CONTRACTS REENGINEERING STUDY RECOMMENDATIONS MATRIX

RECOMMENDATION NUMBER	*DESCRIPTION*	*IMPLEMENTATION STATUS*
Overarching		
C4-1	Reorganize and consolidate a professional contracts staff in a central department	**Before Council for Approval Today**
C1: Material, Supplies and Services Contracts		
C1-d	Incorporate automatic adjustments, reflecting the consumer price index (CPI) or similar index, in contracts required to be competitively awarded.	**Under Development/Final Proposal May Require Council Action**
C1-f	Change the protest period to five (5) days for Requests for Bid and ten (10) days for Requests for Proposals.	
C1-e	Delegate the authority to award contracts for expenditures equal to or less than $50,000 from the Purchasing Agent to the Department to award the contract.	
C1-a	Eliminate requirement to competitively bid contracts that provide for an expenditure of less than $15,000.	**Mayor does not recommend at this time**
C1-b	Eliminate requirement to be competitively award contracts to enterprises that resell products and services, i.e. golf courses and lake concessions	
C1-c	Delegate the authority to award contracts with expenditures greater than $15,000, but less than $50,000, to the Purchasing & Contracting Agent; or, delegated authority may award the contract but shall solicit a minimum of three (3) phone/fax quotes.	

RECOMMENDATION NUMBER	*DESCRIPTION*	*IMPLEMENTATION STATUS*
C2: Revenue Generating Contracts		
C2-d	Eliminate duplicative Requests for Council Action (1472) processes. When possible, approve grant application, accept grant funds and appropriate and expend grant and matching funds in one City Council action.	**Under Development/Final Proposal May Require Council Action**
C2-b	Provide centralized grant management and review.	**Under Development/Mayoral Implementation**
C2-c	Incorporate grant funding into the annual budget process.	

C2-e	Establish consistent, city-wide standards and practices for accounting and record keeping.	
C2-a	Delegate authority to approve grant applications to the Mayor or designee if matching funds and/or up-front costs are available in fiscal year's budget.	**Mayor does not recommend at this time**

RECOMMENDATION NUMBER	*DESCRIPTION*	*IMPLEMENTATION STATUS*
C3: Architectural & Engineering (A&E) Professional Services Contracts		
C3-f	Develop on-line contract policies and procedures manual with down-loadable contract agreement templates. Use the manual as the basis for contracts training.	**Under Development/Mayoral Implementation**
C3-g	Conduct annual compliance reviews of contract files.	
C3-h	Ensure that consultants file Statement of Economic Interest with the City Clerk as required by law.	
C3-b	Remove dollar ceiling on use of Consultant Rotation List.	**Mayor does not recommend at this time**
C3-c	Increase approval threshold to allow cumulative awards of $1,000,000 or less, city-wide, to a single consultant in a fiscal year.	
C3-d	Do not require Requests for Council Action (1472) for projects greater than $250,000. Let the initiating department make awards based on the already approved department budget in which the project budget resides.	

RECOMMENDATION NUMBER	*DESCRIPTION*	*IMPLEMENTATION STATUS*
C4: Construction Contracts		
C4-e	Reduce the bid protest period from ten (10) days to five (5) days.	**Under Development/Final Proposal May Require Council Action**
C4-a	Concurrent review and approval of project plans and specifications, using electronic review and mark-up.	**Under Development/Mayoral Implementation**
C4-b	Begin the review of project plans and specifications at 100% design submittal.	
C4-c	Make contract documents available electronically to bidders and various plan rooms.	
C4-g	Delegate Mayoral authority to execute contracts to Department Director or lower.	
C4-h	Create an electronic review process for approval documents (1472/1544/PA700) so they can be approved concurrently and at an earlier point in the process.	
C4-j	Review all contract boilerplates to standardize language in like sections.	
C4-k	Develop one common method/philosophy of how phase funding for construction	

	contracts will function.	
C4-n	Create an electronic process for Change Order approval.	
C4-o	Have a contracts procedures manual available on line.	
C4-p	Develop system for tracking warranty information to assist project managers in obtaining contractor sign-off at close of contract.	
C4-f	Do not require insurance certificates and endorsements at time of award as the requirement to provide insurance is already covered in the contract and as such the contractor is required to comply.	**Mayor does not recommend at this time**
C4-i	Delegate authority to award contracts over $1,000,000 to the Mayor, or designee if project is identified and approved in the annual CIP budget; or increase the approval threshold of contracts requiring Council approval.	
C4-m	Increase the approval threshold for contract change orders.	

RECOMMENDATION NUMBER	*DESCRIPTION*	*IMPLEMENTATION STATUS*
C5: Non-Architectural & Engineering Services Contracts		
C5-a	Centralize the review of non-architectural & engineering consultant contracts within the Purchasing Division and provide the staff with training and/or a certification program.	**Under Development/Mayoral Implementation**
C5-b	Standardize template documents.	
C5-c	Develop and implement a process to maintain electronic copies of all executed contracts.	
C5-d	Network and share contract information with other local agencies to better utilize the sharing of contracts that have already been through a competitive bidding process.	
C5-e	Publish all contract award summaries on the City's web site, including sole source contract awards for a period of sixty (60) days.	
C5-f	Develop "as-needed" lists of pre-qualified non-A&E professional service providers similar to the process currently used to develop as-needed lists for A&E professional services.	
C5-g	Expand the usage of the blanket purchase order process.	
C5-h	Require the signature of the Purchasing Agent or designee for the execution of all non-A&E contract documents.	
C5-i	Reengineer the 1472 and 1544 processes. Include the use of information systems technology to support document processing and approvals.	
C5-j	Increase the threshold for the competitive bidding of contracts to $25,000.	**Mayor does not recommend at this time**
C5-k	Increase the approval thresholds of non-A&E services.	

RECOMMENDATION NUMBER	DESCRIPTION	IMPLEMENTATION STATUS
C6: Reimbursement Agreements		
C6-a	Earlier identification of potential reimbursable projects: Development Services Department to identify reimbursable projects at the time Tentative Map conditions are established.	**Under Development/Mayoral Implementation**
C6-b	Standardize boilerplate agreements.	
C6-c	Have the Development Services Department engineer coordinate the review and submittal of a reimbursable project: involve Field Engineering immediately.	
C6-d	Delegate authorization of reimbursement agreements to the Mayor and the Office of the Independent Budget Analyst.	**Mayor does not recommend at this time**