

Spring 2016 PTI Schedule

PIP Subcontractor Tracking – January 12, 2016 (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.

LL34 Compliance/DBA – January 12, 2016 (11:00am-12:30pm)

Local Law 34 of 2007 (LL34) established a public Doing Business Database of all entities that are doing or seek to do business with the City, as well as their principal officers, owners, and senior managers. Doing Business Data Forms (DBDF) are collected by City agencies with proposals, at the beginning of contract negotiations or discussions with proposed vendors, as well as when a contract is awarded. When an entity has proposed and has been awarded business by the City that reaches or exceeds threshold amounts, the persons associated with the entity are considered to be doing business with the City. They are then listed on the public Doing Business Database and are subject to the stricter limits for campaign donations defined by the law. This training provides an overview of LL34, when and for what types of purchases the DBDF is collected, and how the information is used for campaign finance purposes.

Introduction to Procurement – January 14, 2016 (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.

Performance Evaluation Process – January 19, 2016 (9:00am – 12:30pm)

In this course, participants will learn the step by step process of evaluating a contract through the VENDEX database. Participants will learn how to determine which contract needs evaluating, create and complete a performance evaluation, as well as review and upload the evaluation into VENDEX. Participants will also learn how to monitor the evaluation throughout the evaluation process using various VENDEX reports.

Target Audience: This course is designed for City procurement personnel involved in all stages of evaluating a vendor performance on a contract.

Legal Compliance in Procurement – January 20, 2016 (9:00am-12:30pm)

This class will provide an overview of procurement laws related to a variety of topics relevant to procurement personnel. Participants will learn about:

- Local Law 50 of 2011, relating to the purchase of New York State food, and the New York City Agency Food Standards;
- Environmentally Preferable Purchasing (EPP) laws;
- Corrective Action Plans (CAPs) for nonprofit providers;
- The New York state Preferred Source law and reporting on preferred source contract awards under Local Law 125 of 2013
- The Living Wage Law
- Local Law 18 of 2012, relating to disclosure of project cost increases; and
- Small Purchases under PPB Rule 3-08.

LL34 Compliance/DBA – January 20, 2016 (1:00pm-2:30pm)

Local Law 34 of 2007 (LL34) established a public Doing Business Database of all entities that are doing or seek to do business with the City, as well as their principal officers, owners, and senior managers. Doing Business Data Forms (DBDF) are collected by City agencies with proposals, at the beginning of contract negotiations or discussions with proposed vendors, as well as when a contract is awarded. When an entity has proposed and has been awarded business by the City that reaches or exceeds threshold amounts, the persons associated with the entity are considered to be doing business with the City. They are then listed on the public Doing Business Database and are subject to the stricter limits for campaign donations defined by the law. This training provides an overview of LL34, when and for what types of purchases the DBDF is collected, and how the information is used for campaign finance purposes.

HireNYC - January 27, 2016 (9:00am – 12:30pm)

This class will provide an overview of the HireNYC initiative and its impact on City agencies. HireNYC is a suite of initiatives designed to leverage the City's purchasing power and economic investments to create employment opportunities for low-income and underserved New Yorkers.

NYC Nonprofits: Financial Management, Internal Controls and Audit Prep – January 28, 2016 (9:00am - 12:00pm)

Audits test the reliability of financial reports and review the adequacy of internal controls, the systems and procedures that nonprofits follow to safeguard their assets and create reliable financial reports. Funding audits or government audits also test for compliance with the contract and program terms. At the end of this session, nonprofit staff will learn how to safeguard assets through strategic internal controls and prepare for a successful audit. Nonprofit leaders will learn:

- Best practices for internal controls,
- How to ensure the reliability of financial reporting,
- How to reduce the costs of independent audits or get more value from the auditor.

This workshop will help nonprofit board and staff manage a smooth audit and build the internal control systems needed to protect public funds. This training presented by Ethan Khan, Partner, at WeiserMazars LLP.

Please visit <https://a002-oom03.nyc.gov/rsvp1/rsvp2> to register.

