GOAL ONE

REFINE PROCUREMENT PLANNING PROCESS TO...

- Identify clear, consistent, community-based goals and outcomes for funding streams
- Widely communicate information to solicit proposals to meet these goals and outcomes
- Provide room for creativity and innovation

CLEAR AND INTEGRATED GOALS AND OUTCOMES

CROSS-AGENCY OBJECTIVE

Goals and outcomes for each funding stream are mapped across City agencies and analyzed for consistency and best use of funding.

INTRA-AGENCY OBJECTIVE

Clear goals and outcomes that support overall agency priorities are identified for each funding stream, using data analysis and transparent public and political input processes.

WHAT ACTIVITIES WOULD WE ENGAGE IN TO MAKE THIS HAPPEN?

- Formal launch
- Build discussion about funding stream outcomes into citywide goal planning and strategic planning processes
- Meetings of executive leadership and of managers
- Identify funding streams and cross reference by subject
- Consolidate information
- Engage IT to explore creation of an online tool
- Create handbook (online tool?) through multi-agency work group and disseminate to agencies
- Identify points of contact
- Ongoing meetings of managers

WHAT WOULD HELP US UNDERSTAND WE WERE MAKING PROGRESS ALONG THE WAY (OUTPUTS)?

- Management is talking about it
- Resources dedicated – (Point of contact - someone to manage information, IT person)
- Handbook for contacts that are subject matter experts in funding stream
- Central online resource for grants manager for each agency
- Staff know City and agency goals and incorporate them into the planning and RFP process
- Staff work together to put the right funding toward the right kind of projects (cross-agency)
- Agencies tie together funding streams to support overall goals

WHAT WOULD IT LOOK LIKE IF WE WERE SUCCESSFUL IN THIS WORK (OUTCOMES)?

- Executive management support of unified goals
- Planning and competitive bid tools are tied to identified outcomes so that the right contractor can be selected
- Each funding stream is maximized to best meet community needs
- Nonprofits can provide better, more consistent service because there are a coherent set of outcomes identified across and within funding streams
- Resources go further because they are working in concert
- Agencies are using resources more efficiently and effectively because they understand where their funding fits into supporting the bigger picture
**STAFF TRAINING**

**CROSS-AGENCY OBJECTIVE**

Training around City procurement policies and best practice processes is provided for new and ongoing staff who manage funding streams.

**INTRA-AGENCY OBJECTIVE**

Staff managing funding streams are trained on the range of procurement options in order to utilize the appropriate procurement tool to reach identified outcome.

**WHAT ACTIVITIES WOULD WE ENGAGE IN TO MAKE THIS HAPPEN?**

- Inventory resources already available from Purchasing
- If needed, create training curriculum:
  - Procurement 101
  - Procurement 201 (agency specific training – requirements by funders)
- Deliver trainings

**WHAT WOULD HELP US UNDERSTAND WE WERE MAKING PROGRESS ALONG THE WAY (OUTPUTS)?**

- Staff know the advantages and disadvantages of procurement tools and identify and use the right one
- Staff understand where community input fits into planning process and how to solicit that input
- No more trial by fire
- Staff don’t have to guess or make up the process

**WHAT WOULD IT LOOK LIKE IF WE WERE SUCCESSFUL IN THIS WORK (OUTCOMES)?**

- Well trained staff
- Staff have clear, consistent process to engage in planning for successful procurement
- Reduces mistakes and increases timeliness of the procurement

**VENDOR AND PROGRAM INFORMATION**

**CROSS-AGENCY OBJECTIVE**

Consistent vendor-specific information (not relating to program outcomes) is identified for annual, centralized collection and made available to all City agencies.

**INTRA-AGENCY OBJECTIVE**

Funding stream-specific proposal questions are developed and tied directly to assessing a potential contractor’s ability to produce results around identified outcomes.

