

Knowledge to Practice

A Model for Individual and Organizational Learning



Presented by
Richard Pennington

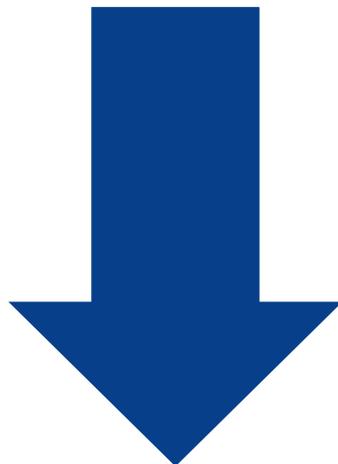
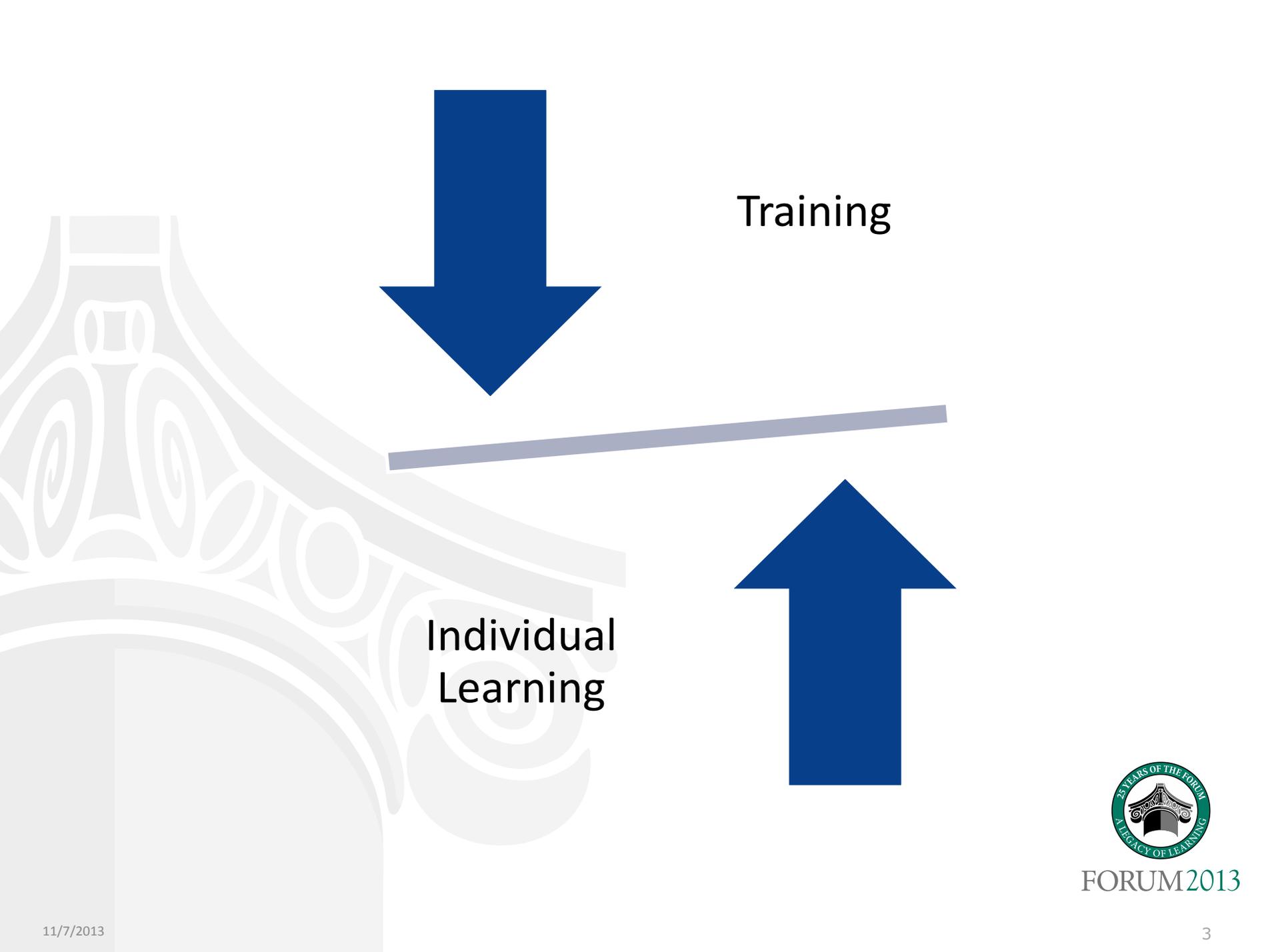


