



Mayor's Goal 5: "Philadelphia government works efficiently and effectively, with integrity and responsiveness."

Topic: Office of the Director of Finance, Contracts Legislation Unit

Department Head: Rob Dubow, *Director of Finance*

Key Presenters: T. David Williams Jr, *Deputy Director of Finance*

Drew Menten, *Contract Management Analyst*

Date: November 23rd, 2015

Executive Summary

Major Accomplishments:

- Doubled 2008 “On Time” Contract Conformance performance
- Made the eContract Philly website and contract data more accessible to the public and the community
- Established RFP e-notification system for vendors
- Kept RFPs and contracts moving – worked closely with departments and agencies to help them manage their contracts and provide services to the City and our Citizens in an open, transparent, ethical manner
- Slight improvement in conformance times than FY09/steady with FY08



City of Philadelphia | OPEN CONTRACT DATA

Philadelphia.gov / Open Contract Data / Professional Services Contracts FAQ

PROFESSIONAL SERVICES CONTRACTS FAQ

WHAT ARE SOME OF THE OTHER REQUIREMENTS FOR PROFESSIONAL SERVICES CONTRACTS?

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- The advertisement of most Professional Services contracting opportunities (un
- The public posting of notices of intent to contract, which include the name of th
- The required disclosure of campaign contributions by individuals and business
- Eligibility restrictions to receive City contracts to those that do not make camp
- The regular reporting of contract activity.

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Proposal for
MAINTENANCE, SUPPORT, UPGRADES AND TRAINING
FOR THE
AUTOMATED CONTRACTS INFORMATION SYSTEM
(ACIS)
AND THE ECONTRACTPHILLY WEBSITE

Who We Are

- Mission
- Scope of Services
- Organization
- Budget



MISSION:

- To provide assistance to City departments and agencies to effectively manage the professional services contracting process
- To serve as good stewards of the taxpayers' money, obtaining the best possible and most cost effective services available through open, transparent and competitive processes



The importance of the Unit's role

SCOPE

In any given fiscal year, the Unit **handles approximately 230 Request For Proposals (RFPs), 1,200 applications and 1,900 vendor/applicant disclosures**

In any given fiscal year, the City enters into **close to 1,900 professional services contracts, valued at approximately \$2.5B, with over 1,700 vendors**

IMPACT

An increase in the percentage of City contracts that are conformed before the planned start dates (“on time”) ***reduces delays in services and payments to vendors*** and should increase competition as more vendors become comfortable doing business with the City

Major activities

17-1400 Compliance

- Implements, monitors and enforces compliance with the requirements of Chapter 17-1400 of the Philadelphia Code, and many contract-related Code provisions, Mayoral Executive Orders, and departmental Rules, Regulations and Policies and Procedures
- Produces mandated 17-1400 quarterly and annual reports
- Reviews applicant and vendor disclosures and addresses any issues

RFP reviews

- Reviews each RFP to be posted on eContract Philly
- Reviews each RFP, RFI, and RFQ to be posted on RFPs Online

Major activities

Strategic Support and Training

- Provides training, support, advice and assistance to City departments and City-related agencies on the 17-1400 requirements and on the contracting process as a whole
 - Conformance Manager trainings – typically quarterly
 - Project Management trainings
 - ACIS User training
 - Works with Departments to determine appropriate path/vehicle for services sought.
 - Work through blockages/issues
 - Special reports/special projects
 - Legislative support
 - OEO participation
- Provides support, direction and assistance to applicants and vendors on the 17-1400 requirements and on the application process.
 - Disclosures
 - Technical Support

