San Francisco City & Contractors Liaison Meeting

April 20, 2016
San Francisco City & Contractors Liaison Meeting

Update on efforts to evaluate construction jobs

• Juliana Choy Sommer, Asian American Contractors Association
• Claire Koenig, Associated General Contractors
• Emily Cohen, United Contractors
• Nicolas King, SF Public Works
Evaluations and Consideration of Past Performance
Proposed Chapter 6 changes

1) Departments shall evaluate contractor performance on construction jobs

2) Gives departments the option to use best value procurement
Evaluation accomplishments so far

1) Drafted evaluations
   1) City staff of contractor performance
   2) Contractor of City staff performance/processes

2) Begun to craft process for contractor feedback/comment on evaluation

3) Tracked other concerns/issures that have come up along the way
Next steps

Evaluation content and process

• Refine questions
• Fill in detail of how to complete
• Begin to consider how evaluations will be used

Legislation

• Goes before Board of Supervisors
• Departments would develop procedures, training and outreach
How to weigh in and timing

Evaluation content and process

- UCON/AGC/AACA
- Public Works, Nicolas King
- 2016

Legislation

- At Board of Supervisors Audit & Oversight Committee
- As soon as May 2016
How to weigh in

- Claire Koenig, AGC
  - KoenigC@agc-ca.org or (510) 773-8116
- Emily Cohen, UCON
  - ecohen@unitedcontractors.org or (925) 362-7304
- Man-Li Kelly, UCON
  - mlinkelly@unitedcontractors.org or (925) 363-7313
- Juliana Choy Sommer, AACA
  - juliana@prioritygraphics.com or (415) 643-1144
Update on best value contracting option
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Financial System Project

Julie Ansell, Controller’s Office
Project Initiation

**Project Business Case & Requirements (2014)**
- The City’s current financial system, FAMIS, has reached it’s end of life, and can no longer support the City’s business needs
- Citywide solicitation collected about 1,700 functional and 250 technical requirements for a new financial system

- RFP submission, evaluation and selection
  - Solution: PeopleSoft Financial & Supply Chain; Oracle Business Intelligence
  - Systems Integrator: Accenture

**Project Start**
- July 1, 2015
What’s In Scope

The following modules/functionality are in scope for F$P:

**PeopleSoft Financials and Supply Chain Management**

**Finance**
- General Ledger
- Expenses
- Accounts Payable
- eSettlements
- Receivables
- Project Costing
- Contracts
- Billing/eBill
- Cash Management
- Grants Management
- Asset Management

**Procurement and Inventory**
- eProcurement
- Supplier Contracts
- Strategic Sourcing
- eSupplier Connect
- Purchasing
- Inventory + Mobile

**PeopleSoft Human Capital Management**

- Human Resource
- Payroll & Labor Distribution
- Time and Labor

**Oracle BI (Business Intelligence)**

**SF Open Book**
What will change for Contractors?

• Online Invoicing
• Online Bidding
• Online Contract Certification and Negotiation
• One Portal for all Departments
# F$P Timeline

## F$P Business Process Analysis (BPA)

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<thead>
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<th>Year</th>
<th>January</th>
<th>February</th>
<th>March</th>
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## Business Process Analysis (BPA)

- **Plan**: BPA

## System Development

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<tr>
<th>Project</th>
<th>Analyze</th>
<th>Design</th>
<th>Build</th>
<th>Test</th>
<th>Deploy</th>
<th>Post Go Live Support</th>
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## Reporting

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<tr>
<th>BI</th>
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<th>Analyze</th>
<th>Design</th>
<th>Build</th>
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## Change Management

- **BPW**: Agency Readiness & Support

## End User Training

- **Design**: Develop, Test, Train the Trainer
- **End User Training**:
## FSP Engagement with Contractor Community

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Activities</th>
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<tr>
<td><strong>2016</strong></td>
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<tr>
<td>Today</td>
<td>Introduction and overview of project</td>
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<td>July – September</td>
<td>Business process walk-through sessions</td>
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<td><strong>2017</strong></td>
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<td>February – March</td>
<td>Contractor end-user testing help</td>
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<td>May – June</td>
<td>Contractor training and additional readiness support</td>
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<tr>
<td>July</td>
<td>Go-Live!</td>
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Questions?
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Update on collaborative partnering

Mindy Linetzky, SF Public Works
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Key contract submittals

Suzanne Suskind, SF Public Works
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1. Notice to Proceed timing

2. Key contract submittals:
   • Environmental Health and Safety Plan
   • Shoring/Excavation Plan
   • Traffic Control Plan

3. Progress payments
Contractor close out releases

Emily Cohen, United Contractors
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Upcoming construction opportunities
San Francisco City & Contractors Liaison Meeting

General forum, Q & A, announcements
Adjourn

Special thanks to
Associated General Contractors for refreshments