

# Leveraging AI to Boost Your Procurement Efficiency

Transforming Public Sector Procurement through AI

2025.08.07





# Introductions

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# Welcome to the Future

## Today's Agenda

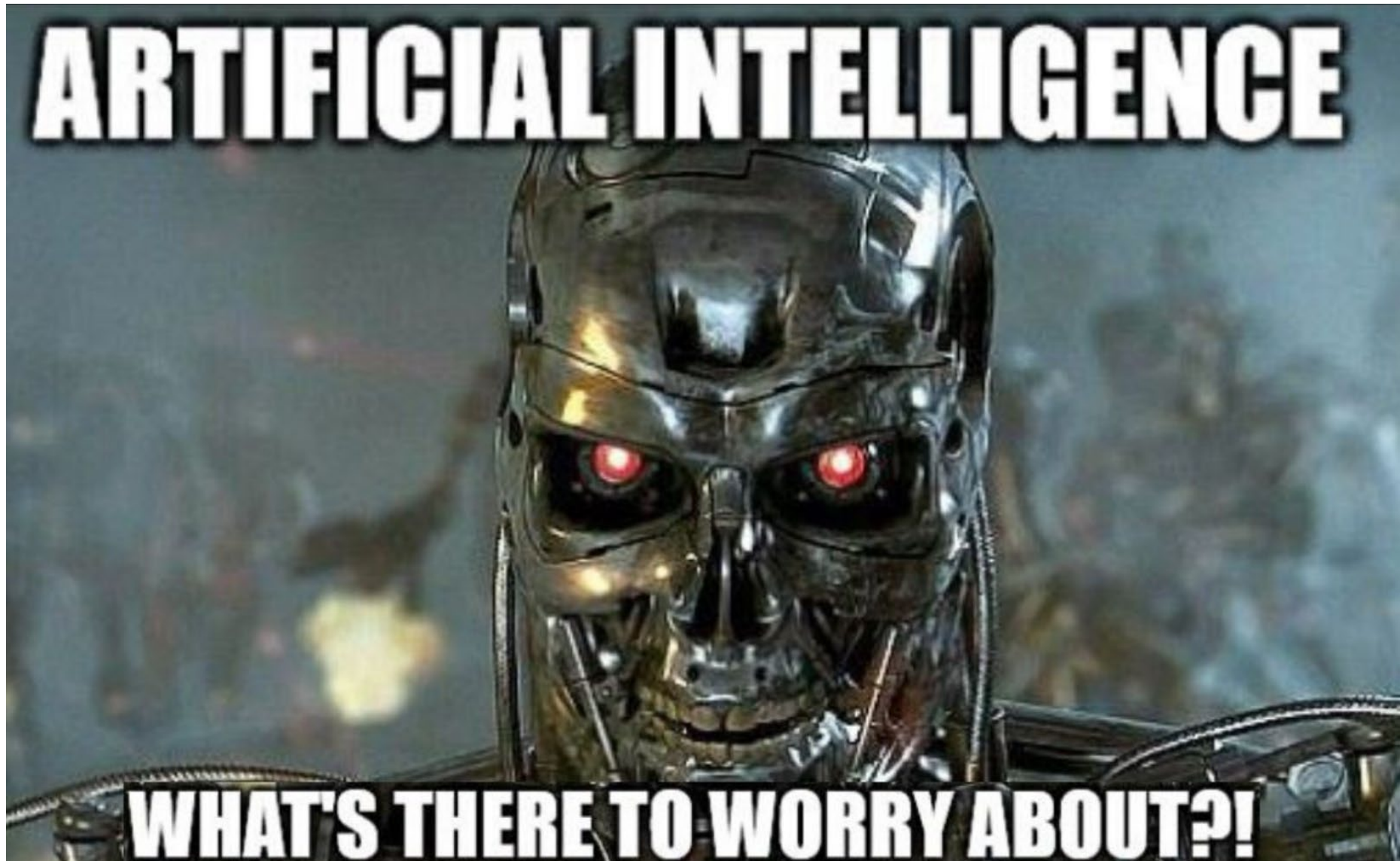
- A Brief Review of Previous Technology Revolutions
- The AI Road Less Traveled
- KaizenIQ™ Solicitation Builder
- Access & Utilize Solicitation Builder... For Free



