



# City of Baltimore Capital Contracting Improvement Plan

**MAYOR'S OFFICE OF INFRASTRUCTURE DEVELOPMENT**

*January 2025*

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# Executive Summary

This report outlines twenty-three recommendations to improve the capital contracting processes and project implementation within the city. Key areas include enhancing transparency and accountability, stakeholder communication, operational efficiency, and equity and inclusion. Additionally, the recommendations address project implementation to mitigate risks, increase effectiveness, and improve relationships with contractors and other external partners. By adopting these measures and ensuring their application during project implementation, the city can transform the capital project ecosystem into a more efficient and accessible platform for all involved.

## Purpose

The capital contracting process is vital to the city's operations, impacting numerous projects and services. This report addresses current inefficiencies and proposes solutions to modernize the process, ensuring it meets the needs of stakeholders.

## Key Findings

The recommendations will benefit city staff, vendors, contractors, and funders by streamlining processes, enhancing communication, and ensuring equitable treatment and opportunities for all parties involved.

## Specific Goals

This project aims to achieve:

- Enhanced transparency and accountability in contracting.
- Greater equity and inclusion in contracting opportunities.
- Improved communication among stakeholders.
- Increased efficiency and reduced delays.
- Strategic improvements through forward-thinking solutions.

## Summary of Recommendations

Among the twenty-three (23) recommendations, some key suggestions include:

- Implementing a centralized digital platform to enhance transparency.
- Establishing clear protocols for timely engagement.
- Introducing standardized procedures to enhance operational efficiency.

## Improvement Areas

The recommendations are organized into five key improvement areas crucial for the city's contracting process:

1. Transparency & Accountability
2. Equity & Inclusion
3. Communication Enhancement
4. Operational Efficiency
5. Innovation & Strategic Improvement

## Report Structure

The report begins with a background on the challenges in the current capital contracting process. It outlines the project goals and phases, followed by a summary of data collection methods and findings from city staff and vendors.

The analysis of the twenty-three recommendations includes descriptions of the issues they address, their potential impacts, and necessary collaborators for implementation. The report concludes with a roadmap for next steps and areas for future initiatives to ensure comprehensive improvement.

## Conclusion

Implementing these recommendations will significantly enhance the city's contracting process, making it more transparent, efficient, and equitable. This transformation will foster stronger relationships with funders, contractors, and other external partners, benefiting those involved in the city's capital contracting ecosystem.

# Background

Baltimore has long received negative feedback from contractors, funders, the public, and internal staff regarding challenges in delivering capital projects efficiently and effectively. Concerns have been raised about delays in processing invoices, communication issues with and among staff, and with outdated processes. These issues cause negative implications for the city's reputation, relationships with regional partners, and create delays in project delivery.

To address these issues, an assessment was undertaken to identify the challenges within the contracting process. This revealed a wide range of problems that were categorized into five focus areas: Transparency & Accountability, Inclusionary Practices, Communication Channels, Operational Efficiency, and Innovation & Strategic Improvement. Each of these reflect challenges that hinder the effective delivery of capital projects.

For Transparency & Accountability, guidelines and reporting mechanisms are unclear, decreasing accountability among stakeholders to meet desired outcomes. Reports from vendors and other internal stakeholders suggest that there is a need for more oversight on inclusionary practices, as parts of the contracting and procurement processes need stronger equity considerations. Outdated procedures and technology significantly impact the flow of information, leading to delays and miscommunication among stakeholders. Expanding the methods in which the city contracts will help modernize the system and improve the outcomes of projects. Enhancing communication channels and the efficiency of operations are also crucial to fix many of the issues discovered.

## The Project

Given the need to manage increased federal and state funding effectively and improve the city's capital contracting process, MOID initiated a comprehensive project to identify bottlenecks, understand causes, and explore solutions. This project, launched in 2023, was structured into three phases to systematically address the challenges and implement necessary improvements. The following section defines the scope and objectives of this critical project.

### Project Goals

The goal of this project is to define and improve the city's capital contracting process through several key initiatives:

- **Create a Visual Workflow:** Develop a detailed visual representation of the steps, procedures, and subprocesses involved in the city's capital contracting process.
- **Identify Agency-Specific Practices:** Conduct walkthroughs with various agencies to document key differences in contracting approaches, task completion durations, and ownership of specific steps, all to identify potential gaps in project delivery.
- **Highlight Bottlenecks and Obsolete Steps:** Organize and redefine the steps of the process to pinpoint bottlenecks and outdated practices that hinder efficiency.

- **Enhance Communication and Transparency:** Have conversations with staff and other stakeholders to recognize the need for improvement to make the process more efficient, accessible, transparent, and accountable.
- **Engage with Stakeholders:** Increase outreach to staff and vendors to gather insights on the successes, challenges, and gaps in the current process, ensuring a comprehensive understanding of the contracting landscape.
- **Develop Recommendations:** Create a catalog of recommendations aimed at addressing identified areas of need, enhancing the overall contracting process to better serve the city and the stakeholders.

## Project Phases

### Phase I: Discovery

This involved research on similar jurisdictions' processes, gathering information from agencies via standard operating procedures (SOPs) and existing workflow charts, and mapping the contracting process from beginning to end. Notable findings included outdated guides and documents, reliance on manual systems misaligning with industry best practices, and inconsistency in the perception of critical chokepoints or approval checkpoints in the process as well as employees' and vendors' understanding of the overall workflow.

### Phase II: Stakeholder Outreach and Analysis

This focused on collecting qualitative and quantitative data from various outreach methods to better understand stakeholder experiences in navigating the city's contracting process.

### Phase 3: Recommendation Development

Based on findings from discovery and outreach, this phase concentrates on development of recommendations for improving the contracting process, finalizing the associated report for further review as needed, and implementation of approved recommendations in collaboration with identified solution leaders.

## Data Collection & Analysis

A range of outreach methods were employed to gather data from city staff and external partners about the capital contracting process. These methods aimed to understand the current process and gather stakeholder insights.

Methods included workflow mapping to visualize and identify chokepoints, focus groups and surveys to capture diverse perspectives on the process's strengths and weaknesses. A detailed workflow map was created to grasp the full scope of executing a capital project.

This section details the methods used, their goals, and the results, providing a foundation for recommendations.

