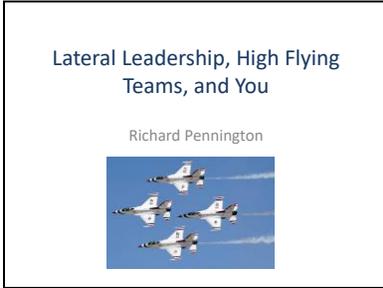


Lateral Leadership, High Flying Teams, and You



Teams are the life blood of organizations. Procurement is part of the circulatory system. Teams need your leadership. This presentation illustrated five principles of lateral leadership. The presentation was based on stories in *Seeing Excellence: Learning from Great Procurement Teams*.

Lead laterally: Choose to help!



This introductory slide was my story of an emergency landing at the Broadmoor Hotel in Colorado Springs—a great aviation team!—and how the pilot in command was overheard after landing saying, apparently to the command post, “I’m not comfortable with that.”



In 2007, Oregon encountered unprecedented flooding. The story of Marscy Stone and the Oregon Disaster Preparedness Work Group is told in *Seeing Excellence*. It illustrates the importance of purpose to a team’s success and the essential elements of effective teaming.

Purpose. Develop, recommend, and document processes to support procurement activities during a state of emergency.

This team used a charter. This was the team purpose. After the 2007 Oregon flooding, there was a feeling among procurement professionals that they could do better in disaster response.

Help the team keep purpose in mind.

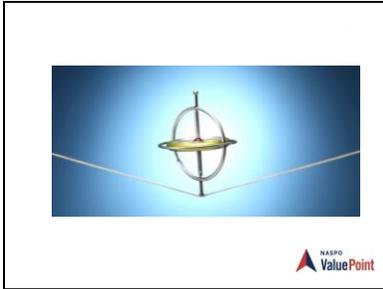


The team went through the typical Tuchman phases of forming, storming, norming, and performing. Their initial enthusiasm threatened to get them off track until they used a "parking lot" approach to up-channel ideas not in procurement's area. They talked about team commitment, shared meeting leadership, and put the purpose on the agenda. They visited the charter often.



The team used table-top simulations to test the tools and procedures, inviting non-procurement professions to assess their adequacy. One cool item: the bracelet containing a flash drive with resources!

This project was awarded the Cronin Award for Procurement Excellence by the National Association of State Procurement Officials.



Focus on Purpose cemented itself as the central principle in *Seeing Excellence*, both from a team discipline and lateral leadership perspective. The gyroscope is my visual metaphor for purpose. If the gyroscope stops spinning, it precesses and falls over. Just like organizations that stop seeking ways to improve.



The second thread that weaves its way through *Seeing Excellence* is the importance of using effective questions. This story was about the use by the City of Longmont, Colorado, of Appreciative Inquiry to improve procurement. The secret: use of appreciate questions. What was a good experience in the past? How does that inform the present? What would perfection look like in the future?



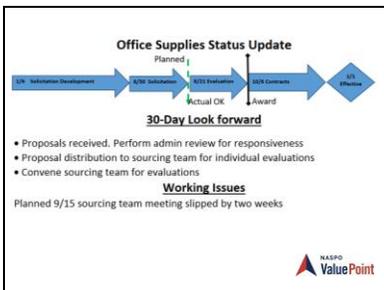
NASPO ValuePoint, the nonprofit that supports the states' cooperative procurement program, has special challenges in managing projects. Lead states follow their own laws and practices, but they deal with policies and practices of the cooperative and other states. This requires some additional tools.



Shown here are members of NASPO ValuePoint’s process improvement team, led by Tim Hay, Cooperative Development Director (front facing left). This training was developed by two members of the process improvement team to training Lead State Contract Administrators. The story of this process improvement team was told in the [December/January 2017 edition of Government Procurement magazine](#).

