DEVELOPING HYPOTHESES FOR MEANINGFUL INVOLVEMENT OF MUNICIPAL PURCHASING DEPARTMENTS IN ACQUISITION PROCESSES FOR CONSULTING SERVICES

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ABSTRACT. This research uses a case-based approach to develop an improved understanding of the factors that affect meaningful involvement of municipal purchasing departments in acquisition processes for consulting services. Twenty-nine apparently distinct factors have been extracted from those reported by case study informants. Informants included ten purchasing agents, nine client department representatives, and a consultant. Findings, along with organizational behavior literature on trust, were used to develop a theoretical model, and nineteen research hypotheses that may be used to test the validity of the theory developed. This work addresses the problem of low public sector purchasing department involvement in these important purchase decisions and some very significant gaps in the public procurement literature.

INTRODUCTION

Despite the fact that the purchasing department has been shown to play a central role in helping to ensure that funds are spent properly, improve the quality of goods and services purchased, and save both time and money (Leenders, Fearon, Flynn & Johnson, 2003), purchase decisions, made by public sector organizations, concerning consulting services, have included very little, if any, involvement by public sector purchasing departments (Fearon & Bales, 1995). These low involvement levels may suggest that these services are being acquired without appropriate consideration of organizational goals and objectives, and the

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possibility that taxpayer funds are being spent improperly. In addition, considering the types of services that are being purchased, the significance of these low involvement levels should not be overlooked. Poor purchase decisions related to these services can lead to poor performance and good purchase decisions can lead to good performance (Mitchell, 1994; Soriano, 2001; West, 1997). This has created a major concern for many purchasers, who have acknowledged that they do not have a clear understanding about how to purchase consulting services properly (Smeltzer & Ogden, 2002). The purchasing department may be in a better position to affect more positively these types of purchase decisions if involved.

If we are to utilize more fully the role of the public purchasing department, we must first be able to understand the basis for its low involvement levels. Unfortunately, however, the extant literature provides little guidance on this matter; problems related to public sector procurement still remain an area of traditional neglect within the literature (Davies, 2002; Gordon, Zemansky & Sekwat, 2000), especially with respect to local government purchasing (Murray, 2001) and consulting services (Canback, 1999).

SOME BASIS FOR THE PROBLEM OF LOW INVOLVEMENT

While the literature is particularly arid, it does provide a starting point for an improved understanding of the basis for low purchasing department involvement in purchase decisions related to consulting services made within the public sector. Fundamentally, the problem of low involvement may stem from the challenges associated with public sector procurement. Public purchasers are faced with continual scrutiny of their activities through audits and in-house reviews, intensive reviews by the media for any suggestion of mismanagement or impropriety, and an overwhelming number of required policies and procedures that characterize government decision-making (Gordon et al., 2000; Mechling, 1995). As a result, these purchasers are much more focused on the public's perception of their adherence to procedure, rather than on whether or not value for money spent has been achieved (Pettijohn & Qiao, 2000). This may help to explain why the public purchasing department has been commonly referred to as a clerical, process-orientated function that adds little value to purchase decisions (Gordon et al., 2000; Mechling, 1995), and why many public purchasers lack confidence in the purchasing department (de Boer & Telgen, 1998; Murray, 2001). This may also help to explain, in part, why many public

purchasing departments have been involved so rarely in purchase decisions related to consulting services.

The problem of low involvement may also stem from the types of services being purchased. Because consulting services are associated with a high degree of intangibility, labor intensity, customer contact and interaction, and customization (Haywood-Farmer, 1988; Verma, 2002; West, 1997), determining and describing what is actually needed can be very problematic (Shetterly, 2002). This can make evaluating these services both pre- and post-delivery very difficult (Soriano, 2001), which in turn makes purchasing these services very risky.

Lastly, the problem of low involvement may also stem from perceptions that user agencies have regarding the purchasing department. While public purchasers have stated that they believe that public purchasing departments are capable of adding value to traditional purchase decisions, involving such things as raw materials, special and standard production items, and maintenance, repair, and operating supplies, they also state that consulting services constitute a purchase category not typically within the realm of the purchasing department's acquisition capabilities (Smeltzer et al., 2002; Mitchell, 1994). This may also affect a purchaser's decision of whether to involve the public purchasing department in these purchase decisions.

METHODS

Although the literature provided a starting point for furthering our understanding of the basis for these low involvement levels, further study was needed for a more complete understanding of how and why this problem exists. Given the scarcity of research relating to this work (Bray, 2001; Canback, 1998; Davies, 2002; de Boer et al., 1998; Murray, 2001), and the exploratory nature of this research, a case-based methodology was chosen for use by this study. This kind of methodology is useful in developing an improved understanding of how and why events have occurred (Voss, Tsikriktsis & Frohlich, 2002).

With the aim of improving our understanding of the factors that affect involvement of public purchasing departments in acquisition processes for consulting services, we set out to identify and examine exemplary cases of a phenomenon known as "meaningful involvement." Meaningful involvement was originally defined by Stuart (1991, p. 30) as:

The timely and useful collaboration of purchasing's knowledge and expertise… in all aspects of the acquisition process, including the decision making process, leading to the best buy decision with the objective of satisfying the immediate needs of the specifier and the long term needs and strategic objectives of the [organization] as a whole.

Further, Johnson and Leenders (2003) refer to meaningful involvement as an ideal level of involvement on the part of the purchasing department. It occurs when the purchasing department carries out the activities that characterize professional involvement, while also considering the interrelationship between the various purchasing activities performed and their effects on the long-term needs and strategies of the organization as a whole. Johnson and Leenders (2003, p.24) call this type of involvement "an ultimate state of perfection… not normally attainable."

Arguably, we could have looked at purchase decisions that had varying levels of involvement. However, we selected our cases on their ability to emphasize, as clearly as possible, the meaningful involvement phenomenon and the broad range factors affecting the phenomenon being examined (Glaser & Strauss, 1967). This sampling technique, in which a researcher sets out to identify excellent or unusual cases, is a useful way to improve to the usefulness of research findings Patton (1990).

