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2024 FAPPO Best Practice Award

Procurement Academy

Introduction

The Miami-Dade County Strategic Procurement Department's (SPD) Guiding Principles are aligned with the word "**PURPOSE**":

- Professional service to departments, businesses, and constituents.
- Unparalleled model for accountable and transparent governance.
- Resilient and adaptive to the evolving needs of our environment.
- Promote ethical standards and diverse ideas in our business practices.
- Operational efficiencies through use of innovative technology and processes.
- **Strategic development of talent through training and recognition.**
- Engagement and inclusion of all stakeholders to promote fair and equitable competition.

SPD serves as the central agency for the procurement of goods and services, architectural and engineering services, and design-build projects, as well as managing unsolicited proposals and public-private partnerships (P3s) for Miami-Dade County government. The department supports the County Mayor's priorities and initiatives for sustainable practices, and thus the procurement processes are guided by the Mayor's 4Es of equity, engagement, environment and economy. SPD's vision is to be the global leader of purpose-driven procurement and its mission is to deliver value and integrate PURPOSE in all sourcing decisions by assuring our processes are Equitable to suppliers, sustainable for our Environment, and beneficial to our Economy. We pride ourselves in collaborating with our customers and Engaging our community with integrity, fairness, innovation, competition, efficiency, and transparency.

SPD promotes equitable and fair treatment of all suppliers and conducts the procurement process in an impartial, consistent, reliable, and ethical manner. Through the purchase of environmentally preferred products and services, SPD aims to reduce greenhouse gas emissions, decrease the use of hazardous materials, facilitate waste management, and increase the efficiency and effectiveness of the County's resources consumption. SPD encourages the participation of small and local businesses in the County's contracting opportunities – as this not only results in the growth of our small and local businesses, but also the overall growth and development of the County. Additionally, SPD encourages the inclusion of all stakeholders in the procurement process thereby promoting diverse ideas, accountability, and transparency.

SPD supports a wide range of internal and external stakeholders, including County departments and employees, municipalities, the business community, and County residents. County departments depend on SPD to establish contracts and prequalification pools for the procurement of goods and services needed to carry out their departmental missions. Procurement professionals and other staff in each of those departments rely on SPD to assist in navigating the complex and evolving procurement laws and procedures. Among other forms of assistance, these procurement professionals expect continuously available training on policies and procedures to ensure they can continue delivering services to their customers.

SPD's submission for the Best Practices Award will focus on the **"S" in "PURPOSE"**, namely, the ***strategic development of talent through training and recognition***. SPD is committed to providing a training and development program that empowers procurement professionals with the knowledge and skills needed to implement sustainable procurement initiatives and sound procurement practices, ensure ethical behaviors; develop capabilities; promote and enhance efficiencies, effectiveness, economy, and equity in all purchasing activities; and engage all stakeholders to encourage diverse ideas and responsible stewardship of County resources. The **County's Procurement Academy** (Academy) was launched by SPD in March 2023 during National Procurement Month and is designed to provide procurement professionals with a better understanding of how the County's procurement processes work, as well as to enhance their skill development primarily through structured education, training, and support resources to ensure that the County's procurement professionals are competent, trained, and qualified.

This submission will highlight the innovative and forward-thinking strategies in the creation of the Academy, which are aimed at capacity building, and which will serve as a best practice. With the evolutionary nature of public procurement, capacity building through a structured comprehensive education and training program is vital for the effective and efficient functioning of a procurement system. It is imperative that procurement professionals are knowledgeable, qualified, well trained and equipped to perform their functions. The Academy empowers the County's procurement professionals with the knowledge and skills necessary to promote stakeholder engagement; ensure responsible stewardship of County resources in all procurement activities; and respond to emerging issues and trends such as supply chain disruptions, globalization, and advancements in technology.

