

**Kevin Minor:** 0:05

Greetings. Episode 14 of the NASPO Pulse, the podcast where we are monitoring issues in state procurement. We've got our finger on the pulse. I'm your host, Kevin Minor, and man, what a couple weeks it's been. We were off last week because of the NASPO annual conference, which went really well. I thought we laughed, we cried, we had insightful conversation that aided in elevating the profession of public procurement.

**Kevin Minor:** 0:35

A couple shout-outs real quick. I want to congratulate our new 2022 President-elect, Delbert Singleton. He's the Division Director for Procurement Services State Physical Accountability Authority Division of Procurement Services for the state of South Carolina. I want to wish Roz Ingram, director of State Purchasing and Chief Procurement Officer for the state of Florida, and our incoming 2021 NASPO President the best of luck. Not that she'll need it. I want to thank Lisa Eason, deputy Commissioner, state Purchasing Division, for the best of luck. Not that she'll need it. I want to thank Lisa Eason, deputy Commissioner, state Purchasing Division for the state of Georgia, and our immediate past president, for all the great work she did last year and this year. And, of course, huge shout out to our 2020 NASPO President, George Shutter, chief Procurement Officer for the District of Columbia. George, you showed exemplary leadership and dedication to the public procurement profession and if you are listening, thank you, we definitely need to get you on the pod soon, George. Speaking of the pod, we got a good one.

**Kevin Minor:** 1:40

Today I'm talking with yet another leader in our organization, Megan Homeland. Megan is the Chief Procurement Officer State Financial Services Division of the state of Montana. She is on the NASPA Board of Directors as well as the PR and Awareness Champion. Megan and I discuss Montana's regional top priorities, such as maximizing statewide e-procurement utilization, training and certifications and you guessed it maintaining other responsibilities during a pandemic. Got questions, comments? We'd love to hear from you. Email us podcast at naspo.org. If you haven't already, make sure you subscribe to us on Apple Podcasts, Spotify, Google or wherever you get those sweet podcast listenings. Make sure you check out our NASPO blog that's pulsenaspo.org, and catch up on some procurement articles written by your very own NASPO staff. Let's take that pulse, Megan. Thank you so much for joining us today. How are you?

**Meghan Holmlund:** 2:41

I'm doing well. Thanks for having me, Kevin.

**Kevin Minor:** 2:44

Yeah, thank you so much for joining us. Megan is the Chief Procurement Officer for the state of Montana. Megan, can you give us just a little bit of your experience in procurement?

**Meghan Holmlund:** 2:54

Sure. So I really started my role in government as an accountant for the Montana Department of Transportation. After college I moved back to Helena, which is the capital of Montana and kind of a state government hub. So I got a job there, did accounting for many years and kind of fell into a procurement position and worked there for a few years at the Department of Transportation and Procurement and then about three years ago this month actually I had an opportunity to apply for the Chief Procurement Officer position. And here I am.

**Kevin Minor:** 3:34

Well, happy anniversary almost.

**Meghan Holmlund:** 3:37

Thank you.

**Kevin Minor:** 3:39

Tell us a little bit about Department of Transportation.

**Meghan Holmlund:** 3:43

So our Department of Transportation here their procurement. They do have delegated authority from the Central Procurement Office to do a lot of things on their own so I was able to do all kinds of procurements there, from road maintenance projects to all the commodities they buy like road oil, asphalt, paint, all kinds of things. So it really gave me some good experience in procurement with both bids and requests for proposals, and I learned a lot about a lot of different things.

**Kevin Minor:** 4:19

How has that transferred into your role now?

**Meghan Holmlund:** 4:22

Well, I think it really helped me, coming from an agency, to understand some of the challenges that they face and to know, coming in you know, what policies that the central procurement office has that can be a barrier for agencies, as well as what training needs they have, because it's a little bit different. If you have just been in the central procurement office, you don't, I think, have as well of an understanding of what the agencies have to deal with. So I think it really really helped me coming into the role that I'm in now.