Ultimately, ten case studies were used as the basis upon which to address the primary research question: *What factors affect meaningful involvement of municipal purchasing departments in acquisition processes for consulting services?* This total, which consisted of two cases from each of the five municipalities that agreed to participate in the study, is well within the range suggested for case-based research by Eisenhardt (1989) and Miles and Huberman (1994). Each of these case studies entailed an examination of a purchase decision in which a Canadian municipal purchasing department was meaningfully involved in an acquisition process for consulting services.

Municipalities from Ontario, Canada were chosen as a public environment from which to select cases because of their similar operating environments and the likelihood that they would be able to provide a sufficient number of cases to facilitate both within and across site analysis. Consequently, municipal sites were selected from a total

population of 446 municipalities located in Ontario, Canada (AMO, 2003).

Forty-three purchasing managers were contacted randomly before identifying the requisite number of cases. When contacted, purchasing managers were asked about the extent to which their departments were involved in acquisition processes for consulting services. If they were able to identify two cases in which meaningful involvement had occurred, we asked them to participate in the study. Only one case failed to meet the standards set out to determine whether meaningful involvement had occurred. As a result an additional case had to be selected that met the criteria as described.

Once cases were selected, data was collected with the use of an interview protocol that was organized in a sufficiently unstructured manner to allow enough freedom to probe other areas of interest that might be uncovered during the interview. We refer to this method as a free-flow method of interviewing where prompting of informants is limited. This protocol was also arranged to follow the suggestions made by Glaser et al. (1967) and Patton (1990) regarding the sequencing of questions. Introductory questions were non-controversial and straightforward. More sensitive questions, such as demographics, were addressed at the end of the interview.

Approximately two to three days were spent collecting data at each site. Twenty-five informants were interviewed, including five purchasing managers - one from each of the municipalities that participated in the study, ten purchasing agents - one from each of the cases that were included in the study, nine client department informants (generally managers of these departments) – one from nine of the cases included in the study, and for one case, a consultant. Initially, we had hoped to be able to include all of the consultants selected in the study, but this proved to be too impractical given problems with access and disclosure. In addition, for case number nine a client department informant was not available to participate in the study. Despite this however, we were still able to conclude that meaningful involvement did in fact occur. We based our conclusion on the feedback received from both the purchasing manager and the agent involved in this purchase decision and on the abundance of supporting documentation that allowed us to form an objective opinion that meaningful involvement had in fact occurred. Initial interviews with each informant lasted between 1 to 2 hours in length. Several subsequent interviews were also conducted in order to

clarify information collected and or to follow up on requests for additional information such as organizational charts, request for proposal documents, consultants proposals that were evaluated during the acquisition process, and evaluation committee scorecards that were used to evaluate consultants.

Interviews with informants were also tape-recorded. At the beginning of each interview, informants were asked if they had any objections to the use of a tape recorder. Informants were told that the purpose of the tape recorder was to ensure that all information could be used for reference purposes only during the data analysis phase of the research. Tape-recording interviews can improve a case study's reliability (McCutcheon and Meredith, 1993), and help ensure that information is not lost during the research process. The use of a tape recorder did not seem to result in response bias.

In order to deal with the issues related to construct validity, internal validity, external validity, and reliability several methods suggested by Eisenhardt (1989), Patton (1990), McCutcheon et al. (1993), Miles et al. (1994), and Yin (1994) were included in the research design for this study. Data was collected from a number of different sources, including relevant request for proposal documents (RFPs), policy and procedure guidelines, consultants' proposals received by the municipality, evaluations of the respective consultants' proposals conducted by evaluation teams, and reports that discussed the process followed including any comments made by participants. These multiple sources of evidence, along with feedback from multiple informants for each case, significantly increase the reliability and validity of the research findings and provided a level of information richness not otherwise available.

Qualitative data analysis involved three activities: data reduction, data display, and conclusion drawing/verification. These activities took place both during and after the data-collection process. Miles et al. (1994) define data reduction as the process of organizing the data collected in research notes in order to permit the researcher to draw and verify conclusions. Data reduction occurred throughout the life of the study. Data display is a visual arrangement of data that facilitates conclusion drawing and action. Methods for data display used by this study included narrative text, checklist matrices, graphs, networks, and charts. Further, Miles et al. (1994) suggest thirteen data analysis tactics for conclusion drawing and verification within case research. Several of these tactics were used, including noting patterns and themes, clustering,

making contrasts/comparisons, subsuming, factoring, and noting relationships between variables.

Analysis began with within-site analyses emerging from detailed case study reports, which were supported by descriptive matrices and flow diagrams, and extensive research notes that were developed during each interview. These notes were used to document the following: an account of what questions were asked and how they were answered, including a general description of what took place during each interview; impressions related to the reliability of the data collected from an informant, the relative importance of findings, and the reactions to various questions asked; actual quotations from informants, since Patton (1990) and Miles et al. (1994) suggest including direct quotations in research notes whenever feasible; notes and commentary with respect to suggested leads for additional data, or reminders to follow up on information provided during the interview; and interpretations and insights relating to the phenomenon examined. Data analysis took place simultaneously with data collection. Developing interpretations while data collection occurs signifies the start of the data analysis phase (ibid.). These interpretations were useful in the later stages of data analysis.

While the literature review was intended to develop an improved understanding of the basis for low purchasing department involvement, it was also used to create intuitively five *tentative* factor categories that were used to present and analyze research findings. These categories included environmental factors, organizational factors, client department factors, purchasing department factors, and product or service related factors.

