



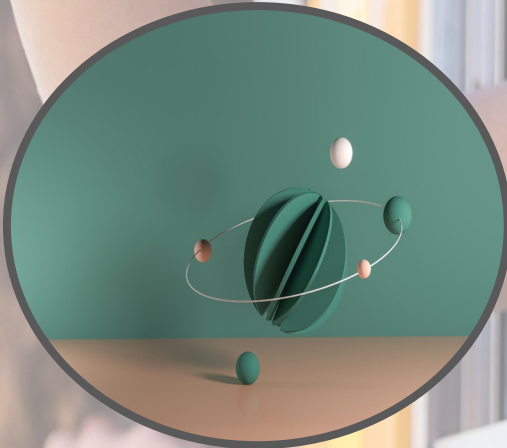
St. Louis Public School System

Procurement Transformation

Wright Associates

Charles Wright's Leadership Story

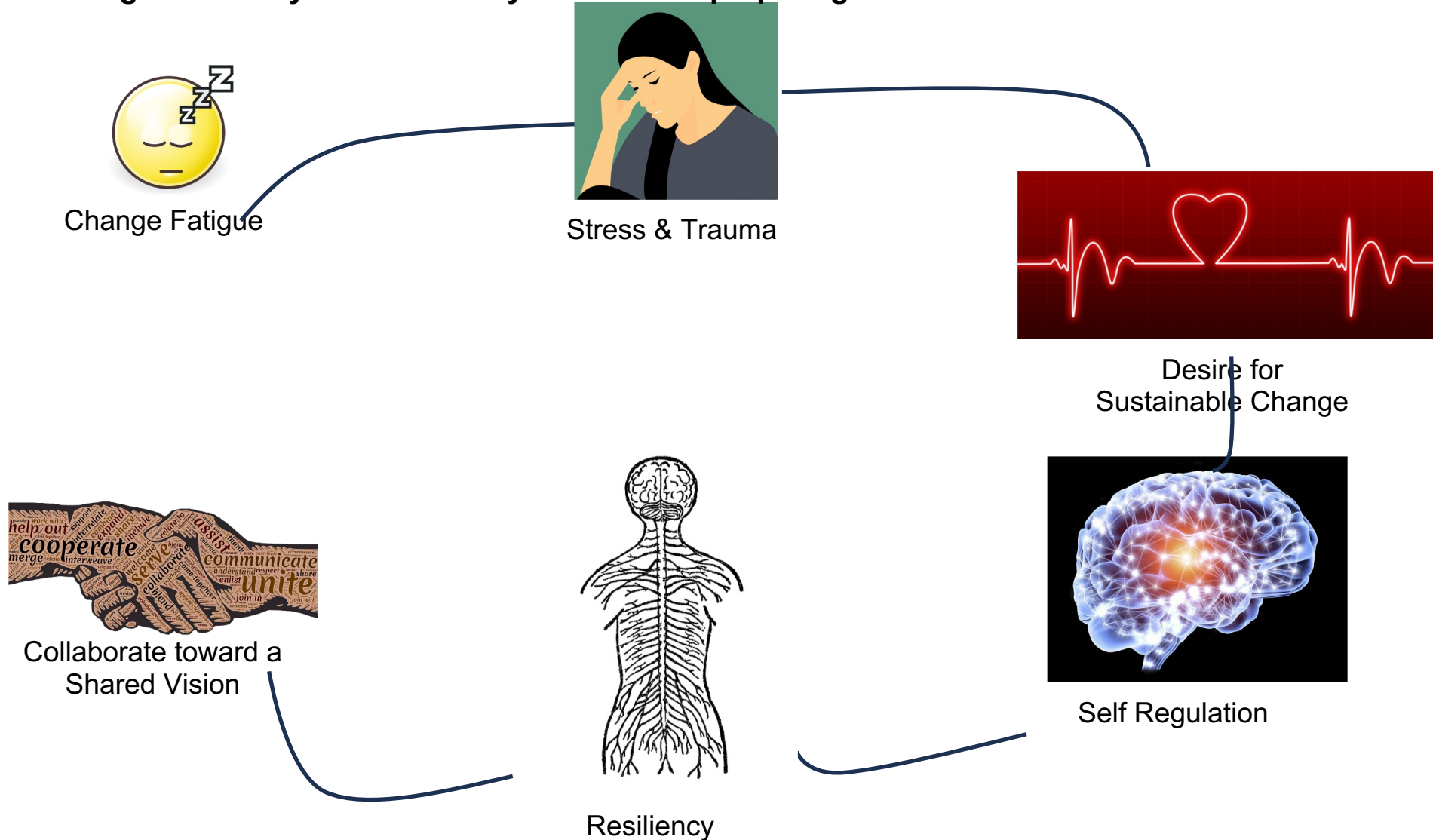
Wright Associates



Our Theory of Building Readiness for Change

Wright Associates

We believe increasing nervous system resiliency is central to preparing individuals to create and sustain a shared vision.



