

It Was an Honest Mistake: *Learning from past procurement mistakes*

Stacy Gregg, CPPO, CPPB



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Case Study: The Notorious Paper Snatcher



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Case Study The Notorious Paper Snatcher

The Story:

- Young procurement specialist.
- Bid for security officers.
- Young security firm/experienced owner.
- Gut said “no.”
- Contractor did not perform.



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Case Study The Notorious Paper Snatcher

The Impact

- \$60,000 missing athletic funds.



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Case Study The Notorious Paper Snatcher

The Concept:

Responsible Bidder/Proposer

A business entity or individual who has the integrity and reliability as well as the financial and technical capacity to perform the requirements of the solicitation and subsequent contract. -

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Case Study The Notorious Paper Snatcher

The Outcome

- Contract terminated.
- Contractor was arrested and prosecuted.
- Hired off duty police officers to manage this task.



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Case Study: Faked Anger by a "Bad Cop"

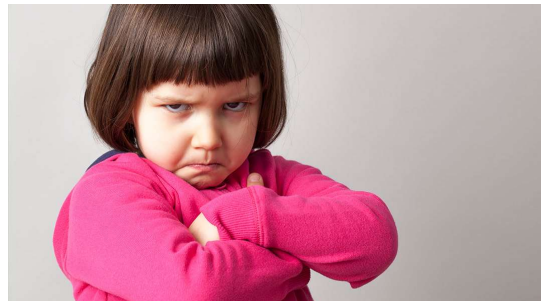


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Case Study Faked Anger by a Bad Cop

The Story:

- Negotiations Meeting
- Reached impasse
- Colonel steps in and fakes anger



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Case Study Faked Anger by a Bad Cop

The Impact:

- Closed deal
- Everyone “happy”



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Case Study - Faked Anger by a Bad Cop

The Concept:

“The Goal of any negotiation is to achieve a mutual goal referred to as a win-win agreement.”

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Case Study Faked Anger by a Bad Cop

The Outcome:

- Regret
- New Methods of negotiating



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Case Study: A Promotional Mess



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Case Study

A Promotional Mess

The Story:

- Buyer orders promotional items
- Program area approves proof
- Incorrect telephone number



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Case Study

A Promotional Mess

The Impact

- \$35,000 worth of items they could not use



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Case Study

A Promotional Mess

The Concept(s):

- Procurement value
- Procurement ethics



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Case Study

A Promotional Mess

The Outcomes

- Admin terminated
- Suspended supervisor
- No adverse action for procurement



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Case Study
A Risky Situation

The Story

- Procurement Officer’s first time using the Construction Management at Risk method
- Building a school
- Leadership pressured to expedite
- Issued the Request for Qualifications for a smaller amount of time required by code

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graph TD
    Owner[Owner] --- CM[Construction Manager]
    Owner --- Architect[Architect]
    CM --- SubA[Subcontractor A]
    CM --- SubB[Subcontractor B]
    CM --- SubC[Subcontractor C]
    CM --- SubD[Subcontractor D]
    
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Case Study
A Risky Situation

The Impact

- Protest of solicitation
- Delayed process



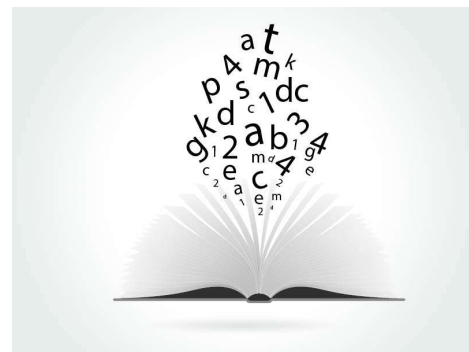
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Case Study
A Risky Situation

The Concept(s)

- Procurement Value
- Professional Development
- Loss of trust in Procurement Dept



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Case Study: Share Your Story



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Case Study: The Case of the Misplaced Bid



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Case Study: The Case of the Misplaced Bid



The Story

- Buyer has 2 RFPs closing near the same time.
- She opened the first one and distributed them to panel
- She opened the second one and realized one of them should have been distributed the day before



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Case Study: The Case of the Misplaced Bid

The Impact

- Minimal, however what could go wrong?



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Case Study: The Case of the Misplaced Bid

The Concept

- Handling of Offers



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Case Study: The Case of the Misplaced Bid

The Outcome

- Revised the documents for the first RFP
- Distributed the offer to the panel with an apology



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Case Study: The Custodial Conundrum



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Case Study: The Custodial Conundrum

The Story

- Buyer issues ITB for Janitorial services
- 30 day testing period prior to award
- Award to the 5th highest bidder



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Case Study: The Custodial Conundrum

The Impact

- 5 months
- 5 companies
- Process prolonged unnecessarily
- Perception



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Case Study: The Custodial Conundrum

The Concept

- Procurement Value
- Appropriate sourcing methods



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Case Study:
The Custodial Conundrum

Outcome

- RFPs only for janitorial services
- The contract worked for the city



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Case Study
A Change in Criteria



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Case Study A Change in Criteria

The Story

- Buyer issued RFP for copier machines
- Minimum 75 copies/minute
- Added copy/min as an evaluation factor in panel meeting



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Case Study A Change in Criteria

The Impact

- The award was protested



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Case Study A Change in Criteria

The Concepts

- RFP Scoring
- Ethics



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Case Study A Change in Criteria

The Outcomes

- Buyer convened a new panel and rescored.



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Questions?

Stacy Gregg, CPPO, CPPB

Procurement Manager, The University of South Carolina

Stacy Gregg, CPPO, CPPB



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