Los Angeles County Metropolitan Transportation Authority Office of the Inspector General

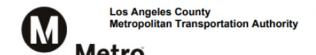
Review of Procurement Training for Project Managers

Report No. 24-AUD-03

Metro

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E-SIGNED by Yvonne Zheng

DATE: October 27, 2023

TO: Metro Board of Directors

Metro Chief Executive Officer

FROM: Yvonne Zheng, Senior Manager, Audit

Office of the Inspector General on 2023-10-27 14:20:22 PDT

SUBJECT: Final Report: Review of Procurement Training for Project Managers

(Report No. 24-AUD-03)

INTRODUCTION

The Office of the Inspector General (OIG) performed a review of Procurement Training for Project Managers. This review was conducted as part of our ongoing effort to assist Metro in providing responsive, accountable, and trustworthy governance within the Metro organization.

The objective of this review is aligned with the vision of Vendor/Contract Management (V/CM) to deliver efficient, cost effective, value added services that are responsive to and supportive of both Metro's internal and external clients. V/CM's mission is to be the industry leader in providing efficient acquisition, supply chain, and small business development solutions with integrity, trust and ethical practices. This mission will be accomplished with skilled, knowledgeable, and a high-performing workforce which will ensure efficient and effective operations of the Agency.

Training is an important tool in conducting Metro business effectively and works to achieve Metro's Vision 2028 Strategic Plan's goal to build and nurture a diverse, inspired, and high-performing workforce. When employees undergo training, it improves their skills and knowledge of the job and builds their confidence in their abilities and makes them better able to accomplish Metro objectives.

Our review found the following:

- 1. Required procurement training has not been provided to Project Managers since June 2014:
- 2. Policy (GEN 44) Project Management for Metro Projects was last updated in 2008;
- 3. Procurement training was last offered in 2014; and
- 4. Less than 10% of Project Managers attended other procurement-related trainings

OBJECTIVES, METHODOLOGY AND SCOPE OF REVIEW

The key objectives of this review are to identify:

- When Procurement Training courses were last offered and how often it is currently offered;
- Whether current and recent Program/Project Managers have attended project management training as required.

To achieve the review objectives, we:

- Reviewed Metro Policy GEN 44: General Management, Project Management for Metro Projects, to identify sections related to Procurement Training for Project Managers;
- Contacted Talent Development and Vendor/Contract Management to identify when Procurement Training courses were last offered;
- Contacted Administrative Business Services to identify Project Managers assigned to project requisitions for the last three (3) fiscal years, July 1, 2020 through June 30, 2023; and
- Reviewed other Project Management Trainings offered by Metro.

BACKGROUND

Human Capital and Development's Talent Development department, in coordination with the Procurement Unit of Vendor/Contract Management, is responsible for conducting Procurement Training for Project Managers. Talent Development "is responsible for creating a learning environment that is geared toward attracting, developing, motivating and enhancing employees' professional and skill development." (Source: Metro Intranet)

Vendor/Contract Management (V/CM) provides guidance for procurement activities through the policy established and adopted in Metro's Acquisition Policy and Procedure Manual (APPM). They also developed the Procurement Client Guide for professional services and construction services which summarizes the procurement procedures and processes so employees will have a clear understanding of the necessary requirements to initiate and manage a procurement activity.

Metro adopts the Project Management for Metro Projects (GEN 44) policy which defines specific duties and authority for Project Managers to ensure that Metro projects are managed efficiently and effectively.

Metro uses the Contract Information Management System (CIMS) as its procurement and acquisition management system, where V/CM creates and manages contracts. The requisition preparer or Project Manager provides pertinent data and supporting documents for Metro projects and responds to requisition package updates and issues.

RESULTS OF REVIEW

Our review of Metro's Project Managers Training Program found:

1. Required Procurement Training Has Not Been Provided to Project Managers Since June 2014

Section 2.3 of GEN 44 states, "Procurement training through Organizational Development & Training's course "Procurement Training for Project Managers" is mandatory for managers of projects with a life-of-project budget of \$5,000,000 or greater and is strongly recommended for managers of smaller projects."