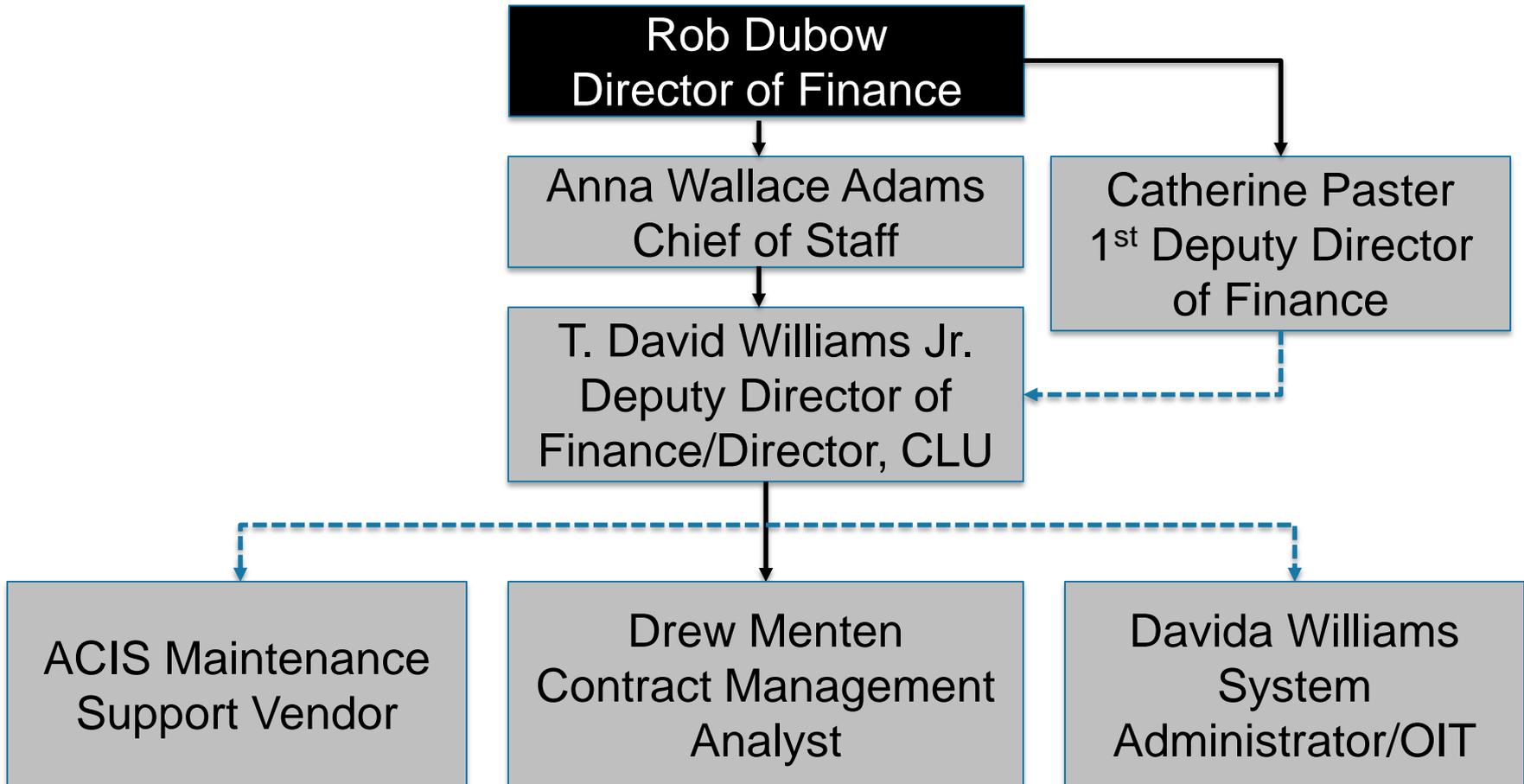
Major activities

Vendor Registration/Verification

- Verify new vendors, often working with the Accounting Bureau, OEO and Revenue
- Troubleshoots many issues related to vendor payment, tax compliance, OEO participation

Contracting and Conformance Process

Manages ACIS and eContract Philly websites, resolving application submission issues - technical and substantive (often working with Law, Integrity or the Ethics Board) – and operating issues (usually around User access and Vendor registration)

