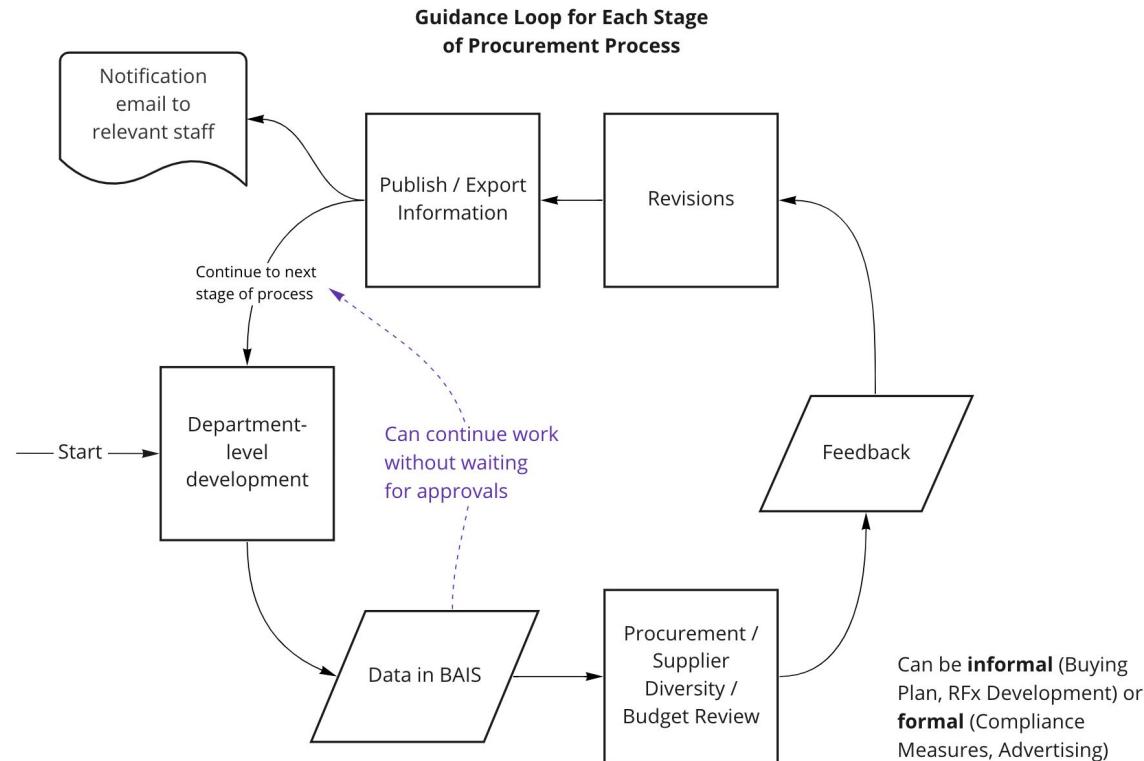
A VISION FOR THE PROCUREMENT PROCESS

- Integrated, streamlined system in BAIS



Procurement matures, certified businesses prepare, strategic goals advance

ITERATIVE LOOP FRAMEWORK



PROCUREMENT PLAN DASHBOARD

- See all your procurements in one place
- Views for Program Managers, Contract Managers, Strategic Procurement Staff, and Supplier Diversity Team

[Link to Figma Prototype](#)



BAIS FINANCIALS

First Name Last Name | Home | Worklist | Add to Favorites | Sign Out

Favorites ▾ | Main Menu ▾ > Procurement ▾ > Procurement Plan—Department of X, Z Division, First Name Last Name

| Add to Favorites | Sign Out

Department of X, Z Division, First Name Last Name

Procurement Plan

Add procurement

In Progress

Event Number	Procurement Title	Procurement Method	Total Estimated Amount	Fiscal Year and Quarter Seeking Quotes/Bids/Proposals	Stage
Pending review	Building maintenance for 123 Main St.	Invitation for Bids	\$60,000	FY23 Q4	Not yet reviewed
EV00001234	Building maintenance for 123 Main St.	Invitation for Bids	\$60,000	FY23 Q3	Buying Plan
EV00001234	Building maintenance for 123 Main St.	Invitation for Bids	\$60,000	FY23 Q2	Procurement instrument development