## Workflow Mapping

A comprehensive workflow map was created using data and information from agency standard operating procedures (SOPs), workflow maps, and conversations during walkthrough sessions. It was discovered early that there were several differences between agencies; thus, separate maps for BCRP, DPW, DOT, and DGS were created to highlight their variations in steps, ownership, activity duration, etc. Using Microsoft Visio, MOID created a visual of the city's capital contracting process from initial concept to project closeout. The mapping identified key decision points, ownership of activities.

While the maps are a transparency and educational tool to better understand the process, they are also can be used to develop an accountability tool to analyze which steps can be streamlined, which offices require more resources or less influence, or which changes in problem areas could be implemented to deliver projects more efficiently. Completion of these maps allowed for MOID to facilitate discussions with agency personnel and leadership on specific portions of the process that could be improved and to begin collecting examples of areas where problems frequently persist.

## Results

- Six process maps were drafted to show the city's capital contracting process.
- The comprehensive maps have over 200 steps and 150+ subprocesses.
- Each map has the functionality to directly connect a standard step for the subprocess and each map is broken down into specific subsections to indicate which part of the process a project may be in, such as design or construction.
- Differences between each agency's approach to contracting, even excluding the changes due to requirements of state and federal funding sources, demonstrate the need for standardization in some areas along with available and clearer SOPs and guides to avoid confusion on roles and step completion. A few differences are below:
  - Variations in payment processes, regulatory reviews, and planning across all agencies.
  - Differences in software used, post-construction procedures, and data storage.

## Internal Survey

The internal survey captured qualitative feedback and an insider perspective from city staff involved with the contracting process. This helped better understand the nuances of problems frequently reported and experienced. The survey was conducted via Microsoft Forms with a total of 28 questions designed from previous discussions with city personnel during the process map development. The internal survey was distributed via email directly to the city's contract administrators, project managers, engineers, and additional relevant staff. The survey was open for 22 days total.

## Results

- 16 total responses were received from various agencies and divisions out of 81.
- BOE Approval, Design, and Advertisement phases were reported to encounter the most challenges, aligning with anecdotes expressed during the development of agency contract process maps.
- Budget problems, staffing, communication, and lack of transparency were the most common responses for the challenges faced pointing to a potential mismanagement of resources as well as a need for a shift in culture to avoid delays.
- Most respondents reported dissatisfaction with communication among stakeholders, the procurement and bidding process, and contract award methods.
- Questions surrounding timelines for approvals, reviews, and troubleshooting also had responses noting significant delays 1-3 months longer than expected which negatively impacts the agency's ability to deliver projects on schedule.

## External Survey

An external survey was developed to focus on gaining outside perspective from the city contractors and consultants. Overall thoughts, attitudes, and experiences on process fairness, transparency, and effectiveness were captured in responses to gain a better understanding on the challenges and barriers for them throughout the process.

The external survey was also conducted via Microsoft Forms and had a total of 24 questions with many centered-on experiences with procurement and areas where external stakeholders were suspected to encounter the most issues. The survey was distributed through the GovDelivery system using available listservs of contractors and consultants who worked with the city or were interested in working with the city. The survey was open for 24 days.

## Results

- A total of 276 responses from consultants, contractors, and suppliers were received out of a universe of approximately 8,728 contacts from a variety of disciplines. The initial target for this exercise was 100 responses.
- Out of 276 responses, 176 identified as small businesses, 152 as Minority-owned businesses, and 95 as Women-owned businesses.
- Challenges vendors face most frequently include payment delays (vendors experiencing delays in receiving payments), communication issues (difficulty in getting responses from city personnel regarding payments), and pricing pressures due to pricing constraints.
- 159 respondents (57.6%) selected “Faster payments following invoices” as the #1 reason for what would make their organization more likely to work with or recommend working with the city. If allowed to persist, this problem could cause the city’s reputation to continue to diminish and along with its pool of quality vendors and bidders, causing costs to increase over time due to a lack of competition.

- 85 respondents (30.7%) stated an interagency issue delayed the contract they were working on by an average of 3+ months. 148 respondents (53.6%) suggested interagency problems take at least a month to reconcile to move forward, indicating approval processes to be overly cumbersome and complex.
- Short answer responses to the survey also suggested the process lacks transparency and oversight, with many reporting they do not receive guides on the process, explanations on the city's steps, or updates on the status of a contract following their input.

## Internal Focus Groups

The internal focus groups followed up on the survey, creating an open forum for agency personnel to discuss the contracting process. They provided insights on positives, negatives, and potential improvements. Participants, who helped develop agency contract process maps, continued offering feedback on streamlining specific parts and shared successes and pitfalls of their processes.

Four focus groups were held with BCRP, DPW, DOT and DGS. A standardized questionnaire for easy comparison was used. Each session lasted 1 hour, with agency staff discussing agenda items and suggesting process improvements.

## Results

- Increase connectivity to reduce duplicate work across portals and platforms.
- More ownership over the process and clearly define the roles along to have better communication and response times.
- Need more accessible information on projects for transparency,
- Update the bidding process to include electronic bidding, use of more alternative delivery methods, and provide bidders opportunities to revise for minor mistakes,
- Improve agency coordination, especially on permitting processes and reviews.

## External Focus Groups

The goal of the external focus groups was to host meetings with vendors recommended by agencies to receive feedback on the city's contracting process and discover major problems they encounter before and after contract awarding. This provided an open space for contractors and consultants to share their experiences and thoughts working with Baltimore City as well as note what the city does differently compared to other jurisdictions nearby. Agency staff provided a list of 3–5 contractors and consultants they work with regularly who could provide constructive feedback on the advantages and drawbacks of the process from prequalification to project closeout.

Following messages to each company, six responded and provided times expressing their interest. Focus groups followed a standard question and answer format but allowed opportunities for vendors to further expand on points, share examples from past experiences, and provide suggestions and input that could benefit them and other vendors in the future. Six external interviews were held throughout January 2024 with prime contractors and consultants, MBEs, WBEs, a subcontractor, and a lawyer specializing in Labor Law based in Baltimore City.