FORUM2013

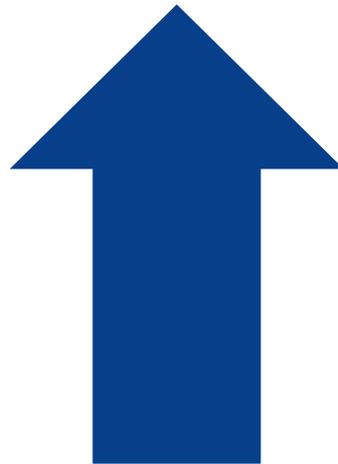
Why do you need to
learn about moving from
knowledge to practice?



FORUM2013



Training



Individual Learning



FORUM2013

Why do you
need to
learn?

What do you
know about
learning already?



FORUM2013

Adult Learning Principles

Readiness to Learn

Active Involvement

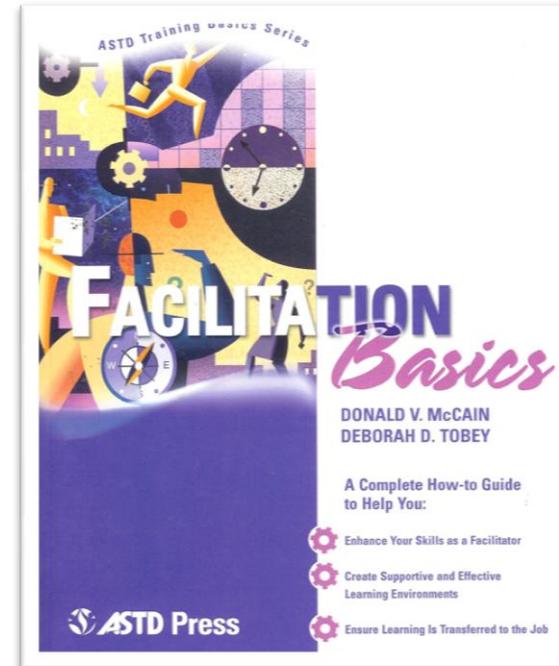
Sensory Learning

Individual Differences

Build on Experience

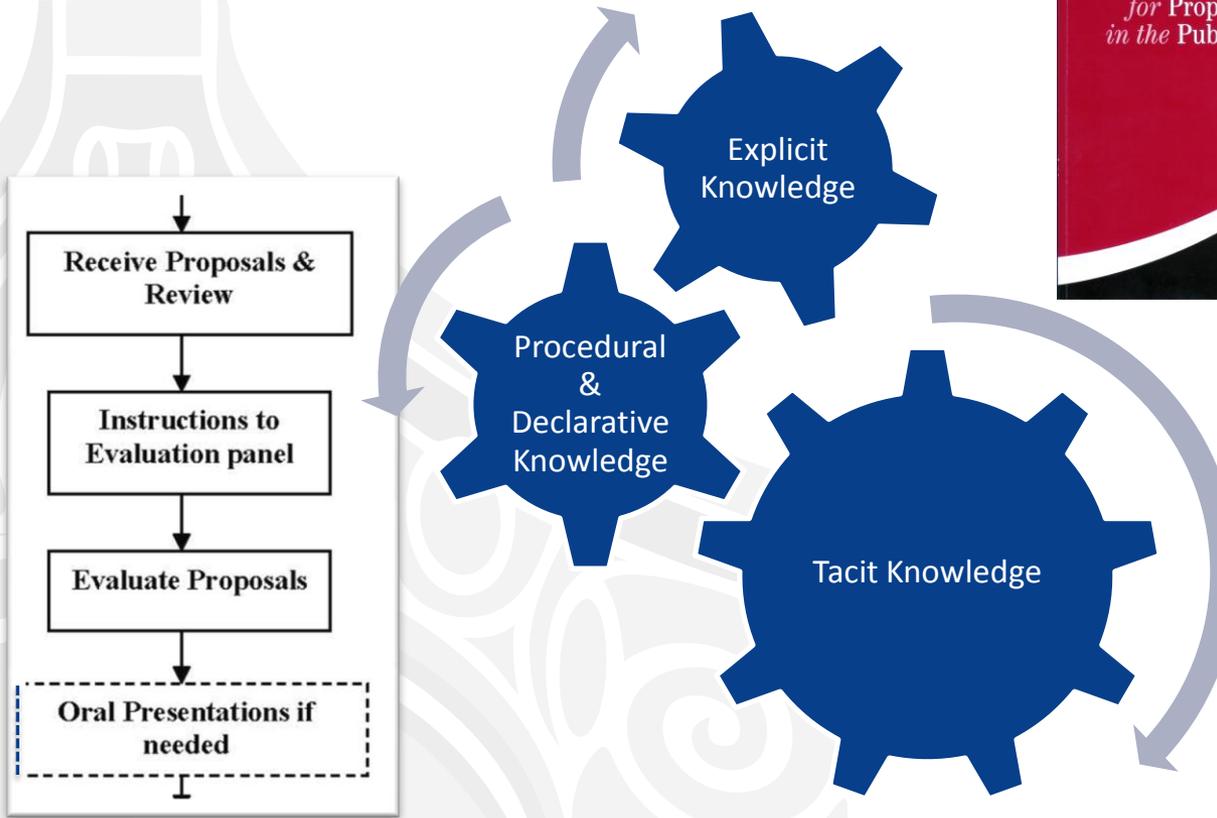
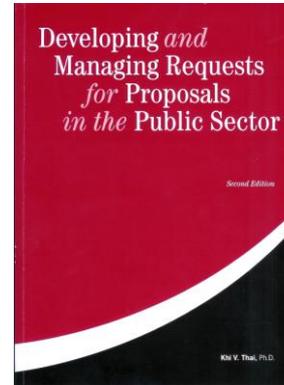
Practice

