



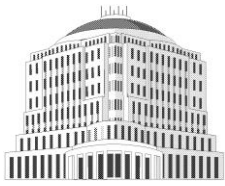
City of Orlando
Purchasing and Materials Management Division
Business Plan and Tracking Report
 Rev: 10/10/11

| Project/Initiative (Goal: Policy or Process Improvement) | Status Key Milestones | Start Date | Target Date |
|---|--|------------|--------------------|
| Procurement Code, Chapter 7 Revision Goal: Implement statutory policy using Model Procurement Code | Pending Council Approval March 2012 | 2010 | Adoption 3/2012 |
| Strategy/Results - See summary of substantive changes | | | |
| eQuote Software Goal: Send and receive electronic quotations from suppliers. Streamline RFQ process; Supports paperless green initiative | Phase I Complete 9/23/11; | 6/3/11 | 10/1/11 |
| Strategy/Results - Expanded eSupplier to add eQuote Tool; Purchasing Agents complete online RFQ, select registered suppliers and add supplemental suppliers; receive submittals electronically; automatic Bid Tab. Using Agency can initiate process, workflow sends to Procurement for final review, processing and award. Note: eSupplier has 4,000+ registered suppliers. | | | |
| Contract Management – eSupplier Software Goal: Store, track & manage annual term contracts and City-wide Contracts with CM software | Test; Training Manual Development; Conversion of JDE Contract Database | 01/2011 | 01/2012 |
| Strategy/Results - Under development. Internet based software system to track contracts, maintain compliance with terms and conditions, bonds, insurance, reporting revenue deadlines, Contract Performance Assessment, M/WBE data, provide task notifications. | | | |



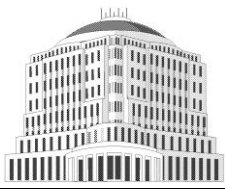
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| A/E Consulting Services Plan (CCNA) Goal: Automate CCNA submittal and evaluation process; Improve efficiency with paperless process with Government Forms Software | eConsultant Software installed and ready to launch; Public Works supports initiative to streamline process; Begin Phase I – 10/30/11 March 2012 - Procurement Code Adoption. | 4/2011 | 03/2012 |
| Strategy/Results - eConsultant Software installed; Phase I – (4 Months) Market and recruit consultants to complete online registration process. Phase II – Notifications sent to interested consultants. Consultants complete online and submit all documents electronically; Advisory Committee receives submittals electronically; Advisory Committee scores electronically; reduce errors and streamline evaluation process. | | | |
| Construction Solicitation Process Goal: Research Best Practices; Develop procedures, directives; master contract and related documents. | Pending Adoption of Procurement Code, Chapter 7 and Policy Changes. | 4/2011 | TBD |
| Strategy/Results - Phase in construction solicitation process from Public Works to Procurement. Provide uniform procedures and consistency to the procurement process. | | | |



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| RFP Evaluation Methodology Goal: Develop and pilot a more objective and effective evaluation and scoring method for Request for Proposals | Develop Business Process; Review for Legal sufficiency; Conduct trial evaluation. | 12/30/11 | 3/30/12 |
| Strategy/Results – Evaluate Adjectival Rating methods; Weighted Point Method. | | | |
| Annual Contract Spend/Usage Process Goal: Improved fiscal accountability, control, and reporting | Modify JDE Security; TM Resources Limited. | 10/4/11 | 3/30/12 |
| Strategy/Results - Pilot program for six months using Standing Purchase Orders; TM to enhance JDE Security; enable use of contract numbers and NIGP Codes for tracking and reporting spend; develop Directives to support initiative. | | | |
| Sustainability Plan Goal: Work with Sustainability Committee to identify and develop procurement plan to support Mayor's green initiative | Review specifications; research best practices; promote paperless environment. | 01/2011 | 04/2012 |
| Strategy/Results - City Stores inventory - environmentally sensitive products; Automation of business processes to reduce paper handling; As contracts are rebid, incorporate "green specs" as appropriate. | | | |



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| Update Policies & Procedures <i>Goal: Revise procedures to support current business practices.</i> | Review P & P to support Code revisions. | 11/2011 | 3/2012 |
| Strategy/Results - Develop supplemental Directives | | | |
| Vendor Training <i>Goal: Improve Supplier's understanding of City's Procurement Process. Promote participation of M/WBE Suppliers</i> | Schedule semi-annual events; Maintain up-to-date material/powerpoint. | 03/2011 | Semi-Annual |
| Strategy/Results - Supplier Diversity Tradeshow; Annual Reverse Tradeshow, CFC NIGP; How to Do Business with the City of Orlando. | | | |
| Staff Training Plan <i>Goal: Cross Training; Promote staff development and learning; Book Club.</i> | Current Text: Sourcing in the Public Sector; Cross train by Commodity Code | 9/2011 | |
| New Hire Training Manual | Review Forms & Processes; Revised New Hire Manual | 01/25/11 | Review Quarterly |
| Strategy/Results – Completed first text: “Introduction to Public Procurement” August. Staff receives CEU's for each hour in team learning environment. Cross training – Reassignment of Commodity Codes completed in October; Procurement Book Club – Read/Discussions each week; Textbooks selected from the NIGP Procurement Body of Knowledge. | | | |



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| Internal Customer Service Training Workshops Goal: Provide using agencies JDE Hands on Lab Training ; and Customer Service On-Site Training | TM Training Lab; Revise Training / PowerPoint | 02/2011 | As required, Monthly |
| Strategy/Results - Focus on building stronger customer relations, providing using agencies with the knowledge and information through hands-on training, workshops, and customer meetings to better understand the procurement processes and policy and procedures. | | | |
| Asset Management Electronic Forms Goal: Create online electronic Surplus/Transfer forms to streamline process | Share Point; TM Resources | TBD | |
| Strategy/Results – Central site for Procurement sharing information real time, documents, processes. | | | |
| City Stores Online Catalog Goal: Provide up-to-date product/pricing information and promote green products | Create online warehouse catalog with pictures; Identify/integrate ECO friendly products; Customer Satisfaction Form. | | 2011/2012 |
| Strategy/Results – Catalog will help the customer to view and read about the products. | | | |



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| Sharepoint Site for Purchasing & Materials Mgmt. Goal: Central Procurement Site for Documents, Forms, Calendar, etc. | Ami train on Sharepoint; Design site; Train staff; TM Resources. | TBD | 6/30/12 |
| Strategy/Results - Central Procurement Site for Documents, Forms, Calendar, etc. | | | |
| Spend Analysis Direct Pay & Procard Spend Goal: Monitor/analyze spend quarterly | Analysis by Supplier; Monitor/analyze cumulative spend \$25,00 +. | 2009 | Quarterly |
| Strategy/Results - To date, six new solicitations have been developed and awarded as a result of the analysis. Aggregate spending analysis was positioned at \$50,000. Now focus is on aggregate spend of \$25,000. | | | |
| Covalent – Balanced Scorecard Goal: Tool to align Procurement activities with City's vision | Collect Data & Analyze for operational performance. | 2009 | Monthly |
| Strategy/Results - Provides a framework to provide data to compare performance measurements; Identify target goals, current state and potential change/improvements. | | | |
| Emergency Operations Plan Goal: Provide a basis for a coordinated response before, during and after an emergency or disaster affecting the City | | 2009 | Semi-Annual |
| Strategy/Results – Develop and maintain a comprehensive Emergency Operations Plan. Placed on flash drive for ease of modification of contracts and distribution. | | | |