Academy Overview

SPD's Policy, Training and Compliance Division (PTC) was formed with the specific purpose of enhancing the knowledge, skill, and abilities of internal and external County procurement professionals. PTC is managed by a department Assistant Director, who oversees 12 procurement professionals (see Attachment A). These professionals consist of a PTC Division Director, PTC Manager, Procurement Competition Advocate, Equity and Inclusion Officer, four Policy and Training Coordinators, one Analyst, one Governmental Affairs Coordinator, and two Administrative Officers. The Division manages business process design changes due to the County's Integrated Financial Resources Management System (INFORMS), and provides ongoing training to SPD staff, County departments' procurement staff, and stakeholders through the Academy. PTC is also responsible for developing procurement legislation, processes, strategies and templates; providing guidance on legislation, policies and procedures; performing legislative and compliance oversight; designing and providing training to vendors; conducting outreach programs; establishing and executing the department's marketing strategies and plans; and coordinating Mayoral initiatives for strategic and innovative approaches to deploying emergent industry best practices in the acquisition process of large scale County-wide projects

The Academy provides a wide array of training courses to participants covering procurement and soft-skills topics, including but not limited to contract negotiation, legal framework governing public procurement, procurement methods, purpose-driven procurement, market research, risk management, specifications development, communication and customer service, supplier relationship management, and teamwork and collaboration. Since the launch of the Academy in March 2023, SPD has conducted over 95 workshops/trainings with more than 5,700 participants in attendance (see Attachment B). The schedule of training for 2024 encompasses 23 published

courses for the period of January to June 2024, with an additional eight courses slated for July to December 2024 that are in the process of being finalized and published.

Three key initiatives planned under the Academy for Fiscal year 2023-2024 are:

1. Developing and implementing an *Introductory Certificate in Public Procurement*

This introductory course will provide the knowledge and skills necessary to develop solicitations, evaluate responses, and manage contracts effectively. The course will become part of the professional development plan for the County's procurement professionals, including SPD staff. Participants will be assessed through a final examination, and upon successful completion of the course, participants will receive a certificate. It is anticipated that the 40-hour course will be offered twice a year. Topics anticipated in the course will include:

- Foundations of Public Procurement
- Legal Framework that governs Public Procurement
- Procurement Planning and Strategy
- Specifications Development
- Procurement Methods
- Preparing Solicitation Documents
- Evaluating Bids and Proposals
- Contract Award Process
- Contract Administration

This introductory course will be designed for persons new to the procurement function, those who have worked in procurement but have not previously obtained a certification, and those in functions that closely interact with procurement, such as project managers, evaluation committee members, etc.

2. Developing and implementing a *Leadership Certificate in Public Procurement*

This leadership course will equip senior procurement professionals in SPD and throughout the County with the essential skills, knowledge, and strategic insights required to excel in leadership roles within the procurement function. This course will empower participants to become strategic leaders who enact changes through strategic analysis, effective contract management and sustainable practices. Participants will be assessed through quizzes, case study analyses and group projects. Upon successful completion of the course participants will receive a certificate. Topics anticipated in the course will include:

- Foundations of Leadership
- Strategic Procurement Planning and Analysis
- Strategic Sourcing and Supplier Relationship Management
- Sustainable Procurement
- Advanced Negotiation Techniques
- Change Management

The leadership course is designed for senior procurement professionals in roles such as Procurement Contracting Officer 3, Policy and Training Coordinators, Procurement Contracting Managers, Division Directors and Assistant Directors, and other senior procurement professionals.

3. Implementing *Cross Training/Procurement Swap Meet*

This initiative will give County department procurement professionals first-hand experience of the SPD procurement processes. For the cross-training, procurement Managers from the County departments will be matched with an SPD Manager for a determined period. For the Procurement Swap Meet portion of the initiative, Procurement Contracting Managers, Procurement Contracting Officers and Policy and Training Coordinators will go out to County departments and will collaborate and provide guidance while observing how they operate.

Academy’s Strategic Alignment to County’s Plan

SPD supports the County’s Strategic Plan by focusing on the goals and key performance indicators (KPI), one of which is “Excellent, Engaged and Resilient Workforce - Through the Department’s Divisions.” The goal is to promote employee development and leadership. The KPI title is “*Number of trainings facilitated by SPD to promote employee development.*” SPD’s senior leadership utilized the Strengths, Opportunities, Aspirations and Results (SOAR) strategic planning framework to collaboratively identify an approach that focuses on strengths and weaknesses and seeks to understand the whole system by including the voices of the relevant stakeholders. This proactive approach to strategic thinking and planning allows SPD to construct its future through collaboration, shared understanding, and a commitment to action. The results in part, specifically taken from the SOAR chart, will be used as part of the Academy’s staff development program and in the career development of individual employees.