Get Feedback



FORUM2013

Explicit and Tacit Knowledge

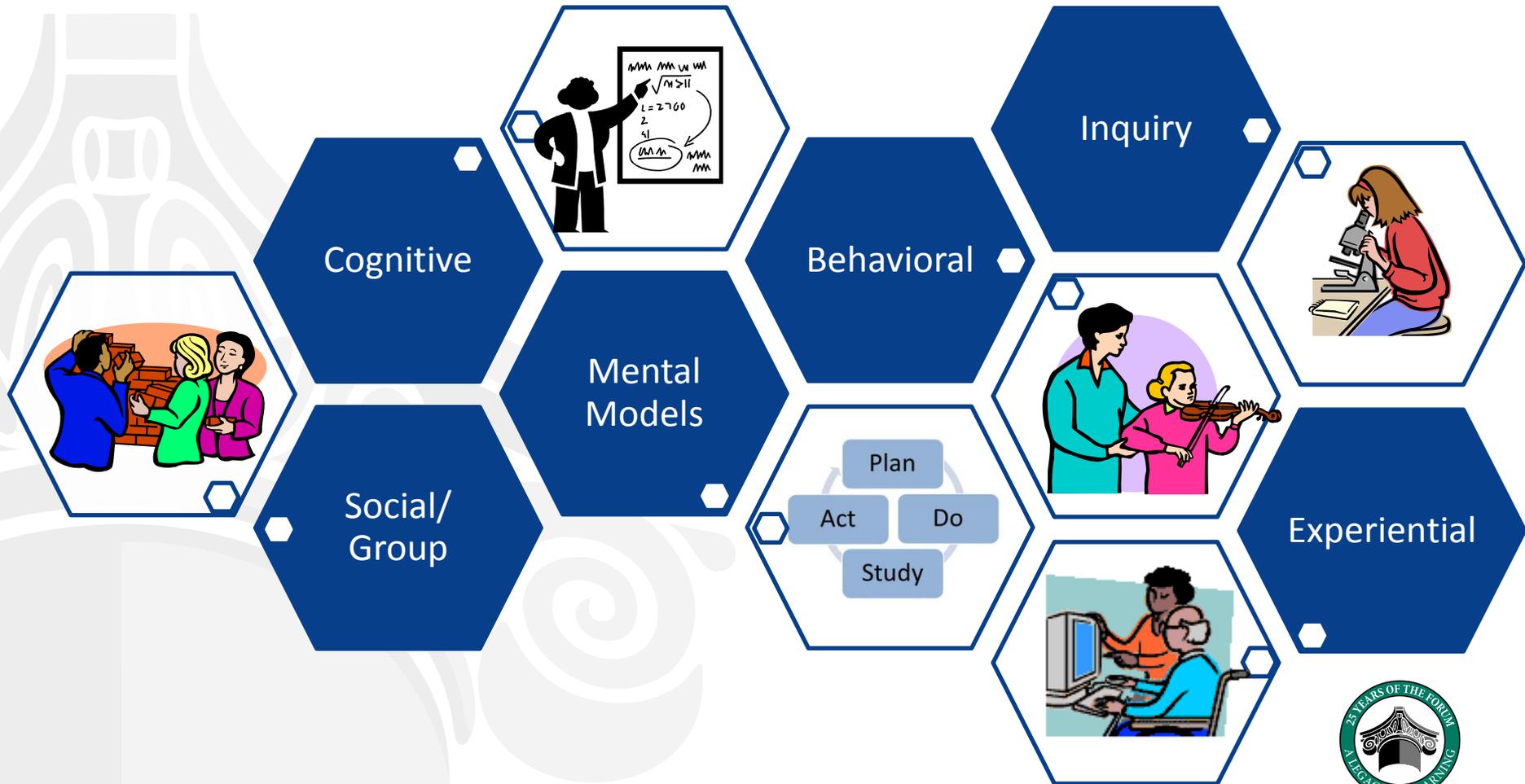


(From Agency Procurement and Surplus Property Manual, Annex 7-A)

SOURCE SELECTION SENSITIVE DISCLOSURE LIMITED (Final Eval Briefing 8/23/00)