Organizational chart

FY16 budget is approximately \$500K & has remained fairly steady over time



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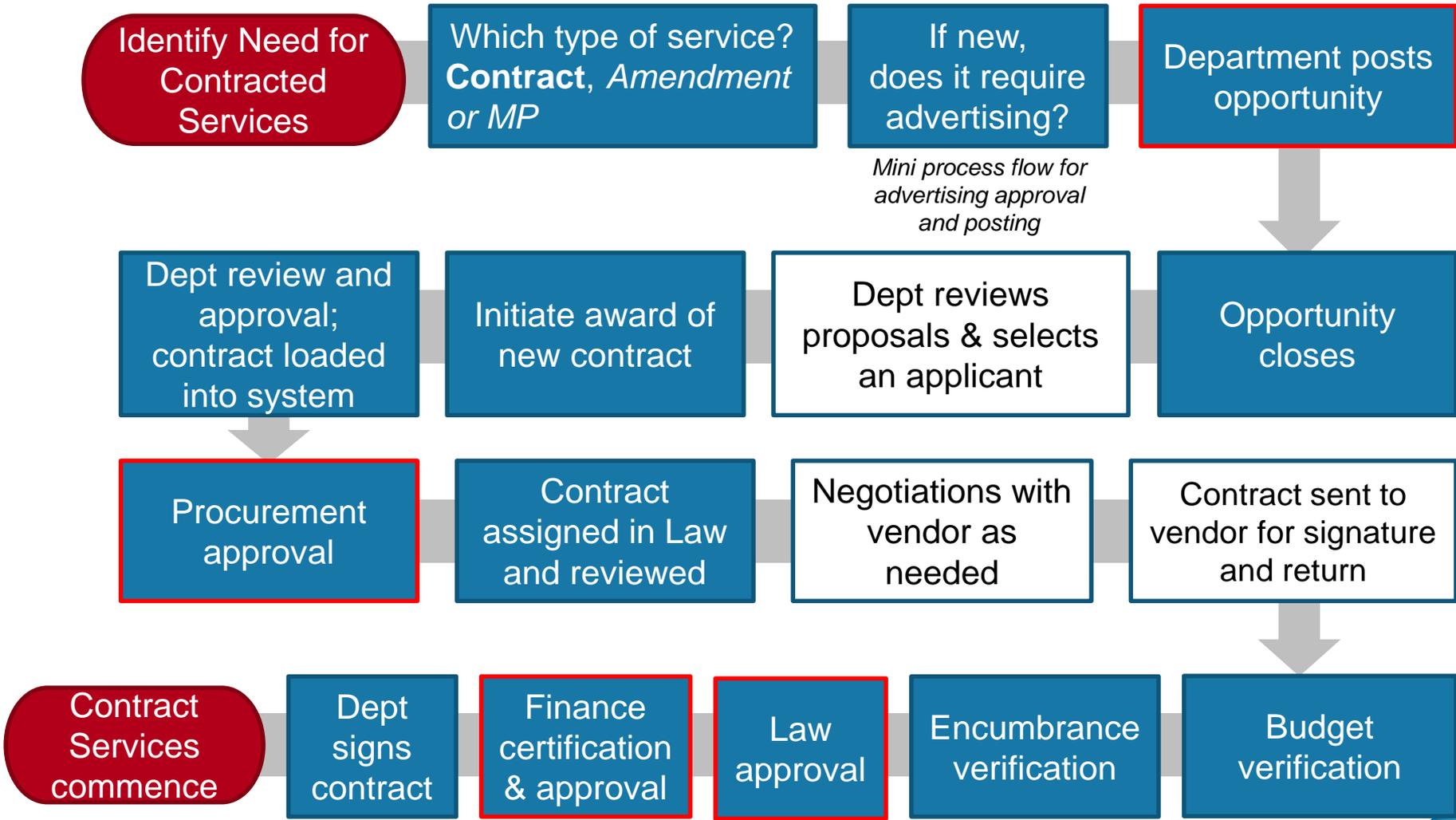
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What We Do

- Contracting and Conformance Process
- Performance Measures
- Key Strengths and Challenges



