



Improving Contract Administration; Creation of an In-House/Agency Designed Contract Database

Submitted by: City of Palm Bay, Florida
Purchasing & Contracts Division
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BACKGROUND:

The City of Palm Bay's Purchasing and Contracts Division had utilized an Excel spreadsheet for tracking contracts and expiration dates for many years. This process was a very time-consuming manual effort that was vulnerable to errors and did not track a number of important items such as contract value, authorized spend approved by City Council, department utilization or Certificates of Insurance. Additionally, all copies of contract documents were maintained in a centralized filing cabinet which consisted of only hard-copy documents. Nothing was available through any sort of electronic database or link to actual contract documents. Purchasing experienced a constant barrage of phone calls and visits from end-user departments for information regarding contracts and copies of documents because they seemed to have "misplaced" the ones that we had just sent to them a week ago. This process seemed incredibly frustrating and consumed an excessive amount of staff time.

This problem had previously raised its ugly head on more than one occasion. Through its weekly "Palm Stat" meetings, which are hosted by our City Manager with participation of all Department Heads for the purpose of measuring performance and resolving operational deficits; this problem was discussed in December of 2007 as to how it affects all end-user departments; and assigned to the Purchasing and Contracts Division in January of 2008 as a performance deficit to be researched and resolved. Since this was a non-budgeted expenditure with no hope of any funding to be provided, it was left to staff to come up with an internal process that would work.

GOALS / IMPLEMENTATION:

In January 2008, Purchasing began working in conjunction with the City's Information and Technology Department (I2D) to pull together a user-friendly contract database that would ultimately be made available electronically to all end-user departments. We initially began with the following goals:

- Reduce Purchasing staff time spent pulling contract files to answer using department questions;
- Provide tracking for contract expirations through customized reporting;

- Provide tracking for Certificate of Insurance expirations;
- Provide at-a-glance checks to compare current contract expenditures versus expenditures as pre-authorized by City Council;
- Provide on-line access to contract information by using departments;
- Integrate document imaging of contracts from Laser Fiche to the database.
- All of this and more at “no cost” to the City

Purchasing staff met with the I2D Department staff to brainstorm the conversion from a simple Excel spreadsheet to a workable database that captured all desired information. Initial discussions centered around the transition from a simple spreadsheet to an Access database; and what, in a perfect world scenario, Purchasing staff, as well as end-user departments would like to see in a database. Items not available on the simple spreadsheet that staff wanted to capture included the ability to:

- View contract value for the most recently ended contract year;
- Identify the contract type (commodity, service, revenue, lease etc.);
- View actual contract expenditures and compare to what had been authorized by City Council;
- View expenditures from multiple years at-a-glance;
- Determine status of Certificates of Insurance;
- Identify department point of contact;
- View and provide the ability for end-users to download all contract documents.

By March of 2008, a working shell for a database had been created for testing and for additional modifications that became necessary. As none of the Purchasing staff had previous experience using an Access database, several months of on-the-job training ensued. Once staff became familiar with using the database, modifications were required to reflect actual enhancements that could be made versus those that were not possible. Various user reports were amended and added. Fields were added or removed. Staff continued to modify the database for about 6 months until it met their expectations.