**WHAT ACTIVITIES WOULD WE ENGAGE IN TO MAKE THIS HAPPEN?**

- Work with multi-agency team to decide what information and forms to collect across all vendors
- Work with team to develop guidance on basic funding stream specific questions – RFP template?
- Pilot questions across agencies
- Identify infrastructure
- Test environment
- Matrix of funding streams, vendors, outcomes
- Work with agencies on individual competitive bid tools
- Best practices on databases researched
### WHAT WOULD HELP US UNDERSTAND WE WERE MAKING PROGRESS ALONG THE WAY (OUTPUTS)?
- Inventory of funding streams and questions specific to typical program outcomes
- Agree to what consistent central information should be collected
- Develop consistent way to ask funding-stream specific questions
- Unnecessary questions are screened out
- One application for multiple agencies
- Central vendor database architecture complete (searchable based on key words)

### WHAT WOULD IT LOOK LIKE IF WE WERE SUCCESSFUL IN THIS WORK (OUTCOMES)?
- Application process is streamlined
- The right information is collected to make the best funding decisions
- Agencies are asking for and getting consistent information to make informed choices
- Staff have easy access to information
- Nonprofits are not spending time and resources providing unnecessary or duplicative information
- Staff are not spending time and resources soliciting information that someone else already has

### SPACE FOR INNOVATION

#### CROSS-AGENCY OBJECTIVE
Opportunities for braiding or integrating funding streams across City agencies to encourage innovation are explored.

#### INTRA-AGENCY OBJECTIVE
Applications are crafted to proactively seek innovative or creative approaches in each competitive proposal opportunity.

#### WHAT ACTIVITIES WOULD WE ENGAGE IN TO MAKE THIS HAPPEN?
- Application/new RFP template to carry into matrix
- Cross agency team to identify standing committee for meeting agency needs
- Ongoing consistent communication
- Identify how agencies have encouraged innovative approaches
- Help agencies build questions into competitive bid tools to solicit new, creative ideas and encourage a variety of vendors

#### WHAT WOULD HELP US UNDERSTAND WE WERE MAKING PROGRESS ALONG THE WAY (OUTPUTS)?
- Matrix to identify outcomes of funding streams to identify braiding opportunities with one application for multiple agencies
- RFPs building in questions or scoring to award and support innovation
- Space for risk is built into the RFP process
- Smaller organizations who have not engaged before have opportunities
- Innovative approaches are considered and tried

#### WHAT WOULD IT LOOK LIKE IF WE WERE SUCCESSFUL IN THIS WORK (OUTCOMES)?
- Community receiving message of “meeting outcomes with application using multiple funding sources”
- New ideas are generated and new ways of doing things emerge to better meet community needs
- Reach populations or people currently not being well served
# External Communication

## Cross-Agency Objective
Mechanisms for advertising funding opportunities are coordinated across City agencies and opportunities are widely advertised in a clear and open manner.

## Intra-Agency Objective
Detailed information about opportunities, expected outcomes, and requirements are clearly communicated to potential contractors.

## What Activities Would We Engage In To Make This Happen?
- Standardize pre-bid approach to include opportunities for funding, identified goals and outcomes, basic requirements, opportunities to use grant dollars to support cost of complying with City requirements, and rationale for procurement tool
- Nonprofit email database
- One-page forum with hyperlink to agency with opportunity
- Dot (cross), denver.gov (intra goals), Purchasing (inventory)
- Denver.gov page designated to nonprofits (use DOSP site?)
- Consolidated pre-bid conference for multiple funding streams

## What Would Help Us Understand We Were Making Progress Along The Way (Outputs)?
- Consistent way of getting the word out
- Agencies are not duplicating efforts trying to get the word out and communicate basic city funding rules
- Nonprofits are not spending unnecessary time searching for city funding opportunities that are hard to find
- Agencies and nonprofits can clearly articulate how to find out about funding from the City