What

Why

How



“Help us transform the SPLS Procurement Process.”

“Goods and services aren’t consistently procured or paid for in a timely manner.”

“We need change that will last!”



Triage & Stabilize

The pain is so great that we need to act now.

Make the existing process clearer. If possible, start making it faster, too.



Accelerate Transformational Improvements

Stakeholder needs aren’t consistently met under current paradigm.

Redesign our processes while using proven change management techniques to drive sustainability.



Vendor Welcome Letter



Construction Welcome Letter



Process Roles & Responsibilities



Process Clearer & Faster



Website Changes



Grants Work Session

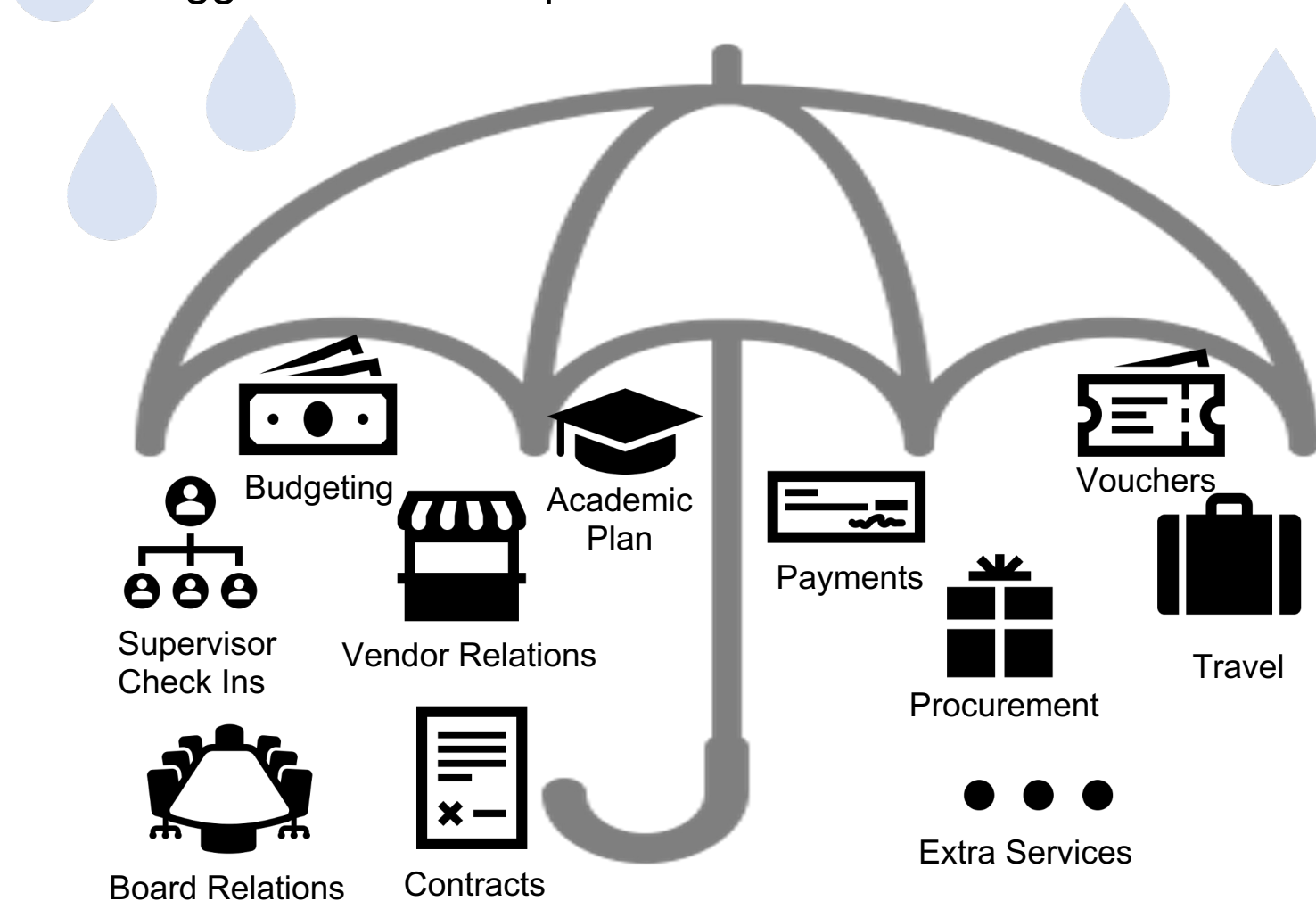
Proposed Changes to Board
Policy & Superintendent
Procedure