Published

Event Number	Procurement Title	Procurement Method	Total Estimated Amount	Release Date	Bid Opening Date	Total Bids Received
EV00001234	Building maintenance for 123 Main St.	Invitation for Bids	\$60,000	8/1/2022	8/29/2022	7
EV00001234	Building maintenance for 123 Main St.	Invitation for Bids	\$60,000	8/8/2022	8/29/2022	2

Contracting

Event Number	Procurement Title	Procurement Method	Total Amount	Contract Holder	Contract Renewal/End Date
EV00001234	Building maintenance for 123 Main St.	Invitation for Bids	\$60,000	ABC Company	Renewal: FY24 Q1
EV00001234	Building maintenance for 123 Main St.	Invitation for Bids	\$60,000	ABC Company	Renewal: FY24 Q1

CONNECTING BUYING PLAN WITH EVENT RECORD

- Create continuity for staff and businesses
- Help Strategic Procurement and Supplier Diversity Team identify and target procurements for additional assistance

BAIS FINANCIALS

First Name Last Name | Home | Worklist | Add to Favorites | Sign Out

Favorites ▾ | Main Menu ▾ > Procurement ▾ > Procurement Plan—Department of X, Z Division, First Name Last Name > Buying Plan

| Add to Favorites | Sign Out

Department of X, Z Division, First Name Last Name

EV00001234

```
graph LR; A[Buying Plan In progress] --> B[Procurement Instrument Development]; B --> C[Departmental Review]; C --> D[CPO Delegation]; D --> E[Equitable Procurement Compliance and Assistance]; E --> F[Advertising Copy]; F --> G[Awaiting Release]
```

Buying Plan

Procurement title
Building maintenance for 123 Main St.

Total estimated amount
\$60,000

Procurement method
 Invitation for bids
 Request for proposals

Fiscal year and quarter seeking quotes/bids/proposals (FYXX QX)
FYXX QX

Comments
Internal comments that you would like to share with the production team regarding the procurement

Enter your comments here

Save | Mark as complete

[Link to Figma Prototype](#)

LIVE PROGRESS BAR

- Clarify next steps, deadlines, and roles
- Carry data from one step to the next

BAIS FINANCIALS

First Name Last Name | Home | Worklist | Add to Favorites | Sign Out

Favorites ▾ | Main Menu ▾ > Procurement ▾ > Procurement Plan—Department of X, Z Division, First Name Last Name > Advertising Copy

| Add to Favorites | Sign Out

Department of X, Z Division, First Name Last Name

EV00001234

```
graph LR; A[Buying Plan] -- Complete --> B[Procurement Instrument Development]; B -- Complete --> C[Departmental Review]; C -- Complete --> D[CPO Delegation]; D -- Complete --> E[Equitable Procurement Compliance and Assistance]; E -- Complete --> F[Advertising Copy]; F -- "In progress  
Due 7/27/2022" --> G[Awaiting Release]; G -- "Not started  
Due 8/8/2022" --> H;
```

Advertising Copy

Procurement ad headline
(Keep this short. For example, "Repairs to Sports Lighting")

Compensation Management Software

Proposal Opportunity

Brief summary of project

Enter your comments here

What are your goals for this proposal?

Enter your comments here

Brief problem statement explaining current context

Enter your comments here

Save Submit to Procurement Ad Team

[Link to Figma
Prototype](#)



PROTOTYPING

WHAT'S NEXT—PROTOTYPING CONCEPTS

- System change after people and process changes
- Working with assumptions
 - Best practices are known and just need to be communicated
 - Departments can and want to collaborate with Strategic Procurement and Supplier Diversity Team
 - Better procurements and ads will help certified businesses
- Testing through prototypes and pilots
 - Opportunities to learn, iterate

PROTOTYPING EXAMPLE—ADS



Invitation for Bids / Request for Proposals / Request for Qualifications

HEADLINE FOR PROCUREMENT

Department Head Name, Title Department Name

Highlights

UNSPSC Code #####

Posted Time, Monday, Month Day, Year

Due Time, Monday, Month Day, Year

Maximum cost \$X0,000

Length of contract X months/years

Intended start date Month, Year

Contract previously held by
Company Name / N/A

Questions?