<p style="text-align: center;">STRENGTHS</p> <ul style="list-style-type: none"> • Strong leadership and integrity • Highly skilled and dedicated employees with diverse expertise • Professional development training • Employee morale and satisfaction • Documented and proven public procurement processes and best practices 	<p style="text-align: center;">OPPORTUNITIES</p> <ul style="list-style-type: none"> • Benchmarking with other agencies for best practices • Partner with Human Resources Department to improve recruitment and retention initiatives • Succession planning and staff mentoring
<p style="text-align: center;">ASPIRATIONS</p> <ul style="list-style-type: none"> • Attract and retain excellent employees • Countywide procurement training for all departments and vendors • Staff cross-training 	<p style="text-align: center;">RESULTS</p> <ul style="list-style-type: none"> • Establishing Web-based Key Performance Indicators • Number of filled positions • Improved employee retention rates • Improved strategic procurement planning through collaboration with departments • Recognized as a leader by presenting as local, state and national training opportunities or educational conferences for procurement professionals • Follow project management methodology to plan, execute, monitor, and measure, and optimize.

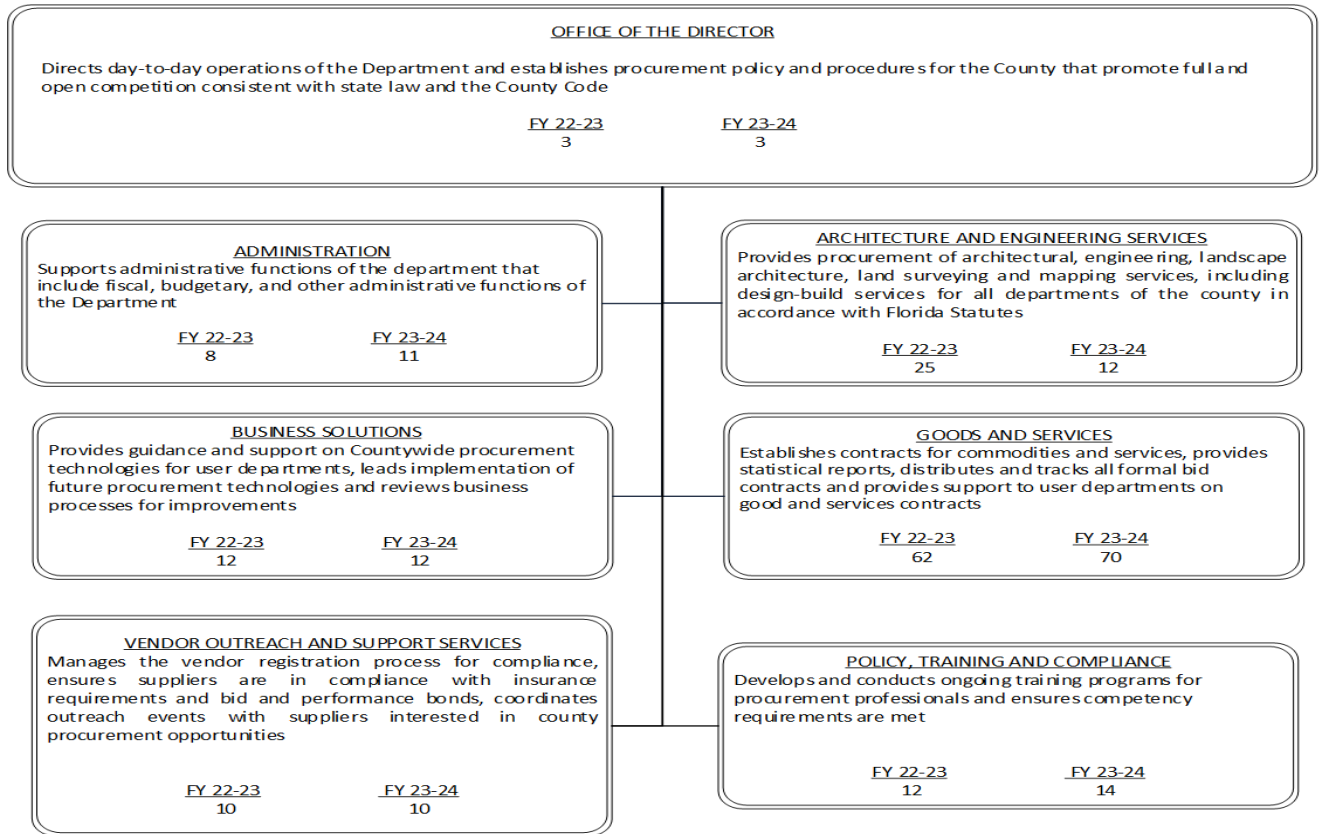
Future Outlook

SPD is continually reassessing the way our economy has changed and will continue to adapt, pivot and change, as needed. SPD is looking at how we have evolved as a department, government, and community, and is making sure that all new approaches, like the Academy, and other innovations in the way we provide and deliver services are part of our procurement process. SPD is leveraging our staff's procurement expertise to increase efficiencies and reduce the time it takes to traverse from identification of the need to implementation of the solution and will continue to set realistic benchmarks to identify the areas in the processes where we can use our resources more efficiently to serve the County residents. Monitoring internal and external customers feedback on ways to improve the quality of service of our operations, and promoting, rewarding, and advancing local workforce training programs as part of contract awards, will ensure we are deploying local hire efforts through our procurement processes.