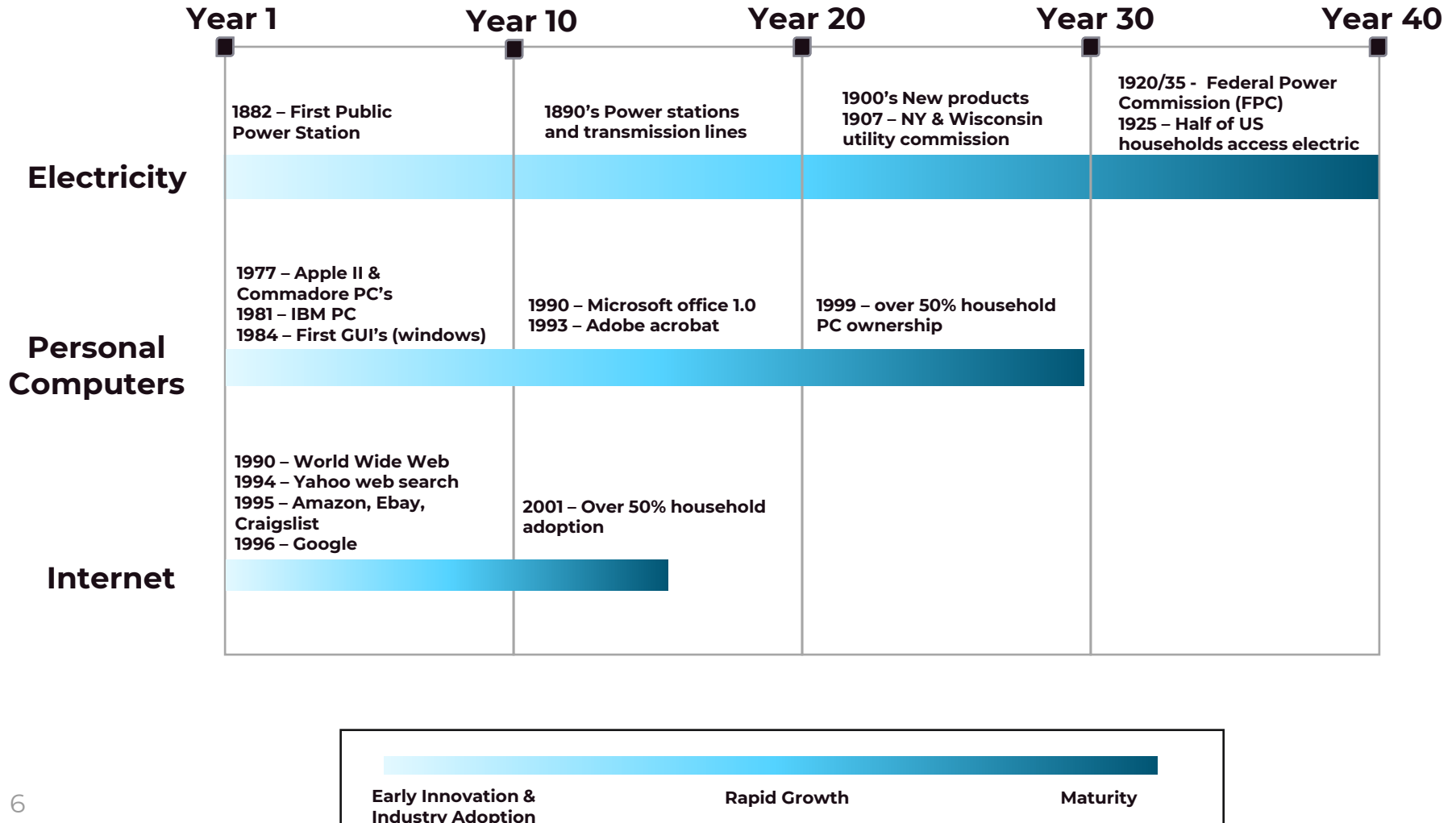
# Learning Objectives

- **Understand AI's Role in Public Procurement** – Gain insights into how AI is transforming public sector procurement, including key challenges, opportunities, and practical applications for improving efficiency and decision-making.
- **Explore Practical Applications of AI in Procurement** – Identify key areas within the procurement process where AI can provide the most value, such as speeding up solicitation development, improving accuracy, and enhancing compliance.
- **See AI in Action and Apply It to Your Workflow** – Experience a live demonstration of AI-powered procurement tools and leave with practical strategies for integrating AI into your procurement processes to streamline workload, enhance accuracy, and improve outcomes.