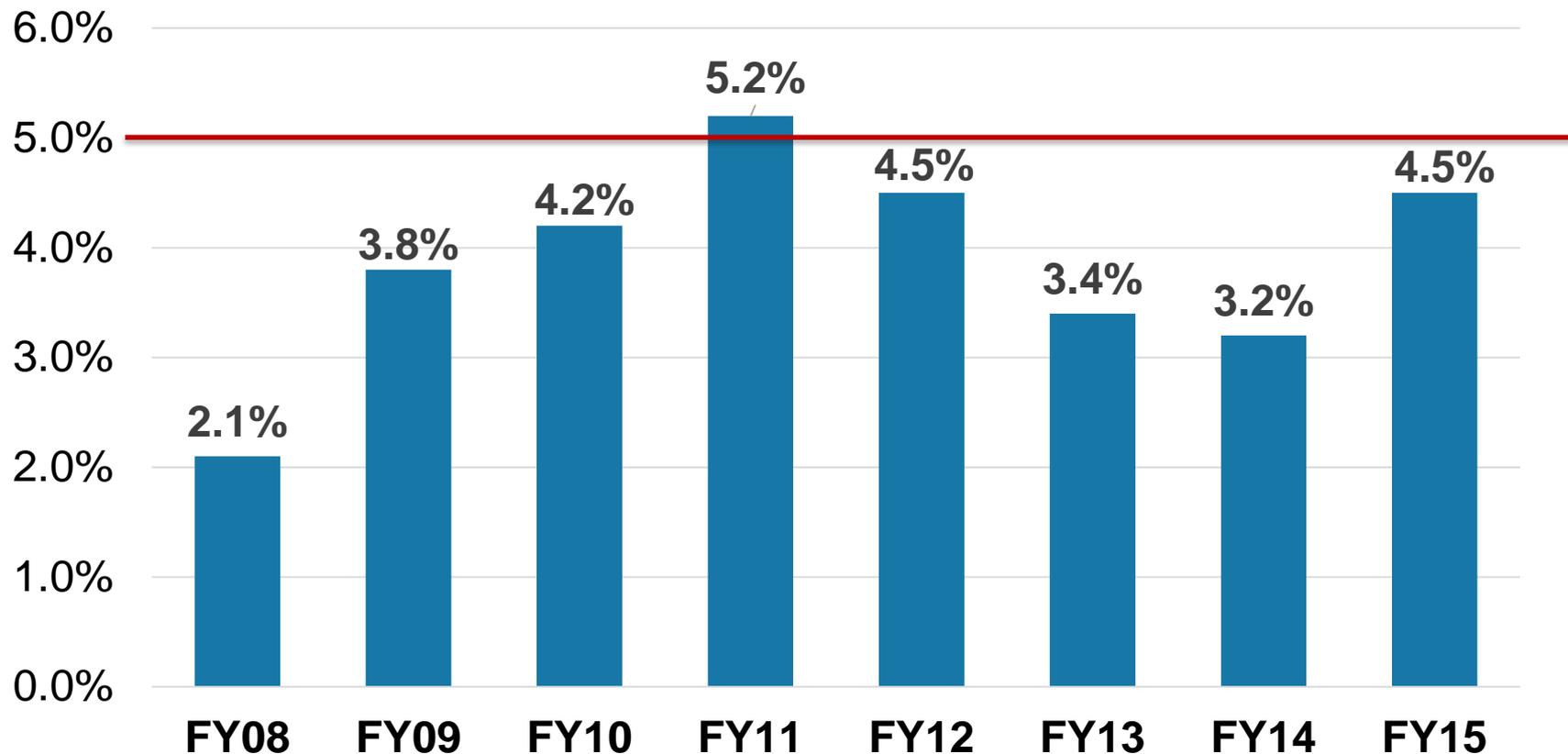
Simplified process flow for law draft contracts



Primary Performance Measure: Percent of Contracts fully executed by contract start date

Target: 5.0%

— Target



Contracts fully executed by start date have more than doubled since FY08. Our long range goal is to reach 15% by the end of FY20.