LL34 Compliance/DBA – February 2, 2016 (11:00am-12:30pm)

LL34 Compliance/DBA – February 10, 2016 (1:00pm-2:30pm)

Local Law 34 of 2007 (LL34) established a public Doing Business Database of all entities that are doing or seek to do business with the City, as well as their principal officers, owners, and senior managers. Doing Business Data Forms (DBDF) are collected by City agencies with proposals, at the beginning of contract negotiations or discussions with proposed vendors, as well as when a contract is awarded. When an entity has proposed and has been awarded business by the City that reaches or exceeds threshold amounts, the persons associated with the entity are considered to be doing business with the City. They are then listed on the public Doing Business Database and are subject to the stricter limits for campaign donations defined by the law. This training provides an overview of LL34, when and for what types of purchases the DBDF is collected, and how the information is used for campaign finance purposes.

Vendor Responsibility/Determinations – February 10, 2016 (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.

NYC Nonprofits: Fundraising Training Series, Proposal and Grant Writing – February 11, 2016 (9:00am - 12:00pm)

As resources remain scarce, it is a challenge for nonprofit executive staff and board's doing great work in their community to compete for grants, contracts, or RFPs. If your organization would like to know the key components of a successful proposal, you should attend this course. This training is presented by Natasha Mast and Vincent Pernetti, at HHS Accelerator, Cressida Wasserman, Senior Planner at NYC Department of Youth & Community Development, and Jon Moscow, Managing Partner, at Sterner-Moscow Partnership. *Targeted to nonprofit executives and board members, registration required.*

During this training session, nonprofit staff will learn:

- How to respond to a RFP,
- How to develop a winning proposal,
- Tips for making your proposal stronger.

Please visit <https://a002-oom03.nyc.gov/rsvp1/rsvp2> to register.

PIP Subcontractor Tracking – February 16, 2016 (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.

PLA for Contract Administrators (at DHMH) – February 24, 2016 (1:00pm-5:00pm)

This course will focus on the role of Contract Administrators as part of The City's team effort to implement NYC's Project Labor Agreements (PLAs).

SEMINAR OBJECTIVES:

- A brief overview of the City's PLAs
- A discussion of how prevailing wage standards are affected by the PLAs
- Contract Administrators responsibilities at project mobilization
- 'Tell-tale signs' of potential non-compliance with the PLAs

Target Audience: This course is designed for all City procurement personnel

NYC Nonprofits: Fundraising Training Series, Digital Marketing – February 25, 2016 (9:00am - 12:00pm)

The Internet and social networks are transforming the way nonprofit organizations interact with clients, partners, and potential donors. Digital marketing has become an essential tool for nonprofit outreach and advocacy. A key digital marketing objective is to engage targeted community members and give them a way to interact with the nonprofit organization. This workshop will provide nonprofit organizations with the fundamentals of digital marketing: spreading awareness, managing audience member relationships, and understanding contemporary digital trends. The training will provide staff with best practices for navigating each platform, developing a digital strategy and analyzing audience trends. This training is presented by Tobias Rodriguez, Deputy Digital Director, and Masha Gindler, Deputy Director at NYC Mayor's Office of Digital Strategy and Petia A. Bradshaw of Stylista Group.

Please visit <https://a002-oom03.nyc.gov/rsvp1/rsvp2> to register.

LL34 Compliance/DBA – March 1, 2016 (11:00am-12:30pm)

Local Law 34 of 2007 (LL34) established a public Doing Business Database of all entities that are doing or seek to do business with the City, as well as their principal officers, owners, and senior managers. Doing Business Data Forms (DBDF) are collected by City agencies with proposals, at the beginning of contract negotiations or discussions with proposed vendors, as well as when a contract is awarded. When an entity has proposed and has been awarded business by the City that reaches or exceeds threshold amounts, the persons associated with the entity are considered to be doing business with the City. They are then listed on the public Doing Business Database and are subject to the stricter limits for campaign donations defined by the law. This training provides an overview of LL34, when and for what types of purchases the DBDF is collected, and how the information is used for campaign finance purposes.