Based on the lack of training records supporting attendance, it appears Project Managers¹, whether assigned to projects with an estimated contract value of \$5 million or more or less, have not had formal training, as required in GEN 44, since June 2014.

We found there are training records for Metro employees who had taken Project Management training for Project Managers in the past; however, there are no records of such training since May of 2014.

a. Project Managers Assigned to Purchase Requisitions

Based on data extracted from Metro's Contract Information Management System (CIMS) by Administrative Business Services, we found there were 2,334 project requisitions from Fiscal Year 2021 to Fiscal Year 2023 (July 1, 2020 to June 30, 2023) as shown on Table 1. (Over \$7 Billion across the prior three fiscal years)

Table 1: Project Requisitions FY21 to FY23 By Fiscal Year

Fiscal Year	No. of Project Requisitions	Amount
FY 21	688	\$ 1,533,422,396
FY 22	745	1,984,398,302
FY 23	901	3,524,561,584
Total	2,334	\$ 7,042,382,282

Source: Data from Metro CIMS

The requisitions based on project status as of June 30, 2023 are summarized on Table 2:

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¹ To respect and protect employee confidentiality, a complete list of Metro employees we reviewed assigned to procurement projects can be provided to Metro Management upon request.

Table 2: Project Requisitions FY21 to FY23
By Project Status

Project Status	No. of Project Requisitions	Amount
Approved	2,316	\$ 6,945,165,207
In-Process	9	8,208,676
Incomplete	9	89,008,399
Total	2,334	\$ 7,042,382,282

Source: Data from Metro CIMS

Table 3 shows that out of 2,334 project requisitions, 118 had a contract value of \$5 million and higher and 2,216 had a contract value of less than \$5 million.

Table 3: Project Requisitions FY21 to FY23
By Status and Category

	\$5 Millio	on and Above		and Above Less than \$5 Million		Tota	al		
	No. of			No. of			No. of		
Status	Requisitions		Amount	Requisitions		Amount	Requisitions		Amount
Approved	117	\$	6,408,070,721	2,199	\$	537,094,486	2,316	\$	6,945,165,207
In Process				9		8,208,676	9		8,208,676
Incomplete	1		88,239,000	8		769,399	9		89,008,399
Total	118	\$	6,496,309,721	2,216	\$	546,072,561	2,334	\$	7,042,382,282

Source: Data from Metro CIMS

We reviewed active procurement projects including approved, in process, and incomplete, and did not include projects with a cancelled, returned or rejected status.

Our review found that 394 Metro Project Managers were assigned to 2,334 project requisitions from FY21 to FY23, of which:

- 118 procurement projects with a value of \$5 million or more were assigned to 69 Project Managers across 29 cost centers.
- 2,216 procurement projects with a value of less than \$5 million were assigned to 325 Project Managers across 123 cost centers.

Table 4 shows the top ten departments with project contract amounts of \$5 million and higher from FY21 to FY23.

Table 4: Top Ten Departments/Business Units with Projects of \$5 Million and Higher

	_	-	
		No. of	
No.	Department	Requisitions	Amount
1	Construction Management	34	\$ 2,816,235,642
2	Vehicle Engineering & Acquisition	6	1,036,265,977
3	Contract Services	3	624,692,873
4	Facilities Contracted Maintenance Services	13	443,000,464
5	Office Of Management & Budget	5	409,663,569
6	Congestion Reduction	10	291,326,984
7	Executive Director, Maintenance And Engineering	8	272,380,094
8	Program Control	1	97,778,975
9	Connectivity Programs	1	59,000,000
10	Supply Chain Management	2	56,746,000
	Total	83	\$ 6,107,090,578

Source: Data from Metro CIMS

In terms of value, these 10 departments handled 94% of the total 118 projects with contract value of \$5 million and higher (\$6,107,090,578 out of \$6,496,309,721) or 87% of all projects (\$7,042,382,282) for the three-year period.

b. Positions/Titles

There are several Metro employees holding positions that include the title "Project Manager" and may be assigned to a procurement project. The use of the Project Manager title in CIMS is a functional title and may include employees who fulfill this function and duty when assigned the Project Manager role without "Project Manager" in their job title. There are many Project Managers for procurement projects who do not have "Project Manager" in their job title.