Some of the earliest literature has reported the effects of the environment on the decisions made by organizations (Barnard, 1938; Dill, 1958; Katz & Kahn, 1966). These effects are associated with physical and social factors outside the boundaries of the organization, but still important to its success (Duncan, 1972). The public scrutiny associated with the dollars spent by public organizations, for example is a type of *environmental factor* that has been noted to affect the way in which purchasing departments are involved (Bray, 2001; de Boer et al., 1998; Gordon et al., 2000). Just as the environment affects the organization, the organization also affects the functioning of operating departments within it (Pfeffer, 1978). Organizational policies that direct the involvement of the purchasing department as a standard operating procedure (Pettijohn & Qiao, 2000; Carter & Carter, 1998), and the

extent to which the organization invests in its purchasing activities (Narasimhan, Jayaram & Carter, 2001) are example of *organizational factors*.

Client department factors include its trust in the purchasing department (West, 1997), its perception that the purchasing department is capable of adding value (Rossler & Hirsz, 1996; ibid.; Lakemond, Echtelt & Wynstra, 2001; Zsidisim & Ellram, 2001), and its knowledge and experience with respect to what is being purchased (West, 1997). Whereas, purchasing department factors include such things as the purchasing agent's capabilities including their specific knowledge and experience related to a given purchase decision (Stuart, 1991), and the purchasing agent's ability to be proactive (Murray, 2001; Wisners & Stanely, 1999; Lakemond et al., 2001; Stuart, 1991).

Lastly, *product or service factors* include the complexity and intangibility of the product or service required, and the urgency associated with acquiring a consulting service, which may necessitate excluding the purchasing department (Lakemond et al., 2001; Mitchell, 1994; Shetterly, 2002; Smeltzer et al., 2002; West, 1997).

These factor categories were used as a preliminary means of organizing our research findings. These categories, as they appeared in the checklist matrices used by this study and as they were reported by purchasing agents and client department informants, are presented within the Appendices within Tables 1 and 2.

The final stages of analysis involved both within and across-site analysis of the similarities and differences across cases based on the detailed case study reports, responses of the informants to the research questions posed, and other data collected. The existing literature was used to derive logical connections from the observed events and provide a more meaningful interpretation of the results (Eisenhardt, 1989; McCutcheon et al. 1993).

Accordingly, twenty-nine apparently distinct factors were extracted from the two hundred and thirty-four reported across case study informants. These findings, along with organizational behavior literature concerning trust, were then used to develop a theoretical model, and nineteen testable research hypotheses. Our interpretations were then sent to informants for verification and comment in order to verify our conclusions and improve upon the validity and reliability of our initial findings.

RESULTS

Overview

Analysis of the data allowed for the extraction of twenty-nine factors that were used as a basis for developing the theoretical model. These factors varied on a case-by-case basis, both within and across research sites. This variation was a function of: the different ways that meaningful involvement occurred for each case; the mix of informants included in the study who reported what they observed or perceived as individuals for any given; the open ended type of questions that were used during the interview process which did not allow informants to report factors based on a given list; and the different types and value of consulting services purchased.

It is important to note at this time that this research did not investigate the *relative* strength of the factors identified; rather, this research's primary purpose was to identify, the broad range of factors that might affect meaningful involvement, as reported by case study informants. As the research progressed, our research findings were not used to infer statistical generalization, rather, they were used to test, the analytical generalization of the model that was ultimately developed, on a case-by-case basis.

The model that was developed was created in such a way that was in keeping with accepted techniques. Glasner et al. (1967) suggested that researchers collect a vast number of qualitative facts to achieve generality. This was accomplished by conducting semi-structured interviews with 25 informants, under a number of diverse conditions, and by collecting and using multiple sources of evidence.

We also drew upon existing organizational behavior literature concerning trust to further clarify some of the variables emerging from our qualitative results and use as a basis upon which to formulate relationships among them. Building upon validated theoretical models from other fields has been strongly recommended by operations management scholars as a means of bolstering the theoretical soundness of proposed models and of avoiding a "reinvention of the wheel" (Amundson, 1998; Eisenhardt, 1989). We also sent the model to case study informants for feedback and confirmation and to validate our model and ensure that it truly reflected the events that occurred. This is an essential step when developing theory based on exploratory work (Judd, Smith & Kidder, 1991). Once the model was completed, a number

of research hypothesis were then created in order to facilitate the adoption of a rationalist approach (cf. Richardt & Cook, 1979) and test our theoretical claims.

The Theoretical Model and Testable Research Hypotheses

The model developed consists of two parts. These are presented in the Appendices, and are contained within Figures 1 and 2 respectively. The first part of the model specifically addresses those factors that are believed to influence a client department's willingness to involve the purchasing department in acquisition processes for consulting services. This was based on the notion that the client must *first* be willing to engage the services offered by the purchasing department before any involvement in these purchase decisions could occur. Prior research has shown that client departments, who are not willing to involve the purchasing department, find ways to bypass formal policies and procedures that call for purchasing involvement (de Boer et al., 1998). Moreover, our own study informants also suggested that such willingness is necessary before meaningful involvement can occur.

The second part of our model assumes that a client department, given its prior willingness to involve the purchasing department, has actually decided to call upon the purchasing department for some assistance with their respective purchase decision. Thus, the second part of the model describes the factors that are believed to directly influence the way in which the purchasing department is meaningfully involved *once the client department has given it the opportunity to do so*.

The decision to involve the purchasing department can represent significant risk to the client department. The purchasing department's lack of skills and knowledge, and/or its lack of concern for the needs and interests of the client could result in wasted time, resources, and money for the client department, and could provoke increased scrutiny by the public. Given this potential risk, it is fitting that the client department's *trust* in the purchasing department emerged from the list of factors that were uncovered. Perceived risk in working or collaborating with another almost invariably involves trust (Mayer, Davis & Schoorman, 1995). In the following paragraphs, we explain how a person or group can be deemed trustworthy and explain why this particular concept was woven into our theoretical model.

