

TO: Mayor Eric Adams
Comptroller Brad Lander
City Council Speaker Adrienne Adams
FROM: The Procurement Policy Board (PPB)
DATE: January 26, 2024
SUBJECT: Professional Standards for Agency Contracting Officers:
Calendar Year 2023

1. 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.

2. TRAINING PROGRAM AND PTI EXPANSION

The MOCS Learning and Development team ("MOCS L&D") continues to lead learning and development offerings for citywide procurement professionals, vendors, and MOCS Staff.

Since the team's formation in 2022, the MOCS L&D team has been making significant progress in developing a robust number of learning engagements for citywide procurement staff. In 2023, the training program included:

- Procurement Trainings
- PASSPort Learning Resources
- M/WBE Trainings Support
- ProTIP e-Courses
- Procurement Leaders Meetings

2.1 Procurement Trainings

In 2023, MOCS L&D produced **11 procurement process trainings** in live webinar format. These webinars, typically spanning 1.5 to 2 hours, were hosted by MOCS with the support of the DCAS Citywide Training Center (CTC). Guest presenters were staff from MOCS and other City Agencies with subject matter expertise in relevant training topics.

The 11 training topics are listed below:

- Competitive Sealed Bids
- Project Labor Agreements
- Local Law 63 Compliance
- Competitive Sealed Proposals
- PASSPort Agency Performance Evaluations
- Vendor Integrity Review
- Sole Source Procurements
- Emergency Purchase Method
- Environmentally Preferable Purchasing Review
- Best Value Bids and Proposals
- Local Law 34 and Compliance

The majority of these trainings were promoted via the DCAS CTC Catalog (as feasible given the Catalog publication cutoff dates) and email invitations were sent to all of MOCS' citywide procurement staff contacts. The recordings of the trainings, as well as the presentation decks, are available on [BuyWise](#).

2.2 PASSPort Learning Resources

MOCS leads the development of learning resources for **PASSPort (Procurement and Sourcing Solutions Portal)** end-users. These learning resources, which go over not only the functionalities but also best practices and policy directives, are available to users in the following formats: guides, trainings (live webinars), and webinar recordings. All PASSPort learning resources are published on [BuyWise](#).

With the **Fall 2023 PASSPort Release** (also known as PASSPort Release 5.1) which launched on November 17, 2023, MOCS rolled out a comprehensive communications and training plan to educate all stakeholders and PASSPort system users in regard to the latest system functionalities, features, and interface updates. For procurement professionals, guides, webinars, and webinar recordings were made available upon the launch of the new system release.

PASSPort guides have been a staple for user learning since the initial launch of PASSPort in 2017; they provide detailed step-by-step instructions with annotated screenshots. Noteworthy on the PASSPort materials-end is MOCS' progress towards accessibility, which is in line with citywide accessibility efforts under [Local Law 12 of 2023](#). As of November 2023, all new PASSPort guides are being published as **Web**

Guides. Web Guides allow for content to be published directly to web pages which increases accessibility. It also provides a seamless experience to translate the language through Google Translate.

MOCS launched an interactive **Contracting Roadmap** in September 2023 which has become the go-to resource for vendors in learning more about doing business with the City. Launched at the **Minority and Women-owned Business Enterprise (“M/WBE”)** Procurement Fair in September, the Contracting Roadmap has since enjoyed more than 7,700 views. While the target user group of the Contracting Roadmap is vendors, City employees, including procurement professionals, benefit from this new resource as well by learning the vendor-side of the contracting experience.

Contracting Roadmap

Welcome to our new interactive Contracting Roadmap!

Want to learn how to do business with the City of New York?
The Contracting Roadmap will guide you through the process.
Start your contracting journey – click Get Ready To Do Business.

Click/tap each step in the path below.