## What Would It Look Like If We Were Successful In This Work (Outcomes)?
- More nonprofits know about funding opportunities
- An appropriate, broad, competitive applicant pool applies for opportunities
- City and nonprofit staff time is saved communicating about and researching grant and contract opportunities
- Consistent information is getting to nonprofits about city funding streams and policies
**GOAL TWO**

**IMPROVE PROCUREMENT SELECTION PROCESS TO:**

- Be clearly articulated, transparent and objective for each funding stream
- Encourage innovation
- Lead to awards for contractors best able to produce identified outcomes

**IDENTIFY, DOCUMENT, AND TRAIN IN PROCUREMENT BEST-PRACTICE**

<table>
<thead>
<tr>
<th>CROSS-AGENCY OBJECTIVE</th>
<th>INTRA-AGENCY OBJECTIVE</th>
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<tbody>
<tr>
<td><strong>CROSS-AGENCY OBJECTIVE</strong></td>
<td>All major funding streams identify and implement a selection process that drives toward best-practice.</td>
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<tr>
<td><strong>INTRA-AGENCY OBJECTIVE</strong></td>
<td>Best practices in selection are identified and documented and training is provided to new and ongoing staff on this topic.</td>
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**WHAT ACTIVITIES WOULD WE ENGAGE IN TO MAKE THIS HAPPEN?**

- Meet with Purchasing, Contracting, and Program to define roles and how to collaborate
- Areas of focus to pull out best practices: Selection Teams, Scoring, Timing, Feedback, Appeals
- Develop training curriculum
- Train staff
- Work with individual agencies to adjust their selection processes
- Develop a guide or handbook documenting the best practices in each area and toolkits for staff to use

**WHAT WOULD HELP US UNDERSTAND WE WERE MAKING PROGRESS ALONG THE WAY (OUTPUTS)?**

- Clarity of roles (e.g. program stronger role in weighting score of RFP – not just a template)
- Guide and training developed
- Individual funding streams have new processes that match up with best practices

**WHAT WOULD IT LOOK LIKE IF WE WERE SUCCESSFUL IN THIS WORK (OUTCOMES)?**

- A citywide definition of best practices in selection would exist
- Clarification of roles and responsibilities
- Staff could find out about how to structure their selection process
- Shorter timelines for selection
- There would be a foundation for a common understanding and consistency in practice across the city
- Increased trust from providers
# POLICIES SUPPORT PROCUREMENT BEST-PRACTICE

## CROSS-AGENCY OBJECTIVE

City procurement policies around selection are reviewed to ensure they are consistent in supporting best practices and encouraging innovation.

## INTRA-AGENCY OBJECTIVE

Agency procurement policies around selection are reviewed to ensure they are consistent in supporting best practices and encouraging innovation.

### WHAT ACTIVITIES WOULD WE ENGAGE IN TO MAKE THIS HAPPEN?

- Include Purchasing in Selection Process to consider financial capacity and stability Citywide
- Policy review around places where there is not consistency (role of external input, feedback to providers, appeals)

### WHAT WOULD HELP US UNDERSTAND WE WERE MAKING PROGRESS ALONG THE WAY (OUTPUTS)?

- Where needed, policies are passed that support agencies in engaging in best practices in selection
- Policies not consistent with best practices are changed
- Policies that help support innovation are developed

### WHAT WOULD IT LOOK LIKE IF WE WERE SUCCESSFUL IN THIS WORK (OUTCOMES)?

- Staff are able to implement best-practice selection process because there is a policy environment that supports it
- Policies support a good process that leads to fair selection of strongest contractors to meet outcomes

# PROPOSAL INFORMATION COLLECTION

## CROSS-AGENCY OBJECTIVE

Vendor-specific information is housed in a central location and review teams are trained on how to utilize this information to understand the organizational strength of a potential contractor.

## INTRA-AGENCY OBJECTIVE

Only information necessary to select best partner(s) to accomplish the work is collected and those reviewing information are trained on how to evaluate.