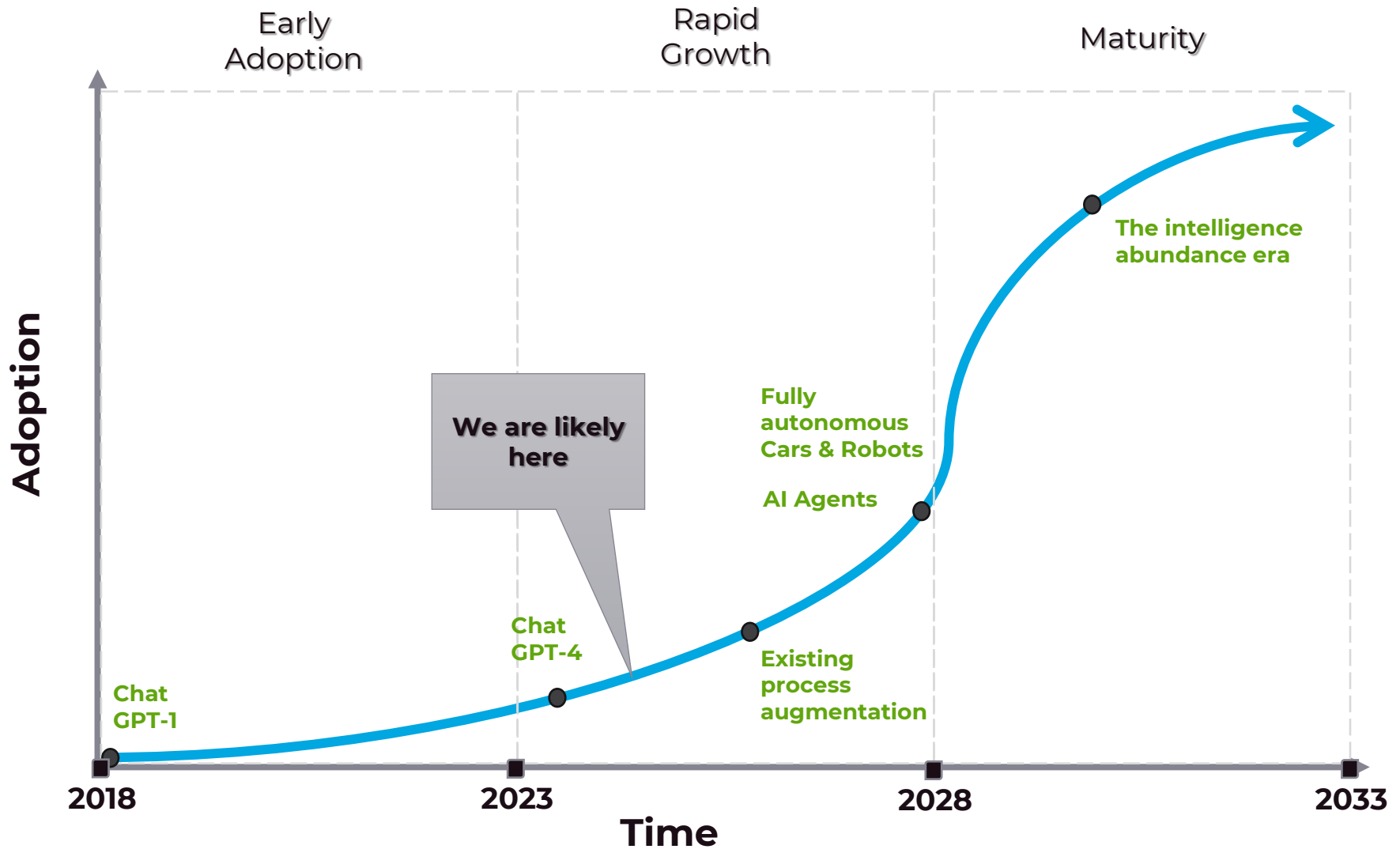
# The AI Adoption Curve



# The Adoption Timeline



# The AI Adoption Curve





# Procurement & AI: Two Paths

## PROCURING AI

DATA PRIVACY  
& SECURITY

SYSTEMS  
INTEGRATION

WORKFORCE  
IMPLICATIONS

REGULATORY  
COMPLIANCE

ETHICS  
& BIAS

## LEVERAGING AI ACROSS PROCUREMENT

 **equalis**  
GROUP

 **KaizenIQ**  
INTELLIGENCE. SIMPLIFIED.

Solicitation Builder

EASY TO  
USE

CONSISTENT  
QUALITY

FAST &  
FREE



# AI: The Procurement Power Tool

## Efficiency & Speed

- Reduces solicitation development timelines from weeks and hours to minutes
- Overcomes writer's block with intelligent content suggestions