## Results

- City needs to improve the efficiency of its invoice payments system.
- Pricing pressures concern small businesses when there are payment delays.
- City should work to reduce the time between contract award and project start.
- Change orders sit with city agencies for too long.
- Repeated discussion on the fairness of contract awards related to a need for smaller organizations getting more contracts.
- A lack of electronic bidding causes loss of money on both city-side and for vendors.
- Communication from the city needs to improve; updating contract and contact information; timely responses and notifications on project statuses do not occur.

## Contract Milestone Tracking

This exercise assessed the application and execution of the current contracting process across various agencies, ensuring their activities align with the previously mapped steps. MOID coordinated with BCRP, DOT, DPW, and DGS to provide 1–3 active contracts in different phases. This allowed for an evaluation of how quickly certain steps are completed based on the agency, project type, and phase, with updates every three weeks.

Updates were recorded on a spreadsheet aligned with the process steps to easily identify where issues occurred and note the associated causes. This “real-time” observation, as opposed to previous retroactive analysis, aimed to provide more accurate insights into contract progress and pinpoint specific delays and their causes.

## Results

- Delays for curing bidder mistakes
- Late invoice payments and extended delays post-BOE approval
- Untimely receipt of items from vendors and agency personnel
- Extended bid submission deadlines due to vendor questions
- Underestimated engineer estimates compared to bids.
- Limited capacity due to staff turnover.
- Lengthy revisions and edits to consultant proposals.

## Analysis & Discussion of Problems Identified

Following the data collection, the findings were analyzed to identify common issues. Both internal and external surveys highlighted challenges with approval processes, communication, and interagency coordination, leading to delays of 1–3 months. External focus groups mainly suggested payment process improvements, while both vendors and internal focus groups identified necessary changes to the bidding process. There was a notable push for modernization, including electronic bidding and error correction opportunity, leading to potential cost-savings and a more robust bidding process.

Despite varying causes of delays observed during the Contract Milestone Tracking exercise, all four agencies experienced delays due to external factors such as interagency review times, bidder revisions, and changes in project priorities. These findings revealed common underlying problems related to staff capacity and communication gaps. To address these, the issues were consolidated into five key improvement areas: Transparency & Accountability, Equity & Inclusion, Communication Enhancement, Operational Efficiency, and Innovation & Strategic Improvement. These areas emerged from commonalities found in the problems and were designed to organize and target recommendations effectively and clearly.

### Improvement Areas

**Transparency & Accountability:** Aims to enhance clarity and responsibility through clearer guidelines, reporting mechanisms, and consistent oversight throughout the project lifecycle.

**Equity & Inclusion:** Focuses on promoting fairness and access for minority-owned and women-owned businesses.

**Communication Enhancement:** Seeks to improve dialogue and information sharing among stakeholders to foster better collaboration and mutual understanding throughout the project lifecycle.

**Operational Efficiency:** Targets streamlining processes and optimizing tools to accelerate project timelines and reduce delays.

**Innovation & Strategic Improvement:** Encourages the use of unique and forward-thinking contract and project delivery methods to promote flexibility and adaptability to enhance project outcomes.

# Recommendations

## **Recommendation #1: SOPs & Comprehensive Contract Documents**

Develop and disseminate comprehensive documents including standard operating procedures, contracting materials, and compliance requirements.

### **Improvement Area: Transparency & Accountability**

**Description:** Establish criteria working with contract administrators in agencies and project managers (PMs) to develop easily understandable documents detailing the contracting process for internal use.

**Problem Being Addressed:** There is a lack of staff training on the capital contracting process, leading to reports from vendors and cross-functional staff citing a lack of transparency regarding responsibilities and progression in the process.

### **Potential Impacts**

- Clearer understanding and communication regarding capital projects.
- Fewer vendor complaints.
- Improved staff knowledge of processes and contract needs.
- Better able to track project and contract status.

### **Related Challenges**

- Process guidelines are unclear, unavailable, outdated, or inaccessible.
- Lack of knowledgeable staff on process milestones and needs.
- Complex bid language and excessive jargon for staff and vendors.
- Ineffective communication between and within departments at times.
- Reusing past RFPs and IFBs, creating confusion with lack of updates.
- The process is not transparent, leading to confusion.

### **Measures of Success**

- Decrease in the number of vendor complaints received.
- Increased vendor and staff satisfaction.

### **Solution Leaders**

- Contract Administrators in agencies.
- Project Managers
- Engineers and related personnel
- Agency Support Staff

## **Recommendation #2: Late Invoice Dashboard**

Develop and publish a late invoice dashboard for capital project invoices.

### **Improvement Area: Transparency & Accountability**

**Description:** Adding capital invoices to the current dashboard will increase awareness of late invoices citywide, improving tracking and oversight to reduce delays and allocate resources more effectively.

**Problem Being Addressed:** A late invoice dashboard was created, but it focuses on procurement and other invoices, not including capital and associated contracts. This may further damage the reputation of the city for inefficient vendor payment if continued.

### **Potential Impacts**

- Increased vendor satisfaction.
- Improved reputation for the city with local businesses.
- Increased competition for contracting opportunities due to reputational increase.
- Allows for quicker response to analyze problem areas, payment delays, and where resources are needed for managers.
- Improved data management on city projects.

### **Related Challenges**

- Concerns from vendors on late invoices
- Lack of communication from city staff to vendors on timing.
- Lack of transparency on the payment process in general.
- Limited tracking capabilities for city personnel.

### **Measures of Success**

- Increase in number of capital invoices over time.
- Number of late invoices for capital vendors are decreased.
- Average number of days late for invoice payments before and after tracking.

### **Solution Leaders**

- Agency Fiscal Teams
- Department of Finance
- Workday Team
- Mayor's Office of Performance and Innovation (MOPI)
- Project Managers

## **Recommendation #3: Standardized Contract Language**

Standardize specific contracting practices and language across agencies, to the extent practical.

### **Improvement Area: Transparency & Accountability**

**Description:** Collaborate with contract administrators in agencies and project staff to standardize language, contract information, and certain procedures across agencies, enhancing transparency, accountability, and clarity in the contracting process.

**Problem Being Addressed:** Variations in agency approaches to contracting lead to confusion due to differences in language, personnel roles, process steps, and order.

### **Potential Impacts**

- Better understanding of the city's contracting process by stakeholders.
- Increased transparency and less confusion for stakeholders.
- Easier communication between city personnel.
- Ease of access for vendors on opportunities.