There are several factors to manage that may affect SPD's operations and the Academy within the next few years. Being able to adequately identify and respond to supply chain issues, staff hiring and retention, and sustainability regulations requires a stable, motivated, educated staff pool. Employees must be given opportunities to remain current to meet the rising demands of their organizations and professions. While being able to recruit and retain a strong, consistent workforce is essential to the growth of the industry, so too is teaching new and established procurement professionals the skills they need to wisely dispense billions of public dollars each year. Providing critical training, educational options, and certification opportunities promotes employee satisfaction and organizational excellence and growth. When entities invest in their employees and provide training and opportunities to expand their knowledge, skills, and abilities, they will most likely increase the motivation of those employees to stay and grow at their own organizations. Maintaining a highly skilled workforce benefits not only the staff, but also their internal clients, suppliers, elected officials and taxpayers.

As we look forward to the future, it is important to look back and take note of how SPD arrived where we are today as it informs and supports where we will go tomorrow. SPD is still in its infancy in many ways, as the Department as it is currently positioned, was only formed on October 1, 2022. Prior to that, SPD functioned as a division of a larger department. As a stand-alone department, we are uniquely positioned to be the masters of our own destiny and to write our own story. Further, this is an opportunity which highlights the level of confidence that the Miami-Dade County Administration has in SPD's competency to carry the County forward. Procurement is not merely a role or a function, it is the bedrock of the County organization. The Academy exemplifies SPD's commitment to innovation and investing in ourselves; it is a brand-new initiative under a leadership team which did not previously exist within the County organization. The massive amount of growth and progress which SPD has achieved in only a year cannot be overstated and is indicative of the dedication and focus the SPD team has to continue to move procurement forward. The best is yet to come!

