



Date: December 8, 2016

To: Patrick H. West, City Manager 

From:  Craig A. Beck, Director of Public Works
John Gross, Director of Financial Management 

For: Mayor and Members of the City Council

Subject: Update on Contract Management

At its June 21, 2016 meeting, the City Council requested that the City Manager provide an update on contract management procedural changes to address concerns raised by the City Auditor. Each of the four areas identified by the City Council are addressed below.

Develop a training program for Project Managers (both employees and consultants) on managing projects, preparing scope of work, and reviewing proposals.

For a number of years, Public Works (PW) has supported training and development for project managers (staff and consultants) responsible for delivery of City projects. Regular brownbag lunch sessions are held to discuss industry trends and provide updates on large, interesting projects. Additionally, staff attends continuing education sessions to stay current on Project Management (PM) practices.

To specifically address overall contract management and project delivery, PW has implemented a number of changes to improve effectiveness and efficiency. Organizationally, a new Public Works division, Project Management, was established to better align work teams, provide coordinated training, and ensure a focused approach.

Active project monitoring is now a priority for the PM teams. Tools, such as Microsoft Project and Project Tracker 2.0 are now a required element of managing project schedules and tasks. These tools will help keep resources focused and allow for better planning. Information is also being entered into a "project status template," which will be made available to the community as soon as January 2017.

Additionally, PW in partnership with the City's utilities, is working to identify a new Project Performance Management software system. This new tool will help provide more robust oversight and coordination between various construction projects. The goal is to bring a recommendation before the City Council the first quarter of 2017.

Develop a training program on contract administration best practices.

In order to support increased skills and knowledge related to contract administration throughout the City, Financial Management (FM) now offers "Effective Contract Management" training. Training topics include the lifespan of a contract, the responsibilities

of a contract manager, and contract management best practices. The training format utilizes example scenarios to help participants apply the principles covered.

Two large group sessions were attended in July 2016. The training was video recorded, and is now available on the FM intranet website along with the accompanying PowerPoint presentation. The video and materials will remain available for on-demand training, with additional group sessions scheduled in 2017. FM also provides specialized training for groups on an as needed basis. For example, a recent training session was provided to Long Beach Gas and Oil Department managers regarding procurement procedures for professional services.

In addition to the training provided by FM, PW will be hiring an outside consultant to provide training support for project and contract management. It is anticipated these training sessions will provide multi-tiered instruction (basic, intermediate, advanced) to appropriately address differing needs within the City organization. This training is planned to start in the first quarter of 2017.

Establish policies and procedures for overseeing standardized citywide contracts.

FM is evaluating several options to provide City staff with contract management software tools to support improved contract oversight. The introduction of contract management software is expected to increase access to contract information and provide tools to strengthen ongoing monitoring efforts. Once implemented, software functionality will provide a foundation for development of additional policies and procedures related to contract oversight.

Software options include the contract module available within PlanetBids (the City's current bidding platform). There is also a contract module in the new Citywide Enterprise Resource Planning (ERP) Financial and Human Resources system. The most likely direction will include implementing PlanetBids functionality now, while the ERP system is being developed.

Develop a policy to ensure project managers are certified and certifications are current.

Through the Civil Service testing and recruitment process, the City is hiring individuals with the necessary credentials, experience and training to handle the daily responsibilities of the job they perform (Exhibit A). While individuals are hired with the requisite skills, continuing education is an important part of a successful project delivery process. This year, a significant amount of training was provided to the PM staff including: software training on Microsoft Project and Project Tracker 2.0; PW's brown bag lunch training series on best engineering practices in labor compliance, E-Gordian system, cost estimating, funding and maintenance of bridges, construction management and scheduling, street repaving (Cold-In-Place), stormwater infiltration design, and training on the City's financial system to allow for tracking of project costs.

