

Kevin Minor: 0:00

Greetings Pulse Takers and welcome to the NASPO Pulse. This is the podcast where we are monitoring issues in state procurement. I'm your host, Kevin Miner, and we have a very special episode for you today. I am joined by my guest co-host and NASPO Senior Instructional Designer, samantha Gerard.

Samantha Gerard: 0:18

Hello, thank you for having me.

Kevin Minor: 0:20

Sam, why don't you tell the good people a little bit about yourself?

Samantha Gerard: 0:24

So I went to the University of Connecticut and I actually majored in English, which is far from what I'm sort of doing now. I fell into training and instructional design by accident, but it was a very happy accident. It brought me here and I love what I do. I've been with Nassau about three and a half years and I guess a personal thing about me I love pumpkins, I love growing them, I love decorating with them, I love carving them, and so I guess that's a pretty seasonally appropriate fact about me?

Kevin Minor: 0:58

Absolutely, it is. I am a sucker for pumpkin spice anything the candles, the flavor. You put it in a bottle it'll be cologne. That's fine, and I think that we should make it any time of year. I don't think pumpkin spice needs to be designated for one or two months, you know.

Samantha Gerard: 1:17

I agree with you. A lot of people on social media will disagree with you and come for you when you say that. So just watch out.

Kevin Minor: 1:25

You know, what I'm ready for it Come for me. I've got pumpkin spice for everybody. So, speaking of your instructional designer background, sam, why don't you tell the Pulse Takers who we're chatting with today?

Samantha Gerard: 1:39

Sure yeah. Today we're talking with Christy Sly. She's the training and development director for the Division of Procurement Services in South Carolina. We're going to talk to her all about South Carolina certification program, things like what it used to look like, what promoted that old program to need change and what the current program looks like.

Kevin Minor: 1:59

Right, and Sam has graciously agreed to co-host this episode with me because of her experience in instructional design, and I know that we're going to have a really great conversation with her. We also discussed with Christy what motivates learners to create excitement and what other states can learn from what she's gone through in the process. You got questions, comments. We'd love to hear from you. Email us podcast at naspoorg and, if you haven't already, make sure you subscribe to us on Apple Podcasts, spotify, google or wherever you get those sweet listeners. Make sure to check out the NASPO blog, pulsenaspoorg, and catch up on some procurement articles written by your very own NASPO staff. Sam, do the honors.

Samantha Gerard: 2:46

Of course it would be an honor. Let's take the polls.

Kevin Minor: 2:49

Christy, how you doing.

Samantha Gerard: 2:50

I'm great, Kevin. How are you?

Kevin Minor: 2:56

I'm doing well. Thank you so much for joining us today. We really appreciate you taking the time to speak with us. Christy, you are the training and development director in South Carolina. Before we get started, can you just provide us with a little bit of context of how you got into training?

Kristi Sligh: 3:07

Sure, I was actually or I am actually a youth services librarian, so I have my master's in information and library science. I worked as a youth and family librarian, specializing in teens, but basically I had everyone from zero to 18 and their parents because I was at a branch and yeah, I did that for almost a decade and then I was picked up. I was doing presentations at the conferences, the library conferences, and I got picked up by the state library to be their continuing education consultant and that basically tasked me with doing almost exactly what I'm doing here with procurement. And that basically tasked me with doing almost exactly what I'm doing here with procurement, which was developing a ongoing continuing education program for the state for librarians and library staff. And when I got that position, I was like, look, I'm fine with developing events, I'm fine with.

Kristi Sligh: 4:00

You know all of that, but I know pedagogy. I only I've only worked with kids. I don't know all of that, but I know pedagogy. I only I've only worked with kids. I don't know anything from training adults. And so I ended up they were very generous and they allowed me to get my ATD master trainer certification, and so basically through that I learned that adults are giant kids.

Kristi Sligh: 4:21

The only thing that really changes is that you have to kind of tie in how the material directly involves them, so it's the what's in it for me or with them factor. So you know, that's pretty much the only thing. But yeah, that's how I got into training.