Research to date suggests that a person or group is deemed trustworthy to the extent that they are seen as likely to act in a way that

fulfills needs and interests of both groups (Dirks, 2000; Mayer et al., 1995; Whitener, Brodt, Korsgaard & Werner, 1998). A person's or group's trustworthiness strengthens our willingness to be vulnerable to this person's or group's actions (Mayer et al., 1995). Thus, the client department's willingness to involve the purchasing department in the acquisition process is contingent upon the purchasing department's trustworthiness.

When trying to determine whether the purchasing department is trustworthy, the client department may ask itself this question: "What evidence do we have that suggests that the purchasing department is likely to act in a way that will fulfill our needs and interests?" A review of the trust literature suggests that there are two important traits that could increase the purchasing department's trustworthiness: (1) the extent to which the purchasing department has the requisite expertise and ability to benefit the client department, and (2) the extent to which the purchasing department is concerned about the needs and interests of the client department. These two traits can be more simply labeled "ability" and "benevolence" (Bews & Rossouw, 2002; Mayer et al., 1995), which respectively denote whether the purchasing department *can* and *wants to* benefit a particular client department.

The *purchasing department factors* we listed earlier largely denote characteristics related to the purchasing departments' trustworthiness. Specifically, the purchasing department's broad knowledge and experience relating to both the acquisition process and the consulting service sought, its ability to meet deadlines and to solve problems, and its knowledge of the client department's specific needs would all relate to the purchasing department's *ability* to fulfill the needs and interests of the client department. Tact, respect, openness and friendliness, initiative, and use of a service-based approach would exemplify the purchasing department's *benevolence*, at least from the perspective of the particular client department interacting with the purchasing department. Interestingly, informants from purchasing departments seemed to emphasize these factors when asked what they felt influenced their meaningful involvement in purchasing decisions. Similarly, client department informants seemed to emphasize the trust that they had in the purchasing department when asked the same question. Together, these findings provide some indication of the importance of trustworthiness in our model. In light of the above arguments, we propose that:

Hypothesis 1: The purchasing department's ability and benevolence will positively affect the client department's willingness to meaningfully involve the purchasing department in the acquisition processes for consulting services.

Up to this point, we have examined the traits underlying the purchasing department's trustworthiness, and how these traits, namely ability and benevolence, would influence the client department's willingness to meaningfully involve the purchasing department in the purchasing process. We believe a number of other factors identified in our study would also affect the client department's willingness to involve the purchasing department.

The factors that we categorized under *client department factors* included the client department's awareness of the value offered by the purchasing department, the client department's specific knowledge and experience about how to purchase a particular consulting service, its current workload, and the type of relationship that the client department has with the purchasing department. These factors will likely have a positive affect on the client department's willingness to meaningfully involve the purchasing department. A client department who is aware of the value offered by the purchasing department, is lacking in terms of knowledge and experience with respect to making a particular purchase, has "too much to do" and has a positive relationship with purchasing potentially indicates their willingness to seek help and thus involve the purchasing department. With respect to awareness, the informant from the client department from Case 7 stated that his willingness to work with the purchasing department stemmed from *positive* past experiences that had helped him to be aware of the value that the purchasing department could offer. In addition, with respect to current workload, the informant from the client department from Case 1 stated that:

> Having Purchasing involved really relieves me of a lot of the work that needs to be done… [such as] answering supplier's questions, contacts, scheduling, writing letters…. [The purchasing agent] was able to save me a lot of time…. That's especially important to me when time is so limited."

Accordingly, we propose that:

Hypothesis 2: Client departments' awareness of the value offered by the purchasing department, the client department's specific knowledge and experience about how to purchase a particular

consulting service, its current workload, and the positive relationship that the client department has with the purchasing department will positively affect their willingness to meaningfully involve the purchasing department.

Environmental factors include political and public scrutiny, and the difficulty in identifying a suitable supplier. Both are expected to have positive effects on a client departments' willingness to involve the purchasing department. Further to this, the informant from the client department from Case 1 mentioned, "One of the reasons we decided to use Purchasing, and will be sure to use them in the future, is to ensure that the process is defendable…. This was one of the biggest draws for me." The informant from the client department from Case 2 stated in a similar vein that "one of the reasons we use the purchasing department is to make sure that the process is seen as aboveboard… fair and defendable." This may be particularly important in an environment where political and public scrutiny is ever present. Therefore, we propose that:

Hypothesis 3: Increased political and or public scrutiny will positively affect the client department's willingness to meaningfully involve the purchasing department.

With respect to the availability of suppliers the informant from the client department from Case 1, noted:

I don't know if we would have had as many suppliers competing for the work as we did if we didn't get (purchasing) involved. I was able to feel more comfortable that all our options were being considered.

And thus, we can propose that:

Hypothesis 4: Increased difficulty in identifying a suitable supplier will positively affect the client department's willingness to meaningfully involve the purchasing department.

Among the organizational factors, policies and procedures in place that direct the involvement of the purchasing department, and pressure from senior management concerning the success of a particular purchase, should increase the client department's willingness to involve the purchasing department. Indeed, ignoring organizational policies or the desires of senior management would likely result in negative consequences for the client department. For six of the ten cases,

"involvement" was mandatory based on the value of the consulting services needed. Also, the centralization of the purchasing department can have the tendency to increase the profile of the department within the organization and the resources that are available to it. This in turn would also have the affect of increasing the client department's awareness of the value offered by the purchasing department which then would in turn increase their propensity to involve purchasing. And lastly, the physical proximity of the purchasing department was also noted by informants. The closer a purchasing department is to client departments the more likely that ongoing relationships will develop which again would increase the likelihood that client departments would become more aware of the value offered by purchasing thus becoming more willing to involve them. Accordingly, we propose that:

Hypothesis 5: Organizational policies and procedures directing purchasing department involvement will positively affect a client department's willingness to meaningfully involve the purchasing department; and

Hypothesis 6: Senior management's pressure towards more involvement will positively affect a client department's willingness to meaningfully involve the purchasing department; and,

Hypothesis 7: The purchasing department's degree of centralization will positively affect a client department's willingness to meaningfully involve the purchasing department; and

Hypothesis 8. The physical proximity of the purchasing department will positively affect a client department's willingness to meaningfully involve the purchasing department.