### **Related Challenges**

- Lack of transparency in the process.
- Disjointed approach to contracting amongst agencies.
- Outdated SOPs and guides related to capital contracting.
- Difficulty finding contracting opportunities online for vendors.
- Role ambiguity between staff.

### **Measures of Success**

- Increase in employee satisfaction as it relates to the city's contracting process.
- Number of materials created to help standardize the process.

### **Solution Leaders**

- Contract Administrators in agencies.
- Project Managers in agencies.
- Law Department
- Agency Leadership

## **Recommendation #4: Internal Contracting Database**

Create an online resource to help city contracting with visual workflows, improving understanding of capital project process.

### **Improvement Area: Transparency & Accountability**

**Description:** Create an online resource hub for contracting processes, offering detailed information including contracting specifics, access to regulatory documents, and visual workflows illustrating contracting stages.

**Problem Being Addressed:** The lack of formalized step-by-step guides lead to role and project status confusion in the capital contracting process.

### **Potential Impacts**

- Improved accessibility and clarity regarding the contracting process.
- Regular updates to SOPs and training materials.
- Enhanced staff expertise and stakeholder awareness.
- Vendor satisfaction rate is increased.

### **Related Challenges**

- Lack of accessible SOPs for capital contracting process.
- Limited awareness of the contracting and payment process by stakeholders.
- Overreliance on emails and individual updates for project communication.
- Unclear information on Workday for internal and external stakeholders.
- Limited and insufficient training on the contracting process.

### **Measures of Success**

- Traffic driven to site.
- Continued updates to SOPs and training materials over time.
- Decrease in vendor complaints related to communication.
- Reduction in delays at common process bottlenecks.

### **Solution Leaders**

- Contract administrators in agencies.
- Baltimore City Office of Information & Technology (BCIT)
- Office of Boards and Commissions (OBC)
- Workday Team
- Engineer Supervisors
- Law Office (Green Book)

## **Recommendation #5: Capital Project Reporting**

Develop and analyze reports on capital project expenditures, progress, and outcomes.

### **Improvement Area: Transparency & Accountability**

**Description:** Regularly published or internally disseminated reports on capital project expenditures, progress, and outcomes are needed to provide transparent and accountable information for discussion and improvement. These reports can be accessible for various levels of review and serve as a tool for internal assessment and decision-making.

**Problem Being Addressed:** Severe lack of accessibility regarding capital project information, impeding oversight as well as misinformation or lack of information flow.

### **Potential Impacts**

- Faster resolution of project issues or logjams.
- Enhanced accountability and oversight within project teams.
- An increase in trust among stakeholders and those that will review and use reports.

### **Related Challenges**

- Limited visibility into design or construction status of infrastructure projects.
- Limited information on expenditure details for capital projects.
- City personnel operating with incomplete or outdated information.
- Potential delays in project execution.

### **Measures of Success**

- Decrease in project delays attributed to information gaps.
- Number of publicly or internally accessible project reports.

### **Solution Leaders**

- Mayor's Office of Infrastructure Development (MOID)
- Department of Finance
- Department of Planning
- Mayor's Office of Performance and Innovation (OPI)
- Individual project teams in certain agencies.
- Baltimore City Office of Information & Technology (BCIT)

## **Recommendation #6: Capital Process Audits**

Implement regular audits and reviews of capital contracting processes.

### **Improvement Area: Transparency & Accountability**

**Description:** Work with the Department of Audits to conduct regular audits and reviews of capital contracting processes to ensure adherence to established standards and regulations related to the process.

**Problem Being Addressed:** Inconsistent compliance with contracting standards and regulations can lead to inefficiencies, legal risks, and misuse of public funds as well as severe differences in practices for agencies.

### **Potential Impacts**

- Enhanced transparency and accountability in capital contracting processes.
- Reduced risk of legal issues due to non-compliance.
- Improved efficiency in the contract management processes.

### **Related Challenges**

- Lack of clarity and oversight in contract practices in agencies.
- Potential non-compliance with legal, regulatory, and administrative requirements.
- Financial mismanagement for contracts and grants.
- Difficulty in identifying contract-related issues.
- Limited and insufficient training on the contracting process.

### **Measures of Success**

- Number of audits conducted.
- Percentage of contracts found to be compliant with established standards.
- Reduction in contract-related disputes or legal actions.
- Increase in stakeholder satisfaction.

### **Solution Leaders**

- Department of Audits
- Law Department
- Contract Teams in Agencies
- Department of Finance

## **Recommendation #7: Feedback Surveys**

Implement regular feedback surveys to enhance capital contracting processes.

### **Improvement Area: Transparency & Accountability**

**Description:** Regular feedback surveys will help gather insights on experiences with the capital contracting process. These surveys are a proactive measure to find areas for improvement, ensuring the process becomes more transparent and responsive.

**Problem Being Addressed:** A current lack of a feedback loop or mechanism from internal and external stakeholders to address needed problems or changes.

### **Potential Impacts**

- Facilitate an improved process in contracting.
- Help find contractor hold-ups and logjams in the process.
- Increase trust with local vendor community.
- Enhanced transparency and accountability in capital contracting processes.

### **Related Challenges**

- Lack of clarity and oversight in contract practices in agencies.
- City personnel operating with incomplete or outdated project information.
- Difficulty in identifying contract-related issues.
- Limited and insufficient training on the contracting process.

### **Measures of Success**

- Number of feedback surveys completed.
- Actionable insights received and executed.
- Increase in usefulness of tools involved in the process.

### **Solution Leaders**

- Mayor's Office of Infrastructure Development (MOID)
- Mayor's Office of Performance and Innovation (OPI)
- Project Teams in Agencies
- Baltimore City Office of Information & Technology (BCIT)

## **Recommendation #8: Contract Unbundling**

Identify and unbundle contracts to create more opportunities for MBEs and WBEs with smaller scale contracts, where appropriate.

### **Improvement Area: Equity & Inclusion**

**Description:** Working with and encouraging PMs and engineers to identify more instances within the planning stage where contracts can be unbundled into smaller activities to contract directly to MBEs and WBEs that may have limited capacity.

**Problem Being Addressed:** Concerns from vendors about limited opportunities for contracts particularly for smaller businesses. An emphasis from the city to reduce incumbency and favoritism for vendors by developing more, smaller projects that would allow for MBEs, WBEs and businesses with limited capacity to pursue capital contracts.

