

**TO:** Mayor Eric Adams  
Comptroller Brad Lander  
City Council Speaker Adrienne Adams  
**FROM:** The Procurement Policy Board (PPB)  
**DATE:** February 3, 2025  
**SUBJECT:** Professional Standards for Agency Contracting Officers:  
**Calendar Year 2024**

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## 1. BACKGROUND

Pursuant to § 311 of the New York City Charter, the Procurement Policy Board is required to issue an annual report setting forth the professional standards for agency contracting officers adopted by the Mayor, including any applicable certification process.

The New York City Procurement Training Institute (PTI) was established by way of Executive Order 38 of 1992 in order to provide training and education programs to City personnel in professional skills necessary for the procurement of goods, services, and construction by City agencies. Executive Order 121 of 2008 charged the Mayor's Office of Contract Services (MOCS) with developing guidelines, as appropriate, for professional qualifications for the City's senior procurement staff. MOCS' training program was created with the goal of ensuring that the agencies are regularly trained on the best practices in procurement methods and policies.

## 2. TRAINING PROGRAM AND PTI EXPANSION

The MOCS Learning and Development team ("MOCS L&D") continues to lead learning and development offerings for citywide procurement professionals, vendors, and MOCS Staff.

Since the team's formation in 2022, the MOCS L&D team has been making significant progress in developing a robust number of learning engagements for citywide procurement staff. In 2024, the training program included:

- Procurement Trainings
- PASSPort Learning Resources
- M/WBE Trainings Support
- LMS Procurement Training Institute E-courses
- Procurement Leaders Meetings

## 2.1 Procurement Trainings

In 2024, MOCS L&D produced **14 procurement process trainings** in live webinar format. These webinars, typically spanning 1.5 to 2 hours, were hosted by MOCS with the support of the DCAS Citywide Training Center (CTC). Guest presenters were staff from MOCS and other City Agencies with subject matter expertise in relevant training topics.

The 14 training topics are listed below:

- Competitive Sealed Bids
- Evaluation Process—Competitive Sealed Proposals
- Local Law 63 Compliance (3 sessions)
  - Spring 2024 focus on annual plans
  - Summer 2024 focus on plan additions
  - Fall 2024 focus on new rule and plan additions
- Responsibility Determination: Process and Principles
- Human Service Contract Monitoring: Process and Principles
- Performance Evaluation: Process and Principles
- Emergency Purchase Method: Continued
- Procurement Methods 101
- Adverse Integrity Issues
- Labor Law Compliance
- Introduction to Franchises and Concessions
- Discretionary Award Process—Multiyear Discretionary Contracts

MOCS promoted these trainings via the DCAS CTC Catalog and sent email invitations to all of MOCS' citywide procurement staff contacts. The recordings of the trainings, as well as the presentation decks, are available on [BuyWise](#). In addition, all trainings are used to create E-courses for the Procurement Training Institute LMS (See Section 2.4).

## 2.2 PASSPort Learning Resources

MOCS leads the development of learning resources for **PASSPort (Procurement and Sourcing Solutions Portal)** end-users. These learning resources, which go over not only the functionalities but also best practices and policy directives, are available to users in the following formats: guides, trainings (live webinars), and webinar recordings. All PASSPort learning resources are published on [BuyWise](#).

With the **Fall 2024 PASSPort Release** (also known as PASSPort Release 6) which launched on September 23, 2024, MOCS rolled out a comprehensive communications and training plan to educate all stakeholders and PASSPort system users in regard to the latest system functionalities, features, and interface updates. MOCS made available guides, webinars, and webinar recordings upon the launch of the new system release. MOCS published over 25 guides on the new functionality.

**PASSPort guides** have been a staple for user learning since the initial launch of

PASSPort in 2017; they provide detailed step-by-step instructions with annotated screenshots. Noteworthy on the PASSPort materials-end is MOCS' progress towards accessibility, which is in line with citywide accessibility efforts under [Local Law 12 of 2023](#). As of November 2023, all new PASSPort guides are being published as **Web Guides**. Web Guides allow for content to be published directly to web pages which increases accessibility. It also provides a seamless experience to translate the language through Google Translate.

Among the resources MOCS created, one of the most popular remains the interactive **Contracting Roadmap** created in September 2023, which has become the go-to resource for vendors in learning more about doing business with the City. The Contracting Roadmap has since enjoyed more than 29,000 views. While the target user group of the Contracting Roadmap is vendors, City employees, including procurement professionals, benefit from this new resource as well by learning the vendor-side of the contracting experience.

## Contracting Roadmap

Welcome to our new interactive Contracting Roadmap!

Want to learn how to do business with the City of New York?  
The Contracting Roadmap will guide you through the process.

Start your contracting journey – click Get Ready To Do Business.

Click/tap each step in the path below.