Table 5 shows the positions with "Project Manager" in their title, while Table 6 is a list of some positions without this title but were designated as Project Managers, based on data generated from CIMS.

Table 5: Metro Positions with Project Manager's Title

Job Title	Job Class
Assistant Project Manager, Transit Project Delivery	4620
Project Manager	4181
Project Manager, Facilities	4617
Project Manager, General Services	4810
Project Manager, Transit Asset Management	4169
Project Manager, Transit Capital Projects	4623
Project Manager, Vertical Transportation Maintenance	4627

Source: Metro Intranet

Accessibility Program Manager	Service Operations Superintendent
Deputy Executive Officer, Project Management	Senior Administrative Analyst
Director, Budget	Senior Director, Program Management
Director, Business Interruption Fund Program	Senior Director, Project Engineering
Director, Community Relations	Senior Director, Audit
Director, Construction Management	Senior Director, Capital Project
Director, Engineering	Senior Director, Countywide Planning & Development
Director, Project Control	Senior Director, Service Performance
Director, Real Property Management & Development	Senior Director, Special Projects
Director, Risk Management	Senior Executive Officer, Project Management
Executive Officer, Customer Care	Senior Executive Officer, Project Management Oversight
Executive Officer, Information Technology	Senior Facilities Maintenance Supervisor
Executive Officer, Projects Engineering	Senior Manager, Environmental Compliance & Service
Executive Officer, Regional Rail	Senior Manager, Facilities Maintenance
Facilities Maint Supervisor	Senior Manager, Information Security
Manager, Transportation Planning	Senior Manager, Project Control
Principal Transportation Planner	Senior Manager, Transportation Planning
Project Manager, General Services	Senior Transportation Planner
Project Manager	

Source: Metro CIMS and Intranet

2. Policy (GEN 44) Project Management for Metro Projects was Last Updated in 2008

The primary purpose of the policy is to provide Business Units with necessary guidance for managing Metro projects. GEN 44 was adopted on 9/30/2006 and revised on 8/25/2008, 15 years ago. The policy has not been updated since then.

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According to Workforce Services, "the policy had been worked on for quite a while including several drafts and one with the help of a contractor that was brought in, but no consensus was ever reached on finalizing it and it [had] come to a standstill."

Section 2.3 of the General Management Administrative Policies and Procedures (GEN 5) states, "Existing policies will be reviewed biennially, unless otherwise noted and approved in the policy. Workforce Services will initiate the biennial review by contracting the originating department for initial review. Policies may be updated more frequently as necessary. Depending upon a policy's complexity, the review process may exceed the biennial review date."

The GEN 44 policy should be reviewed and updated to ensure it addresses changes in the organization, operations, and responsibilities of all Business Units. If there are changes in the procurement processes and procedures, the policy should be updated so Project Managers will perform their job properly.

3. Procurement Training was Last Offered in 2014

According to Human Capital & Development's Talent Development staff, the Procurement Training for Project Managers was last offered on May 28, 2014.

We contacted V/CM to determine whether they are offering Procurement Training for Project Managers. We were advised that Procurement 101 training is provided to Project Managers within the Customer Experience, Records Management, Information Technology departments, and others on an "as requested basis". However, no records of having delivered training were provided.

We sampled 29 of the 394 Project Managers (PMs) we identified during the review period and asked Talent Development to provide a list of trainings they have taken. We found that three (3) Project Managers participated in the required Procurement Training for Project Managers, as shown below. Procurement for Project Managers was last taken by the sampled PMs in 2011 or earlier.