Vendor Receipts	Weights	Vndr B	Vndr E	Vndr F	Vndr H	Vndr I
TECHNICAL SCORE	685	506.68	539.88	502.63	527.93	533.82
Technology Requirements	130	84.40	109.34	103.17	112.29	110.03
Hosting Model (4.3.1)	25	18.34	21.66	19.91	21.69	20.63
User Interface (4.3.2)	40	28.10	32.03	31.28	32.40	32.38
Security (4.3.3)	40	29.30	35.25	32.05	35.80	36.25
IT Platform, Performance, Reliability (4.3.4)	25	18.66	20.41	19.84	22.41	20.78
Functionality	500	375.99	393.91	366.17	378.97	390.85
Accounting Interface (COFRS/FINE1) (4.4.2)	40	31.80	32.93	33.13	33.73	33.87
Product Catalog (4.4.3)	40	30.25	31.75	30.50	32.35	30.65
Inventory System (4.4.5)	5	2.64	2.25	1.55	2.36	2.05
Trading Community (4.4.5)	25	16.16	19.97	20.31	18.59	16.25
Electronic Invoicing (4.4.6)	25	15.98	19.79	20.35	15.63	16.18
Supplier Support (4.4.7)	40	28.85	30.40	29.35	29.95	29.50
Bidding Process/Quote Capability (4.4.8)	15	10.55	11.84	9.65	9.55	10.44
Full procurement solution	10	11.92	7.94	3.99	7.94	7.94
Electronic Ordering (4.4.9)	40	32.05	30.45	29.80	31.25	32.20
Workflow (4.4.10)	40	32.21	32.24	33.07	33.39	31.33
Political Subdivisions Extendability (4.4.11)	40	31.20	32.05	31.05	32.05	31.00
Electronic Authorization (4.4.12)	40	32.64	31.95	32.13	34.16	33.89
Logging and Auditing (4.4.13)	25	19.87	21.02	20.82	20.97	20.53
Reporting (4.4.14)	25	18.98	20.53	20.18	19.83	19.05
Systems Integration (4.4.15)	40	32.40	34.46	30.69	34.11	32.97
Software Maintenance and Support (4.4.16)	25	20.50	21.71	17.32	21.50	21.97
Training and Documentation (4.4.17)	25	18.63	20.49	18.87	19.10	20.35
Other System Features	15	2.97	2.94	3.62	2.94	3.77
Procurement Card interface (4.5.1)	5	3.97	3.99	3.63	3.81	3.88
Procurement Card Program	10	0.00	0.00	0.00	0.00	0.00
Implementation Strategy (4.6)	40	32.32	32.84	29.76	32.85	31.23
COST TO STATE/IMPACTS	500	314.79	336.63	393.33	373.33	410.63
Fee/Revenue Analysis	125	63.75	57.50	125.00	65.00	101.25
Impact from Vendor Fees/Revenue Model	125	76.04	89.58	87.50	89.96	101.04
State Infrastructure/Personnel Costs	125	86.46	88.54	80.21	102.08	104.17
Expected Efficiencies and Cost Savings	125	88.54	100.00	90.83	107.29	104.17
EXPERIENCE/DEMONSTRATED CAPABILITY	300	246.00	219.75	192.00	269.25	253.75
Past Experience Web-based Procurement/Catalogs	100	83.25	80.75	83.25	91.75	88.75
Past Experience Integration	100	80.00	82.50	46.25	88.50	80.00
Qualifications/Resumes	100	82.75	86.50	62.50	89.00	85.00
TOTAL POINTS	1485	1067	1095	1078	1171	1198

Models of Learning



FORUM2013

How Should the Topic Be Learned?

“Adults retain about 10% of what they read, 20% of what they hear, 30% of what they see, and 50% of what they hear and see. But if adults become actively involved in their learning, those percentages rise to 70% of what they say and 90% of what they both say and do.”