**Kevin Minor:** 4:55

So what are your responsibilities now? What's a day-to-day look like for you?

**Meghan Holmlund:** 5:00

Well, day-to-day, I don't think I have a single day that looks the same. The only consistent thing is that it always starts with coffee. After that, you never know what it's going to look like. It can be anything from implementing a new executive order that the governor issued one day to meeting with the agencies, or answering auditor questions, testifying before the legislature, doing a media interview. It's just a wide variety and it definitely keeps me on my toes. But really my role is to carry out the mission of our bureau and to lead my team with best-in-class procurement services.

**Meghan Holmlund:** 5:45

We strive to administer effective and responsible procurements to maximize the value of public funds for Montana, and our office does a lot of things. We provide professional procurement services to all student agencies for all procurements of goods and services for the state. We also monitor compliance with all state statutes. We establish statewide term contracts for commonly used goods and services and we manage the state's fuel and procurement card programs. And then we also administer our state's enterprise e-procurement system, which we call EMAX, the Montana Acquisition and Contracting System. So we do a lot and we call e-max the Montana acquisition and contracting system. So we do a lot and we do it all with a really small staff. We have 12 people in our office right now, oh wow, just 12.

**Meghan Holmlund:** 6:33

Yeah, yep, it's a lot of work for a small amount of people but I have a really great team it is, but I have a great team and they just amaze me every day with what they can accomplish, so I really appreciate all the work that they do.

**Kevin Minor:** 6:53

Well, and I'm sure all those responsibilities this past year with coronavirus there's been added responsibilities on top of those right.

**Meghan Holmlund:** 7:03

Oh, absolutely. Added responsibilities on top of those, right? Oh, absolutely yeah. So our state, our governor,

actually had a task force for the COVID response and it was handled through our department of military affairs, disaster and emergency services. But we were fortunate that they they looped our office in pretty early on and we actually had one of my managers went out there full time for a while and assisted with the procurement related to the state's COVID response. So that kind of took away one of our resources because we still had all of our normal work to do. But I'm glad that we got to be involved and have a hand in helping our state respond to the pandemic.

**Kevin Minor:** 7:49

You know, it's interesting that you say that we've heard a lot of different experiences from a lot of different states where personnel had to be moved around and even go work full time in other agencies. How did you delegate? Because I know, I'm sure, that with your staff, with all those responsibilities that you were mentioning, you had to delegate the extra responsibilities. How did you go about doing that for your staff?

**Meghan Holmlund:** 8:17

So I had, first off, I kind of had to ask for volunteers because they did want somebody out there in person and I wanted to make sure that. You know, the staff that went out there and was a part of that team felt comfortable being face to face with other people at that time. But I selected one of my managers that I felt would be a really good fit with his business background in procurement, and while he was there, I just really had to step up myself and the other managers on my team to kind of cover his roles and responsibilities. He did have, you know, his laptop and he was set up to be able to still multitask and help with some of his normal duties as well. But it was a challenge and it still is. He still helps out there, not full-time, but he does as needed. So it's been interesting times for sure.

**Kevin Minor:** 9:17

Yeah, absolutely Well. This is a cheers to you and your staff for that. We'll have a couple other COVID-related questions for you and we'll get to that in a little bit. What I'm really interested in talking to you about today is the regional top 10. So every year it's probably not a surprise to our members that every year, naspa puts out the top 10 priorities for state procurement state procurement officers who basically take a survey, state procurement officers who basically take a survey and we, based on that data, we put out a top 10 priorities for state procurement as a whole. So this year we did something new. We did a regional top 10. Now number one of Montana's top 10 regional priorities is maximizing statewide e-procurement utilization and functionality, and I really want to discuss that. So what exactly does that mean to you?

**Meghan Holmlund:** 10:12

So what it means for Montana is that we went through. I guess we were a little ahead of the game if you look at what other states are doing today. We implemented an e-procurement system back in 2015. We implemented several modules and moved to an electronic bidding process. But one of the modules, the contracts module, we didn't mandate initially. Agencies either had their own systems or didn't have time to kind of migrate their data into it or, you know, weren't really hip on change and like they're hard copying files of contracts. So it's been a slow process to try to get agencies into that contracts module.