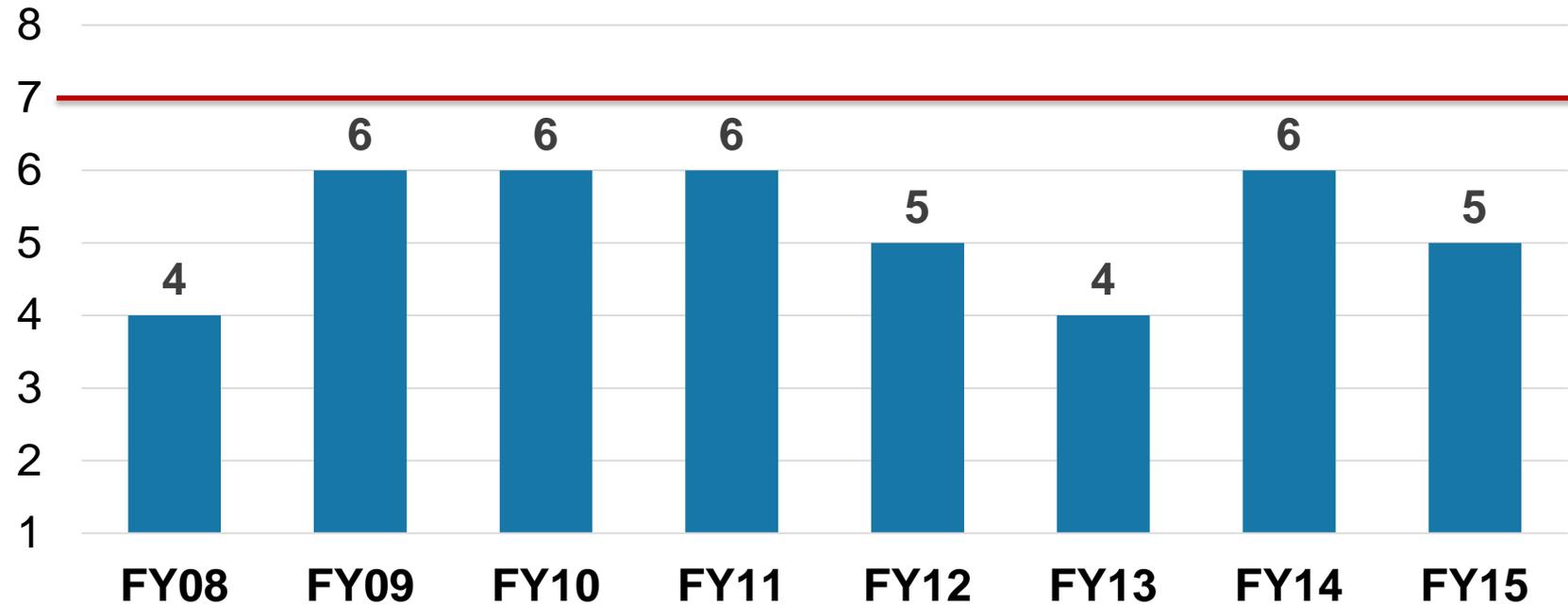
The Contracts Unit hopes to sustain this improved performance through:

- Workflow modification
- Continued Conformance Managers trainings – especially focused on conformance review process – and comprehensive Project Manager training
- Department Heads' Expiring Contracts Report

Other Performance Measures: Average Number of Vendors responding to professional contract opportunities