Attachment A: Table of Organization



The FY 2023-24 total number of full-time equivalent positions is 132

Attachment B: Schedule of Training Workshops

Event Name	Date	In-Person/ Virtual	# of Attendees	Duration (per session)	Instructor	Attendees
A&E / Design Build	12/01/23	Virtual	97	1	SPD Staff	SPD Staff County Procurement Staff
Administration and Leadership Academy for Government Supervisors	3/1, 3/2	In-person	8	16	Miami-Dade Public Safety Training Institute	SPD Staff
BCC Memo Changes Workshop	07/12/23	Virtual	52	1	SPD Staff	SPD Staff & County Procurement Staff
Bid Protest 101	07/11/23	Virtual	24	1	SPD Staff	SPD Staff & County Procurement Staff
Bid Tracking System/ Project Administration Training	03/16/23	Virtual	73	1	SPD Staff	SPD Staff & County Procurement Staff
BTS/PA Class	04/21/23	Virtual	22	1	SPD Staff	SPD Staff
CAO Public Records Overview	4/28/2023 & 11/6/2023	Virtual	163	1.5	SPD Staff & County Attorney (CAO)	SPD Staff
Commission on Ethics	12/08/23	Virtual	146	1	SPD Staff & Commission on Ethics (COE)	SPD Staff & County Procurement Staff
Competitive Selection Committee Workshop	Monthly	Virtual	1055	2	SPD Staff & Office of Inspector General; CAO, COE	SPD Staff & County Procurement Staff
Construction Strategic Sourcing INFORMS Training	6/13; 6/15; 6/26; 6/28	Virtual	105	6	SPD Staff	SPD Staff
Contract 101 (Cohort A)	03/03/23	Virtual	86	1	SPD Staff	SPD Staff & County Procurement Staff
Contract 101 (Cohort B)	03/10/23	Virtual	88	1	SPD Staff	SPD Staff & County Procurement Staff

Event Name2	Date	In-Person/ Virtual	# of Attendees	Duration (per session)	Instructor	Attendees
Contract Price: Escalation Clauses	09/29/23	Virtual	77	1	U.S. Bureau of Labor Statistics	SPD Staff & County Procurement Staff
Cooperative Purchasing 101 – OMNIA	08/04/23	Virtual	53	1.5	OMNIA	SPD Staff & County Procurement Staff
County Calendar Revision	07/21/23	Virtual	153	1	Mireidy Fernandez, CCED	SPD Staff & County Procurement Staff
CPPB/CPPO Test Preparation Series: Part I	09/06/23	Virtual	27	6	Sophia Cunningham, Christopher Grant- Henriques	SPD Staff & County Procurement Staff
Critical Thinking	06/09/23	Virtual	43	1	Mireidy Fernandez	SPD Staff & County Procurement Staff
Due Diligence – Overview	09/15/23	Virtual	30	1	US GSA	SPD Staff & County Procurement Staff
GOVMVMT Co-Op Purchasing	01/05/24	Virtual	61	1	GOVMVMT	SPD Staff & County Procurement Staff
Green Best Practices	07/25/23	Virtual	22	1.5	State of Maryland	SPD Staff & County Procurement Staff
Insurance Requirements	06/30/23	Virtual	49	1	Risk Management Staff	SPD Staff & County Procurement Staff
Introduction to County Procurement Processes	03/20/23	Virtual	96	2.5	SPD Staff	SPD Staff & County Procurement Staff
Introduction to the County's Procurement Legislation	04/26/23	Virtual	66	2	SPD Staff	SPD Staff & County Procurement Staff
Leadership in Supply Management	05/31/23	In-Person	49	2	Broward School Board	SPD Staff & County Procurement Staff

Event Name	Date	In-Person/ Virtual	# of Attendees	Duration (per session)	Instructor	Attendees
Leading and Managing Remote Workers	03/17/23	Virtual	2	2.5	Change & Innovations Agency (CIA)	SPD Staff
Marketplace.city Platform Demo - Market Research Tool/Database	03/30/23	Virtual	52	1	SPD Staff	SPD Staff
Marketplace.city Subscription Kick-off	09/08/23	Virtual	153	1	Marketplace.city	SPD Staff & County Procurement Staff
Monday.com Training	March/Weekly	Virtual	56	1	SPD Staff	SPD Staff
Monday.com Vendor Compliance Project	04/17/23	Virtual	14	0.3	SPD Staff	SPD Staff
NASPO Training	06/14/23	Virtual	94	6	National Association of State Procurement Officials (NASPO)	SPD Staff & County Procurement Staff
Negotiation 101	10/13/23	Virtual	120	1	SPD Staff	SPD Staff & County Procurement Staff
New Hires Training - Access Contracts	10/31/23	In-Person	14	1	SPD Staff	SPD Staff
New Hires Training- BTS/PA	11/15/23	Virtual	12	1	SPD Staff	SPD Staff
New Hires Training - Contract Award	12/22/23	Virtual	11	1	SPD Staff	SPD Staff
New Hires Training - Critical Thinking	12/19/23	Virtual	9	1	SPD Staff	SPD Staff
New Hires Training - Introduction to County's Procurement Process	10/05/23	Virtual	17	2	SPD Staff	SPD Staff
New Hires Training - Invitation to Bid	11/14/2023	In-Person	14	1	SPD Staff	SPD Staff
New Hires Training - Legal Framework of Public Procurement	10/06/23	Virtual	13	1	SPD Staff	SPD Staff
New Hires Training - Non-Competitive Purchases	10/16/23	Virtual	18	1	SPD Staff	SPD Staff