Kevin Minor: 4:39

So, christy, we're here today to discuss the certification program that you are currently developing. Before we do that, though, I think it's important for us that we understand what South Carolina's certification program used to look like.

Kristi Sligh: 4:54

Yeah, absolutely, I can do that. So to give you a little bit of history, there is actually a section in the South Carolina Procurement Code that states that the CPO should develop a system of training, and it clarifies that it must encompass the latest techniques and methods of procurement. And then it also states that the CPO, if they consider it appropriate, can include a requirement for certification for procurement officers. So basically it is in the law that we do training, but it is also kind of and to this point we have not required certification for people to work as procurement officers within the state. It is a voluntary program. With the new development of the division and all of that, there were some consultants that were hired to kind of ease the change management process, and one of the things that they did was actually say here's a sample certification process.

Kristi Sligh: 5:56

The classes themselves were all lecture-based, they were in person, and that nobody really had time to redevelop them, and so when I got there, things were still prone to shifting. You know, we'd get the class schedule and then the instructor would be like oh, I've got a thing that day, and so we'd have to shift everything around. So one of the

things my first goal became just standardizing, when we presented, like, okay, we're going to do this quarterly, give me dates. You know, give me a date a year out, like we're in January, we're going to sit down, you're going to give me your dates for your year and then you can't move them, like you have no excuses, you don't have meetings scheduled. Don't schedule meetings over your classes. So we standardized the classes and the class schedule.

Kristi Sligh: 6:43

The classes were very well received. We did have evaluations at the back and they were very, very well received. But a lot of what I was seeing was this is too much information for the time frame. I came in with my little naive like well, what? What are your activities? What are you? You know? How are you doing this? What are your knowledge checks? And they're like honey.

Kevin Minor: 7:04

No, what's a?

Kristi Sligh: 7:05

knowledge check.

Samantha Gerard: 7:07

We don't have time for that.

Kristi Sligh: 7:08

Like well, what information of this do they really need to have? All of it? Okay, to be fair, intro to procurement we had a 12 day class that was taught by one of our CPOs. Brilliant class, very much a knowledge dump, but the way that he did it was extremely helpful and it was mostly he was like it's a FAM course, it's a familiarization course, because the first six weeks of it were like here's the code, here's what it means, here's how you do an IFB, here's how you do an RFP, you know, like those kinds of just step-by-step-by-step-by-step things. And then the last six weeks were like more using that towards purchasing technology, which is what the course was supposed to be, and so like super, super, super helpful. Also, six and a half hours a day of lecture, 12 times.

Kristi Sligh: 8:04

And so the feedback was I loved that class. That class was amazing. I'm going to take this class every time it's offered because I get something new out of it every time and that is an insanely wonderful compliment. That is just like a brilliant compliment. We got the same with our legal class too, which was four to five days. Beautiful compliment. I want you to want to come to our classes, but also as an instructional designer. What that tells me is people's needs are being met.

Samantha Gerard: 8:32

Oh, that's interesting. Yeah, if you need to revisit the same class over and over to learn new things, we got to break it down differently.

Kevin Minor: 8:41

So so, Christy, is that kind of what prompted the need for change it?

Kristi Sligh: 8:46

is. It is One of the things that came out of one of the procurement directors conferences was I ended up being able to form a advisory committee of procurement directors from the field, and so I have about seven of them, and there was someone on our floor so that our floor was represented as well, and we'd meet and discuss like what is it that you all actually need? You know, what are you seeing your people struggle with? Because we can tell you what we're seeing, but what we're seeing isn't the picture. We went through and standardized all of the position descriptions for the state procurement stuff and, like, actually sat down and discussed what does a procurement

specialist need to know? What does a procurement specialist need to transition to procurement specialist to, to transition to procurement manager, procurement manager to procurement director? What are the different education levels? What are the different experiences that they need? What do they need to be doing on the job? At least from a designer standpoint, I have okay, I'm designing for these people, right.

Samantha Gerard: 9:49

You mentioned a lot of areas where the old certification program had space for improvement. After identifying those areas, what was sort of the journey to when you are now? Where are you now in this new certification program?