Target: 7 applications submitted per opportunity

— Target

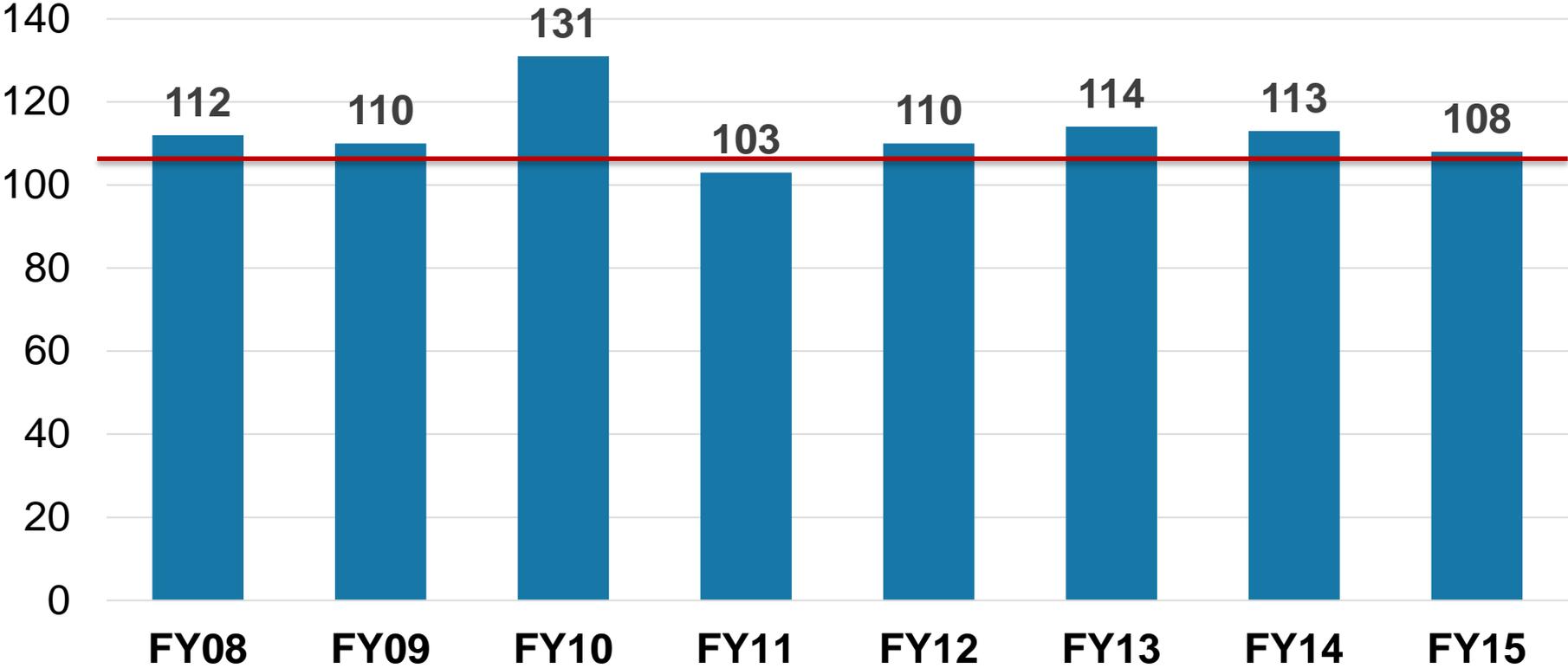


- Increase in the number of applicants per opportunity from FY08
- The Unit's continued work with departments (especially with the RFP drafting process) and with Vendors (especially with the application process and in creating the eNotification process) is paying modest dividends

Other Performance Measures: Number of Days to fully execute a contract from RFP closing