**Meghan Holmlund:** 11:03

And so one of our big focuses right now in our state is just overall contract management practices and we had a legislative audit a couple of years ago that came out with some recommendations as to trying to get a better grasp on that contract management on a statewide level.

**Meghan Holmlund:** 11:23

Agencies manage a lot of their contracts and we wanted to be able to report on contracts across agencies and we didn't have that capability. So our focus now has been really to do a lot of outreach and training with agencies to show them kind of the benefits of utilizing that module and, you know, kind of building Tying it back to COVID it. Actually in hindsight it was a benefit in that area for us because agencies quickly saw the need to kind of move to

this electronic platform where they can have access to their files, and then our system is also integrated with DocuSign, so we have electronic signatures for executing contracts and so we've actually had more and more agencies expressing interest and we're starting to implement them a little bit slowly because obviously agencies are strapped for resources right now. But that's really been a huge focus for us so that we have kind of that higher level reporting and oversight over all of those agency contracts in one place.

**Kevin Minor:** 12:39

Oversight, but also probably data right. I mean, that's a lot of great data to look at and useful information.

**Meghan Holmlund:** 12:48

Yes, for sure. We can analyze the data to see maybe where we have some overlap or we can gain some efficiencies or cost savings if we, you know, do a statewide contract for services that you know multiple agencies are doing that we don't already have a statewide contract for and things like that, you know helping with FOIA requests and all kinds of things things like that, you know helping with FOIA requests and all kinds of things.

**Meghan Holmlund:** 13:18

So what does that, what did that outreach look like to help kind of increase the utilization? So we meet with agencies, we have big meetings twice a year and then we've just the past couple of years we've held what we call our procurement symposium, where we invite agency staff and we have different topics, kind of like our annual procurement conference, if you will, for our state. So we've really tried to demo the system through those meetings and online webinars, one demos with the agencies to answer any questions they have, really just to educate them at any chance that we have to explain the benefits of the system. We also had to develop a legislative report on the use of the system as well as any duplicative systems that agencies had that they're paying for, that has the same functionality as our enterprise system. So we had to do that analysis and then hopefully that will kind of, I guess, shame agencies into expressing interest into the enterprise system.

**Kevin Minor:** 14:29

Absolutely. Hey, you got to get that utilization some way, have you seen? I know that COVID has definitely probably skewed these results, but you said that you have seen an increase.

**Meghan Holmlund:** 14:42

So the workforce has moved to remote work. They've kind of seen a need for, hey, we would like to have access to all of our files with the tip of our fingers, and we would like to be able to route our contracts through an electronic signature process, and so I think they're now even seeing more of the benefits of why they should utilize this online system, and so we've seen more interest from agencies already as a result of that.

**Kevin Minor:** 15:17

So another one of Montana's top 10 priorities is the training and certification programs for world-class procurement organizations. Can you talk to us about that please?

**Meghan Holmlund:** 15:27

Yes, absolutely. So right before COVID hit, we actually got approved to hire a training coordinator position in our office, which was something we identified as a pretty critical need that we had never had before. We had historically done, you know, in-person series of basic and advanced procurement trainings, and we'd only offered those twice a year. Well, we're requiring training of all of our agencies and, as they have turnover, there just really became a need for us to be able to offer more training, and with the little resources that we have in our office, we said, okay, online training is definitely the way to go. We need somebody that knows how to do this, and so we got a trainer on board shortly before COVID kind of all came along, and then we transitioned to remote work.

**Meghan Holmlund:** 16:23

But she has been just amazing putting this online training together. We're using a platform called Articulate to develop the online training, and then we have actually already launched our basic procurement training, as well as a contract management training. Wow, we've loaded those into our state's learning management system so that we can track who's taking it, if they completed it, all that kind of stuff. So we're working on other modules right now as well, but it's just. The timing could not have been better. So, like you said, silver lining. So it was good timing in that regard that we were already working on that and could launch those trainings pretty quickly.

