

Bond Performance Audit Tracker
 Status of Performance Audit Recommendations
 August 2023 - BAC Report

2021 Bond Performance Audit Recommendations				
Program	#	Abbreviated Recommendation	Response	Status
20 !		The PPS Board should revisit its Budget (in Public Purchasing and Contracting) and PPCG Procurement (to clarify and define the "strictly vision) goals and commitment to business development. This should include reassessing the overall intent) determining the budget (is characterized) and expanding on the attainment of business development goals for the "strictly should entail"	Concur \$it% Comment	; orking
20 !	2	, further develop the Board's overarching vision into more succinct measurable subgoals or objectives) support the goal setting dependable data) and define qualitative and quantitative metrics to measure against the goals"	Concur	; orking
20 !	3	Conduct a cost-benefit analysis of available business development (strategies) such as those outlined in this report) and include considerations such as long-term versus short-term strategies) direct versus intangible investment (type strategies) and unintended consequences"	Concur	; orking
20 !	.	"develop tools and protocols to capture outcomes of chosen development (strategies) and validate outcome data accuracy"	Concur \$it% Comment	; orking
20 !	3	Create protocols to expand on existing business development (annual reporting to include an assessment of the overall annual development (outcomes realized meet the intent of the PPC Procurement (and goals of the Administrative Directive) or if modification to the portfolio of development (strategies is warranted) and based on results) adjust strategies as necessary"	Concur	; orking
20 !	5	"develop and formalize operating procedures to define the roles) responsibilities and expectations of PPS staff specific to managing contractor and consultant business development (compliance) reporting on outcomes) and coordinating efforts to bolster PPSA presence and visibility (in the certified business community"	Concur	Complete
20 !	!	Provide content and explanation of nuances and limitations of B2C data in presentations and reports to the Board and the Bond Accountability (Committee"	Concur	Complete
20 !	4	"develop a PPS-led training to provide new and existing contractors and consultants guidance on development (reporting requirements and expectations) and provide refreshers on training materials on an established schedule over the course of the contract duration"	Concur \$it% Comment	Complete
20 !	1	Conduct a review to explore (stem capabilities) functions) and reports \$it% the B2C vendor that could enhance PPSA management of business development (efforts"	Concur	Complete
20 !	0	"develop new and strengthen existing protocols for capturing institutional knowledge current (lead by one 9S7 staff member to ensure information and processes about Bond Communication efforts is retained \$it% PPS* Protocols could include establishing (policies and procedures) cross-training staff on communication activities and knowledge) creating a resource library) and providing data sources) timestamps) Fax of dates) and follow-up contact information) as appropriate"	Concur	Complete

Audit Year

Summary of Recommendations

Percent Completed

202

10 Recommendations) 5 completed

50% Completed

Recommendations Marked as Complete Since Last Reporting

202

4

existing training materials available online have been reviewed and updated* Targeted trainings have been completed for local contractor/consultant professional organizations and more scheduled* 9S7's Certified Business Program Manager is not attending any pre-construction meetings to coordinate any needed trainings \$it% individual contractors* A contact info sheet offering training and support on B2C reporting (as been developed) is sent out at the start of the contract) and should be re-sent quarterly (to vendors"

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Status Notes on Recommendations Not Completed

- 202 Policy updates are scheduled by the Board and are therefore subject to the Board's timeline. The Board has recent expressed interest in reviewing policy in this area and staff awaits further direction.
- 202 2 As an initial step staff have begun working on new focus areas in reporting) in addition to total amount paid to Certified Businesses. These new focus areas include: number of firms and number of unique Certified Businesses utilized at prime and sub level; number of Certified Businesses that access bid documents; number that bid) and percent awarded; and percentage of total prime contract awards going to Certified Businesses. Further implementation of this recommendation will depend on Board decision-making regarding policy updates and/or development of new reporting areas as determined through the annual business review and reporting cycle discussed below.
- 202 3 This is being developed as part of an annual business review and reporting cycle. Staff are working on developing the components) scope and schedule of this new annual review.
- 202 . This recommendation is under review by the A/T. As noted in the "raft Report) it can be difficult to find a direct correlation between FPO a particular strategy) employment results in increased or decreased utilization rates. Staff are considering tools to capture outcomes) but the understanding that not all outcomes may be able to be directly attributed to chosen review strategies.
- 202 3 Staff are working on an SOP for an annual review and reporting process of business review strategies that will assess strategies in place during the previous year) identify potential changes or new strategies) develop cost-benefit analyses for use in selection of the strategies in the upcoming year) and collect and analyze outcome data over the course of the year. An SOP of the proposed annual review and reporting process is in development. Once the SOP is complete and adopted) this recommendation will be closed.