Understanding the VENDEX Process – March 8, 2016 (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: Navigating New York City's Contracting Requirements – March 9, 2016 (9:00-12:00 pm)

With the complexity of the City's contracting process, it can seem overwhelming to navigate the procurement process, win a contract and receive reimbursement for the services provided under a contract. Often grassroots and small, community based organizations find the process confusing and need help figuring out who to talk to about what. This training will provide **nonprofit staff and board members** with the context and guidance to effectively communicate with City agency staff, build relationships, and meet compliance requirements and "vendor" expectations.

Please visit <https://a002-oom03.nyc.gov/rsvp1/rsvp2> to register.

LL34 Compliance/DBA – March 9, 2016 (1:00pm-2:30pm)

Local Law 34 of 2007 (LL34) established a public Doing Business Database of all entities that are doing or seek to do business with the City, as well as their principal officers, owners, and senior managers. Doing Business Data Forms (DBDF) are collected by City agencies with proposals, at the beginning of contract negotiations or discussions with proposed vendors, as well as when a contract is awarded. When an entity has proposed and has been awarded business by the City that reaches or exceeds threshold amounts, the persons associated with the entity are considered to be doing business with the City. They are then listed on the public Doing Business Database and are subject to the stricter limits for campaign donations defined by the law. This training provides an overview of LL34, when and for what types of purchases the DBDF is collected, and how the information is used for campaign finance purposes.

Ethics/Legal Compliance – March 10, 2016 (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.

APT (Automated Procurement Tracking) Basics – March 15, 2016 (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.

LL34 Compliance/DBA – March 17, 2016 (11:00am-12:30pm)

Local Law 34 of 2007 (LL34) established a public Doing Business Database of all entities that are doing or seek to do business with the City, as well as their principal officers, owners, and senior managers. Doing Business Data Forms (DBDF) are collected by City agencies with proposals, at the beginning of contract negotiations or discussions with proposed vendors, as well as when a contract is awarded. When an entity has proposed and has been awarded business by the City that reaches or exceeds threshold amounts, the persons associated with the entity are considered to be doing business with the City. They are then listed on the public Doing Business Database and are subject to the stricter limits for campaign

donations defined by the law. This training provides an overview of LL34, when and for what types of purchases the DBDF is collected, and how the information is used for campaign finance purposes.

PIP Subcontractor Tracking – March 22, 2016 (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.

Intergovernmental Procurements – April 4, 2016 (1:30pm-5:00pm)

In this class, participants will learn how to procure goods and services through New York State Office of General Services (OGS) and federal General Services Administration (GSA) Contracts. Participants will also learn proper solicitation procedures for OGS and GSA intergovernmental contracting, relevant local, state, and federal rules that govern such contracting, and best practices.

RFPs for All: Removing Barriers to Competition for Small CBOs – March 22, 2016 (9:00 am-12:00 pm)

This class will explore program and RFP design elements that encourage community based organizations to compete for City contracts. The material will be geared towards City programs that require culturally competent service providers rooted in the communities they serve. Topics include using the structured proposal format, evaluating cultural competency and language access, determining community demographics, outreach to underserved communities, and providing technical assistance to small organizations.

Target audience: City agency procurement and program staff.

LL34 Compliance/DBA – April 5, 2016 (11:00am-12:30pm)

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PIP Subcontractor Tracking – April 12, 2016 (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.

**NYC Nonprofits: Financial Management, Budgeting for the Full Cost of Programs
April 13, 2015 (9:00am - 12:00pm)**

Understanding the nature of revenues and expenses and translating that knowledge into programmatic planning and success is a critical skill for nonprofits, which are required to track financial and in-kind resources by contract or funding source. This session will provide board and staff with an understanding of budgeting and cost allocation principles and the financial tools and systems needed to record and review an organization's revenues and expenses by program, as well as provide best practices templates to implement a comprehensive budgeting process. This training is presented by Neil P. Flynn, CFO, Vice President of Finance and Operations at Boys and Girls Harbor and Alan Cheng, Associate Commissioner/ Chief Financial Officer at NYC Department of Youth and Community Development.