## Improved Accuracy & Consistency

- Pulls current industry standards, specifications, and trends
- Ensures uniform application of procurement standards, language, and processes across the organization

## Greater Value & Transparency

- Enables data-driven drafting
- Promotes fairness

## Workforce enablement

- Supports staff with limited resources, time, or subject expertise
- Frees up time for strategic sourcing and supplier engagement

**Bottom Line:** AI tools don't replace procurement professionals; they empower them to deliver better outcomes, faster.

# Build Your Own AI Workflow vs. Purpose Built Tools

Factor	Build Your Own AI Workflow	Use Tools like KaizenIQ™ / Open Gov / Beacon Bid
Learning Curve	<b>High</b> – Requires staff training on AI prompts, tools, and workflows	<b>Low</b> – Intuitive interfaces with procurement-specific guidance
Time to Value	<b>Slower</b> – Trial-and-error before results are usable	<b>Fast</b> – Ready to generate compliant documents from day one
Customization	Requires <b>manual setup</b> and maintenance	Comes <b>pre-configured</b> for public procurement needs
Risk	<b>Higher</b> – Greater chance of errors or non-compliance	<b>Lower</b> – Built-in best practices and version control
Support	<b>Limited</b> – Internal resources must manage AI use	<b>Included</b> – Access to training, support, and updates
Integration	<b>Complex</b> – May need IT or API setup	<b>Seamless</b> – Designed to drop into existing platforms
Cost Efficiency	<b>Hidden costs</b> in time, training, and trial of various AI models and prompt engineering	<b>Transparent</b> – Typically offered as part of cooperative membership or SaaS subscription

**Bottom Line:** Purpose-built platforms eliminate guesswork and reduce risk, allowing your team to focus on value, not just functionality.

# SOLICITATION BUILDER

An effortless experience for you

THOUSANDS OF  
HOURS INVESTED

ONGOING ENHANCEMENTS

EXTENSIVE TESTING

USER EXPERIENCE

DEVELOPMENT

PROMPT ENGINEERING

AI MODEL SELECTION

PLANNING



## The Solicitation Builder Odyssey



15+ Agencies



Dozens of  
people



Countless  
Prompts



14+ months

# Step 1: Input Scope Values

← Office & School Supplies

Input Scope Values

Scope Description

Evaluation Criteria

Questions

Next Steps

Solicitation Name \*

Office & School Supplies

Procurement Type \*

Sealed Proposal

Publication Date

08/04/2025

Annual Spend in Category

\$225,000.00

Current/Potential Suppliers ⓘ

Office Depot × Staples × Office Solutions 360 ×

Additional Details ⓘ

Office & School Supplies district-wide

SAVE DRAFT

Continue

- Complete the form
- Minimal information is required
- Include the names of 3-7 potential suppliers

# Step 2: Refine/Edit Scope Description


Input Scope Values

Scope Description

Evaluation Criteria

Questions

Next Steps

 **\*\*Overview\*\***

Butte School District No 1, MT seeks to establish a comprehensive procurement contract for office and school supplies to serve all educational facilities, administrative offices, and support services throughout the district. This solicitation encompasses the full spectrum of consumable materials, educational resources, and administrative supplies necessary to support daily operations across elementary, middle, and high school levels, as well as district administrative functions.