Action Plan to Close Open PO
Backlog

Highlights from the Procurement Transformation Project



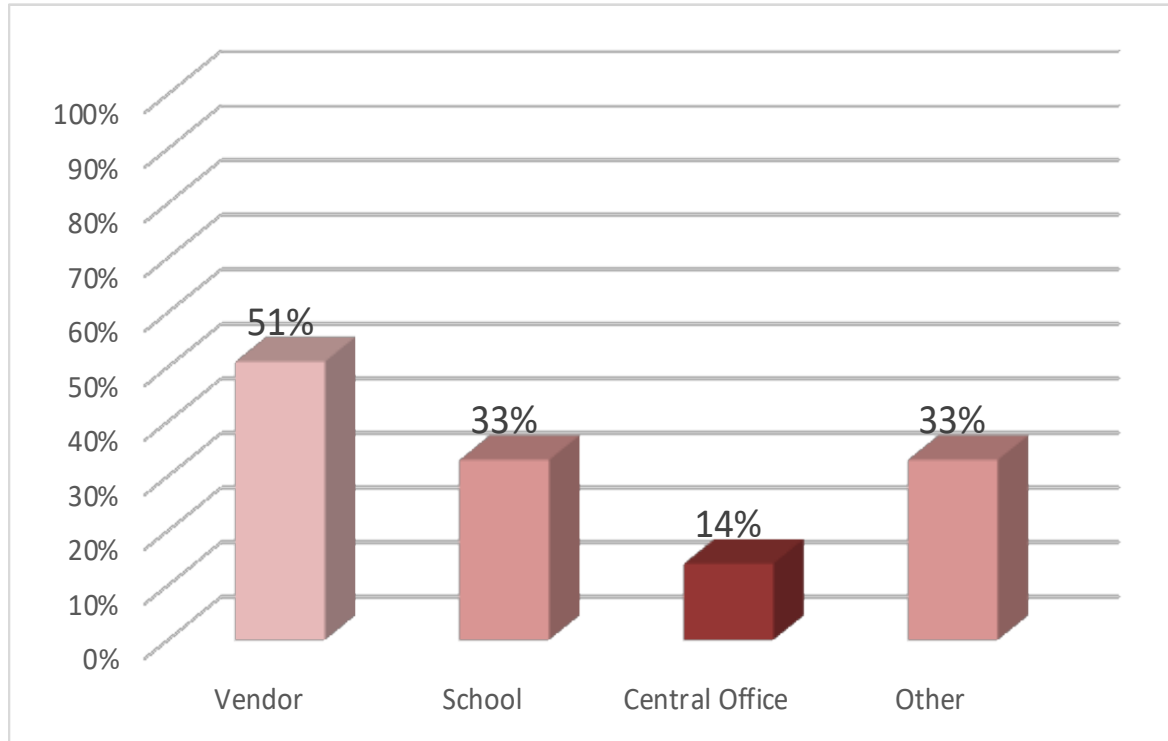
Our work is revealing that the Purchasing Experience is much bigger than the responsibilities of the Procurement team!