Please visit <https://a002-oom03.nyc.gov/rsvp1/rsvp2> to register.

Procurement Law for Beginners –April 14, 2016 (1:30pm-5:00pm)

This course presents a basic introduction to the legal framework for City procurements. City procurements are governed by State Law, the Charter, the Administrative Code, and the PPB Rules. The class will discuss these rules and how they apply to the decisions procurement professionals make every day in solicitations, evaluations, responsibility determinations and more. The class is an opportunity for program staff to understand the rules that procurement professional have to follow.

LL34 Compliance/DBA – April 20, 2016 (1:00pm-2:30pm)

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APT (Automated Procurement Tracking) Basics (at HPD) – April 20, 2016 (2:00pm-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.

LL34 Compliance/DBA – May 3, 2016 (11:00am-12:30pm) – CANCELLED

Local Law 34 of 2007 (LL34) established a public Doing Business Database of all entities that are doing or seek to do business with the City, as well as their principal officers, owners, and senior managers. Doing Business Data Forms (DBDF) are collected by City agencies with proposals, at the beginning of contract negotiations or discussions with proposed vendors, as well as when a contract is awarded. When an entity has proposed and has been awarded business by the City that reaches or exceeds threshold amounts, the persons associated with the entity are considered to be doing business with the City. They are then listed on the public Doing Business Database and are subject to the stricter limits for campaign donations defined by the law. This training provides an overview of LL34, when and for what types of purchases the DBDF is collected, and how the information is used for campaign finance purposes.

PIP Subcontractor Tracking – May 10, 2016 (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.

Project Labor Agreements (PLA) for Contract Administrators – May 12, 2016 (9:00am-12:30pm)

This course will focus on the role of Contract Administrators as part of The City's team effort to implement NYC's Project Labor Agreements (PLAs).

SEMINAR OBJECTIVES:

- A brief overview of the City's PLAs
- A discussion of how prevailing wage standards are affected by the PLAs
- Contract Administrators responsibilities at project mobilization
- 'Tell-tale signs' of potential non-compliance with the PLAs

Target Audience: This course is designed for all City procurement personnel

Contract Public Hearings – May 17, 2016 (9:00am - 12:30pm) – CANCELLED

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.

NYC Nonprofits: Volunteer Management - May 25, 2015 (9:00am - 12:00pm)

Volunteer management should be considered a part of strategic planning. The impact that volunteers can have in their communities and on the people they serve and engage can successfully support the mission of an organization. Though managing volunteers is an investment of time and energy and requires systems and processes to ensure that they are well managed, an organization can achieve its programmatic goals, get more donations, and get bigger recognition with limited 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 clearly present the whole picture of their efforts and impact that they will have in their community? This workshop will answer all those questions, as well as provide best practices templates and tools to ensure that volunteers achieve their goals in service, increase their volunteer commitments and provide a real benefit to your organization. This training is presented by Paula Gavin, Chief Service Officer, at NYC Service and Gary Bagley, Executive Director at New York Cares.

Please visit <https://a002-oom03.nyc.gov/rsvp1/> to register.

Legal Compliance in Procurement – May 26, 2016 (9:00am-12:30pm)

This class will provide an overview of procurement laws related to a variety of topics relevant to procurement personnel. Participants will learn about:

- Local Law 50 of 2011, relating to the purchase of New York State food, and the New York City Agency Food Standards;
- Environmentally Preferable Purchasing (EPP) laws;
- Corrective Action Plans (CAPs) for nonprofit providers;
- The New York state Preferred Source law and reporting on preferred source contract awards under Local Law 125 of 2013
- The Living Wage Law
- Local Law 18 of 2012, relating to disclosure of project cost increases; and
- Small Purchases under PPB Rule 3-08.