## 2.3 M/WBE Trainings Support

In 2024, MOCS supported several **M/WBE live webinars** for NYC procurement professionals. M/WBE trainings are organized by SBS and the Mayor’s Office of M/WBE and delivered through the DCAS Citywide Training Center. 2024 M/WBE Trainings comprised:

- 101: M/WBE Program Overview
- 102: Identifying M/WBEs for Opportunities, incl. Online Directory
- 201: Incorporating the M/WBE Program into the Procurement Process
- 202: Best Practices for M/WBE Goal Setting
- 203: M/WBE Program Resources
- 204: Best Practices for M/WBE Networking & Outreach

## 2.4 MOCS Procurement Training Institute (LMS)

In Spring 2024, MOCS started to offer procurement courses through the **MOCS Procurement Training Institute (LMS)** and continues to provision senior city procurement staff and all MOCS staff with access. **24/7 access** to a growing library of mobile-friendly learning resources. Senior procurement personnel of Mayoral agencies currently can take **26** MOCS’ online courses on procurement topics, such as the following:

- “Ethics” A Crash Course for NYC Public Procurement Professional
- Adverse Integrity Issues
- Agency Performance Evaluations in PASSPort
- Best Value Bids and Proposals
- Competitive Sealed Bids
- Competitive Sealed Proposals
- Discretionary Award Process—Multiyear Discretionary Contracts
- Emergency Purchase Method
- Emergency Purchase Method: Continued
- Environmentally Preferable Purchasing
- Evaluation Process: Competitive Sealed Proposals
- Human Service Contract Monitoring: Process and Principles
- Introduction to Franchises and Concessions
- Local Law 34 and Compliance
- Local Law 63 and Compliance
- Performance Evaluation: Process and Principles
- Procurement Methods 101
- Project Labor Agreements (PLA) for the Procurement Professional
- Responsibility Determination: Process and Principles
- Sole Source Procurements
- Understanding Labor Law Compliance Objectives

- Vendor Integrity Review

For public employees to uphold the City's underlying procurement policy related to ethics and comply with PPB Rule § 1-03(a) (requiring that all public employees responsible for the expenditure of taxpayer dollars take the appropriate measures to ensure that their conduct does not violate the public trust placed in them,) all procurement personnel must take, at a minimum, the **Ethics in Procurement** e-course.

## **2.5 Procurement Leaders Meetings**

MOCS continues to provide procurement policy changes and updates during the monthly **Procurement Leaders Meetings**, including guest speakers from other City Agencies presenting on a variety of procurement-related topics.

Examples of topics presented in 2024 include, but are not limited to, PASSPort functionality updates and enhancements, legislation updates, reporting requirements, and procurement-related programs.

The meeting presentations and follow-up emails are published on [BuyWise](#).

## INDICATORS

- The **14 Procurement Process Trainings** live webinars in conjunction with DCAS yielded a total of 2,947 registrants and **2,295 attendees** with an average of 92% of attendees rating the trainings as Excellent or Very Good. The top five most popular webinars in terms of attendance numbers were, in descending order: Responsibility Determination: Process and Principles; Procurement Methods 101, Discretionary Award Process—Multiyear Discretionary Contracts, Adverse Integrity Issues, Human Service Contract Monitoring: Process and Principles.

Training	Registrants	Attendees	Attendance Rate	Attendees Rating Training as Excellent/Very Good
Competitive Sealed Bids	185	170	92%	96%
Evaluation Process--Competitive Sealed Proposals	253	180	71%	88%
Local Law 63	204	151	74%	87%
Responsibility Determination: Process and Principles	375	264	70%	96%
Human Service Contract Monitoring: Process and Principles	287	187	65%	88%
Performance Evaluation: Process and Principles	255	177	69%	97%
Emergency Purchase Method: Continued	141	90	64%	95%
Procurement Methods 101	264	239	91%	92%
Local Law 63	109	83	76%	97%
Adverse Integrity Issues	253	188	74%	92%
Labor Law Compliance	120	124	103%	91%
Local Law 63	167	142	85%	88%
Introduction to Franchises and Concessions	96	96	100%	94%
Discretionary Award Process--Multiyear Discretionary Contracts	238	204	86%	89%
<b>Totals and Averages</b>	<b>2947</b>	<b>2295</b>	<b>80%</b>	<b>92%</b>

- The **9 Agency PASSPort Trainings** live webinars hosted in Fall 2024 that address PASSPort functionalities yielded a total of 726 registrants and **627 attendees**.
- The **Contracting Roadmap** web page yielded more than **29,000** views since its launch in September 2023.
- The **20 M/WBE Trainings** supported by MOCS yielded **1,072 attendees**. The top five popular webinars in terms of attendance numbers were, in descending order: M/WBE Program Overview, Identifying M/WBE for Opportunities, Best Practices for M/WBE Goal Setting, M/WBE Program Resources, Best Practices for M/WBE Networking and Outreach.
- **MOCS Procurement Training Institute (LMS)** reports indicate **598** platform users as of December 31, 2024. Platform users had **116** course completions in the City of New (NYC) Procurement series, which included **40** completions of the “Ethics” A Crash Course for NYC Public Procurement Professional by new hires.
- Over **160 participants** typically attend MOCS’ **Monthly Procurement Leaders Meeting**, including all Mayoral Agencies Agency Chief Contracting Officers (ACCOs), Deputy Agency Chief Contracting Officers (DACCOs), and selected procurement professionals who are expected to attend and pass on the information to their procurement staff.