Kristi Sligh: 10:06

So we got our trainers trained in 2019 and we were all set. Everybody loved it. It was really super successful. Amazing. I was so thrilled. We had a place to go, we had people who were willing to help and change and everything. And then, bam, covid.

Kristi Sligh: 10:26

And all of our classes. All of our classes were instructor led, classroom based, and all of the subject matter experts and everyone who was willing to help were suddenly like no kid, we do not have time. So, basically, our courses are being redeveloped with online in mind, they're being developed with activities and breakpoints, and all of that to make sure that our objectives are being met. I'm developing knowledge checks to go with the courses and eventually the certification will also include a certification exam. That goes ties back to the knowledge checks, because I feel there's a difference between a certificate program, which is what we had, where it's time and seat. You know, you came to the class. You may have slept through the whole thing, but you came. So congratulations, you have a certificate that says that you did all of our classes.

Kristi Sligh: 11:25

And we were also super reliant on other, like outside sources for classes and that got expensive, especially for the poly subs, to do these, to do these outside classes, because we were using the outside classes for theory and then the our classes were kind of the how South Carolina does it really quick, quick down and dirty Right. So trying to move away from using those outside sources and bring the information that they're providing in the general. What is procurement? The general? You know how to do a contract or how to do contract management, all of that we can provide that theory without having someone take another course, that theory without having someone take another course. We can recommend other courses, like we can recommend hey, take, you know, the procurement U course, or take the NIGP course or whichever you know, take this course through ICN. But I don't think we should be reliant on people doing that to have the knowledge to bring to our course.

Kevin Minor: 12:23

Samantha, I know you have a lot of experience in course design. What is? What do you feel? How does that statement kind of make you? How does that resonate with you?

Samantha Gerard: 12:33

Yeah, so having additional resources outside of your required training or what you're trying to learn, I mean that's great, right, it's. It's so good to have supportive resources that you can turn to Google you know all of our anything. I mean there's so much out there for any topic, right. But, um, when you are developing training for a specific audience, um, you cannot rely on that additional, on those additional resources. It's great, everyone knows they're out there, but you need to be able to cover what is needed for that learning group in your training. Without a doubt, you have to know your audience, you have to know what they need to learn and you have to cover those things specifically in the training.

Kevin Minor: 13:21

Yeah, that's interesting. That's also not something that I ever thought about. I would just point Me myself. Somebody had a question. I mean, google's a verb, now right, so I would just tell them to Google it and Google will give you a great overview right of the procurement process, but that doesn't tell you how to be a procurement professional right.

Samantha Gerard: 13:40

It doesn't tell you about the actual details of it. So, with all this work that you've put into the current program that you're developing, what do you, what are your hopes and dreams for this? How do you want this to look five, 10 years down the line?

Kristi Sligh: 13:53

Yeah, I mean, my hope is that we actually have a program that is very, very functional. So if you take our level one certification whatever the name of it may be in the future if you take that level one certification whatever the name of it may be in the future if you take that level one certification, you can work as a procurement officer within South Carolina and at an agency that's maybe not necessarily certified to purchase, to do large purchases, but you should have a solid basis in procurement. If you come in from another state, we are going to have that exam so you can maybe test out. You know if you, if you don't, you know and you'll be able to know. With the knowledge checks and that sort of stuff, you'll be able to know where your weak spots are and what you need to work on and that sort of stuff. It's all based on objectives and understanding who needs what when.

Kevin Minor: 14:47

What's some advice that you can give to other states who need their own training program, or maybe that they're looking for their own training program? What's some takeaways from this process that you can give to them?

Kristi Sligh: 14:59

The first thing I would say would be know your audience. It's really important to know who you're training for and what you are, what your measurable outcomes should be for each of your courses. The second thing that I would say is believe in your SMEs and that comes from conversations that we have had at STCC and that sort of stuff. But the subject matter experts yes, they know procurement and yes, they may not know training. It is a heck of a lot easier to get them trained to do training than it is to teach someone who has only done training 20 years of procurement knowledge. That is. It's vitally important to have at least have them in the room when you're doing your trainings, because there are going to be questions and people can smell BS, right, like you asked me a question about doing something or this has come up in my situation and how would it, how would you address it? And I'm just going to be like deer in the headlights because I don't know and people. That's going to discredit everything.