Finally, factors relating to the specific consulting service required, such as its intangibility and complexity, strategic importance, urgency related to its purchase, as well as dollar value would theoretically increase the client department's willingness to seek assistance from the purchasing department. In speaking about the complexity of a particular consulting service that was needed, the informant from the client department from Case 3 indicated that "this acquisition required quite a lot of guidance and steering by the purchasing department because of the size and complexity of the services being contracted for." In addition, the purchasing agent from Cases 3 and 4 stated, "When the city makes a large dollar purchase such as this we tend to attract a lot of attention. This means that we have to be particularly careful that proper procedures

are followed and that the best supplier is chosen." Thus, we propose that:

Hypothesis 9: The consulting services' intangibility and complexity, strategic importance, urgency related to its purchase, as well as dollar value will positively affect the client department's willingness to meaningfully involve the purchasing department.

Earlier we suggested that in order for meaningful involvement to occur, it is necessary for the client department to be willing to involve the purchasing department and thus to call upon its services. The client department's willingness is also a factor to consider once the involvement of the purchasing department has begun. Specifically, if the client's willingness weakens during the acquisition process, perhaps because the purchasing department has been less than helpful, then it may decide to limit or terminate the continued involvement of the purchasing department in the remainder of the purchasing process. Thus, we propose that:

Hypothesis 10: The client department's willingness to involve the purchasing department will positively affect the purchasing department's meaningful involvement during the acquisition process.

In the first part of our model, we also presented theoretical arguments for the effects of the purchasing department's ability and benevolence on client departments' willingness to involve the purchasing department in the purchasing process. It is important to specify, as well, that the purchasing department's ability and benevolence may also affect whether it is meaningfully involved. That is, once the client department has decided to actually involve the purchasing department, the purchasing department must use its ability and benevolence to ensure its actions and decisions during the acquisition process clearly denote meaningful involvement as defined by Stuart (1991) and Johnson et al. (2003). Likewise, with respect to these factors, the purchasing agent from Case 9 commented that:

> We [the purchasing department] were able to make a 'meaningful contribution' as you defined because of the traits we bring to the table: we ask the right questions, we're experts on the process, we're aware of what the client needs are, we have an attitude of service towards the client, we use a less dictatorial approach, we're friendly, professional, have a broad knowledge

base to work from, we try to solve problems… not create them… and we always try to meet our timelines.

Similarly, the purchasing agent from Case 1 reflected that:

If we [the purchasing department] are seen as slowing things down, then no one would bother asking us to get involved. Time is just too important these days…. Being able to stay on track is critical.

Thus we propose that:

Hypothesis 11: The purchasing department's ability and benevolence will positively affect its meaningful involvement during the purchasing process.

Once the purchasing department's involvement has begun, the client will be likely to continue to assess its ability and benevolence. And, with respect to the purchasing agent's ability to utilize an open and friendly approach, the informant from the client department from Case 5 observed that "Purchasing makes me feel comfortable…. They're open and receptive to ideas…. They don't make me feel stupid when I'm asking questions…. I think this is the only way that they can make a meaningful contribution throughout." If the client were to determine, during the purchasing process, that the purchasing department was not able or willing to provide quality assistance, the client's willingness to further involve the purchasing department in the remainder of the purchasing process is likely to wane, thereby hindering the purchasing department's meaningful involvement. Accordingly, we propose that:

Hypothesis 12: The client department's willingness to involve the purchasing department will partly mediate the effect of the purchasing department's ability and benevolence on its meaningful involvement during the purchasing process.

Other factors uncovered in our study are likely to influence meaningful involvement as well. Client department factors, namely their lack of knowledge and experience in making the specific purchase decision, as well as their current workload, would indicate the extent to which the purchasing department should be involved. Thus, we propose that:

Hypothesis 13: The client department's lack of knowledge and experience in making the specific purchase decision, as well as its

current workload, will positively affect the purchasing department's meaningful involvement during the purchasing process.

Environmental factors, such as the perceived difficulty in finding a suitable supplier, and the level of public scrutiny, would potentially inform the purchasing department as to the necessity of its involvement. Accordingly,

Hypothesis 14: The perceived difficulty in finding a suitable supplier, and the level of public scrutiny will positively affect the purchasing department's meaningful involvement during the purchasing process.

Organizational factors would also influence meaningful involvement. Policies in place that direct the involvement of the purchasing department and pressure from senior management could potentially force the purchasing department to provide the client with increased assistance. Other factors, such as physical proximity and centralization, could potentially facilitate the demonstration of meaningful involvement. Thus,

Hypothesis 15: Organizational policies and procedures directing purchasing department involvement will have a positive affect on the purchasing department's meaningful involvement during the purchasing process; and

Hypothesis 16:   Senior management's pressure towards increased involvement will positively affect the purchasing department's meaningful involvement during the purchasing process; and

Hypothesis 17: The purchasing department's level of centralization will positively affect its meaningful involvement during the purchasing process; and

Hypothesis 18: The physical proximity of the purchasing department will positively affect its meaningful involvement during the purchasing process.

Finally, consulting service factors may inform the purchasing department as to the importance of its involvement in the purchasing process. Accordingly, we propose

Hypothesis 19. The consulting services' intangibility and complexity, strategic importance, urgency related to its purchase, as well as dollar value will positively affect the purchasing department's meaningful involvement during the purchasing process.

Suggested Measurement Scales for Conducting Future Research

The development of the theoretical model and the nineteen testable hypotheses signified the second phase of theory development, which was founded upon the first phase that involved the exploratory case-based work completed as part of this research. At the second stage, frameworks were created to define and justify relationships between variables, and hypotheses formed to allow for future empirical study. This explanation phase has too often been neglected within the operations management field (Filippini, 1997).