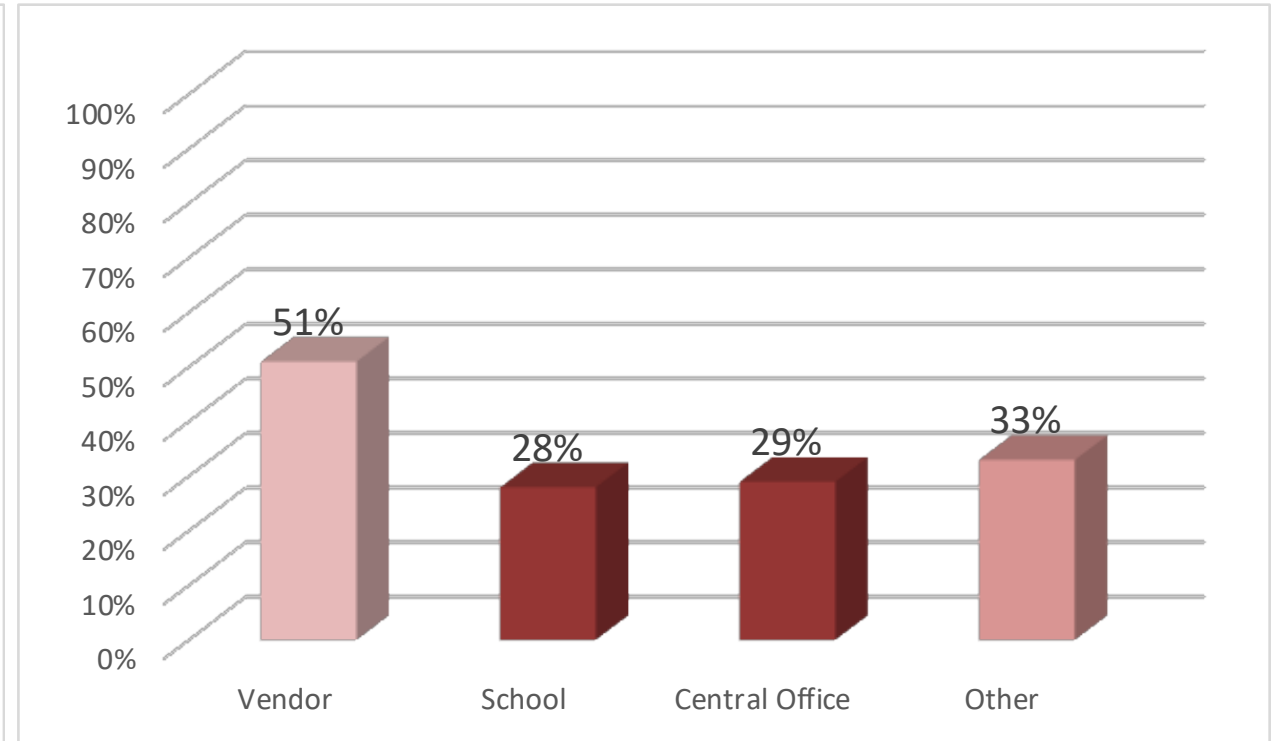
I can trust the procurement process (vendor set up, purchase request, budget transfer, legal review, and approval).

I can trust the accounts payable process for ensuring vendors are paid in a timely manner.

% Positive (agree & strongly agree)



% Positive (agree & strongly agree)



“We must collaborate throughout the system in order to develop our ability to make strategic purchasing decisions – and we must partner to execute them in a timely way.”



Key Needs

- Actively develop a culture of trust & respect
- Recognize that requestors are not finance experts
- Work on all components of Purchasing system so they work together – instead of against each other



