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Eric Adams
Mayor

TO: Mayor Eric Adams
Comptroller Brad Lander
City Council Speaker Adrienne Adams

FROM: The Procurement Policy Board (PPB)

DATE: June 9, 2023

SUBJECT: Professional Standards for Agency Contracting Officers:
Calendar Year 2022

BACKGROUND

Pursuant to §311 of the New York City Charter, the Procurement Policy Board is required to issue an annual report setting forth the professional standards for agency contracting officers adopted by the Mayor, including any applicable certification process.

The New York City Procurement Training Institute (PTI) was established by way of Executive Order 38 of 1992 in order to provide training and education programs to City personnel in professional skills necessary for the procurement of goods, services, and construction by City agencies. Executive Order 121 of 2008 charged the Mayor's Office of Contract Services (MOCS) with developing guidelines, as appropriate, for professional qualifications for the City's senior procurement staff. MOCS' training program was created with the goal of ensuring that the agencies are regularly trained on the best practices in procurement methods and policies.

TRAINING PROGRAM OVERVIEW

Since 2020 and continuing into 2022, MOCS offers procurement courses through a web-based platform **ProTIP** (Procurement Training Institute Portal) and continued to provision senior city procurement staff and all MOCS staff with access to ProTIP. Within ProTIP, public procurement professionals can partake in a growing library of eLearning courses available on-demand to enrich and deepen their general procurement knowledge.

Especially critical since the beginning of the COVID-19 pandemic and with the new and improved learning resources provided by the **MOCS' new Learning & Development ("MOCS L&D") team**, MOCS continues to create more self-directed online trainings, live trainings, as well as learning materials for procurement professionals and expects to provide a variety of course offerings online.

Online courses also offer public procurement professionals the freedom to complete their course load on their own time and provide a way to further their procurement skills remotely while the City undergoes changes due to the pandemic. MOCS offers a wealth of online resources regarding the **procurement process**, including procurement policies and procurement methods, which are made available to agency staff on MOCS' updated **BuyWise** page.

MOCS also continued to publish and update **PASSPort** (Procurement and Sourcing Solutions Portal) system user learning resources including job aids, guides, e-courses and webinar recordings. All PASSPort learning resources for City Agency users are published on BuyWise. With **PASSPort Release 4** of system updates and enhancements, MOCS offered meetings with key agency stakeholders on the new Financials system functionalities and policies. MOCS plans to hold in person trainings and live webinars to train procurement professionals on the new features of any future releases in PASSPort.

Furthermore, in 2022 MOCS supported several **Minority and Women-owned Business Enterprise ("M/WBE") live webinars** for procurement professionals across NYC agencies. M/WBE trainings are organized by SBS and the Mayor's Office of M/WBE, and delivered by the DCAS Citywide Training Center. Training topics include:

- M/WBE Program Compliance and Administration
- M/WBE Program Overview & Resources
- Best Practices for M/WBE Goal Setting & Identifying M/WBEs for Opportunities
- M/WBE Procurement and Utilization Plans
- Incorporating the M/WBEs into the Procurement Process
- Best Practices for M/WBE Networking and Outreach
- Best Practices for Incorporating the M/WBE Program into the Procurement Process
- Best Practices for Goal Setting
- Best Practices for Networking and Outreach

Finally, MOCS continued to provide procurement policy changes and updates during the **Monthly Procurement Leaders Meetings**, including guest speakers from other City Agencies presenting on a variety of procurement-related topics. Examples of topics presented in 2022 include, but are not limited to, general PASSPort functionality updates and enhancements, Agency Engagement with Vendors, Performance Management (Procurement Data Warehouse), Citywide Language Services contracts, M/WBE policy updates, Local Law 1 plan updates, Results-Driven Contracting, and Financial Updates.

The newly formed MOCS L&D team developed learning curricula and learning activities designed to educate and support its core learner groups: MOCS Staff, Citywide Procurement Staff, and Vendors/Prospective Vendors including Nonprofits. MOCS L&D aims to establish and continuously evolve core competencies-based learning resources

that can meet the learners at the point of need (e.g., completing a task in PASSPort, requiring procurement policy guidance, or seeking personal development resources.) MOCS L&D looks forward to producing and facilitating the advancement of knowledge sharing among New York City Procurement Staff.

All senior procurement personnel of Mayoral agencies are required to take MOCS' online courses on procurement basics (Procurement 101) and Ethics in Procurement ("Ethics" A Crash Course for NYC Public Procurement Professionals).

For public employees to uphold the City's underlying procurement policy related to ethics and comply with PPB Rule § 1-03(a) (requiring that all public employees responsible for the expenditure of taxpayer dollars take the appropriate measures to ensure that their conduct does not violate the public trust placed in them,) all procurement personnel must take the Ethics in Procurement e-course. MOCS also offers a number of NIGP general procurement on demand e-courses through ProTIP, including but not limited to Cost, Price & Value Analysis, Effective Contract Management, and Specification Development.

TRAINING COURSE DEVELOPMENT & PTI EXPANSION

In March 2022, MOCS formed the MOCS L&D team dedicated to the management of trainings, materials, and websites for procurement professionals and vendors –. MOCS L&D started out with two (2) full-time staff and in September 2022 grew to nine (9) team members and become an integral strategic function at MOCS that aligns with the agency's learning and training priorities and engagement needs.

With a new team in place, MOCS has resumed central training opportunities for procurement professionals and has already prioritized a number of e-courses and live webinars that are set to start being rolled out in mid-December of 2022, including:

- Local Law 34 and Compliance (webinar)
- Procurement Law for Beginners (e-course)
- Competitive Sealed Bids (webinar)
- Competitive Sealed Proposals (webinar)
- Vendor Integrity Review (webinar)
- Project Labor Agreements (webinar).

MOCS L&D continues to work with NIGP and agency partners towards regularly training on the best practices in procurement methods and policies, in a live in-person formats, webinars, and virtual e-courses.

INDICATORS

As of December 31, 2022, 367 platform users have been provisioned in ProTIP. A total of 252 e-courses in ProTIP were completed by 231 users. 148 ProTIP users completed Procurement 101 e-course and 178 users completed the Ethics e-course.

410 registrations were received for the City's M/WBE training courses with 249 individuals in attendance with the most popular courses being the M/WBE Program Overview, Incorporating the M/WBE Program into the Procurement Process, Procurement and Utilization plans, Networking and Outreach, and Goal Setting and Identifying M/WBE for Opportunities.

Finally, over 160 participants typically attend MOCS' Monthly Procurement Leaders Meeting, including all ACCOs and DACCOs who are expected to attend and pass on the information to their procurement staff.