Contact FirstName LastName

What we're looking for

- Brief description of the project
- Scale and scope

You are

- Insured with any necessary insurances (specific)
- (if RFP) general criteria/standards for the RFP

Next steps

Find complete bid information, the application packet, and submit applications:

procurement.cityofboston.gov

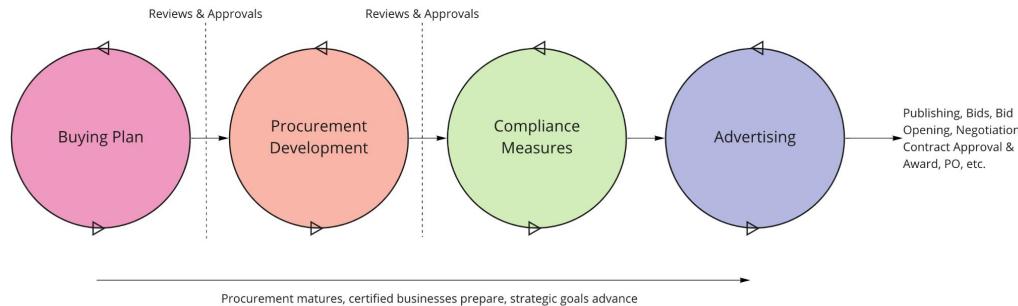
Search for Event ID #####

Direct link [EV#####](#)

PROTOTYPING EXAMPLE—ADS

- Assumptions:
 - We know a better ad format
 - Better ads will help businesses make quick, informed decisions
 - More businesses will bid as a result of better advertisements
- Opportunities to test/verify:
 - Interviews with business owners
 - Testing new ad format with business owners
 - Tracking response rate of businesses receiving new ads

THANK YOU! QUESTIONS + FEEDBACK



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Department of X, Z Division, First Name Last Name

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Procurement concept proposal

Calgary Haines-Trautman | chainest@risd.edu

APPENDIX

CURRENT ADVERTISING LANDSCAPE

CITY OF BOSTON | Mayor Michelle Wu

PAY AND APPLY PUBLIC NOTICES FEEDBACK TRANSLATE

HOME BIDS AND RFP'S EAST BOSTON SENIOR CENTER FF&E (PFD)

FRESH BREAD FOR THE BOSTON PUBLIC SCHOOLS

Due: July 6, 2022

Posted 06/20/2022 - 12:00PM

Closes 07/06/2022 - 12:00PM

Parks & Recreation Planning & Development Agency

INVITATION FOR BIDS
IMPROVEMENTS TO WALNUT PARK, ROXBURY, MA

REQUEST FOR PROPOSAL
FENWAY-KENMORE TRANSPORTATION ACTION PLAN 2022

CONTACT INFORMATION
Lauren Bryant
617-911-3019
6179113019@boston.gov

The City of Boston, acting by the Parks Commission, herein referred to as the Awarding Authority, hereby invites sealed bids for the project listed above.

Bids shall be for a sum proposed by the Parks and Recreation Department to be paid by the City of Boston and awarded by the bid committee. Bids shall clearly be labeled with the project name. All bids for this project are subject to all applicable provisions of law and in accordance with Massachusetts General Law Chapter 30, as may be amended or modified to be for a fixed year contract with BRA.

The Request for Proposal will be available beginning **Monday, August 1, 2022** and may be obtained from the BPDAA Website <https://www.bostonplanning.org/web-within/>.

All responses to this RFP must be returned no later than **12:00 noon on Friday, September 2, 2022**, to: Teresa Polhemus, Secretary, Boston Redevelopment Authority, One City Center, 200 Berkeley Street, Boston, MA 02110. Fee proposals must be submitted under separate cover, in a sealed envelope, and must reach the City of Boston no later than the time named for opening of bid.

SPECIFICATIONS AND PLANS will be available on a USB Thumb Drive on or about **Monday, August 1, 2022**, after 9:00 A.M., Boston time, at 1010 Massachusetts Ave, 3rd floor Boston Ma 02118.

