

Fall 2015 PTI Schedule

LL34 Compliance/DBA– September 2, 2015 (11:00am-12:30pm);
September 3, 2015 (1:00pm-2:30pm) - CANCELLED
September 4, 2015 (11:00am-12:30pm) - CANCELLED
September 9, 2015 (1:00pm-2:30pm) - CANCELLED
September 10, 2015 (11:00am-12:30pm);
September 15, 2015 (10:00am-11:30pm) – for DOE Staff (at CTC) -
CANCELLED
September 17, 2015 (11:00am-12:30pm) - CANCELLED
September 22, 2015 (11:00am-12:30pm)
September 23, 2015 (1:00pm-3:00pm)
September 28, 2015 (1:00pm-3:00pm)

NYC Nonprofits: Financial Management - September 24, 2015 (9:00am-12:00pm)

You will have the opportunity to learn about budgeting and strategic resource allocation. Understanding the nature of revenues and expenses and translating that knowledge into programmatic planning and success is a key aspect of a nonprofit to legally comply, efficiently use and track financial and in-kind resources provided in the framework of NYC contract and by various donor. Understanding financial management principles, having a right financial tools and systems to efficiently record and analyze an organization's revenues and expenses, and developing a clear cost allocation mechanisms is a fundamental pillar that should be addressed by both executive staff and board. This workshop will address all those concerns, consider best practices, and provide templates and tools to ensure that nonprofits have clear and efficient financial tools to achieve their programmatic goals.

Neil P. Flynn, CFO, Vice President of Finance and Operations at Boys and Girls Harbor, Andrea T. Mills, MBA, CPA, CCSA®, CGMA, Principal and Stuart Cohen, Principal, Team Decision-Making and ROLE Services at Fiscal Management Associates (FMA) will conduct this training.

LL34 Compliance/DBA– October 1, 2015 (3:00pm-5:00pm);
October 5, 2015 (10:00am-12:00pm);
October 6, 2015 (11:00am-1:00pm);
October 7, 2015 (1:00pm-3:00pm);
October 8, 2015 (11:00am-12:30pm);
October 13, 2015 (2:30pm-4:00pm) at DOC
October 14, 2015 (1:00pm-2:30pm)
October 15, 2015 (11:00am-12:30pm)
October 21, 2015 (1:00pm-2:30pm);
October 22, 2015 (11:00am-12:30pm)
October 28, 2015 (at FISA)

PIP Subcontractor Tracking – October 14, 2015 (1:30pm-5:00pm) - CANCELLED

Subcontracting will provide participants with an overview of the requirements surrounding subcontractor data collection and reporting. The course will include a demonstration of the Payee Information Portal (PIP) subcontractor data collection system and the subcontractor screens in FMS. The course will also cover the regulatory requirements around subcontracting in the PPB Rules and Local Law 1 of 2013 (M/WBE). Participants should be prepared to discuss practices within their agency and share best practices with colleagues.

APT (Automated Procurement Tracking) Basics – October 19, 2015 (1:30pm-5:00pm)

This course is designed for new APT users to learn about the system. It will provide you with the information you need to complete your tasks in the system. The attendees should have basic procurement knowledge.

Ethics/Legal Compliance – October 20, 2015 (9:00am-5:00pm)

In this course participants will learn about core ethical concepts arising in the procurement context such as accountability for compliance, conflicts of interest avoidance, confidentiality and openness in government. The course also explores the historical evolution of the Mayor's procurement authority. The course uses an interactive approach and creative problem solving techniques to teach how to identify and address ethical issues that might arise in the procurement world.

Introduction to Procurement – October 21, 2015 (1:30pm-5:00pm)

This course will provide an introduction to basic procurement methods, and principles. The purpose of the course is to provide an introductory framework for procurement planning. The course will cover the following areas:

- Methods definitions
- Business requirements
- Municipal tracking systems
- Key local laws

This course is intended for agency procurement and program staff with no background knowledge on municipal procurement.

Understanding the VENDEX Process – October 27, 2015 (9:00am-12:30pm)

In this course, participants will learn about the Vendor Information Exchange System (VENDEX), the City's primary tool for determining vendor responsibility. Participants will learn VENDEX policies and procedures as well as how to query the database. The objective of the class is to understand the VENDEX statute and other legal requirements for determining vendor responsibility; to learn about the various VENDEX forms and the information vendors are required to provide; how to use the VENDEX system, including how to conduct queries and initiate vendor name checks; to understand the sources of information that appear on the VENDEX system and how to analyze this information in making responsibility determinations.