**\*\*Products and Services Required\*\***

**\*\*Classroom Instructional Supplies\*\***



- Writing instruments including pens, pencils, markers, highlighters, and specialty writing tools
- Paper products encompassing copy paper, construction paper, chart paper, newsprint, and specialty papers in various sizes and colors
- Art supplies including paints, brushes, crayons, colored pencils, glue, scissors, rulers, and craft materials
- Educational manipulatives and hands-on learning materials for mathematics, science, and literacy instruction
- Poster board, foam board, and display materials for classroom presentations and bulletin boards
- Binding supplies including spiral coils, binding covers, laminating pouches, and related finishing materials
- Storage solutions for classroom organization including bins, folders, binders, and labeling systems



**\*\*Administrative Office Supplies\*\***



- Technology accessories including printer cartridges, toner, USB drives, cables, and computer peripherals
- Filing and organizational systems including file folders, hanging folders, storage boxes, and cabinet supplies
- Presentation materials such as easel pads, dry erase boards, markers, and projection supplies
- Communication supplies including envelopes, letterhead, business cards, and mailing materials
- Desk accessories and organizational tools for administrative staff workspaces
- Reference materials, planners, calendars, and scheduling resources
- Forms, record-keeping materials, and documentation supplies specific to educational administration

**\*\*Maintenance and Facility Supplies\*\***

- Cleaning supplies suitable for educational environments including sanitizers, disinfectants, and surface cleaners
- Paper towels, tissues, toilet paper, and other restroom and hvacne supplies

 Copy  Edit

  Save Draft

 Refine Scope  Continue to Evaluation Criteria

- Use “**Edit**” to make changes directly in the text
- Use “**Refine Scope**” to make substantive and/or stylistic changes
- Save your work at any time

# Step 3: Refine/Edit Evaluation Criteria

**Input Scope Values** | **Scope Description** | **Evaluation Criteria** | Questions | Next Steps

**\*\*Price - 40% Weight\*\***

The pricing evaluation shall assess the total cost of ownership for office and school supplies throughout Butte School District No 1, MT facilities. Evaluators will examine unit prices for core products including writing instruments, paper products, art supplies, cleaning materials, and technology accessories required across elementary, middle, and high school levels. The analysis will consider volume discounts reflecting the district's purchasing power for approximately 5,000 students and 600 staff members. Delivery charges, handling fees, and any additional surcharges must be clearly itemized and included in the total cost calculation. Price stability mechanisms and provisions for market adjustments during the contract term will be evaluated for budgeting predictability. The evaluation will assess seasonal pricing variations to accommodate peak demand periods at the beginning of academic years and during specific instructional periods throughout Butte School District No 1, MT.

**\*\*Technical Capability and Product Quality - 25% Weight\*\***

This criterion evaluates the vendor's ability to provide comprehensive office and school supplies meeting the educational requirements of Butte School District No 1, MT. Assessment will include the vendor's capacity to supply classroom instructional materials such as educational manipulatives, hands-on learning materials for mathematics and science instruction, and specialty papers in various sizes and colors. The evaluation will examine product quality standards for educational environments, safety compliance for age-appropriate materials, and availability of detailed product specifications. The vendor's inventory depth across administrative office supplies including printer cartridges, filing systems, presentation materials, and facility maintenance supplies will be assessed. Technology integration supplies including digital storage solutions, charging stations, and interactive whiteboard accessories must demonstrate compatibility with educational technology requirements. Product warranties, return policies for defective items, and quality assurance programs will be evaluated to ensure consistent supply quality for Butte School District No 1, MT operations.

**\*\*Service Delivery and Support Capabilities - 20% Weight\*\***

The evaluation will assess delivery and distribution capabilities serving all Butte School District No 1, MT facilities throughout Butte, MT. Vendors must demonstrate flexible delivery options including standard delivery to central administrative locations and direct delivery to individual school sites when operationally advantageous. Emergency delivery services for urgent supply needs will be evaluated for responsiveness and reliability. The assessment will examine inventory management support capabilities including usage reporting, reorder recommendations, and online ordering platforms with appropriate security controls and spending limit configurations. Account management structures must provide dedicated service to Butte School District No 1, MT with personalized support, product recommendations, and problem resolution capabilities. Multiple ordering methods including online platforms, phone ordering, and electronic procurement integration will be evaluated for operational convenience and efficiency.

**\*\*Experience and References - 10% Weight\*\***

This criterion evaluates the vendor's demonstrated experience serving public school districts with comprehensive office and school supply procurement contracts. The assessment will examine the vendor's track record in managing large-scale educational supply contracts similar in scope to Butte School District No 1, MT requirements across multiple facilities and educational levels. References from

[Copy](#) [Edit](#)

[←](#) [Save Draft](#) [Refine Evaluation Criteria](#) [Continue to Questions](#)

- The Evaluation Criteria generated are based on your Scope Values and final Scope Description iteration
- Edit and Refine as needed
- Save your work at any time



# Step 4: Refine/Edit Questions

The screenshot displays a software interface for creating procurement questions. It features a progress bar at the top with five steps: 'Input Scope Values', 'Scope Description', 'Evaluation Criteria', 'Questions' (the current step), and 'Next Steps'. The main area contains a list of 11 questions related to educational supplies for Butte School District No 1, MT. Below the questions, there are three buttons: 'Copy', 'Edit' (circled in red), and 'Info'. At the bottom right, there are two buttons: 'Refine Questions' (circled in red) and 'Complete'.