RYAN WOODS, COMMISSIONER
(Signed 1-August 8, 2022)

MICHELLE R. GOLBERG, CHIEF PROCUREMENT OFFICER
(Signed 1-August 8, 2022)

CIVIC INNOVATION CORPS

City of Boston - Event EVO0010743 may be of interest to you

Brian.Heger@boston.gov to

Fri, May 13, 2:11 PM (12 days ago)

Event Interest

Dear Potential Bidder:

You are being notified that the City of Boston recently posted a sourcing event, which may be of interest to you based upon your self-categorization preferences. Please review this information and if interested, use the hyperlink below to access the City of Boston's Supplier Portal. Once the Event Start Date/Time has passed, search for the Event ID shown below to view further details or to submit a bid on this event.

The bidding period for this event will only take place between the Start Date and End Date shown below.

Note: If you feel you have received this email in error, please update the categories of goods/services for which you are currently registered in order to prevent receiving further emails.

Event Overview

Event Name: REVERE PD - NIGHT VISION EQUIPMENT

Description: REVERE PD - NIGHT VISION EQUIPMENT Per Enclosed Specification or Approved Equal

Event Details

Event ID: BD-23-1142-101-101-76744
Event Type: Bidding Round 1
Event Status: Open
Event Ends: 08/02/2022 12:00PM EDT
Header Attachments: Truck_Side_Guard_C
Line Attachments: None

COMMBUYS
OPERATIONAL SERVICES DIVISION

Bid Solicitation: BD-23-1142-101-101-76744

Header Information

Bid Number:	BD-23-1142-101-101-76744	Description:	Fresh bread for the Boston Public Schools	Bid Opening Date:	07/06/2022 12:00:00 PM
Purchaser:	City Record Admin	Organization:	City of Boston	Allow Electronic Quote:	No
Department:	101 - Boston Public Schools	Location:	101 - Brule C. Boiling Municipal Building	Available Date :	06/20/2022 12:00:00 PM
Fiscal Year:	23	Type Code:		Informal Bid Flag:	No
Alternate Id:	EVO0010924	Required Date:	06/20/2022		
Info Contact:	Eric Stevens at 617-635-9555 or esteven2@bostonpublicschools.org	Bid Type:	OPEN		

Purchase Method: Open Market

Pre Bid Conference:

Bulletin Desc: INVITATION FOR BIDS for Fresh Bread for the Boston Public Schools. To access details for this specific bid event, or to respond through electronic format, Please visit the City of Boston Supplier Portal boston.gov/procurement and access Event EVO0010924 or contact Eric Stevens at 617-635-9555 or esteven2@bostonpublicschools.org

Ship-to Address: Boston Public Schools
230 Washington Street
Boston, MA 02119
US
Email: agrad@bostonpublicschools.org
Phone: (617)935-9500

Bill-to Address: Procurement
1 City Hall Square
Boston, MA 02108, Room 808
US
Email: procurement@boston.gov
Phone: (617)935-4564
Fax: (617)935-2777

Print Format: Bid Print

File Attachments: ADV for RPS EVO10924 Fresh Bread for the Boston Public Schools.docx

Form Attachments:

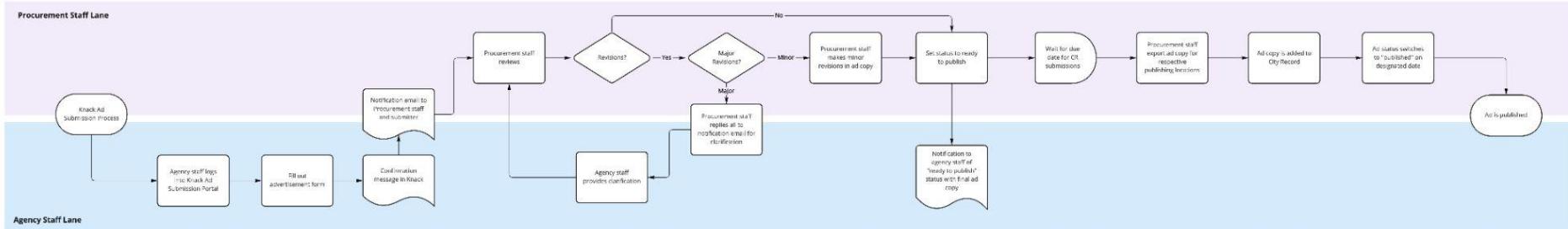
Required Quote Attachments

Item Information

Item # 1: (50-18 - 00) Fresh bread for the Boston Public Schools

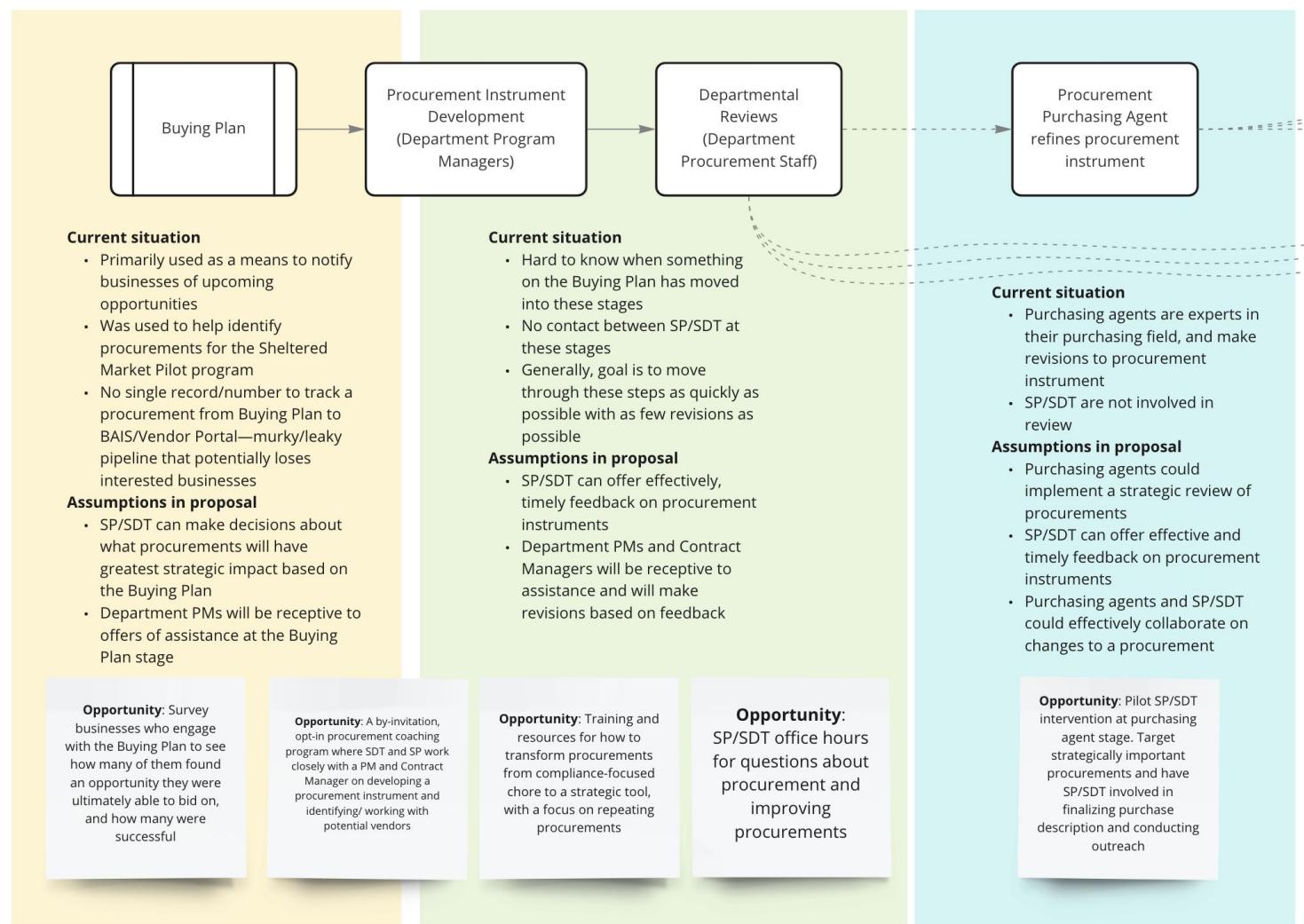
U N S P S C Code: 50-18-00
Bread and bakery products