### **Potential Impacts**

- Unbundling contracts allow agencies to accomplish goals while also encouraging participation from smaller businesses with limited opportunities.
- Increased opportunity on transition from sub to prime contractor.
- Decreased likelihood of favoritism in contract selection.
- Increased variety in pool of bidders.

### **Related Challenges**

- Current contracting methods hinder small vendor participation.
- Incumbents receiving projects continually.
- No current mentor protege program for subprime contractors to become primes.
- M/WBE goals perceived as out of proportion with work proposed.

### **Measures of Success**

- Increase in number of bids received from smaller businesses.
- Fewer reports of primes not paying subs following completion of work.
- Decrease in incumbent contracts.

### **Solution Leaders**

- SMBAD Office
- Contract Administrators in agencies
- Office of Board and Commissions (OBC)
- Agency Capital Project Staff

## **Recommendation #9: M/WBE Outreach Expansion**

Expand outreach programs providing technical assistance and networking opportunities MBEs and WBEs to connect with contracting opportunities.

### **Improvement Area: Equity & Inclusion**

**Description:** Develop and/or expand initiatives aimed at connecting MBEs and WBEs with contracts out for bid on city projects. Technical assistance can be provided as well as mentoring on the contracting process to support success in securing contracts and subcontracts.

**Problem Being Addressed:** MBEs and WBEs face challenges in accessing contracts and opportunities due to lack of networking, support, or accessibility in the process. Some businesses struggle because of limited resources or knowledge in navigating the contracting process. This can lead to underrepresentation in contracts awarded.

### **Potential Impacts**

- Increased participation and success of MBEs and WBEs.
- Increased diversity in contracting program.
- More economic empowerment within underrepresented communities.
- Improved competition in the contracting and bidding marketplace.

### **Related Challenges**

- Lack of awareness about available contracting opportunities
- Limited access to technical resources
- Continued disparities in awards to MBEs and WBEs when compared to larger firms.
- Networking barriers

### **Measures of Success**

- Number of MBEs and WBEs engaged and educated in the process.
- Percentage increase in contract awards to MBEs and WBEs.
- Success rates in securing contracting following assistance.
- Satisfaction rates among these contractors.

### **Solution Leaders**

- Mayor's Office of Small and Minority Business Advocacy & Development (SMBAD)
- Contract Administrators in agencies
- Office of Board and Commissions (OBC)
- Agency capital project staff

## Recommendation #10: Contractor Incentives

Develop incentives for prime contractors to use a higher diversity of sub-contractors.

### Improvement Area: Equity & Inclusion

**Description:** Develop incentives for prime contractors to engage new subcontractors or subcontractors that have not worked with the city for over a year, aiming to diversify the bidder pool and reduce favoritism when rewarding contracts.

**Problem Being Addressed:** This recommendation targets favoritism and incumbency issues reported by both vendors and city personnel. Persistent favoritism may discourage vendors to not bid or work with the city, ultimately diminishing the pool of available contractors and limiting competition in the bid pool.

### Potential Impacts

- Better diversity of subcontractors included on contract bids.
- Increased local vendor satisfaction through incentives.
- Increased equity for minority subcontractors' community.
- Compliance with AEAC requirements to avoid recycling design consultants.
- Positive reputation for the city in welcoming new vendors.

### Related Challenges

- Limited diversity in bidder and subcontractor pools.
- Perceived favoritism in contract awards.
- Challenges for subs to progress and become prime contractors.
- Perceived inequity in subcontractor selection.
- Absence of caps or limits on usage of primes within a given time.

### Measures of Success

- Decrease in rate of incumbent vendors.
- Increase in rate of award/sub award for newer vendors.
- Decrease in complaints of favoritism via surveys.

### Solution Leaders

- Mayor's Office of Small and Minority Business Advocacy & Development (SMBAD)
- Agency Leadership
- Department of Finance
- Comptroller's Office

## **Recommendation #11: Centralized Bidding Website**

Develop and promote a centralized website for bidding opportunities, enhancing accessibility and transparency for vendors and other stakeholders.

### **Improvement Area: Communication Enhancement**

**Description:** Creation of an easily accessible website to serve as central information hub for city capital contracting. The improved site will include all bidding opportunities across all capital agencies with standardized categories of information such as PM contact, bid closing date, project area, and estimated costs.

**Problem Being Addressed:** Navigating city websites to locate contracting opportunities has been difficult for contractors with many sites not having the same types of information. Improving accessibility can broaden vendor participation and transparency in the process for all stakeholders, including the public.

### **Potential Impacts**

- Centralized location highlighting contract opportunities across capital agencies.
- Increased vendor satisfaction.
- Improved data management and regular website updates.
- Increased competition due to better visibility of opportunities.

### **Related Challenges**

- Vendors unable to locate opportunities leading to more bid responses from incumbent contractors.
- Support offices find it challenging to track active project listings.
- Insufficient project information necessitates additional communication between vendors and the city.
- Outdated practices compared to neighboring jurisdictions in Maryland.

### **Measures of Success**

- Increase in number of advertised opportunities updated on the website each month.
- Percent increase in vendor satisfaction ratings related to awareness of opportunity.
- Number of bids received on capital opportunities.

### **Solution Leaders**

- The Office of Boards and Commissions (OBC)
- Project Managers in capital construction agencies.
- Baltimore City Office of Information & Technology (BCIT)
- Mayor's Office of Infrastructure Development (MOID)

## **Recommendation #12: Project Notification Platform**

Implement a centralized communication platform for updates and tracking among project stakeholders.

### **Improvement Area: Communication Enhancement**

**Description:** Implementing an automated system for streamlined communications and notifications between internal and external stakeholders.

**Problem Being Addressed:** Vendors report that agencies use outdated emails, leading to a disruption in information flow and delays on status updates for projects and payments.

### **Potential Impacts**

- Quicker and more effective communication between the city and vendors
- Reduced dependence on email and email trails for problem-solving.
- Cost and managerial time savings through task automations.

### **Related Challenges**

- City reliance on use of email as a primary (or sole) method of communication.
- Outdated email usage results in messages being overlooked, causing inefficient project delivery and miscommunication.
- Potential delays in vendor invoice payments.