Kevin Minor: 16:10

Right.

Kristi Sligh: 16:11

If you do that, so at least have someone who does know in the room. If you don't have them teaching your classes, but I would recommend you know people love to learn and if you have people, they're going to obviously be people that you look at and you go. Never would I ever put them in front of a class. Yes, that happens, but there are going to be those people that you see, that you're like, you know, you're kind of a natural. Let's hone your skills and that's absolutely I would recommend doing that.

Kristi Sligh: 16:41

The other thing is remember that training is frequently the first interaction that people have with your agency. If you are trying to change the culture of procurement within your state, if you are trying to change the way that people see your organization, whatever the case may be remember that training is frequently your marketing arm. Training

is how people interact with you from the beginning, because they don't know who you are or what you do. And this is your chance to set a great example and not just tell people how to do what they're doing, but also explain to them why they're doing what they do and why it's important and how it fits in. And you can take someone who's burnt out and blah, blah, blah, and you can give them that passion back just by emphasizing why you're doing what you're doing, you know, because that is so important for all of this.

Kristi Sligh: 17:41

So just, it's really easy, because the trainers are frequently the oddballs in a procurement organization. Often we're staffs of one, sometimes we're staffs of two, you know, sometimes there's more people, depending on the organization and how structured your certification program is and all of that. But I'm talking specifically for those people who have maybe one trainer, maybe no trainer, that they're often in the weeds and you're just like I had. This is a little bit of a off thing, so it's probably to get cut out. But I had a mentor in library school that said that being a youth services librarian was the best job ever, because you could be sitting under a desk covered in glitter cutting up paper and everyone would be like what a genius. So like your trainers.

Kristi Sligh: 18:30

They're the weirdos right, and they're often the people that don't speak your language and everything, but remember that their job is also vitally important and you really do need to work with them and make sure that they have those resources and provide them the knowledge not just of what to do like you can give them the manuals and you can give them policies and procedures but also how it should be done, and they really are going to need someone who knows that to guide them.

Kevin Minor: 18:58

So now we're going to play the key takeaway game here. Sam and Kevin will present key takeaways from the interview. Christy, it's your job to decide whose takeaway is better and, because I'm a gentleman, I will let Sam go first.

Samantha Gerard: 19:17

Okay, how many do you want me to do?

Kevin Minor: 19:19

Oh, you have multiple ones, I'm intimidated, that gauntlet was thrown, man.

Samantha Gerard: 19:26

I think they probably all go together, but I'd say there's three, not buzzwords. I would say there's three terms, christy, that you used throughout all of your explanations that I think are really important for people to remember when they are developing their own training programs. One of them is standardization. You can't really create training without some sort of um instruction on what, what needs to be included and what needs to be covered and tested on. And the standardization doesn't necessarily need to be like this long written book of these are all the things um, but there needs to be some sort of path um to lead training it.

Samantha Gerard: 20:17

Because you know you can do a training on how to prepare for a hurricane, but if you spend the first hour of the training talking about the history of hurricanes, it's not really going to tell anybody what you really need them to know, right? Um? The other important word that you use many times was the word functional um. Functional training that you can actually use in your job, use in your day-to-day, you know, your day-to-day application of this is what I learned and this is how I'm going to apply it in my professional life. That's very important.

Samantha Gerard: 20:53

And then I don't think you actually use the term recertification, but you touched on the sort of idea of continuing

education. After you take a certification program and you become certified, how do you sort of continue that certification and what you learned over the years in your position and as you advance in your career? It doesn't have to be a formal recertification, but it could be, you know, just taking more classes or getting more involved in training yourself and things like that. So those are the three main things I took away from this that I think are very important.

Kevin Minor: 21:30

I would like to not share mine, yeah that was a knockout.

Kristi Sligh: 21:37

Yeah, I, yeah, winner by default.