Examples from our Collaborative Work to Date

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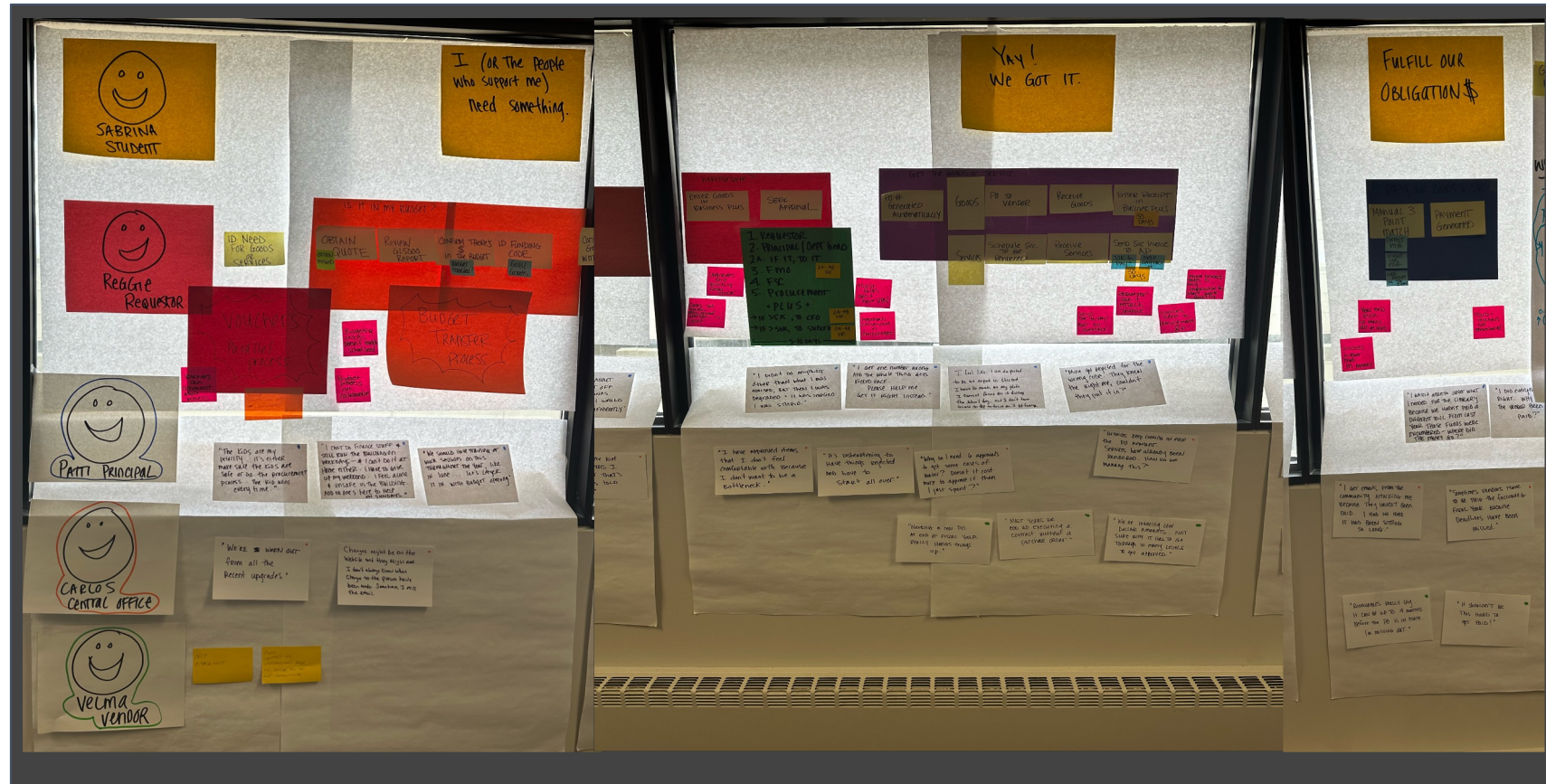
Huddle Purpose: Clean out the Backlog of Requests and keep them moving

Weekly Focus Areas:

- Moved through “stuck” requisition issues
- Unauthorized Purchases
- Time Sensitive Requests

Huddle Highlight: Identified over 1200 open POs, which will grow (working to address)

Gallery Walk & Personas



Prioritize What to do Between NOW and June

Business Plus University (BPU)
(Smaller Chunks of Info)
Contracts | Requisitions | Budgets

Improve Online Resources
videos, 1 pagers, etc

Welcome Email to new staff w resources

Mini BPU for Vendors

Improve Onboarding for new staff (1:1 or group)

Ongoing training in smaller venues

Training & Onboarding

3/29 focus

Help schools align academic plan to \$ plan proactively

Assign Finance Mentor

Consultative Role

Requestor attach email approvals up front

Get Principles BusPlus at Home

"Simple" Tech Stuff

Workshop to support schools - central office w GOB budget cut off

Remind folks of fiscal year deadlines

Outreach to common grad vendors

Purchasing Timeline (eg when to order grad supplies & from whom, when to get invoices, etc)

Use vouchers

Award Fieldtrip Icecream Bounce Trucks

vendor #

Purchasing Timeline (year end, then other key milestones)

Determine how to best help AP with invoices

Timely Payments

Fix Contract Mgmt Process

Contracts

School Ops Mgr who does bldg purchasing

New Role

Board Resolution Process

Renewal Policy

Board

Ongoing Communication until pmt made

Regular vendor surveys/feedback

ID & correct point of payment disconnect

add vendor instructions to our email signatures

notifications when vendor registers

Clean up vendor list

Start saying No to new vendors

Vendors

How to tell PO status - Goods Receipt vs Invoice needed

Report shows what's not receipted

Assign person to school clusters, go through it now

Delivery to School - solve for books ordered by Academics/Curriculum

Receipt Reporting & Communication Process

Goods Receipts

Don't Decline the Req

Call (don't email)