Employe ID	Program Name	Completed Date	Credit Hours
26283	Procurement for Project Managers I	7/13/2004	4
26283	Procurement for Project Managers II	8/8/2006	4
72797	Procurement for Project Managers I	8/21/2007	4
72797	Procurement for Project Managers II	8/22/2007	4
60257	Procurement for Project Managers I	11/10/2011	4
60257	Procurement for Project Managers II	11/17/2011	4

Procurement Training for Project Managers is important to provide Business Units with the necessary guidance for managing Metro projects, help ensure Metro projects are conducted in a disciplined, well-managed, and consistent manner that promotes delivery of quality products and services; and define the Project Manager's roles and responsibilities with respect to the management of contracted functions (e.g. enforcement of terms of contract, evaluating

performance and monitoring contract deliveries, inspection and approval of payments, etc.) to ensure that employees are acting within their authority.

It is important that Project Managers, especially those who handle projects of \$5 million and higher, undergo Procurement Training to give them a better understanding of their responsibilities, enhance their performance, and improve their skills, knowledge and confidence they need to be effective Project Managers. Employee training directly impacts an organization's productivity as employees will improve their performance and work more efficiently and effectively.

4. Less than 10% of Project Managers Attended Other Procurement-Related Trainings

Metro's CIMS procurement system shows there were 394 Project Managers who have worked or are currently working on 2,334 project requisitions. There were 69 project managers assigned to projects greater than \$5M across 29 cost centers and 325 Project Managers assigned to projects under \$5M across 123 cost centers.

We asked Talent Development to provide a list of trainings taken by the sampled 29 Project Managers and identified three (3) procurement-related trainings. A review of procurement-related training and employee participation follows:

a. Project Management/Project Management Foundations Training, et al.

Out of the 29 sampled Project Managers, nine (9) attended Foundation Training between 1996 and 2019. Each of the training courses below offered Project Managers various credit hours.

	No. of Project	Completed	Credit
Program Name	Manager/s	Date	Hours
Project Mgmt	1	1996	6
Project Management	1	2010	16
Project Management Foundations Training-Managing Projects	1	2012	24
Project Management Academy	1	2015	16
Project Management Academy	2	2016	32
Project Management Foundations Training	2	2019	32
Project Management: Budget	1	2019	2

b. **B2GNOW** Training

This training is to review of contract information to ensure data is correct. Review of level of small Business participation to mitigate any shortfalls.

The B2GNOW training courses are the only Project Management courses we found currently offered. While they are not meant to replace the required Procurement Training for Project Managers, they are valuable to the Project Managers. We asked Talent Development for the list of all employees who attended the B2GNOW training courses, and found the following:

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During Fiscal Year 2021 to Fiscal Year 2023, out of the 394 Project Managers we identified during the review period, only 37 attended B2GNOW training courses, as shown below:

	Fiscal Year/s	Number of
Category of Project Managers	Taken	Attendees
Project Managers with \$5M and Higher	FY21 & FY22	8
Project Managers with Less than \$5M	FY21 - FY23	29
Total Number of Project Managers who Attended		
the B2GNOW Training		37

As shown in the above table, only 8 or 12% of 69 Project Managers with projects of \$5 million and higher attended the B2GNOW training in Fiscal Years 2021 – 2022. There were no Project Managers who attended this training in Fiscal Year 2023.

On the other hand, only 29 or 9% of 325 Project Managers with projects of less than \$5M attended the B2GNOW training during Fiscal Years 2021 - 2023.

c. B2GNOW - Contract Modification

This training focuses on procedures for entering contract modifications and change order information.

During the Fiscal Years 2021 - 2023, 47 employees attended the B2GNOW- Contract Modifications training. Out of 47 employees, only two were Project Managers. The two Project Managers, who both handle projects of less than \$5 million, attended this training during FY21 to FY23, as shown below:

	Employee		
Date	ID	Title of Project Manager	Cost Center
1/21/2021	44028	Sr Dir, Special Projects	6925 Administration And Policy
8/9/2022	88250	Contract Administrator	6320 Acquisition Management Services
4/13/2023	88250	Contract Administrator	6320 Acquisition Management Services

Based on the above information on (a) and (b), only 39 out of 394 Project Managers identified for FY21 through FY23 had taken the B2GNOW training courses, less than 10% of the total Project Managers. While the two B2GNOW training courses are not considered substitutes for the required Procurement Training for Project Managers, B2GNOW training helps Project Managers to effectively perform their tasks.