The third stage of the theory development process involves theory testing, which allows for the adjustment and further development of the concepts and the model. To that end, and to encourage and facilitate future testing of our research hypotheses, we offer tentative measurement scales for the variables included in our model. These measures are based upon these research findings and those from other research (Leenders et al., 2003; Stuart, 1991). The suggested measurement scales are presented within the Appendices.

The item content of each scale is based upon the feedback received from our study informants and was written using simple language, as recommended by Converse and Presser (1986). We also chose a Likert (1932) type response scale, that ranged from "strongly disagree" to "strongly agree" for each item, given the popularity of this choice within the social sciences literature (Judge, Smith, & Kidder, 1991).

Administering these scales as part of a survey questionnaire to a large enough sample would permit not only a test of our hypotheses, but also a statistical evaluation of the validity of the categories used to group the factors identified in our study. We recommend that these scales be completed by multiple sources (e.g., members of the purchasing department as well as those of the client departments) in order to minimize the prevalence of single-source biases. It may also be advisable to administer these scales under a number of different conditions with respect to the involvement levels of purchasing departments. This would likely improve our understanding of the relative strength of and inter-relationship between variables under less than ideal conditions. Given that meaningful involvement is contended to be a rare and atypical state interpretation of these results under these conditions may be more useful in a practical sense.

Insights for Practitioners

This research also offers a number of *practical* insights that may help improve the way in which public purchasing departments are involved in purchase decisions concerning consulting services. In order for the client department to be willing to involve the purchasing department in purchase decisions concerning consulting services, just so that the purchasing department is given the opportunity to be meaningfully involved, the client department has to believe that the purchasing department has both the ability and benevolent intentions required to assist them meaningfully with their purchase decision. Simply mandating involvement (i.e., via formal policies and procedures) may not necessarily mean that the client department will choose to involve the purchasing department. Research has found that local government purchasers commonly bypass the purchasing department (de Boer et al., 1998). If purchasing agents are to be considered for involvement, they must ensure that they posses the necessary capabilities and benevolent intentions that would allow them to contribute to purchase decisions in a way that characterizes meaningful involvement.

Purchasing managers must also be proactive in the way that they promote themselves and the role of the purchasing department. Without this, client departments would simply fail to become aware of the value associated with purchasing department involvement, thereby allowing the problem of low involvement to persist. A client department informant, made the following statement:

> Purchasing needs to do a better job of promoting itself. I was just not aware of what they could do for me…. Having gone through this experience with the purchasing department, I will never do it again without them!"

Lastly, at the organizational level, senior management should endorse the capabilities and motivations of the purchasing department in order to ensure that potential client departments understand the value that the purchasing department can offer. These types of investments, in terms of time and money, have been found to have significant positive effects on purchasing department involvement (Carter et al., 1998; Wisner et al., 1999; Zsidisin et al., 2001). It is also important to note that once involved the purchasing department must be equipped to meet the needs of the client department in such a manner that maintains client department willingness to involve them throughout the acquisition process. This means not only having the technical skill sets to make the

purchase but also the soft skills required including tact, friendliness, concern, and a service based approach when working with these departments.

Limitations of the Research Findings

Despite the contributions made by this work, it does have limitations that readers should be aware of. This research only focused on purchase decisions related to consulting services. Acquisition processes relating to other services might well benefit from similar research and, in effect, provide another means by which to improve upon the way that organizations purchase a broad array of services. Also, this research only focused on purchase decisions made by municipalities. Future researchers may want to examine purchase decisions made by other public sector organizations. The operating environments associated with these organizations, as well as their required policies and procedures, may differ significantly from those of municipalities. This could involve testing the applicability of these research findings to other public agencies that may have similar operating environments to the municipalities included in this study.

CONCLUSION

The challenges associated with meaningfully involving the purchasing department are diverse and complex, especially as they relate to consulting services purchased by the public sector. This paper has laid the groundwork for a more organized program of study that could aid public purchasing departments, and perhaps others, as they attempt to provide value for money spent, to achieve quality as it relates to their services, and to meet the needs of client departments while ensuring that the long term needs and strategic goals of the organization are met as well. This paper has also explicitly identified interesting areas for future researchers to further our understanding of the basis for low purchasing department involvement.

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APPENDICES

TABLE 1
Factors Reported by Purchasing Agents for Each Case

Factors thought to affect the involvement of the purchasing department as per purchasing agents for each case	Case										Total
	1	2	3	4	5	6	7	8	9	10	10
Environmental Factors											
Public scrutiny and / or pressure	X	X	X	X	X		X	X	X	X	9
Availability of suppliers to provide service			X		X	X	X	X	X		6
Organizational Factors											
Policies and procedures in place			X			X				X	3
Pressure for purchase success by senior mgmt.				X	X				X		3
Client Department Factors											
Knowledge and experience		X			X	X			X		4
Prior awareness of PD's value					X	X			X	X	4
Trust of purchasing department					X		X	X	X		4
Current workload							X	X			2
Willingness to accept guidance from PD					X						1
Purchasing Department Factors											
Open and friendly approach	X	X	X	X	X	X	X		X	X	9
Ability to use tact	X	X	X	X			X	X	X	X	8
Broad knowledge and experience			X	X	X	X	X	X	X	X	8
Knowledge of CD's needs	X	X		X		X	X	X	X	X	8
Ability to meet deadlines	X	X					X	X	X	X	6
Ability to solve problems							X	X	X	X	4
Structure of the purchasing department						X	X	X		X	4
Ongoing relations with other departments	X			X		X					3
Respect for CD's position		X						X	X		3
Ability to demonstrate value of PD involvement							X	X			2
Service-based approach							X	X			2
Initiative and proactive nature									X		1
Number of purchases processed by the dept.				X							1
Consulting Service Factors											
Intangibility/complexity of the service needed			X		X	X	X	X		X	6
Urgency of the service needed	X			X			X	X	X	X	6
Strategic importance of the service needed					X				X	X	3
Dollar value of the service needed			X			X			X		3
Total	7	8	9	10	11	11	16	16	17	14	119