ADVERTISING PROPOSAL



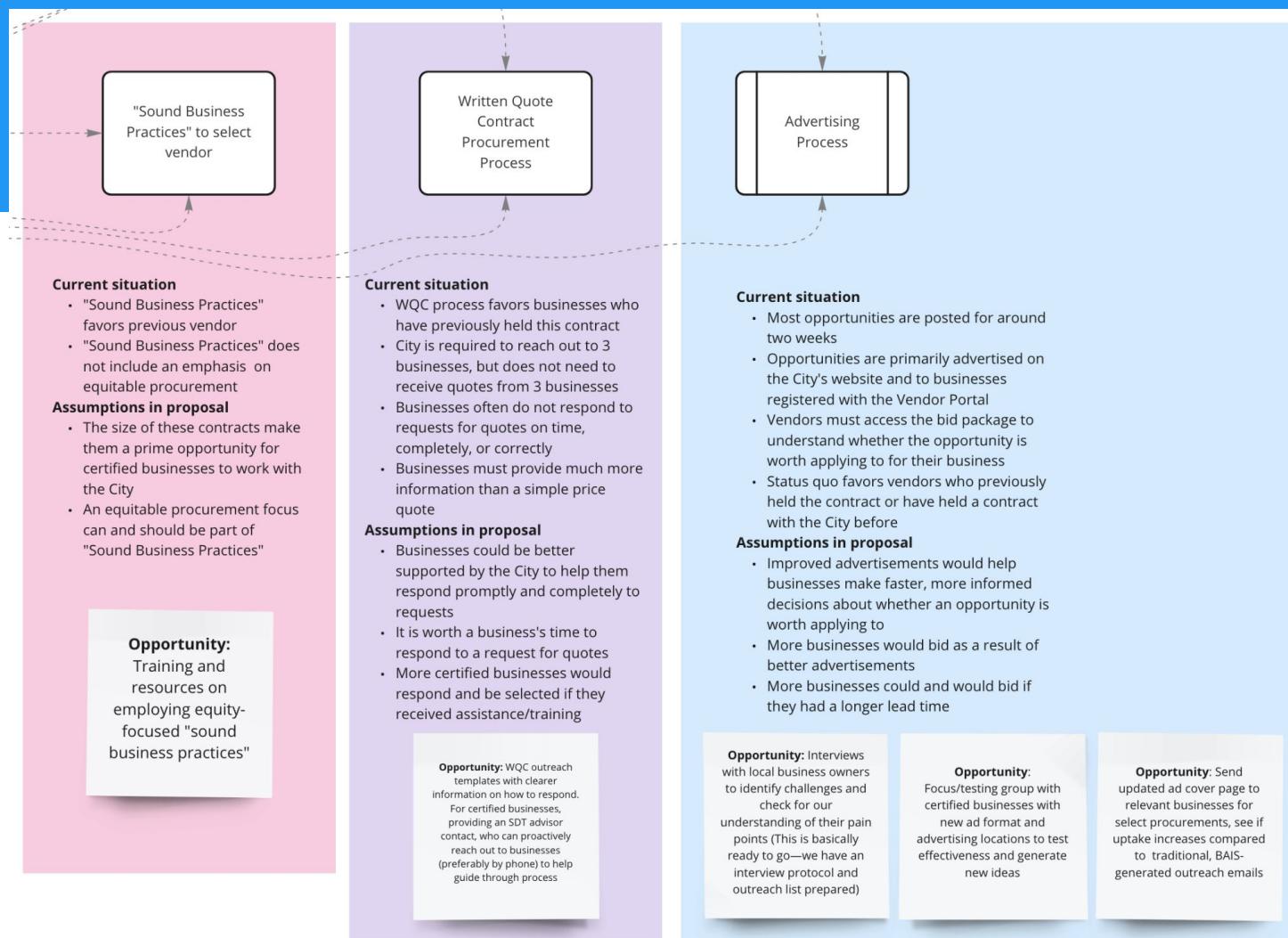
[Link to full-sized map](#)
[\(Download for full quality\)](#)

WHAT'S NEXT— PROTOTYPING CONCEPTS



[Link to full-sized map \(Download for full quality\)](#)

WHAT'S NEXT— PROTOTYPING CONCEPTS



[Link to full-sized map \(Download for full quality\)](#)