BEST PRACTICES AWARD APPLICATION: INNOVATION IN TECHNOLOGY

LEVERAGING TECHNOLOGY FOR INNOVATION

Background

Transitioning to a paperless environment is a global best practice. Procurement professionals can readily find webinars outlining the pros and cons of adopting paperless (eProcurement) processes; procurement training courses now distribute electronic surveys to evaluate their trainers; and eSignature software has become easily accessible to entities of all budget sizes.

In 2019 the Hillsborough County Aviation Authority, commonly known as Tampa International Airport (Airport), kicked off a paperless initiative, challenging its twenty-two departments and 680 employees to reduce or eliminate hardcopy documents wherever possible. The Chief Executive Officer (CEO) has incorporated the challenge into the Airport’s 2020 Strategic Objectives:

<table>
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<th>Innovation and Process Improvement</th>
<th>Paper reduction</th>
<th>Reduce printer and copier usage by 30%</th>
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Embracing the challenge, the Procurement Department (Procurement) is leveraging commonplace technology to innovate its processes. Procurement leadership urges team members to think outside of the box to find new ways of delivering its exceptional service to internal and external customers. Procurement’s guiding mantra is “Change calls for innovation, and innovation leads to progress”. This mantra helps Procurement focus on adopting value-added changes instead of backsliding with inefficient workarounds.

Leveraging Technology

In the last six months, Procurement has leveraged several technology solutions to transform its processes from hardcopy to paperless. Procurement has adopted the Agiloft platform, a low-cost customizable software, for its review and approval of solicitation and contract documents; Oracle Sourcing for issuance of competitive non-capital solicitations; DocuSign for internal signature approvals by Airport employees and electronic contract execution by suppliers; and BoardDocs for review and approval of Board Agenda documents. To ensure the technology adds value, Procurement began by mapping its existing solicitation processes.
The following is an overview of a non-capital Request for Proposals (RFP) process. As a point of reference, the average page count of an RFP, including response forms, cost proposal sheets, addenda, internal approval forms and notices is 120 standard 8.5” x 11” sheets with single-side print.

Prior to adopting the Agiloft platform as a paperless solution, Procurement Agents (PA) utilized a process which required routing hardcopies of RFPs for internal approval. The internal approval process starts with the requesting department and involves obtaining approvals from other departments, such as Risk Management, Environmental Services, Finance and Business Diversity. Procurement then reviews the documents before submitting to Legal Affairs for final approval to issue.

On average, the approval of ten individuals is required for RFP documents. Throughout the review and approval process, each individual may require edits. The PA would then have to make the edits, using track changes, print the newly edited hardcopy pages in color, add them to the RFP document packet and re-route for review and approval. Approvals can only be completed sequentially and depending on the scope of edits required, RFP documents can easily double in size before obtaining final approval. The entire process would take approximately two weeks from start to finish.

After adopting the Agiloft paperless solution, RFP document packets can be routed sequentially or concurrently to the same reviewing departments and individuals. Documents are in editable formats utilizing track changes. Agiloft allows reviewing individuals to request changes and lets them reapprove when additional questions or comments need answered. The entire review and approval process now usually takes a few days, without Procurement printing a single sheet of paper.
Procurement also adopted e-signatures for internal approval forms related to Procurement processes. Since implementation, Procurement has created and utilized 19 forms that route electronically for signature, such as Annual PCard verification forms, Solicitation Advertisement Requests, Property Disposition forms, and Property Transfer Forms. To obtain signatures on approved forms, PAs electronically transmit the forms via templates established in DocuSign for e-signatures. E-Signatures have also been implemented for the execution of contracts and other various documents requiring signature. Contracts now route easily through the Agiloft platform for review and approval, prior to the PA submitting the contract in DocuSign for signature.

It took seven individuals from five different departments less than 24 hours to complete an RFP Addendum review and approval process.

Procurement is now issuing RFPs via Oracle Sourcing. Prior to using online Sourcing, Procurement would receive boxes filled with three-ring binders of Respondent’s responses. Technical Evaluation Committee (TEC) members would also receive a copy of each Respondent’s response. Because the binders were so cumbersome and heavy, Procurement purchased mobile carts to help TEC members transport the responses back and forth to TEC meetings.

Environmental savings realized by the Airport from leveraging DocuSign technology.
Utilizing online Sourcing provides a paperless solution to Procurement’s technical evaluation process. Electronic Respondent’s responses are added to a shared Box.com folder, allowing TEC members to electronically review, document and reference their independent evaluation in a Word document during TEC meetings.

There are ten Board meetings each year to select Respondents and award contracts. Prior to the adoption of BoardDocs, the review and approval process of the Board Agenda was entirely a paper-
based process, resulting in thick binders for each Board Member and Airport Leaders that were hand delivered in advance of each Board meeting. The contracts presented to the Board for award and execution were provided separately from the agenda binders.

Similar to Agiloft, BoardDocs enables an electronic review of Agenda summaries culminating in the use of an electronic binder (see below) for the final agenda and Board-related documents.

**Conclusion**

Embracing the Airport CEO’s challenge, Procurement explored a variety of ways to leverage commonplace technology with the goal of achieving process innovation and supporting Airport strategic objectives. As a result, Procurement has seen a significant decrease in the average length of time necessary to complete review and approval of a standard RFP, and obtaining signatory approvals on Airport forms and Respondent contracts. Printing and delivery expenses have been eliminated for RFP Respondents and Board Agendas. The innovations Procurement has adopted, leverages standard features of commonly used business applications in a cost and time efficient manner.