CONCLUSION

Procurement training for all Project Managers with projects above and below \$5 million, and particularly for Project Managers assigned to numerous and high-value procurement projects, is paramount to ensure efficient and effective management of Metro projects.

Whereas some ad hoc Project Management training 101 has been offered by V/CM over the last few years, we found that formal Project Management training has not been offered to Metro staff since May 2014. While formal project management training for Metro Project Managers is not a guarantee of effective, efficient and successful procurements, offering and conducting such training is beneficial to both the Project Manager and the Agency overall.

Metro's GEN 44 policy was written in 2006 and revised in 2008, 15 years ago. The department has reviewed the policy addressing Project Management for Metro Projects, but an updated revision has not been finalized. Metro's GEN 44 policy states,

"Procurement Training for Project Managers" is mandatory for managers of projects with a life-of- project budget of \$5,000,000 or greater and is strongly recommended for managers of smaller projects."

Metro's CIMS procurement system shows there were 394 Project Managers who have worked or are currently working on 2,334 project requisitions.

Even if an employee is experienced in generally managing projects, procurement rules can vary by the type of project and change over time, requiring initial and periodic training.

An unnecessary business risk may exist where procurement projects are led by assigned Project Managers without proper training, and the procurement process may conclude with a less than satisfactory result, a possible financial loss, or unwanted litigation. This risk can be mitigated by complying with the GEN 44 policy and ensuring Project Managers are formally trained with proper documentation of such a training.

RECOMMENDATIONS

The Office of the Inspector General provided five recommendations to address the above issues. We recommend the following:

Vendor/Contract Management

1. Offer and conduct Project Management training periodically and regularly for all Project Managers according to Metro policy.

Human Capital & Development (Talent Development & Workforce Services)

2. Ensure all training courses, including Project Management training, are offered and conducted.

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3. Document Project Management training for Project Managers when it is completed.

<u>Vendor/Contract Management and Human Capital & Development (Talent Development & Workforce Services)</u>

4. Review the policy (GEN 44) biennially and update it as needed.

All Departments with Procurement Projects

5. Instruct and require Project Managers to attend Procurement Training, or a refresher course if they have not done the training within the last five years.

MANAGEMENT COMMENTS TO RECOMMENDATIONS

On October 4, 2023, we provided Metro Management a draft report. By October 26, 2023, Metro Management had submitted their responses summarizing their corrective actions as shown in Attachment A.

OIG EVALUATION OF MANAGEMENT RESPONSE

Metro Management's responses and corrective actions taken are responsive to the findings and recommendations in the report. Therefore, we consider all issues related to the recommendations resolved and closed based on the corrective actions taken.



Interoffice Memo

Date	October 20, 2023
То	Yvonne Zheng Senior Manager, Audit Office of the Inspector General
From	Debra Avila Deputy Chief Vendor/Contract Management Officer
Through	Nalini Ahuja, Chief Financial Officer
Subject	Management Response – Procurement Training for Project Managers Report No. 24-AUD-03

The Office of Inspector General (OIG) performed a review of Procurement Training for Project Managers across Metro.

Audit Conclusion

Upon engagement with V/CM and Talent Management regarding this review, OIG auditors have reported on the following four findings:

- Required procurement training has not been provided to Project Managers since June 2014
- 2. Policy (GEN 44) Project Management for Metro Projects was last updated in 2008.
- 3. Procurement training was last offered in May 2014
- Less than 10% of Project Managers attended the B2GNow and other procurement-related trainings.