– McCain and Tobey, *Facilitation Basics*

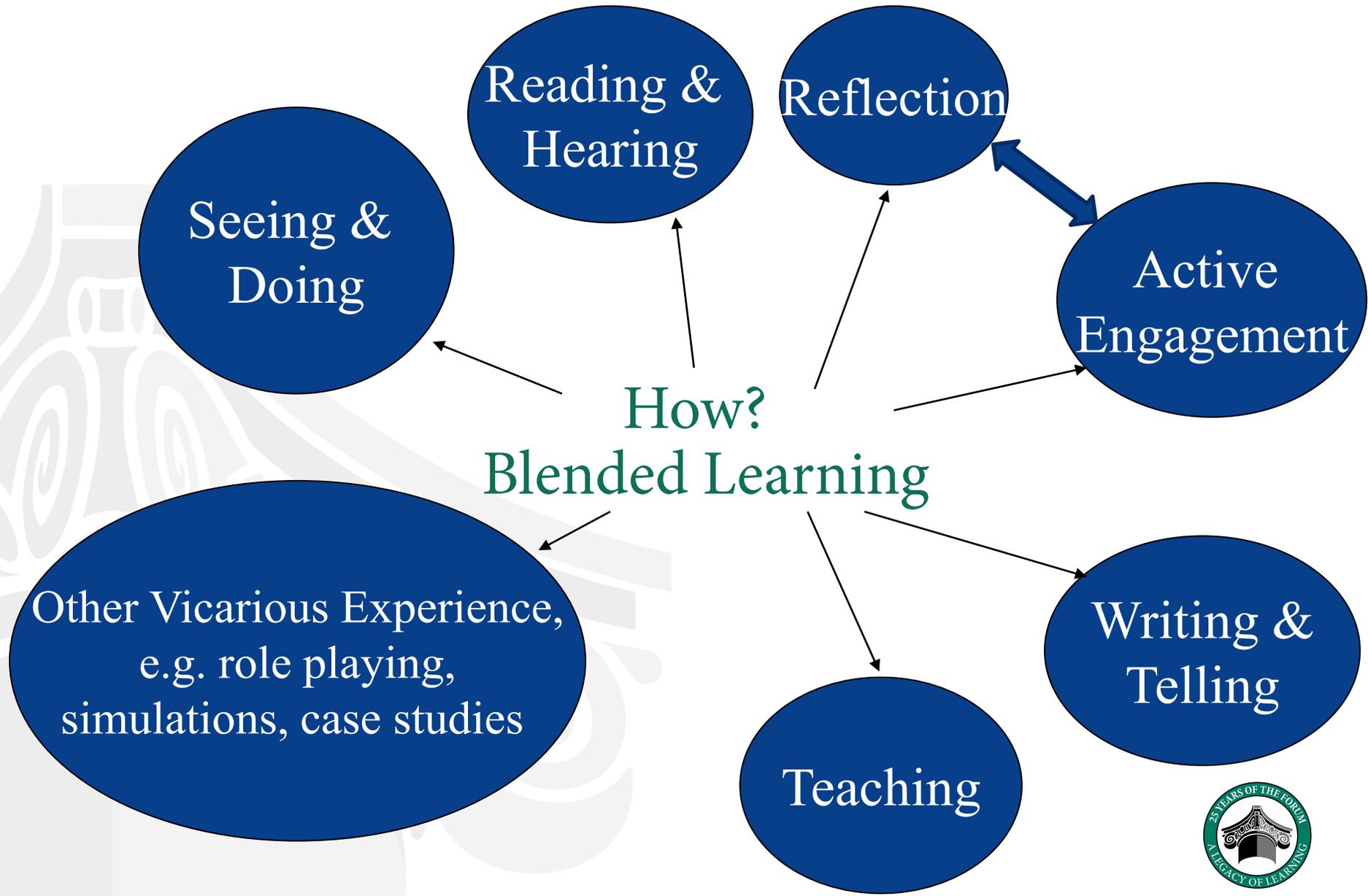


FORUM2013

How should the topic be engaged to guide experience, promote reflection, and allow application?



FORUM2013



Who Can Help Assess Learning?

Peer-to-Peer Training

- Involve peers in training design and planning, however informally
- Use “conversations” creatively



- Use peers’ experience and expertise to help assess

STATE PURCHASING OFFICE
PURCHASING AGENTS TRAINING PLAN

Skill, Knowledge, or Other Competency _____ *Date/Initials* _____

These job skills and knowledge points are intended to highlight the knowledge and/or experience necessary to fully function as a lead purchasing agent in the State Purchasing Office, where daily interface with field purchasing agents is required, and where a unique application of procurement expertise is required for procurements and contracts having statewide impact. When fully functioning as a lead SPO purchasing agents will participate in Peer Reviews of other offices and direct complex source selections. The emphasis is not so much on supervision or authority, but simple availability as a reference and guide to other Purchasing Agents throughout the State of Colorado, including institutions of Higher Education and political subdivisions. Acting as a resource or advisor to newer or junior employees in the office will often be required.