TABLE 2
Factors Reported by Client Department Informants for Each Case

Factors thought to affect the involvement of the purchasing department as per client department informants for each case	Case										Total
	1	2	3	4	5	6	7	8	9	10	10
Environmental Factors											
Public scrutiny and / or pressure	X	X	X	X			X	X		X	7
Availability of suppliers to provide service					X	X	X	X			4
Organizational Factors											
Policies and procedures in place		X	X		X	X	X			X	6
Pressure for success of purchase by mgmt.							X				1
Client Department Factors											
Trust of purchasing department	X	X	X		X	X	X	X		X	8
Knowledge and experience	X		X	X	X	X	X	X			7
Prior awareness of purchasing dept's value	X	X		X	X		X	X		X	7
Willingness to accept guidance from PD		X	X	X		X	X	X			6
Current workload			X	X	X	X	X				5
Purchasing Department Factors											
Ability to use tact	X	X			X	X	X	X		X	7
Broad knowledge and experience	X		X		X	X	X	X			6
Open and friendly approach	X	X	X		X			X			5
Ability to solve problems					X	X	X			X	4
Knowledge of CD's needs	X	X			X			X			4
Ability to meet deadlines	X	X			X						3
Respect for CD's position		X				X		X			3
Ability to demonstrate value of PD					X	X					2
Ongoing relations with other departments	X									X	2
Initiative and proactive nature			X								1
Number of purchases processed by the dept.								X			1
Service-based approach					X						1
Structure of the purchasing department								X			1
Consulting Service Factors											
Intangibility / complexity of the service needed	X		X		X	X	X	X			6
Urgency of the service needed	X	X		X	X		X			X	6
Dollar value of the service needed			X		X	X					3
Strategic importance of the service needed										X	1
Total	13	12	12	6	18	13	15	17	0	9	115

FIGURE 1
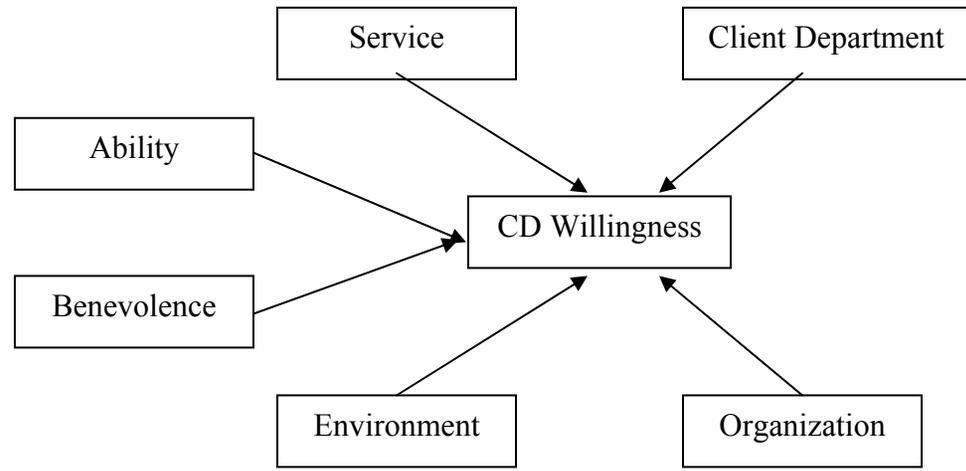**Theoretical Model (Part 1)**
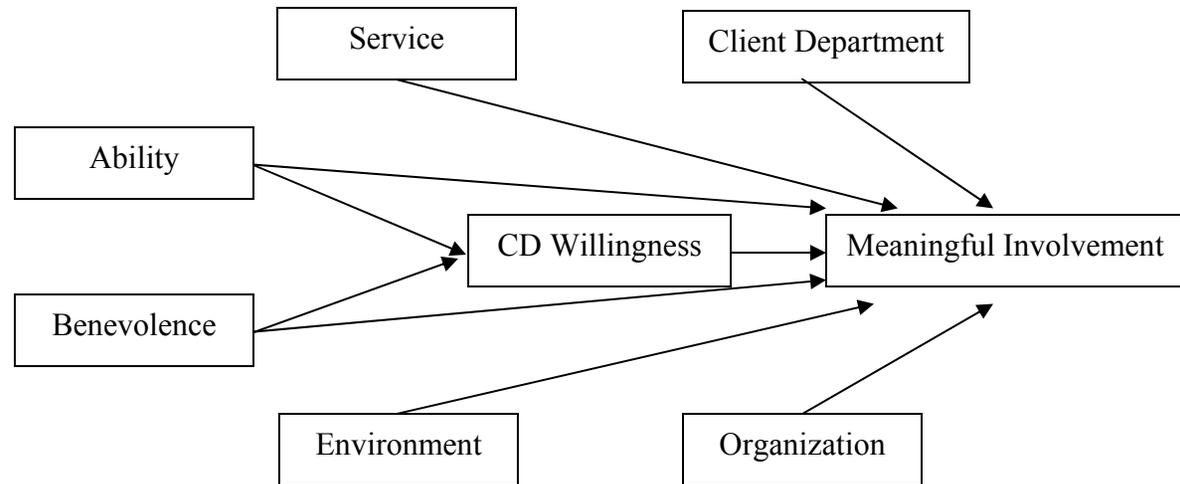

Figure II: Theoretical Model (Part 2)