Analysts Support Schools in person

Finance Standard Work

Action Plans - what we're doing from Now to 3/29

What are we trying to solve?
DESCRIBE PROBLEM:

Timely prints

What Action	Who	When
Pull PO data	Andrew	Monthly 3-28-24 4-22-24 5-20-24
Open PO Report send goods receipt email Manage/Respond	FMO Team AP	3-26-24 Ongoing 3-5-24
Needed Invoice List	Stephanie MP	5-3-24
Request Invoices from Vendors Manage/Respond	Procurement AP	3-6-24 5-4-24
Scan/Save Invoices	AP	Continuously
Enter Invoices	"	"
Validate/Post	"	"
Check Processing	"	"
Huddle Updates/ Evaluate Process	AP	Weekly

Conclusion: AP need more STAFF

WHAT ARE WE TRYING TO SOLVE? DESCRIBE PROBLEM:

Purchasing Timeline

ACTION PLAN

WHAT / ACTION	WHO	WHEN
Ask Principals for a list of vendors for Year end activities (QR Code)	Finance	March 5th
Create list & send to Schools (Prin & Sec) using commodity codes	Procurement	April Principal Mtg 4.2.24
Send communication re: Graduation Vendors	Procurement	
Send Year-End Deadline Reminders ↳ signature block of email ↳ Terry, Step will send ↳ link & email reminder	Fiscal FMO Analyst Step Terry	March 4, 2024 March 4, 2024
Year End activities - Voucher Payment → Submitted 2 weeks prior to event	AP	
YE timeline Graphic	Nichelle/Steph	3/31/24

Goods Receipt

ARE WE TRYING TO SOLVE? DESCRIBE PROBLEM:

ACTION PLAN

WHAT ACTION	WHO	WHEN
Timeline of receipts process	Proc/AP	Mid March
Report showing Open POs that has if receipted, if invoice, if paid	Jason sent request/FMO	Monthly / at least end of mid May (before school)
page of Best practices for requestors include the "why"	Proc/AP	Mid-March
Round 2 (or monthly) of Open PO outstanding emails (include what is missing)	FMO	Mid March
Goods receipt notification sent to requestor, principal network	Jason testing	Mid March
Leadership email or notice concerning what is required & importance	Dr. Scott	Next week

How to tell if Goods Receipt Y Invoices...
Should what's not Receipted

Delivered to school - solve for books when ordered by Academics...
Assign person to cluster of schools to do that if in row

Goods Receipt Reporting process a communication process

ONE WORD

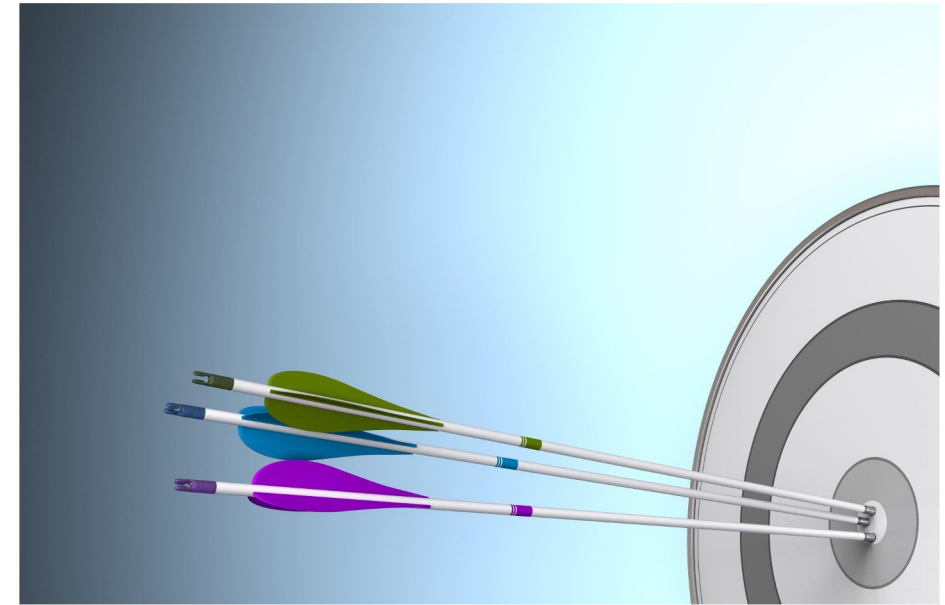
pleased
collaborative
hopeful ↓
productive ✓
DAMN
optimistic
togetherness
enlightening
insightful
Relieved
(shared) vision