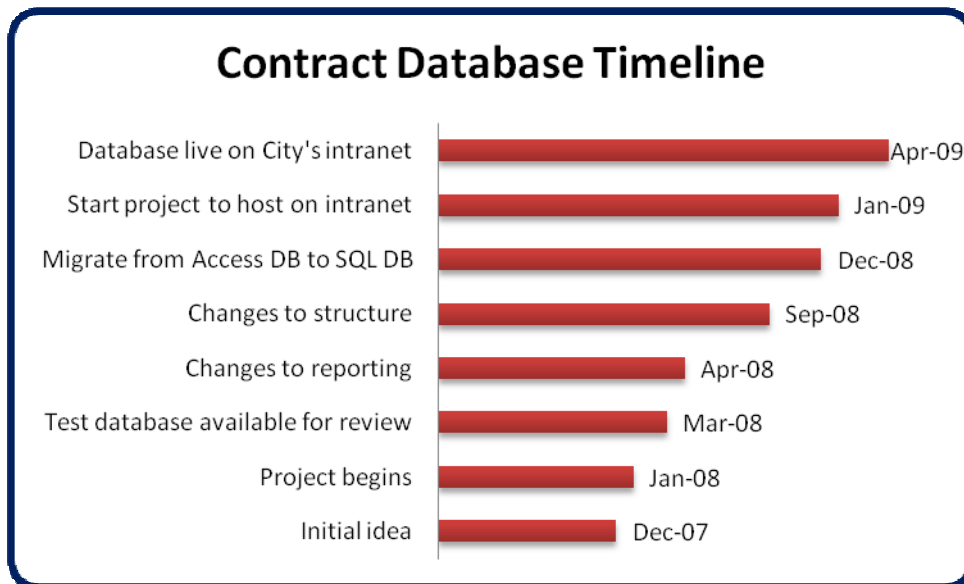
Once the basic Access database was designed and integration of contract information progressed through the uploading stages, in December of 2008, discussion began in earnest to determine how to push this database out to the rest of the City. This presented a host of new challenges, and it was determined in order to accomplish this task the Access database had to migrate to a Microsoft SQL server. One of the key components of this process was that all information needed to be provided to the end-user in a “*Read Only*” format yet still allow for use of the reporting capabilities of the original database. Additionally, Purchasing wanted to provide the functionality of being able to access complete contract documents with the click of a mouse. To do this, two components were needed: first, the contract documents needed to be input into the City’s document imaging system, Laser Fiche; and second, a specific field needed to be added to the database that provided a link to Laser Fiche.

The contract database went live with “real-time” access on the City’s Intranet in April 2009 with full functionality with the exception of end-user’s complete access to all electronic contract documents. With 220 active contracts and 278 database records (each vendor in a multiple vendor contract must have their own record), we faced an additional challenge of scanning all of the contract documents into the City’s document imaging system. With no funding available to pay temporary employee salaries, and the lack of procurement staff available to dedicate their already over-burdened work scheduled to this project, we had to come up with another way to accomplish this task. Our agency is fortunate to

have the voluntary assistance of a retired purchasing professional who worked at a large Central Florida agency for many years. His experience with purchasing contracts has proven to be very valuable. With our volunteer's assistance, over 2,451 documents have been scanned which consist of 20,547 pages totaling 1.2 GB of data, the database is approximately 65% complete.

Conversion of contract documents from hard copy to electronic is an on-going process including the inputting of new contracts and renewal documentation.

This database has significantly streamlined Purchasing staff time spent on routine tasks such as relaying pertinent contract information to using departments; as well as, providing numerous vital pieces of information (contract value, record of insurance, etc.) from one central point. Departments love the flexibility of this on-demand database. Purchasing values the conciseness of contract reporting gleaned from this database and the snapshot of each contract. This database is truly a Purchasing & Contracts Division dream.



Please see attached screen shots of Contract Database from our Intranet.

The screenshot shows a web browser window titled 'Show Contract Detail - Windows Internet Explorer'. The address bar shows the URL 'http://i2dapps/Purchasing/Main/Main.aspx'. The page content includes the City of Palm Bay logo and the heading 'Purchasing Contracts'. Below the heading is a search form with the following fields:

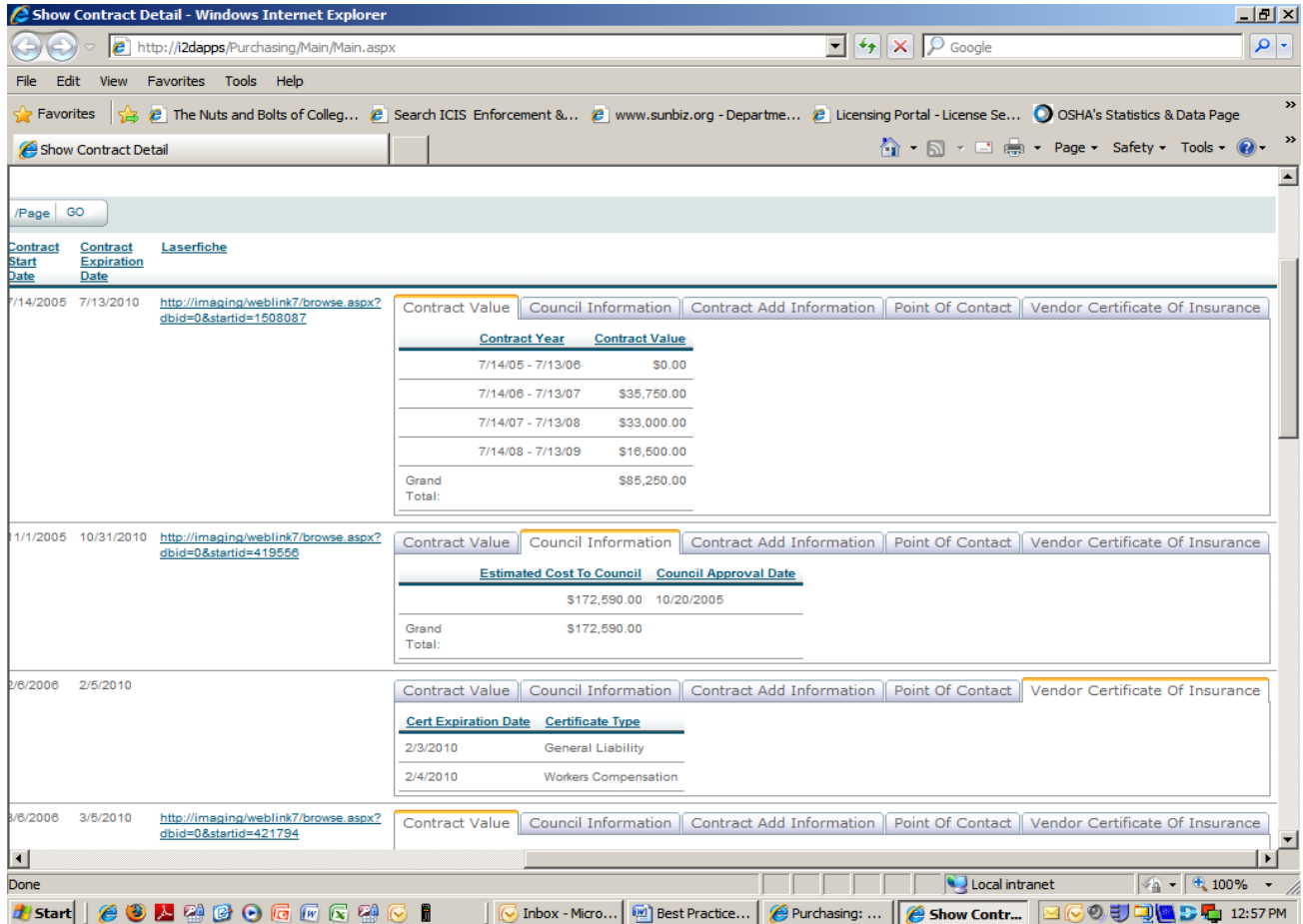
- Search for: [text input]
- Department: [All]
- Agency: [City of Palm Bay]
- Contract Type: [Facility Service Agreement]
- Status: [All]

Below the search form is a table of contract details. The table has the following columns: Contract Number, Contract Title, Department, Agency, Contract Type, Status, Vendor Name, Vendor Number, Contract Start Date, Contract Expiration Date, and Laserfiche. The table contains two rows of data:

Contract Number	Contract Title	Department	Agency	Contract Type	Status	Vendor Name	Vendor Number	Contract Start Date	Contract Expiration Date	Laserfiche
<input type="checkbox"/> 2005-0-22	Fire Sprinkler Maintenance & Repair	Parks and Recreation - Facility Maintenance	City of Palm Bay	Facility Service Agreement	Active	WIGINTON FIRE SPRINKLERS, INC	2821	5/26/2005	5/25/2010	http://imaging/webblink7/browse.aspx?dbid=0&startid=420557
<input type="checkbox"/> 2005-0-34	Pest Control Services	Parks and Recreation - Facility Maintenance	City of Palm Bay	Facility Service Agreement	Inactive	PREVENTECH FROM MASSEY	8858	6/17/2005	7/31/2008	

This screen shows basic information about a contract.

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This screen provides detailed information about specific contracts.