### WHAT ACTIVITIES WOULD WE ENGAGE IN TO MAKE THIS HAPPEN?

- Identify key indicators of financial and organizational health of provider
- Specify what organizational and financial information is to be collected and how it will be used. Don’t collect information that is not needed.
- Across agencies, agree what basic information is needed
- Develop training that can be used with selection teams around indicators of financial and organizational health to help them know what they are looking for
- Train staff and review teams about what is needed to select best partners and why so that scoring is consistent
### Transparency in Selection

**Cross-Agency Objective**

- Policies and processes for mechanisms of feedback to contractors not selected and the City’s policy on appeals are clearly articulated and implemented Citywide.

**Intra-Agency Objective**

- Contractor selection processes are transparent and awards are made on objective selection criteria.

**What Activities Would We Engage In To Make This Happen?**

- Make ratings/justifications available for selections
- Consistency citywide in contracting process and within departments
- Common mechanisms for scoring
- Notification/award letter template
- Common policy on feedback and appeals developed and communicated to staff

**What Would Help Us Understand We Were Making Progress Along The Way (Outputs)?**

- Contractors can access information about why decisions are made
- Applicants receive consistent type and level of information about why they are not selected
- Clarity on whether there is or is not an opportunity to appeal

**What Would It Look Like If We Were Successful In This Work (Outcomes)?**

- Contractors have established expectations
- Clearly defined expectations among agencies
- Selection is in-line with any potential political influence
- Clear justification for why selections were made, tied to ability to meet outcomes and organizational capacity

### Capacity Building

**Cross-Agency Objective**

- City team engages in regular review of areas identified by individual funding streams to identify trends in needed capacity building.
Funding streams track trends in areas where contractors are not competitive to help inform future capacity building needs to broaden the pool of viable candidates.

- Find techniques that work to encourage innovation with small business
- Tracking any trends in why contractors not selected part of the debrief process
- Multi-agency workgroup meets annually to talk about what they are seeing and any ways to support

- City builds collective understanding of where targeted capacity building is needed
- City forms partnerships and seeks resources to meet capacity needs
- Nonprofits know what they need to do to be competitive

- City supports building better nonprofit businesses to meet community need
- Nonprofits have opportunity to enter pipeline of working with city
- City cultivates culture of innovation
GOAL THREE

STREAMLINE PROCUREMENT IMPLEMENTATION PROCESSES TO:

- Maximize agency and partner effectiveness
- Deliver efficient resources to the community
- Measure outcomes and impacts
- Utilize results for continuous improvement of service delivery

STREAMLINED CONTRACT DEVELOPMENT

CROSS-AGENCY OBJECTIVE

Contract development and approval process are streamlined to cut down on time to execution.

INTRA-AGENCY OBJECTIVE

Contract development and approval process are streamlined to cut down on time to execution.

WHAT ACTIVITIES WOULD WE ENGAGE IN TO MAKE THIS HAPPEN?

- LEAN process to assess contract process
- Develop scopes of work earlier in the process (RFP stage)
- Develop a database of scopes (which would need updating as regulations change)

WHAT WOULD HELP US UNDERSTAND WE WERE MAKING PROGRESS ALONG THE WAY (OUTPUTS)?

- Unnecessary steps are cut out of the contract development process
- Balance of templates for quickness and flexibility for responsiveness
- Ability to access central contractor database across all agencies

WHAT WOULD IT LOOK LIKE IF WE WERE SUCCESSFUL IN THIS WORK (OUTCOMES)?

- Shorter contract execution times, from selection to full execution
- City and nonprofits spend less time and fewer resources on contract development
- Work starts more quickly in contract period so nonprofits can be more successful
- Dollars get out the door more quickly and into the community

CONTRACTOR SPECIFIC OUTCOMES

CROSS-AGENCY OBJECTIVE

Outcomes in contracts relate to identified overall City and agency outcomes.

INTRA-AGENCY OBJECTIVE

Clear, nuanced, appropriate outcomes are developed with each vendor and documented in contracts.