Kevin Minor: 21:41

I would like to also say what Sam said. One of my takeaways and look, a lot of this is new for me. I don't know very much about designing courses. I'm not really a trainer. I have been trained before to an extent, but I've never. I don't do much on the other side of that. So I really found it interesting you talking about not relying on outside resources to do the training and to really rely and have confidence and put the time and energy and work into your own program so that you have all of those educational tools that you need that are centered around the needs in your office and the needs in your state, because going outside of that, while it's good, reliable training may not be exactly what your state is looking for. So that's something that I learned maybe even more than a takeaway is just that you really need to be relying on in-house and your SMEs more than necessarily going out somewhere. So that's that's one thing that I learned. So, um, that being said, christy, who, uh whose takeaway are you taking away with you today?

Kristi Sligh: 23:01

I am going to go with Sam's, but I am also going to add the caveat that yours is applicable especially in that recertification program, because you don't want to rely on outside resources so much to do your initial trainings. You want to make sure that people know what's going on within the state and everything, but you can absolutely use them for recertification and bring something back. Go to a conference, bring something back. Go to take a training, bring something back, so you can absolutely do it. So I think that the two go together. I'm going to give it to Sam, though.

Kevin Minor: 23:36

Yeah, absolutely. I am too. It's beginner's luck.

Samantha Gerard: 23:44

I'll take it so before we go. What is? Just one last thing, one piece of advice you want to share with our listeners?

Kristi Sligh: 23:52

Huh, Okay, um, don't be afraid to be ridiculous. Uh, oftentimes, procurement, training and procurement we think of it as law, we think of it as so, very like stayed and it it can get a little dry, um, but don't be afraid to change it up. Don't be afraid to have fun games or do things in a different, from a different perspective, or have people compete or whatever you need to do to punch it up. And don't be afraid to be silly, because those are frequently those unexpected things, are frequently the things that people remember from your training, and so if you really want to make a point, you can do it in that way and it's still professional, it's still fun. But you know, I made our executive leadership make puppets for one of our strategic planning, things Like I was like here's your, you know, do your puppets.

Kristi Sligh: 24:45

And so we did superheroes, supervillains and sidekicks, and they had so much fun, but it it did the most like it

spurred the most wonderful conversation about how do you? You know, I see this side of you, but no one else sees the side of you. I want, like I think you guys really need to work on being more human and this fun side, because it breaks barriers. So don't be afraid to to uh, to be kind of ridiculous and do things that are really strange, because those are the takeaways that you'll get from it.

Kevin Minor: 25:25

Christy Sly, the training and development director for the division of procurement services in South Carolina. It has been a pleasure speaking with you today. Thank you so much.

Samantha Gerard: 25:34

Yes, christy, thank you so so much. Yeah Well, thank you for having me, christy. Thank you so so much.

Kevin Minor: 25:38

Yeah, well, thank you for having me. So, sam, what do you think? You're a natural at the takeaway game.

Samantha Gerard: 25:43

Well, thank you. I think Christy set us up for success there, but you know, I do feel a bit of triumph. I did win, so you know.

Kevin Minor: 25:52

Revel in it that going for me. So what do you think about Christy's experience kind of cultivating this program?

Samantha Gerard: 26:01

What I've learned talking to other people working in training is that, unfortunately, that it's pretty standard kind of coming into somewhere where there's a program that's in place but it's not as good as it could be or there's a lot of room for improvement.

Samantha Gerard: 26:16

That's why we're here, though right, that's why Christy is so important in her office and it's just really important that I think we need to just like collectively as a whole, need to take training more seriously. I would say first, I totally agree with everything Christy said in terms of you know, get a little wild, get a little crazy creative. Definitely think outside the box and don't be afraid to stand up for your training program If you feel like something's missing or if you feel like your learners need something more than what you're currently giving them. Push for that.

Kevin Minor: 26:54

Thanks so much for listening to the Pulse today. Again, make sure to subscribe to us on Apple Podcasts, spotify, google today, again, make sure to subscribe to us on apple podcast, spotify, google. And make sure to check out the naspo blog, pulsenaspoorg.

Samantha Gerard: 27:05

I'm kevin minor and I'm samantha gerrard, stay classy procurement community oh, anchorman reference.

Kevin Minor: 27:11

I like that. Oh yeah, bye.