Input Scope Values > Scope Description > Evaluation Criteria > **Questions** > Next Steps

1. How will your company ensure consistent availability and delivery of the complete range of educational manipulatives and hands-on learning materials required for mathematics, science, and literacy instruction across elementary, middle, and high school levels within Butte School District No 1, MT?

2. What specific inventory management system will you provide to Butte School District No 1, MT personnel to track usage patterns, generate reorder recommendations, and maintain appropriate stock levels across all district facilities?

3. Describe your emergency delivery capabilities and response times for urgent supply needs to individual school sites throughout Butte, MT, including your process for handling requests outside standard delivery schedules.

4. What volume discount structure will you offer Butte School District No 1, MT based on the anticipated annual supply needs for approximately 5,000 students and 600 staff members, and how will these discounts be applied across different product categories?

5. How will your online ordering platform accommodate multiple authorized users from Butte School District No 1, MT with varying security controls and spending limit configurations for different administrative levels and school sites?

6. What price stability mechanisms will you implement throughout the contract term to provide Butte School District No 1, MT with predictable budgeting while accounting for necessary market adjustments?

7. Describe your quality assurance program for educational supplies, including your process for handling returns or exchanges of defective items delivered to Butte School District No 1, MT facilities.

8. What dedicated account management structure will you establish specifically for Butte School District No 1, MT, including the qualifications and availability of assigned personnel for personalized service and problem resolution?

9. How will you accommodate seasonal demand variations for Butte School District No 1, MT, particularly during peak requirements at the beginning of academic years and specific instructional periods?

10. What warehousing or distribution capabilities do you maintain within Montana to support efficient delivery and emergency response to Butte School District No 1, MT locations?

11. Describe your experience managing comprehensive office and school supply contracts for public school districts with similar enrollment and facility requirements to Butte School District No 1, MT.

Copy Edit Info

Save Draft Refine Questions Complete

- The solicitation questions generated are based on your final Evaluation Criteria, Description & Inputs
- Edit and Refine as needed
- Save your work at any time

# Step 5: Next Steps

**Input Scope Values** > **Scope Description** > **Evaluation Criteria** > **Questions** > **Next Steps**

**Your Solicitation** [EXPORT](#)

**Supplier List** [EXPORT](#)

Equalis Awarded Suppliers (2)

[ODP Business Solutions](#)

W.B. Mason

Other Potential Respondents (12)

Staples Advantage

Office Depot Business Solutions Division

School Specialty

Amazon Business

WB Mason

**ODP Business Solutions**

[R10-1128A](#)

ODP Business Solutions (Office Depot), headquartered in Boca Raton, FL, is a leading national office-products distributor. It operates multiple distribution centers across the U.S. and can deliver office and school supplies directly to Butte School District No 1 in...

[Next ->](#)

COMPLIANT  
ETHICALLY - PROCURED

- Export your final Scope Description, Evaluation Criteria, and Questions in your preferred format; copy and paste into your solicitation template
- Review the list of current awarded suppliers as applicable
- Review and connect with the potential suppliers to maximize competition
- Access and refine your solicitations at any time – simply log into KaizenIQ to see your Active and Closed solicitations

# Your Final Product – Ready To Use

## Instantly Usable Deliverables

- Scope Description
- Evaluation Criteria
- Questions
- Ready to insert into your agency's template, procurement systems, or ERP platform

### Questions:

1. How will your company ensure the timely delivery of educational materials and literacy instruction to all schools in Butte School District No 1, MT?
2. What specific inventory management system will your company use to track stock levels across all schools in Butte School District No 1, MT?
3. Describe your estimated annual volume of individual school orders for standard delivery.
4. What volume discounts will you offer for anticipated annual orders, and how will these discounts be calculated?
5. How will your company ensure the timely delivery of educational materials to all schools in Butte School District No 1, MT?
6. What price stabilization mechanisms will you implement to protect Butte School District No 1, MT from price fluctuations?
7. Describe your quality control process for handling returns and defective items.
8. What dedicated personnel will you assign to Butte School District No 1, MT to ensure the timely delivery of personalized services?
9. How will you accommodate special requests, particularly during instructional periods?
10. What warehouse facilities will you use for the storage and delivery of educational materials?
11. Describe your experience with other school districts in Montana.