TABLE 3
Suggested Measures of the Variables Contained within the Models

Please Note: SD = Strongly Disagree, D = Disagree, N = Neutral, A = Agree, and SA = Strongly Agree					
Environmental Factors					
Finding a suitable supplier is difficult	SD	D	N	A	SA
There is increased political pressure towards how money is spent	SD	D	N	A	SA
There is increased political scrutiny about the supplier selected	SD	D	N	A	SA
There is increased public scrutiny or pressure associated with making the purchase	SD	D	N	A	SA
Organizational Factors					
Organizational policies direct the involvement of the purchasing department	SD	D	N	A	SA
Management has mandated or suggested that the purchasing department be involved	SD	D	N	A	SA
The client department is located close to the purchasing department	SD	D	N	A	SA
The purchasing department is centralized	SD	D	N	A	SA
Client Department Factors					
The client department is aware of the value that purchasing can add to their decisions	SD	D	N	A	SA
The client department lacks skills required to make an effective decision	SD	D	N	A	SA
The client department has a heavy workload	SD	D	N	A	SA
The client department has a positive relationship with the purchasing department	SD	D	N	A	SA
Consulting Service Factors					
The service needed is complex and difficult to describe	SD	D	N	A	SA
The service needed is by nature, strategic	SD	D	N	A	SA
There is an urgent need for the service	SD	D	N	A	SA
There is a high dollar value associated with the service	SD	D	N	A	SA
Purchasing Department Ability					
The purchasing department can solve problems	SD	D	N	A	SA
The purchasing department can facilitate the purchasing process	SD	D	N	A	SA

TABLE 3 (Continued)

The purchasing department can avoid delays during the purchasing process	SD	D	N	A	SA
The purchasing department can meet timelines / deadlines	SD	D	N	A	SA
The purchasing department is knowledgeable about the purchasing process	SD	D	N	A	SA
The purchasing department is knowledgeable about the marketplace	SD	D	N	A	SA
The purchasing department is flexible throughout the purchasing process	SD	D	N	A	SA
The purchasing department demonstrates the value offered by the department	SD	D	N	A	SA
Purchasing Department Benevolence					
The purchasing department uses tact when working with client departments	SD	D	N	A	SA
The purchasing department uses a service-based approach with client departments	SD	D	N	A	SA
The purchasing department shows respect for the client department's position	SD	D	N	A	SA
The purchasing department is open and friendly	SD	D	N	A	SA
The purchasing department understands the needs of the client department	SD	D	N	A	SA
The purchasing department is concerned about the needs of the client department	SD	D	N	A	SA
The purchasing department has a good relationship with client departments	SD	D	N	A	SA
The purchasing department is proactive when helping client departments	SD	D	N	A	SA
Client Department Willingness to Involve the Purchasing department					
The client department immediately calls upon the purchasing department for help	SD	D	N	A	SA
The client department contacts the purchasing department to discuss its needs	SD	D	N	A	SA
The client department involves the purchasing department in requirements planning	SD	D	N	A	SA
The client department accepts guidance and advice from the purchasing department	SD	D	N	A	SA

TABLE 3 (Continued)

The client department is honest and open when discussing their needs versus wants	SD	D	N	A	SA
The client department relies on the purchasing department for help	SD	D	N	A	SA
Meaningful Involvement of the Purchasing Department (PD)					
Supplier Input					
The PD provided information regarding the market and suppliers	SD	D	N	A	SA
The PD discussed ways in which to satisfy a client department needs with suppliers	SD	D	N	A	SA
The PD debriefed unsuccessful suppliers	SD	D	N	A	SA
The PD identified potential suppliers	SD	D	N	A	SA
The PD acted as a liaison between client departments and suppliers	SD	D	N	A	SA
The PD prescreened potential suppliers	SD	D	N	A	SA
The PD solved problems related to suppliers	SD	D	N	A	SA
The PD acted as a single point of contact for suppliers	SD	D	N	A	SA
Functional and Technical Specifications					
The PD helped to clarify a client department's operating environment	SD	D	N	A	SA
The PD developed evaluation criteria	SD	D	N	A	SA
The PD developed interview questions	SD	D	N	A	SA
The PD helped a client department deal with any inherent tradeoffs	SD	D	N	A	SA
The PD helped a client department define and understand its needs	SD	D	N	A	SA
The PD identified specific delivery needs of the client department in terms of timing	SD	D	N	A	SA
The PD improved the RFP that was developed	SD	D	N	A	SA
The PD helped to improve the understanding of the client department's expectations	SD	D	N	A	SA
The PD improved the understanding of client department needs	SD	D	N	A	SA
Consulting Service Utilization					
The PD improved the defensibility of the process followed	SD	D	N	A	SA
The PD ensured fair supplier evaluation	SD	D	N	A	SA

TABLE 3 (Continued)

The PD helped suppliers prepare relevant proposals	SD	D	N	A	SA
The PD improved the quality of service delivered	SD	D	N	A	SA
The PD solved problems related to suppliers and the purchasing process	SD	D	N	A	SA
The PD helped to ensure value for money spent	SD	D	N	A	SA
The PD helped to reduce legal risks	SD	D	N	A	SA
The PD helped to reduce the risk of supplier non-performance	SD	D	N	A	SA
Time Savings					
The PD acted as an extra resource for the client department	SD	D	N	A	SA
The PD arranged delivery, payment, and terms	SD	D	N	A	SA
The PD provided corrective action − problems with suppliers	SD	D	N	A	SA
The PD achieved future time savings from synergy – Client Department	SD	D	N	A	SA
The PD jointly evaluated proposals with the Client Department	SD	D	N	A	SA
The PD notified suppliers of supply decision	SD	D	N	A	SA
The PD organized and chaired meetings	SD	D	N	A	SA
The PD acted as a liaison between suppliers and the Client Department	SD	D	N	A	SA
The PD prescreened proposals for the Client Department	SD	D	N	A	SA
The PD facilitated the process / avoided pitfalls / delays	SD	D	N	A	SA
The PD provided a timely delivery of service	SD	D	N	A	SA