### **Measures of Success**

- Number of users for automation software
- Less complaints from vendors on outdated emails
- Improved scores from customer surveys following implementation of AI to solve simple tasks

### **Solution Leaders**

- Baltimore City Office of Information & Technology (BCIT)
- Agency Management

## **Recommendation #13: Electronic Bidding**

Introduce electronic bidding and e-documents to the bidding process.

### **Improvement Area: Operational Efficiency**

**Description:** Electronic bidding will modernize the city's current system, improving vendor accessibility and reducing the likelihood of re-bids, noncompliant submissions, and the need for curing, all of which drain valuable time and resources.

**Problem Being Addressed:** The city's reliance on outdated, physical systems for bidding and information about contracting opportunities poses numerous challenges for bidders, hindering the speed and ease of navigating the process.

### **Potential Impacts**

- Automatic alerts for incorrect entries to prevent noncompliant bids.
- Fewer rebids and less paperwork.
- Increased access boosts competition.
- Real-time addenda changes rather than printed pages stapled and re-stapled.
- Resources redirected from bid pick up by contractors.
- Increased contractor satisfaction.

### **Related Challenges**

- Easily identifiable errors are made more often on paper.
- Removes barrier of cost for bid documents.
- Accessibility to information on contracts is lacking.
- Frequent addenda to bid documents are not easily located.
- Bidders face delays in submitting documents due to documents being required to be physically picked-up, particularly affecting businesses with limited capacity.

### **Measures of Success**

- Traffic to the site
- Reduced number of rebids
- Increase in vendor satisfaction
- Reduced number of noncompliant bids
- Increase in number of bids received

### **Solution Leaders**

- Comptroller's Office
- Baltimore City Office of Information & Technology (BCIT)
- Law Department
- Mayor's Office of Infrastructure Development (MOID)
- Agency Contract Administrators

## **Recommendation #14: Data Management Standards**

Understand the data management standards to improve connectivity between project management software portals.

### **Improvement Area: Operational Efficiency**

**Description:** Collaborating with stakeholders to explore their respective data portals for increased connectivity and to mitigate siloing.

**Problem Being Addressed:** This will address inefficiencies due to disconnected project management and other related software across city agencies. By aligning management standards and improving connectivity between different portals and programs, it seeks to reduce duplicate data entry, enhance communication, and improve project tracking and coordination.

### **Potential Impacts**

- Better communication channels between agency staff.
- No duplication of work.
- Reduced bottleneck effects and delays.
- Reducing communication silos present throughout the city.
- Overall improvement in data governance.

### **Related Challenges**

- Lack of connectivity between portals.
- Duplication of work.
- Poor data tracking and management.

### **Measures of Success**

- Improvement in scores for staff on internal communication.
- More connections being established on portal map.
- Less delays in the contracting process in areas requiring data entry.

### **Solution Leaders**

- Baltimore City Office of Information & Technology (BCIT)
- Unifier and Workday Teams
- Project Managers
- Engineers
- Agency Contract Administrators

## **Recommendation #15: Project Management Training**

Provide ongoing project management training for staff involved in capital projects to ensure proper handling of timelines, budgets, and outcomes while aligning with best practices.

### **Improvement Area: Operational Efficiency**

**Description:** Recommendation to expand the city's offerings for project management training encouraging staff who provide oversight and execution on capital projects to renew or pursue certification. An increase in city staff with accredited project management training can improve performance in project delivery with additional perspectives from trained employees, more effective communication focused on project outcomes, and can facilitate new opportunities to collaborate between agencies on capital projects. Trainings can also alleviate the impacts of staff turnover with more trained project managers becoming available in the event of absences as well as provide opportunities for career development and upward mobility within agencies.

**Problem Being Addressed:** Lack of project management training for new staff and continuous improvement for tenured staff have resulted in limited capacity of project managers to apply to projects causing work overload in some cases and poor performance/project delivery. Lack of training has also led to poor communication on project needs and role confusion as staff that may be responsible for delivering projects are not familiar with the various approaches and mitigation techniques that a project manager would be.

### **Potential Impacts**

- Better project management expertise
- Less vendor complaints about approvals and project information
- Less role confusion
- Higher performance by city staff
- Improved communication channels
- Improved career development opportunities

### **Related Challenges**

- Role confusion
- Unknown job responsibilities
- Project expectations
- Poor communication of project information
- Reduced flexibility to solve project problems
- Staff turnover

### **Measures of Success**

- Number of employees that are trained and received certification
- Improved ratio of project managers per project
- Reduced number of project manager turnover per year

### **Solution Leaders**

- Human Resources
- Agency Leadership
- Engineering and Project Management Supervisors

## **Recommendation #16: Positions and Classifications**

Develop positions and classifications for project management expertise.

### **Improvement Area: Operational Efficiency**

**Description:** Recommendation involves coordinating a performance analysis to assess current roles and reclassify positions to better align with project management standards and requirements. This adjustment aims to ensure that job classifications reflect the skills and responsibilities needed for effective capital project management, reducing role confusion, increasing efficiency, and bettering internal communications.

**Problem Being Addressed:** Misaligned job classifications lead to role ambiguity, unrealistic workload expectations, and inefficiencies in project execution.

### **Potential Impacts**

- More employees being knowledgeable about project management standards
- Less vendor complaints about process transparency and contract status
- Less role confusion for project tasks and deliverables
- Higher performance per job classification
- Quicker project delivery
- Improved communication channels

### **Related Challenges**

- Role confusion
- Confusion of job responsibilities
- Lack of information flow between staff as well as with vendors
- Project delays
- Staff turnover

### **Measures of Success**

- Number of employees that are reclassified
- Decrease in negative rating percentage of vendors on city employee communication.
- Decrease in turnover %

### **Solution Leaders**

- Human Resources
- Agency Leadership
- Engineering and Project Management Supervisors

## **Recommendation #17: Strategic Staffing**

Implement strategic staffing adjustments to align teams, divisions, and departments with capital project requirements and needs.

### **Improvement Area: Operational Efficiency**

**Description:** Plan for and implement strategic staffing adjustments to better align teams and divisions with project requirements, increasing efficiency and collaboration within and between departments.

**Problem Being Addressed:** The current staffing and organizational structure may not fully support the demands of modernizing the city's contracting process.