Event Name	Date	In-Person/ Virtual	# of Attendees	Duration (per session)	Instructor	Attendees
New Hires Training - Procurement Planning & Tally Preparation	12/06/23	In-Person	7	1	SPD Staff	SPD Staff
New Hires Training - RFPs	11/15/23	Virtual	14	1	SPD Staff	SPD Staff
New Hires Training - Roadmaps	11/13/23	Virtual	14	1	SPD Staff	SPD Staff
New Hires Training - Specifications 101	11/7/2023	In-Person	15	3	SPD Staff	SPD Staff
New Hires Training - Vendor Compliance Due Diligence	10/23/23	Virtual	13	1	SPD Staff	SPD Staff
NIGP - Greater Miami Chapter Workshop - Understanding and Procuring Construction Services	3/10/2023	Virtual	80	1.5	Eddy Etienne	SPD Staff & County Procurement Staff
NIGP Greater Miami Chapter - The Decider Guide to Cooperative Purchasing	07/25/23	Virtual	91	1.5	Sourcewell	SPD Staff & County Procurement Staff
Office of the Inspector General	10/20/23	Virtual	136	1	SPD Staff & OIG	SPD Staff & County Procurement Staff
Pre-award Vendor Compliance	06/28/23	In-Person	11	3	SPD Staff	SPD Staff
Prequalification Pools	07/28/23	Virtual	165	1.5	SPD Staff and Office of Small Business Development (SBD)	SPD Staff & County Procurement Staff
Procurement Day Event - Collaboration: A Path to Procurement Transformation	03/30/23	In-person	198	3	SPD/ Mayor/ CSG	SPD Staff & County Procurement Staff
Public Speaking 101	07/14/23	Virtual	16	1	SPD Staff	SPD Staff & County Procurement Staff
Purpose-Driven Procurement (PDP) Workshop	7/31; j8/2; 8/4; 8/8; 8/9; 8/30	Virtual	589	2	PDP Staff	SPD Staff & County Procurement Staff
Request to Qualify and Invitation to Quote	10/17; 11/13; 11/26	In-Person	161	3	SPD Staff	SPD Staff & County Procurement Staff

Event Name	Date	In-Person/ Virtual	# of Attendees	Duration (per session)	Instructor	Attendees
Request to Qualify/ Prequalification Pools	03/08/23	Virtual	94	1.5	SPD Staff	SPD Staff & County Procurement Staff
Review of Coordinator Report and Score sheets for the RFP process	2/23/2023	Virtual	18	1	SPD Staff	SPD Staff
SBE Tier and Preference Training	04/06/23	Virtual	89	1.5	SPD and SBD Staff	SPD Staff
Small Business Centric Procurement	11/03/23	Virtual	85	1.5	City of Las Vegas	SPD Staff & County Procurement Staff
SPARK Academy - Advance Training	5 Sessions 4/14	In-person	19	18	Change & Innovations Agency (CIA)	SPD Staff
SPD Staff Retreat	10/30/23	In-Person	91	6	SPD Staff	SPD Staff
Specifications 101	6/21; 6/22; 10/25	Virtual	216	3	SPD Staff	SPD Staff & County Procurement Staff
Unsolicited Proposals	04/13/23	Virtual	45	1	P3 Director	SPD Staff & County Procurement Staff
Vendor Compliance	4/27/2023 & 5/19/23	Virtual	86	1.5	SPD Staff	SPD Staff
Vendor Compliance/Due Diligence Training	07/26/23	Virtual	18	1	SPD Staff	SPD Staff & County Procurement Staff
Vendor Payments	5/24/2023 & 11/9/23	Virtual	184	1	SPD Staff, Finance Staff	SPD Staff & County Procurement Staff