Confidential Stage		RFI Public			Confidential Stage	
Solicitation Development	Legal Review	RFP and Status Review	Solicitation Posting/Opening Process	Proposal Evaluation	Evaluation Meeting	Award Approval
4-8 Months	1-2 Weeks	2-3 Weeks	2-4 Weeks	4-6 Weeks	2-3 Days	2-3 Weeks
Selection of Sourcing Team Members, appointed and approved by their respective agencies	State legal Review	Confidential/State Requests for Proposals (RFP) due	Post Solicitation on Lead State's procurement system	Lead State Administration Review	Sourcing Team meeting for writing scoring and award criteria	Notification & Award Recommendation Reviewed and Approved
Market Research			Pre Proposal Conferences, if applicable	Individual Proposal Evaluation and Scoring by Sourcing Team	Final Recommendation if applicable	Notice of Award Issued

NASPO ValuePoint’s process improvement team created an Excel schedule that provides common durations for key procurement events and computes suggested milestone dates, planning backwards from the target effective date for the master agreement.



Supervisors and managers need to be aware of key procurement events and dates. Formal communication plans may not be needed, but meeting stakeholder information needs are essential. Use a simple means of communicating updates: key dates, a 30-day look ahead, and a summary of working issues.

To summarize, use just enough structure—not too much—to organize the team’s thinking and action. Too much (unnecessary) structure or bureaucracy can impede creativity.

County of San Diego
2015 NIGP Innovation Award Winner



“Change in any organization will face resistance, but there was strong agreement among our internal customers that they desired better procurement support; and a general feeling among our employees that they wanted to be viewed as professionals and part of a team (eliminating silos).”

– Jack Pellegrino, Director, Department of Purchasing and Contracting

Some structure is particularly important when managing change. San Diego County wanted to get better as an organization and changed to a customer-centric organizational structure instead of the first-in/first-out method of handling agency procurements in the office. This story was told in the [February/March 2017 edition of Government Procurement magazine](#).



Initiatives encountering some resistance to change need some structure: some sense of urgency; enlisting the guiding team; getting the vision and strategy right; communicating the vision continuously; and building on small successes to keep the momentum. And as illustrated here in Jack Pellegrino’s slide, continuously improving.

“ Staff has an ongoing internal mentoring program which benefits both the staff member acting as mentor as well as the less experienced person.” – Cobb County School District

I found this statement on the National Institute Procurement website, as a model response for professional development in the Achievement of Excellence in procurement application by Cobb County Schools, Georgia. The story, “Blended Learning and Mentoring” in Cobb County School District, can be found in the [April/May 2017 edition of Government Procurement magazine](#).

Onboarding and Mentoring in
Cobb County School District, Georgia



- Tailored topics
- Invited review of more senior professionals' work
- Found opportunities for experience, e.g. pre-bids
- Patience
- Staff meeting mini-training

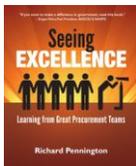
Barbara Bates, referred to in the article, is in the front row, third from the left, next to her procurement director and the executive director of the CCSD Business Services Division. Their mentoring program exceptionally illustrated one lateral leadership principle in particular: step to their side often to help promote collaboration and feedback.

Lead Laterally: Choose to Help

- Help the Team Keep Purpose in Mind
- Use Questions Effectively to Help the Team Learn
 - Use Just Enough Structure to Help Organize Thinking and Action
- Help Promote Collaboration and Feedback by Stepping to Their Side Often
- Help the Team Engage by Committing Your Time and Attention

There is an opportunity for every team member to help lead. "Choose to Help"

These five lateral leadership principles were largely derived from Roger Fisher and Alan Sharp, *Lateral Leadership: Getting Things Done When You Are Not the Boss* (1998, 2009). At the end of the book, a chapter asks, "What if You Are the Boss?" The authors conclusion: the lateral leadership principles still apply if you have power and the authority to be an ultimate decision-maker.



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Here was my final challenge:

1. Find a colleague who will go to a customer's office.
2. Make an appointment and go there; don't just call.
3. When there, ask this question, "What's one thing we can do or stop doing to help you succeed?" [guaranteed the discussion won't stop there . . .]

4. On the way back to the office, talk about the gap—the one between where the customer thinks you should be and where you are.
5. Talk to your supervisor about the gap, maybe put it on a staff meeting agenda.
6. Take one step to start closing the gap.
7. If someone tells you “that’s the way it’s always be done” or “it can’t change,” respond with what the helicopter pilot said in the first slide, “I’m not comfortable with that.”