#### **Potential Impacts**

- Enhanced responsiveness and efficiency in project execution.
- Improved staffing and resource allocation.
- Improved capability to manage projects and contracts effectively.
- Reduction in bottlenecks and delays in information sharing and project coordination.
- Strengthened collaboration among team members.

#### **Related Challenges**

- Lack of staffing in key areas such as project management and data analysis.
- Lack of specialized skills required for development of electronic bidding and contract management systems.
- Limited capacity to handle the increased workload associated with process improvements and transparency initiatives.

#### **Measures of Success**

- Timely completion of project milestones aligned with project requirements.
- Positive feedback from staff on workload distribution.
- Improved project outcomes and stakeholder satisfaction.

#### **Solution Leaders**

- Human Resources
- Mayor's Office of Infrastructure Development (MOID)
- Bureau of the Budget and Management Research (BBMR)
- Project Managers and Team Leads
- Key stakeholders from partnering agencies.

## **Recommendation #18: BOE Cost Threshold**

Raise the cost threshold for Board of Estimates review.

### **Improvement Area: Operational Efficiency**

**Description:** Raising the monetary threshold required for BOE review.

**Problem Being Addressed:** Increasing the threshold would streamline the process, allowing more projects and tasks to proceed without need for extra BOE review, which can cause extended timelines on projects.

### **Potential Impacts**

- Accelerated project delivery through streamlined processes.
- More smaller scale projects moving forward.
- Reduction of bottlenecks and backlog in project management.

### **Related Challenges**

- The current threshold is outdated and fails to reflect modern infrastructure costs.
- Overloading of the BOE agenda following meeting frequency decrease.

### **Measures of Success**

- Number of BOE items up for review.
- Quicker project delivery (i.e. time it takes to get from NOL to NTP)
- Number of change order approvals being sent to the BOE.

### **Solution Leaders**

- Comptroller's Office
- Project Managers
- Contract Administrators
- Agency Fiscal Staff
- Finance Department

## **Recommendation #19: Project Milestone Tracking**

Implement internal project milestone tracker and status reporting.

### **Improvement Area: Operational Efficiency**

**Description:** Develop and implement reporting system to provide updates on contract and project milestones.

**Problem Being Addressed:** Lack of transparency and visibility into progress of capital projects. This system would provide stakeholders with an awareness as to where logjams and delays in the process are located, allowing for continuous improvement.

### **Potential Impacts**

- Improved operational workflow.
- More efficient project delivery.
- Increased contractor and stakeholder confidence.

### **Related Challenges**

- Difficulty in tracking milestones and schedules.
- Inadequate oversight of project timelines and workflow.
- Limited ability to assess project performance against any metrics.
- Challenges in communication of project status.
- Support offices find it challenging to track active project listings.

### **Measures of Success**

- Improvement of project delivery timelines and milestones.
- Ability to measure milestone achievements.
- Reduction in project delays and bottlenecks.
- Easier recognition of continued process-related bottlenecks.

### **Solution Leaders**

- Project Managers in agencies.
- Mayor's Office of Infrastructure Development (MOID)
- Baltimore City Office of Information & Technology (BCIT)
- Mayor's Office of Performance and Innovation (OPI)

## Recommendation #20: Process Workflow Analysis

Analyze current processes and develop workflows to identify redundancies and opportunities for increased efficiency.

### Improvement Area: Operational Efficiency

**Description:** Recommendation to perform a comprehensive analysis of the current materials detailing the capital contracting process and identify specific areas that can be modified to streamline workflows, approval paths, and increase overall efficiency.

**Problem Being Addressed:** Current system/process is outdated with numerous areas that are redundant, posing a risk to project delivery and efficiency in contract/project advancement. Many approval paths are convoluted in various project management platforms creating unnecessary barriers to advancing contracts.

### Potential Impacts

- Improved efficiency in project delivery.
- Reduction of obsolete documents and workflows.
- Improved training guides and clarity surrounding the capital contracting process.

### Related Challenges

- Frequent project delays, often due to miscommunication.
- Redundant steps throughout the process adding to project timelines.
- Outdated materials and guides.
- Lack of notification on project needs.

### Measures of Success

- Number of new materials and guides on the process generated.
- Percentage decrease in time it takes to advance contracts based on eliminated redundancies.
- Decrease in number of project approvals required to advance a contract/project.

### Solution Leaders

- Project Managers and Engineers
- Mayor's Office of Infrastructure Development (MOID)
- Contract Managers
- Capital Project Support Staff
- Baltimore City Office of Information & Technology (BCIT)
- Workday Team

## **Recommendation #21: Outcome-Driven RFPs**

Create templates and guidance to support the expanded use of outcome-driven request for proposals (RFPs), enhancing vendor selection processes and improving project outcomes.

### **Improvement Area: Innovation & Strategic Improvement**

**Description:** Encouraging the use of outcome-based RFPs over IFBs will allow for better discernment over vendor qualifications and capabilities at the project level. Particularly for bigger projects, having RFPs can create a larger range of solutions to solve the need and grant more flexibility to the awarding agency to choose the solution that best fits the need of the project.

**Problem Being Addressed:** Most city contracts use Invitation for Bids (IFB) as the primary method which can be limited in its ability to capture qualifications from vendors. As a result of using this method, many contracts are often awarded to the lowest or most responsive bidder rather than who can deliver the most impactful outcome for the project.

### **Potential Impacts**

- Increase in bid compliance.
- Better project outcomes relative to cost of the project.
- Up-front evaluation of vendor capabilities can lead to better project outcomes related to being on-budget and performance.

### **Related Challenges**

- Inadequate project work outcomes.
- Noncompliant and narrow pool of bidders.
- Focus on lower bidder does not align with project outcomes.

### **Measures of Success**

- Number of contracts using RFPs following implementation.
- Reduction in non-compliant bids.
- Improved project cost-effectiveness.

### **Solution Leaders**

- Project Managers and Engineers
- Mayor's Office of Infrastructure Development (MOID)
- Contract Administrators
- Department of Planning

## **Recommendation #22: Innovative Contract Models**

Expand the use of innovative contracting models for greater flexibility and improve project delivery outcomes.