The person in this job class should possess a unique level of knowledge and expertise in the procurement field that is needed by the State Purchasing Office to support its overall mission. The person in this position is also used by State Purchasing Management in the consultation and implementation of critical program and policy direction of the State Purchasing Office, such as implementation of the e-procurement system. This also includes participation in the design strategy, systems, processes, guidelines, rules, and standards that are mission critical and directly impact the agency's ongoing operations, programs, or policies. Policy direction from the State Purchasing Office directly impacts all State agencies and Institutions of Higher Education. The person in this position is authorized to take action and issue expert opinion that provides direction for further action by others.

This summary focuses on the skills and knowledge considered unique or of special importance in SPO.

JOB SKILLS AND KNOWLEDGE
ADMINISTRATION OF IFB'S AND RFP'S



Where Can More Be Learned About The Topic?

PROCUREMENT ACTIVITY LIST
For Request For Proposals ≥ \$100,000

ACTIVITY/TASK	
NEGOTIATIONS	<p>Notify top ranked firm(s) of tentative selection and proceed to negotiations/BAFO.</p> <ul style="list-style-type: none"> ✓ Letter to top ranked firm(s) (all within at least 10% of top firm) of intent to begin negotiations/BAFO ✓ Identify negotiation team and develop negotiation plan ✓ Request clarifications/BAFO
SELECTION & NOTICE	<p>Conduct responsibility review of top ranked firm(s)</p> <ul style="list-style-type: none"> ✓ Request a Dunn & Bradstreet Report financial review (if ≥ \$500K) ✓ Check for debarment (ST, City & Federal System for Award Management) ✓ Seek review of exceptions with recommendation for next steps to Supervisor/CM ✓ Conduct reference checks
	<p>Seek Approval for Notice of Intent to Award</p> <ul style="list-style-type: none"> ✓ Complete evaluation summaries (including any site-visit/interview/demo evaluations)
CONTRACT EXECUTION	<p>Provide notice to all firms</p> <ul style="list-style-type: none"> ✓ E-Bid/Letter notice to unsuccessful firms (protest period begins) ✓ Letters to successful/unsuccessful of notice of intent to award <p>IF PROTEST(S) OCCURS:</p> <ul style="list-style-type: none"> ✓ Protest Procedures ✓ Draft a protest response letter for Supervisor/CM review ✓ Provide a copy to Laura Sharp for PCD protest file and notification to FTA
	<p>Draft contract and obtain final reviews & approvals</p> <ul style="list-style-type: none"> ✓ Assist PM in obtaining Board/Committee Approval for > \$200K (include signed Motion in file) ✓ Seek Approval for Contract Execution (No contract execution w/o approved E1 Requisition)
CONTRACT EXECUTION	<p>Send Award Letter and Collect necessary contract documents</p> <ul style="list-style-type: none"> ✓ Proof & approval of Insurance ✓ W-9 (if new to ST) ✓ Statement of Intent to Pay Prevailing Wage (before first payment) ✓ Transmit 2 copies of the Contract to Consultant for signature first
	<p>Route Contract for internal signatures with Executive Dept. Signature Request Form (see Sample)</p>
CONTRACT EXECUTION	<p>Create Purchase Order (PO) & prepare file for Livelink</p> <ul style="list-style-type: none"> ✓ Blanket Purchase Order Information Sheet ✓ Seek Supervisor/CM approval after entering PO into E1 ✓ Issue Notice to Proceed ✓ Update e-Bid, Log 1 and Procurement Summary Memo ✓ Hold Kick-Off Meeting and walk through the Contract Roadmap with the Project Manager ✓ Obtain a file review from Supervisor/CM ✓ Send file to AI for scanning to Livelink

- NIGP publications & resource library
- Communities of practice, e.g. yours; Nsite (online)
- ISM and other publications on purchasing and supply management
- The internet



When can I practice?