WHAT ACTIVITIES WOULD WE ENGAGE IN TO MAKE THIS HAPPEN?

- Relate outcomes in contract to City/agency goals
- Solicit community input on goals
- Create common reporting forms to collect information that ties back to city/agency goals
- Consistent reporting on contractor performance – through agency strategic plan reports, regular meetings, or web-based tool
**WHAT WOULD HELP US UNDERSTAND WE WERE MAKING PROGRESS ALONG THE WAY (OUTPUTS)?**

- Ability to see contractor outcomes and performance on contracts with other agencies (through web tool?)
- Can understand and describe progress on the work

**WHAT WOULD IT LOOK LIKE IF WE WERE SUCCESSFUL IN THIS WORK (OUTCOMES)?**

- Contractors are better able to meet and report on outcomes because they are clear.
- Monitoring is more efficient because it is about defined outcomes and consistently reported.
- Outcomes tie to overall agency and city goals and contractor work can be reviewed and reported across agencies to understand impact.
- Outcomes demonstrate beneficial community impacts are achieved and results are analyzed to inform planning process for future funding rounds.

## CONSISTENT POLICIES AND PROCESSES

### CROSS-AGENCY OBJECTIVE

Policies and processes around invoicing, payment, reporting and monitoring are consistent across agencies where possible and drive toward efficiency and timeliness.

### INTRA-AGENCY OBJECTIVE

Policies and processes around invoicing, payment, reporting and monitoring are consistent within agencies and drive toward efficiency and timeliness.

### WHAT ACTIVITIES WOULD WE ENGAGE IN TO MAKE THIS HAPPEN?

- Consistent invoicing requirements across agencies
- Review invoicing process across agencies and develop consistent requirements
- Change policy around prompt pay to speed up payment to contractors
- Have agencies share information about existing reporting systems (e.g. KING at DHS)
- Research other systems that have this capability (Feds HHS system)
- Budget, form committee to centralize reporting data

### WHAT WOULD HELP US UNDERSTAND WE WERE MAKING PROGRESS ALONG THE WAY (OUTPUTS)?

- Contractors submit invoices online
- Payment time is reduced – where feasible faster than net 30
- Web based contractors reporting - periodic reports, required by contract, submitted by contractor online

### WHAT WOULD IT LOOK LIKE IF WE WERE SUCCESSFUL IN THIS WORK (OUTCOMES)?

- Consistent invoicing process leads to efficiencies for city staff and nonprofits
- Quicker payments to contractors lead to more service in community
- Centralized reporting results in more efficient monitoring
- Centralized reporting allows agencies to see what outcomes are being met and use that for future planning
- Ability citywide to mine data entered by contractors
## RESOURCES FOR CAPACITY BUILDING

**CROSS-AGENCY OBJECTIVE**

Resources are sought to support capacity building for targeted segments of the nonprofit sector to achieve greater success as City contractors.

**INTRA-AGENCY OBJECTIVE**

Resources are sought to build contractor capacity to meet and report on outcomes.

**WHAT ACTIVITIES WOULD WE ENGAGE IN TO MAKE THIS HAPPEN?**

- Another nonprofit entity or City staff assisting nonprofits (administrative/back office support)
- City staff training nonprofits consistently on financial management, reporting, etc.
- Assistance to nonprofits- scanning, billing, training (City funded)

**WHAT WOULD HELP US UNDERSTAND WE WERE MAKING PROGRESS ALONG THE WAY (OUTPUTS)?**

- Nonprofits know what is expected around financial management, invoicing, reporting
- Nonprofits manage and can provide clean records and reporting in needed formats

**WHAT WOULD IT LOOK LIKE IF WE WERE SUCCESSFUL IN THIS WORK (OUTCOMES)?**

- Nonprofits can focus on the program component of their work
- Nonprofits are more successful in financial management, invoicing and reporting
- City staff are getting what they need for clean audits and successful management of funds