### **Improvement Area: Innovation & Strategic Improvement**

**Description:** With a growing desire to increase flexibility in how city agencies award contracts, this recommendation encourages use of innovative contract types such outcome-based RFPs, A&E contracts, public-private partnerships outside of real estate, design-bid-build, and risk sharing agreements such as CMAR.

**Problem Being Addressed:** City does not often use variety when it comes to using different contract types, limiting the type of vendors and ultimately work that can be awarded. Traditional methods are not suitable for all types of projects which can result in higher costs, decreased resource flexibility, and poor project performance. There is also a lack of continuity between design and construction processes allowing for poorer quality of construction work on the back end.

### **Potential Impacts**

- Better project outcomes and performance relative to cost.
- Less change orders for capital projects
- Increased flexibility and resources.
- Broadened vendor pool.
- Less risk in project delivery.

### **Related Challenges**

- Ineffective project integration between design and construction.
- Higher costs from traditional contracts not addressing unique project requirements.
- Limited pool of qualified bidders.
- Non-flexible scopes on capital contracts.

### **Measures of Success**

- Number of contracts using an alternative contract type following implementation
- Number of additional partnerships gained following implementation
- Percentage increase in cost savings following use of new contract types
- Percentage decrease in project delays experienced

### **Solution Leaders**

- Project Managers and Engineers
- Mayor's Office of Infrastructure Development (MOID)
- Law Department
- Contract Administrators

## **Recommendation #23: Contract Requirements and Regulations**

Evaluate and refine contract requirements and regulations.

### **Improvement Area: Innovation & Strategic Improvement**

**Description:** Conduct a thorough review of existing contract requirements and regulations to identify and address provisions that may be excessively complex, redundant, or onerous, aiming to increase broader vendor participation and improve contract and project outcomes.

**Problem Being Addressed:** Many contract requirements and regulations can be unnecessarily complex and burdensome, leading to delays during bidding and contracting, increasing timelines, reducing vendor engagement, and potentially increasing overall costs.

### **Potential Impacts**

- Streamlined processes and reduced project timelines.
- Increased vendor participation from a broader range of vendors.
- Enhanced compliance through clearer and more efficient regulations.

### **Related Challenges**

- Lack of documented and standardized procedures
- Lack of vendor engagement.
- Onerous prequalification rules.

### **Measures of Success**

- Increased number of bids or contractors participating.
- Reduction in number of contractual requirements identified as burdensome or redundant.

### **Solution Leaders**

- Project Managers
- Contract Administrators
- Law Department
- Mayor's Office of Infrastructure Development (MOID)

# Next Steps

Phase IV, “Implementation and Management” launches with the completion of the report. MOID will partner with identified solution leaders to apply the proposed recommendations to city processes. The list of recommendations has already been shared with agency staff, and, pending administration approval, the implementation of the recommendations will commence.

MOID will organize sessions to begin implementation and address early concerns. These sessions are expected to last 2–3 months due to staff availability and capacity. After each recommendation session, an action plan will be outlined that show the required resources, steps needed, and responsibilities.

## Monitoring and Measuring Success

Consistent monitoring and key performance indicators are critical for success. Each recommendation includes at least two success metrics, with additional or alternative metrics to be proposed and identified during sessions.

## Implementation Timeline

### January 2025: Report on Recommendations

- Report completed and prepared for release to the public.
- Strategies and recommendations approved by CAO.

### January 2025–March 2025: Stakeholder Engagement and Planning

- Strategic meetings with agency personnel.
- Detailed discussions and brainstorming for implementation.

### February 2025–April 2025: Develop Phased Implementation Plan

- Finalize phased plan.
- List needs and requirements based on developed feedback loop.

### April 2025–September 2025: Begin Execution of Phase 1

- Initial targeted actions and preliminary steps for recommendations.

### September 2025 and Onward: Continued Execution

- Execute, progress, and report on recommendations throughout 2025.

## Future Adaptations

The execution of this project exposed the need for future improvement in various city practices. This study faced challenges in fully incorporating several quantitative methods of data collection due to difficulties in obtaining data across city agencies. The internal survey received a low number of responses and data to draw from, creating difficulty in analyzing feedback to find patterns in how employees view the capital contracting process. Future iterations of surveys should be regularly updated and conducted regularly for both internal and external stakeholders to attain significant sample sizes for data and ultimately encourage a proactive response to lingering issues within the capital contracting process.

More oversight and monitoring of trends that negatively affect the contracting process — such as delays, frequent high bids, noncompliant bids, etc. — can improve efficiency and effectiveness. Due to time constraints and availability of project data for capital contracts, MOID was unable to fully explore two quantitative methods that sought to monitor trends: Cycle Time Analysis and Milestone Tracking. Cycle Time Analysis would involve a more comprehensive look at contracts, as MOID would measure the time it has taken for contracts to move from start to finish (Draft Scope of Work to Final Acceptance) and identify outliers and trends from the sample of past contracts. Milestone Tracking was conducted but was primarily focused on the issues that affected the process rather than the time between milestones which is more akin to a case study exercise. In addition, there was a small sample size of 8 contracts which cannot produce true quantitative conclusions on the efficiency of the contract lifestyle and how milestones are met. Scaling up these measures would aid the city in adopting a proactive approach to improvements to the capital contracting process, fostering greater efficiency, effectiveness, and oversight.

While oversight and analysis occur within agencies, there is a lack of universal oversight to trace trends across the city and evaluate the root causes of issues. In the future, larger scale and regular monitoring of trends for all contracts can lead to a more inclusive and transparent process for all involved.

## Final Overview

This report outlined the background, methodology, and a detailed overview of 23 proposed recommendations developed by MOID to improve the city's capital contracting process. Throughout this project, MOID has identified existing gaps and logjams that hinder the city's ability to deliver projects efficiently and effectively. Potential solutions for these challenges have been proposed to improve the capital contracting experience for all of those involved from Planning to Final Acceptance.

Process improvement is a big undertaking, and with feedback from city staff, this project will transition to Phase IV. The goal is to implement lasting changes that will help transform Baltimore's systems, reputation, and infrastructure to better serve residents.

This report marks a pivotal step in improving the capital contracting process, addressing critical inefficiencies, and laying the groundwork for a more efficient, effective, and responsive system. The collaborative efforts of all involved parties are essential to achieving these transformative changes.



*City of Baltimore*