### Evaluation Criteria:

#### \*\*Price - 40% Weight\*\*

The pricing evaluation shall be based on the lowest price for the required materials, including delivery charges, handling fees, and other costs. The total cost calculation shall include all costs associated with the contract term. The evaluation will consider variations to accommodate instructional periods throughout the year.

#### \*\*Technical Capability\*\*

This criterion evaluates the supplier's ability to provide the educational materials required by Butte School District No 1, MT. The evaluation will consider the supplier's experience, track record, and ability to meet the district's needs. The evaluation will also consider the supplier's ability to provide personalized services and to accommodate special requests.

#### \*\*Service Delivery and Support\*\*

The evaluation will assess the supplier's ability to provide timely delivery of educational materials throughout Butte School District No 1, MT. The evaluation will also consider the supplier's ability to provide operational support and to respond to requests for assistance. The evaluation will also consider the supplier's ability to provide security controls and to protect the district's information.

## Solicitation Name: Office & School Supplies

### Scope Description:

#### \*\*Overview\*\*

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#### \*\*Products and Services Required\*\*

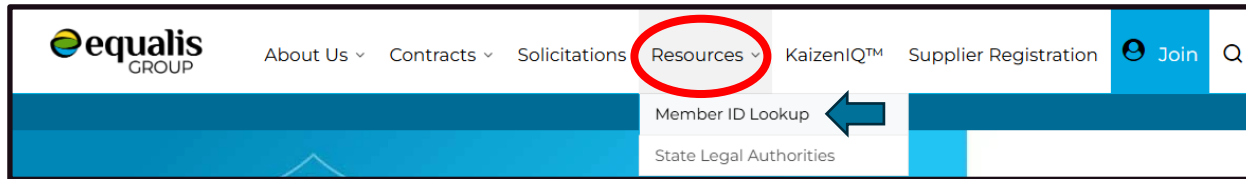
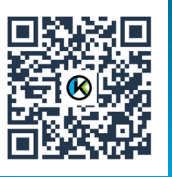
##### \*\*Classroom Instructional Supplies\*\*

- Writing instruments including pens, pencils, markers, highlighters, and specialty writing tools
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- Art supplies including paints, brushes, crayons, colored pencils, glue, scissors, rulers, and craft materials
- Educational manipulatives and hands-on learning materials for mathematics, science, and literacy instruction
- Poster board, foam board, and display materials for classroom presentations and bulletin boards
- Binding supplies including spiral coils, binding covers, laminating pouches, and related finishing materials
- Storage solutions for classroom organization including bins, folders, binders, and labeling systems

##### \*\*Administrative Office Supplies\*\*

- Technology accessories including printer cartridges, toner, USB drives, cables, and computer peripherals
- Filing and organizational systems including file folders, hanging folders, storage boxes, and cabinet supplies
- Presentation materials such as easel pads, dry erase boards, markers, and projection supplies
- Communication supplies including envelopes, letterhead, business cards, and mailing materials
- Desk accessories and organizational tools for administrative staff workspaces
- Reference materials, planners, calendars, and scheduling resources

# Are You an Equalis Member?



Member ID Lookup

Powered by KaizenIQ

Spokane Washington Government Search

Equalis Rep: Brandy Eaton: beaton@equalisgroup.org (561) 914-0857

Organization Name	Address	Agency Type
City of Spokane, WA EG-0028577	808 West Spokane Falls Boulevard Spokane, WA 99201	Government - City
County of Spokane, WA EG-0028816	1116 West Broadway Avenue Spokane, WA 99260	Government - County

- Select **Member ID Lookup** under the **Resources** dropdown
- Input i)Agency Name, ii)State, and iii)Agency Type, and click search
- Agencies that match the criteria will appear, with the Member ID number shown directly below the member name
- Your Equalis Member Engagement representative's contact information will also be shown

# Register for KaizenIQ™

[About Us](#) ▾[Contracts](#) ▾[Solicitations](#)[Resources](#) ▾[KaizenIQ™](#)[Supplier Registration](#)[Join](#)

1. Click on KaizenIQ™
2. Click on Register Now
3. Input your Equalis member ID, click Continue
4. Complete the User Registration form, click Register
5. Review & Accept the Terms & Conditions
6. Click the blue Register button

Registration is complete, you will receive an email with next steps in one business day

**KaizenIQ™ is free for Equalis Group Members**

**Log In To KaizenIQ** 2.

Enter your credentials to access KaizenIQ.