Practice mock debriefings

Record yourself and listen/watch

Co-develop templates

Use after-action reviews

Visit live events, e.g. pre-bid conferences

Informal job shadowing

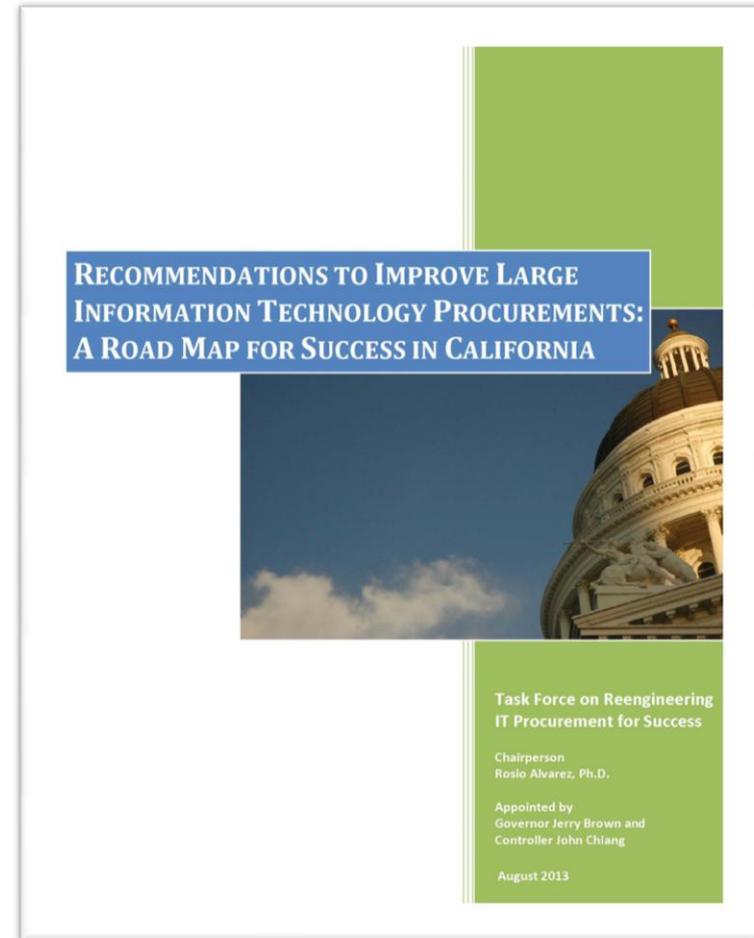
Table-top simulations



FORUM2013

“We recommend that curriculum-development experts be used to integrate adult learning principles into this [contract management] training. The Virginia Institute of Procurement (VIP), for example, uses small group strategies and course guides in its procurement training that leverage adult learning principles. VIP’s approach to training helps build a community of practice for procurement professionals.”

– California Task Force on Reengineering IT Procurement, August 2013



FORUM2013

5 Why's and a How of Learning

Why

- Why learn this? How does it relate to the job?

What

- What needs to be learned given prior knowledge and expertise?

How

- How should the topic be engaged to guide experience, promote reflection, and allow application?

Who

- Who can help assess whether the learning happened?

Where

- Where can more be learned about the topic?

When

- When can the knowledge or skill be practiced?



FORUM2013

Richard Pennington

Richard@SCOPEVision.net



Lead Laterally:
Choose to Help



Practice the Art of the
Question: Find Opportunities



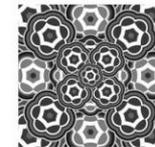
Learn from the Stars



Keep Learning &
Make It Stick!



Keep Purpose in Mind



Step to Their Side
Often: Help Mold &
Promote the Team



Manage Risk and
Change



First Ask How?
Then Why?
Then Decide



Use Meaningful
Measures of Merit



Just Enough Structure: Plan,
Communicate, Follow-up



FORUM2013