Target: Department Draft Target: Less than 107 days

— Target

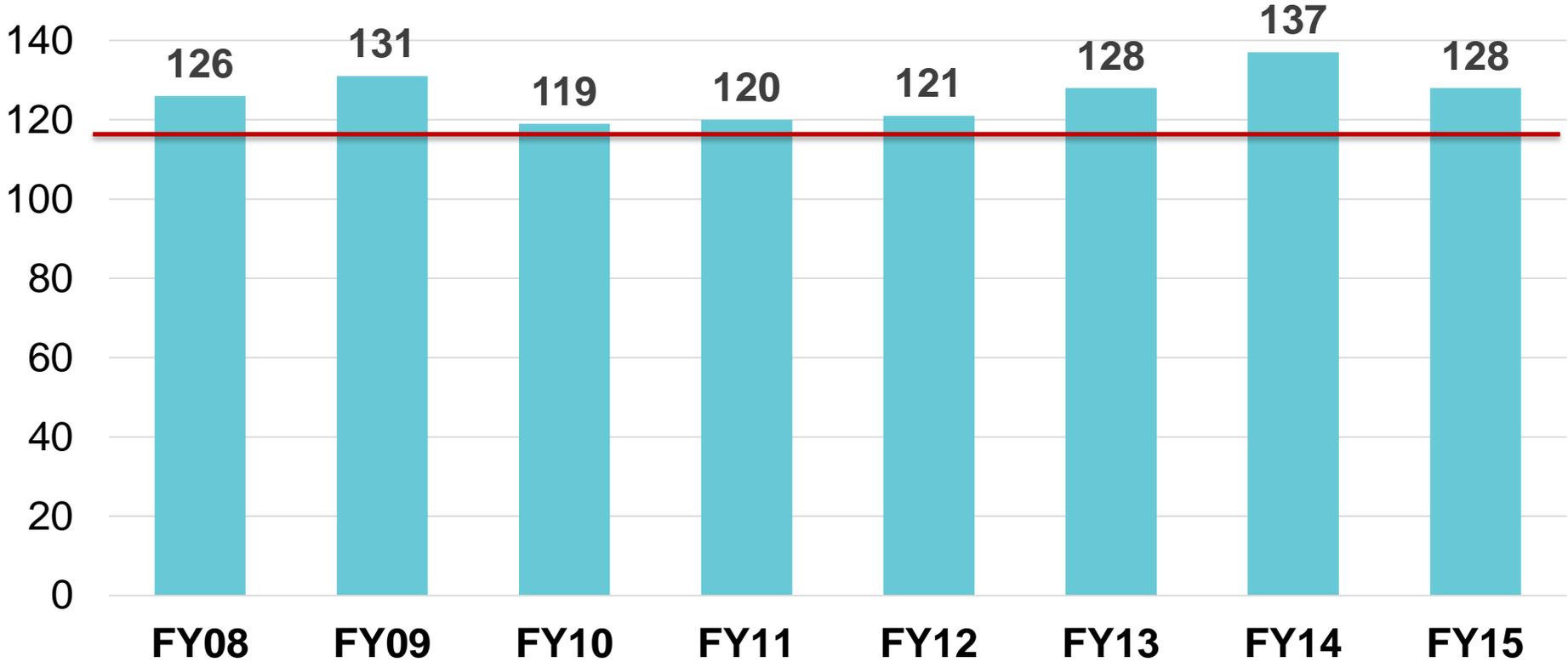


Between FY08 and FY15 there has been a reduction in the number of days to fully execute a contract

Other Performance Measures: Number of Days to fully execute a contract from RFP closing

— Target

Target: Law Draft Target: Less than 117 days



Additional steps are required for Law Drafts contracts, increasing the processing time compared to Department Drafts contracts

Strengths



Compliance Focus: *The Unit has the significant and varied technical and operational experience required to ensure the City follows Chapter 17-1400*



Dedication: *We understand the responsibility of public service and we relish the opportunity to serve the City and our vendor community through strategic support and training as well as a strong customer service orientation*



Accountability: *We take full responsibility for our role in the contracting process and never shy away from issues*

Challenges



Planning: Continued focus on working with departments and agencies to assist them with getting in front of their contracting needs



Managing Expectations: Working with departments to help them understand resource and time constraints in order to process contracts efficiently



Decentralized environment: The Unit must work with departments at all levels in order to effectively collaborate in the matrixed organizational environment



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What's on the Horizon

Initiatives include:

- Electronic Signatures
- Major Project Management training
- Conformance Manager training
- Evaluate new contracting options
- Further system enhancements to improve functionality
- Contract Summary and Existing Vendor Reports

Additional Public Resources

- <https://secure.phila.gov/eContract/>
- <http://www.phila.gov/rfp/Pages/default.aspx>
- <http://cityofphiladelphia.github.io/contracts/professional-services/>
- <http://www.phila.gov/contracts/Pages/default.aspx>
- [Email: econtractphilly@phila.gov](mailto:econtractphilly@phila.gov)
- [Hotline: 215-686-4914](tel:215-686-4914)



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