2.3 M/WBE Trainings Support

In 2023, MOCS supported several **M/WBE live webinars** for NYC procurement professionals. M/WBE trainings are organized by SBS and the Mayor’s Office of M/WBE and delivered through the DCAS Citywide Training Center. 2023 M/WBE

Trainings comprised:

- 101: M/WBE Program Overview
- 102: Identifying M/WBEs for Opportunities, incl. Online Directory
- 201: Incorporating the M/WBE Program into the Procurement Process
- 202: Best Practices for M/WBE Goal Setting
- 203: M/WBE Program Resources
- 204: Best Practices for M/WBE Networking & Outreach
- 301: M/WBE Procurement and Utilization Plans

2.4 ProTIP e-Courses Facilitation

Since 2020, MOCS has offered procurement courses through a web-based platform **ProTIP (Procurement Training Institute Portal)** and continues to provision senior city procurement staff and all MOCS staff with access to ProTIP. 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).

In addition, procurement professionals provisioned with access to ProTIP can partake in a library of eLearning courses available on-demand to enrich and deepen their general procurement knowledge. These e-courses explore general procurement topics and are produced by the National Institute of Governmental Purchasing (NIGP).

- Cost, Price & Value Analysis
- Effective Contract Management
- Evaluation Methods
- Introduction to Contracts in Public Procurement
- Introduction to Specification Writing
- MOCS "Ethics" A Crash Course for NYC Public Procurement Professional
- MOCS Procurement 101
- Requirements Planning & Understanding
- RFPs-From Start to Finish (with Exam)
- Specification Development
- Surety Bonds: Limiting Risk and Financial Loss
- The Procurement Cycle: Contract Administration Phase
- The Procurement Cycle: Planning Phase
- The Procurement Cycle: Solicitation Development Phase

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, at a minimum, the **Ethics in Procurement** e-course.

2.5 Procurement Leaders Meetings

MOCS continues 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 2023 include, but are not limited to, PASSPort functionality updates and enhancements, legislation updates, reporting requirements, and procurement-related programs.

The meeting presentations and follow-up emails are published on [BuyWise](#).

INDICATORS

- The **11 Procurement Process Trainings** yielded a total of 4,321 registrants and **3,201 attendees** with an average of 91% of attendees rating the trainings as Excellent or Very Good. The top five most popular webinars in terms of attendance numbers were, in descending order: PASSPort Agency Performance Evaluations; Local Law 63 Compliance; Emergency Purchase Method, Competitive Sealed Proposals; and Vendor Integrity Review.

Training	Registrants	Attendees	Attendance Rate	Attendees Rating Training as Excellent/Very Good
Competitive Sealed Bids	354	319	90%	91%
Project Labor Agreements	307	270	88%	94%
Local Law 63 Compliance	569	358	63%	90%
Competitive Sealed Proposals	396	336	85%	89%
PASSPort Agency Performance Evaluations	980	451	46%	84%
Vendor Integrity Review	371	328	88%	94%
Sole Source Procurements	245	214	87%	87%
Emergency Purchase Method	351	338	96%	96%
Environmentally Preferable Purchasing Review	238	195	82%	82%
Best Value Bids and Proposals	305	263	86%	96%
Local Law 34 and Compliance	205	129	63%	94%
Totals and Averages	4321	3201	79%	91%

- The **4 PASSPort Trainings** on the new Fall 2023 functionalities yielded a total of 1,673 registrants and **1,328 attendees**.
- The **Contracting Roadmap** web page yielded **7,726 views** generated by 5,247 page visitors since its September launch and through December 31st.
- The **16 M/WBE Trainings** supported by MOCS yielded 410 registrations and **249 attendees**. The top five popular webinars in terms of attendance numbers were, in descending order: 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.
- **ProTIP** reports indicate 468 platform users as of December 21, 2023, with **359 users** having completed an average of 5.4 e-courses in 2023. 120 ProTIP users completed the MOCS Procurement 101 e-course, and 141 users completed the MOCS Ethics e-course.
- Over **160 participants** typically attend MOCS' **Monthly Procurement Leaders Meeting**, including all Mayoral Agencies Agency Chief Contracting Officers (ACCOs) and Deputy Agency Chief Contracting Officers (DACCOs) who are expected to attend and pass on the information to their procurement staff.