Email\*

[Continue](#)

Not registered for access? [Register Now →](#)

**KaizenIQ User Registration** 3.

Enter your Equalis Group member ID to continue

**Note**

Your agency must be an Equalis Group member to access KaizenIQ. Please provide your Equalis Group member ID below to access KaizenIQ.

Equalis Group Member ID\*

[I don't know my Equalis group member ID?](#)

[Continue](#)

Already have access to KaizenIQ? [Login →](#)

**User Registration** 4.

Enter your information to register for access to KaizenIQ.

Agency Name Tied to Member ID:

County of Spokane, WA  
EG-0028816

[This is not my agency.](#)

**Your Information**

First Name\*

Last Name\*

Title\*

Phone Number\*

Email Address\*

[Read & Agree to the Terms & Conditions to Register](#)

[Register](#)

**Terms & Conditions** 5.

**KAIZENIQ™ – OVERVIEW**

1) Background: Equalis Group, LLC ("Equalis Group") works with public sector entities to develop and conduct public sector procurement solicitations, to evaluate solicitation proposals submitted by suppliers, to enter into Master Agreements with awarded suppliers, and to make those Master Agreements available to Equalis Group Members nationwide.

**KAIZENIQ™ – TERMS AND CONDITIONS OF USE**

In consideration of Equalis Group providing you with access to KaizenIQ™, you agree to the terms and conditions of use set forth below.

[Download](#) [I Accept](#)

☒ [Read and Agreed to the Terms & Conditions](#) 6.

[Register](#)

# Become an Equalis Group Member

[About Us](#) ▾[Contracts](#) ▾[Solicitations](#)[Resources](#) ▾[KaizenIQ™](#)[Supplier Registration](#)[Join](#)

- Click the blue **Join** button at the top of the web page
- Complete the form
- Check the boxes
  - MICPA agreement
  - Select Yes to request your KaizenIQ credentials
  - Confirm you are not a robot
- Click **Join Now**

**There are no costs, dues or obligations to become an Equalis member**

### Cooperative Purchasing Group Member Registration

#### Agency Information

#### Primary Contact Information


[View or download the Master Intergovernmental Cooperative Purchasing Agreement](#)

☒ By checking this box, I agree to the terms and conditions of the Master Intergovernmental Purchasing Agreement


Select "Yes" to request your KaizenIQ™ login credentials. Note: In 1-2 business days you will receive a separate email from KaizenIQ@EqualisGroup.org with a link to establish your unique password. \*

☒ Yes

☐ No

☒ I'm not a robot 

[Join Now!](#)





# KaizenIQ™ Solicitation Builder



Register for an upcoming virtual demonstration

Tuesday, August 12<sup>th</sup>  
10:00 AM Central



[Register here](#)

Thursday, August 27<sup>th</sup>  
1:00 PM Central



[Register here](#)

# Attend Office Hours

## **Join our Monthly KaizenIQ™ User Group Discussions**

Equalis has established monthly user group discussions with our KaizenIQ™ Experts, for an open forum to ask questions, get the inside scoop on new enhancements, and learn/share best practices when developing solicitations for your organization.

Thursday, August 21<sup>st</sup>  
11 AM Central



[Register here](#)

# How Did We Do Today?

***Thank you*** for our attending our live demonstration of KaizenIQ™ Solicitation Builder.

In the spirit of KaizenIQ™, we value your input and feedback to help us continuously and intelligently improve the resources we provide to our members. Please take 2-3 minutes to complete the following short survey.



[KaizenIQ™ Solicitation Builder](#)  
[Live Demo - AABSD/SASD -](#)  
[2025.08.07](#)

**In a world where change is the only constant, the future belongs to those who harness technology not to replace expertise, but to amplify it.**

**KaizenIQ™ empowers procurement professionals to lead with clarity, speed, and confidence.**





# Thank you!