NYC Nonprofits: Volunteer Management - October 28, 2015 (9:00am-12:00pm)

Volunteer's management is a significant part of a strategic planning for any nonprofit. The impact that volunteers could have in their communities, the people they serve and engage, and themselves are critical to the mission and success of an organization. Though managing volunteers is an investment of time and energy as well as requires systems and processes to ensure that they are well supervised and efficiently managed, an organization can achieve its programmatic goals, get more donations, and get bigger recognition with smaller resources. Do you engage your volunteers strategically? Do you have a strong position description and professional recruiter? Do you clearly explain what career expectations, opportunities, and possibilities volunteers may encounter in your organization? Do you recognize and retain them? Do you track your volunteers? Do you clearly present the whole picture of their efforts and impact that they will have in their community? This workshop will answer on all those questions, consider best practices, provide templates and tools to ensure that volunteers achieve their goals in service, make a long term volunteer commitment and provide a real benefit to your organization. Paula Gavin - the Chief Service Officer for NYC Service, will conduct this training.

**LL34 Compliance/DBA– November 5, 2015 (11:00am-12:30pm);
November 18, 2015 (1:00pm-2:30pm);
November 19, 2015 (11:00am-12:30pm)**

PIP Subcontractor Tracking – November 5, 2015 (1:30pm-5:00pm)

Subcontracting will provide participants with an overview of the requirements surrounding subcontractor data collection and reporting. The course will include a demonstration of the Payee Information Portal (PIP) subcontractor data collection system and the subcontractor screens in FMS. The course will also cover the regulatory requirements around subcontracting in the PPB Rules and Local Law 1 of 2013 (M/WBE). Participants should be prepared to discuss practices within their agency and share best practices with colleagues.

Prevailing Wage for Contract Administrators – November 10, 2015 (9:00am-12:30pm)

This course will focus on the role of Procurement and contract Administrators as part of The City's team effort to enforce prevailing wage requirements on construction and building service contracts. The course agenda will include an overview of prevailing wage laws in New York State; EO 102 due diligence; review of documentation including sign-in sheets and certified payrolls as well as 'tell tale signs' of potential prevailing wage abuses for procurement and contract administrators.

NYC Nonprofit Assistance: Board Development - November 18, 2015 (9:00am-12:00pm)

Building and managing Board with the capacity to ensure the continued operations of an organization is the most complex and significant asset a nonprofit can develop. Developing a strong and dedicated board whose members are professionals in their fields is often a challenge to accomplish and require thoughtful work and strategic planning. Do you know how to recruit new board members? Are you having trouble in keeping your board engaged and motivated? Is your board financially savvy, understand legal compliance regulations, and actively participate in making major decisions? This training session will describe best practices, tools, references for building and maintaining a strong and dedicated Board. Paula Gavin - the Chief Service Officer for NYC Service and Kelly Mathews New York Council of Nonprofits - will share the benefits and experience of developing a strong and professional Board.

Contract Public Hearings – December 1, 2015 (9:00am - 12:30pm)

This course provides an overview of the relevant rules, pursuant to Section 326 of the New York City Charter and Section 2-11 of the Procurement Policy Board Rules, procedures, deadlines and submissions before a Public Hearing is held in order to receive testimony on any contract over \$100,000. Objectives:

- Describe what documentation is required from the Agency in the APT System for the Public Hearing.
- Review the various methods of source selection for each contract.
- Discuss the Public Hearing Notices to be advertised in The City Record.
- Highlight notification documents to be submitted to elected officials prior to the Public Hearing.
- Requirements for designation letters from agency heads to be transmitted prior to the Public Hearing.
- Master Schedule for Contract Public Hearings.
- APT Tasks, Process and Review.

**LL34 Compliance/DBA– December 3, 2015 (11:00am-12:30pm);
December 8, 2015 (1:00pm-2:30pm);
December 9, 2015 (11:00am-12:30pm)
December 17, 2015 (11:00am-12:30pm)**

PIP Subcontractor Tracking – December 8, 2015 (1:30pm-5:00pm)

Subcontracting will provide participants with an overview of the requirements surrounding subcontractor data collection and reporting. The course will include a demonstration of the Payee Information Portal (PIP) subcontractor data collection system and the subcontractor screens in FMS. The course will also cover the regulatory requirements around subcontracting in the PPB Rules and Local Law 1 of 2013 (M/WBE). Participants should be prepared to discuss practices within their agency and share best practices with colleagues.

Vendor Responsibility/Determinations – December 10, 2015 (1:30pm-5:00pm)

In this course, participants will learn about the vendor responsibility process as governed by the Procurement Policy Board Rules. Participants will learn skills on how to analyze data and will be provided resources to help research prospective vendors. Objectives include understanding the legal requirements for determining vendor responsibility, including VENDEX; to review policies and processes for submitting responsibility determinations to MOCS/Comptroller; to learn skills that will enable agency personnel to gather and analyze data on prospective vendors; to learn how to gather vendor information from the Internet and other resources, including VENDEX, Lexis and other governmental databases; step by step instructions on how to query Internet and other online resources.