Beyond these training efforts, PW is looking at more formal certification programs for all of its Project Managers. Options being considered include:

- Internal Certification Program: Our staff will work with industry professionals and other City departments to create a training program that will teach the skills necessary to be a successful Project Manager with the City of Long Beach.
- Class completion at local university level: Local universities such as California State University, Long Beach have classes taught through their Engineering Departments that focus on Project Management and Construction Management. It is being assessed if there is a class makeup that will build the skills necessary for a Project Manager.
- Professional certification programs: Certifications might include Project Management Professional (PMP), Project Management Institute (PMI), and Certified Associate in Project Management (CAPM).

While professional certification programs provide a more uniformed training experience, there is also the need to work through the Memorandum of Understanding process with the employee groups to make it a job requirement.

If you have any questions regarding this matter, please contact Craig Beck, Director of Public Works, at (562) 570-6771, or John Gross, Director of Financial Management, at (562) 570-6427.

ATTACHMENT: EXHIBIT A – CAPITAL PROJECTS COORDINATOR I-IV

CC: CHARLES PARKIN, CITY ATTORNEY
LAURA L. DOUD, CITY AUDITOR
TOM MODICA, ASSISTANT CITY MANAGER
ARTURO SANCHEZ, DEPUTY CITY MANAGER
REBECCA JIMENEZ, ASSISTANT TO THE CITY MANAGER

CB:JC



CITY OF LONG BEACH CLASSIFICATION SPECIFICATION

TITLE: CAPITAL PROJECTS COORDINATOR I-IV

DEFINITION: Under direction, plans and coordinates capital improvement projects.

DISTINGUISHING CHARACTERISTICS:

Grade Level I - Journey level; directs and coordinates capital improvement projects, programs or activities;

Grade Level II - Directs and coordinates complex capital improvement projects, programs and/or activities.

Grade Level III - Directs and coordinates the most complex capital improvement projects, programs and/or activities.

Grade Level IV - Directs and coordinates the most complex capital improvement projects, programs and/or activities; and acts as lead or supervisor.

EXAMPLES OF DUTIES:

- Plans and coordinates all aspects of one or more capital improvement projects; including definition, design and implementation;
- Prepares project schedules and budgets in concert with project engineer;
- Monitors project schedules and budgets and initiates corrective action when required;
- Represents the City in meetings with architects, engineers, client departments, citizen groups and governmental agencies;
- Prepares grant and permit applications, requests for proposals, consultant agreements, public notices, and other project documents not including plans and specifications;
- Assures project designs represent a reasonable engineering response to the needs of the client department and conform to Citywide policies, goals, and objectives;
- Ensures appropriate construction, maintenance and other related staff have reviewed project designs for constructibility and operability;
- Assists client department and other interested parties in interpreting plans and specifications;
- Assists project team in generating alternative solutions and facilitates the decision making process;

- Directs consultant selection procedures, administers consultant contracts and may assist in bidding and administration of construction contracts;
- Makes presentations to governmental bodies and citizen groups;
- Provides direction to other engineering staff involved in project planning, estimating, design review, scheduling, and construction;
- Harbor Department may have Capital Projects Coordinator I positions work on complex capital improvement projects in the capacity of scheduling and budgeting;
- May act as a lead or supervisor

MINIMUM REQUIREMENTS:

Proof of graduation from an accredited four-year college or university with a Bachelor's degree in engineering, architecture, construction management, public or business administration, or a closely-related field; and three years (full-time equivalent) of paid, professional-level experience relating to the administration of capital improvement projects and/or research projects, including one year of project management experience. Additional related experience offering specific and substantial preparation for the duties of the position may be substituted for the required education on a year-for-year basis.

Experience interpreting plans, writing specifications, and preparing plan documents; experience working effectively with clients and consultants to determine requirements, including selection and administration of contracts; proficiency in the operation of a personal computer, including a working knowledge of spreadsheet, database, and project management applications; ability to communicate effectively, both orally and in writing.

Proof of a valid motor vehicle operator's license may be required. May be required to work evenings, weekends, shift work and split shifts.

HISTORY:

Established: 07/01/90

Revised: 06/19/02

Approval/Adoption Dates: 06/26/02

Revised: 05/25/11

Approval/Adoption Date: 07/06/11