BIG
enthusiastic
coherence
onomonopia
connected
Change
humbled
motivated

Workshop Evaluation Results

% Positive (Agree & Strongly Agree)

- I believe we can achieve our Shared Objective. **89%**
- I felt safe to voice my ideas and speak up today. **86%**
- I believe we discussed the right things today. **100%**
- I believe our Action Plan is attainable. **94%**
- I am excited to keep working on making the Procurement Process better. **100%**



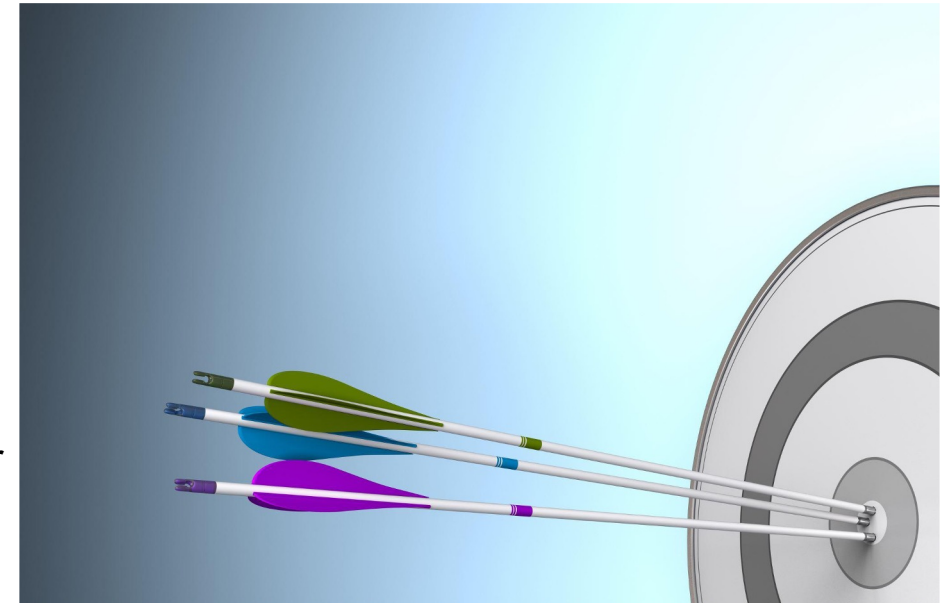
Workshop Evaluation

What worked well today? Sample comments:

- *The entire team participated and objectively voiced their opinions to make this process better*
- *Open discussion about trust*
- *Working in groups, love our activity about different roles & their work through the purchasing process (gallery walk & personas)*
- *We worked cohesively as a team*
- *Action items and plans*

Other comments or advice for us? Sample comments:

- *Hold us accountable*
- *There is a level of complacency that gets in and we go into survival mode and lose sight of automation, training/skills of the future, being progressive or intentional*



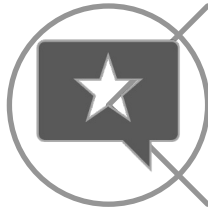
Workshop Sprint Purpose:

Improve the Purchasing Process Results using the Collective Intelligence of our Teams

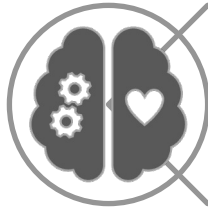


Dates:

- ~~Fri 3/1~~ } Immediate adjustments between now and end of school year
- Fri 3/29 } Immediate adjustments between now and end of school year
- Fri 4/26 — Identify “just do its” to implement in next school year
- Fri 5/31 } Start larger process redesigns for next school year
- Fri 6/21 } Start larger process redesigns for next school year



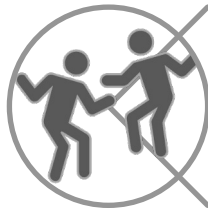
Articulated the User Experience
(Vendor, Principal, Central Office &
Finance)



Change Management Practices Opened
up New Conversations



Procurement Huddles Seeing Results in
\$ Moved Through



First Workshop Closes with 100%
Participants Excited to Move Forward
with the Work

Questions?