**Kevin Minor:** 17:06

So we've talked about certification and training on the pod before and the importance of it, certification and training on the pod before and the importance of it, but I'm curious to know your take on why certifications are so important for procurement.

**Meghan Holmlund:** 17:19

So for me, when I started as a CPO, I did not have any kind of certification and so I went through the process of obtaining my CPPO and was successful in that, and I've encouraged all of my staff to try to reach those certification goals as well. I just think it elevates the profession as a whole and shows that this really is a career path that people should consider, you know, as they're entering college and you know, in the world we live in today I mean look at with COVID and all the supply chain issues, and it's just I think it's becoming more visible and I think, that having certifications make it a more credible profession.

**Kevin Minor:** 18:09

Right, right and, like you said, it's ever changing, so these certifications keep you up to date.

**Meghan Holmlund:** 18:15

Correct. Yep, yeah, You're always staying up with what's what's new what are? You know current issues and things like that.

**Kevin Minor:** 18:24

So with COVID-19, everybody's had to do new and innovative ways of of holding sourcing events, trying to use different tools. What's some innovative things that you guys have been doing in Montana with COVID-19?

**Meghan Holmlund:** 18:45

So, you know, we were pretty fortunate that we were in a good position with our e-procurement platform pre-COVID and you know I've had many years under our belts doing electronic bidding, so from that regard, it really wasn't much of a change. The biggest challenge I think we faced, with procurements and sourcing events in particular, was that our state is extremely transparent and so we have a very public procurement process. So all of our evaluation meetings are open, public meetings, and so the biggest challenge we've faced is just leveraging some technology platforms to make those meetings available to the public, and so we are leveraging Microsoft Teams as well as Zoom to make that happen.

**Kevin Minor:** 19:35

Everyone's learning. The virtual meeting is here to stay. So, megan, I want to switch gears just a little bit. You are on the NASPA Board of Directors and this is your first year on the board in a leadership position and with COVID that's been just a little bit different than we normally have done things in the past. How has this year on the board been for you? What's your experience been like?

**Meghan Holmlund:** 20:01

My experience on the board so far has been amazing. Actually, I, you know, was Western Region Chair last year and I've been on the Valley Point Management Board for a couple years now. Quickly, the board has, you know, made resources available, like the IT asset funds and the, you know, COVID call, director calls and involving vendors

in the supply chain and the FBI. And it's just to me, it's been a great experience and one that I hope to continue in the future.

**Kevin Minor:** 20:53

So, Megan, before we go, do you have any advice for our listeners?

**Meghan Holmlund:** 21:00

Well, obviously get involved in NASPO.

**Kevin Minor:** 21:04

Hey, shameless plug.

**Meghan Holmlund:** 21:05

We are all about those but in all seriousness, you know connecting with other people, counterparts, you know doing the same thing in other states through NASPO. Is it's, you know, when I was new in my role and I still kind of consider?

**Meghan Holmlund:** 21:26

myself new even though it's been three years. But it was just an invaluable resource to to just have these connections and be able to reach out and say, hey, how are you doing this in your state? And the Procurement U trainings are excellent. So I would say to somebody new in the field definitely get involved with NASPO or if there's other organizations in your state where you can make those connections, there's other organizations in your state where you can make those connections.

**Meghan Holmlund:** 22:04

Learn as much as you can from those people that have been doing it for a long time, because I think experience in procurement can bring a lot of value. But that would be my biggest piece of advice for anyone listening that's interested in the procurement.

**Kevin Minor:** 22:12

If you're listening to this and you're new in procurement, come on. Doors open, Doors open. Megan Holman, Chief Procurement Officer for the state of Montana. It was my pleasure speaking with you today. Thank you so much.

**Meghan Holmlund:** 22:26

Thanks, Kevin, I had a great time.