Based on these findings, OIG's report documented five recommendations to improve procurement training for Metro Project Managers. Below are V/CM's responses for Report No. 24-AUD-03.

OIG Recommendations:

Recommendation 1. Vendor/Contract Management

 Offer and conduct Project Management training periodically and regularly for all Project Managers according to Metro policy.

V/CM Response:

V/CM agrees with the above-mentioned recommendation. Within the next 12 months and in collaboration with other relevant departments, V/CM will develop and deliver ondemand Procurement Training for Project Managers that may include Statement of Work/Statement of Service (SOW/SOS), Independent Cost Estimate (ICE), Requisition Requirements, B2GNow Prime Contractors and Sub-Contractors, Procurement Planning, etc. Additionally, V/CM is working towards establishing partnerships with organizational cabinets by creating liaisons to improve procurement support overall. This mechanism may also facilitate identifying project managers throughout cabinets.

V/CM already has the framework and, in some instances, has developed training though not specific for Project Managers. V/CM will work to create the specificity necessary to fulfill GEN 44 compliancy.

Recommendation 2. Human Capital & Development (Talent Development & Workforce Services)

Ensure all training courses, including Project Management training, are offered, and conducted.

V/CM Response:

V/CM will support Talent Development & Workforce Services as necessary.

Recommendation 3. Human Capital & Development (Talent Development & Workforce Services)

3. Document Project Management training for Project Managers when it is completed.

V/CM Response:

V/CM will support Talent Development & Workforce Services as necessary.

Recommendation 4. Vendor/Contract Management and Human Capital & Development (Talent Development & Workforce Services)

4. Review the policy (GEN 44) biennially and update it as needed.

V/CM Response:

V/CM agrees with the above-mentioned recommendations and will work with the policy team in Workforce Services to establish a biannual review of GEN 44 and update as necessary.

Recommendation 5. All Departments with Procurement Projects

Instruct and require Project Managers to attend Procurement Training, or a refresher course if they have not done the training within the last five years.

V/CM Response:

V/CM agrees with the above-mentioned recommendations and once the training is developed and delivered, V/CM will work to promote Procurement Training for Project Managers. V/CM will require training to be completed prior to allowing Project Managers to be identified within Procurement processes.

Any questions or concerns can be addressed to me, Debra Avila at 213 418-3051.

Cc: Debra Avila, Deputy Chief Vendor/Contract Management Officer Carolina Coppolo, Senior Executive Officer, Vendor/Contract Management Dr. Irma L. Licea, Executive Officer, Vendor/Contract Management Selena Reynolds, Chief Innovation Officer and Chief People Officer (Interim) Maria Meleandez, Deputy Executive Officer, Human Resources



One Gateway Plaza Los Angeles, CA 90012-2952 213.922.2000 Tel

Subject	Response to Recommendations Report No. 24-AUD-03
From	Seleta Reynolds, Chief Innovation Officer & Chief People Officer (Interim)
То	Yvonne Zheng Senior Manager, Audit Office of the Inspector General
Date	October 26, 2023

This memo serves as a response to OIG Report No. 24-AUD-03. Talent Development (TD) will take the steps outlined within this response to re-introduce Procurement Training for Project Managers.

BACKGROUND

OIG report No. 24-AUD-03 found the following gaps in procurement training required for Program Managers.

- Required procurement training has not been provided to Project Managers since June 2014
- Policy (GEN 44) Project Management for Metro Projects was last updated in 2008
- · Procurement training was last offered in May 2014
- Less than 10% of Project Managers attended the B2GNow and other procurement-related trainings

OIG Recommendations:

Recommendation 1. Vendor/Contract Management

 Offer and conduct Project Management training periodically and regularly for all Project Managers according to Metro policy.

Talent Development OIG Report Response

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TD Response:

Talent Development agrees with the recommendation and will collaborate with V/CM and appropriate stakeholders to assist in the development and delivery of procurement training for Project Managers.

Recommendation 2. Human Capital & Development (Talent Development & Workforce Services)

Ensure all training courses, including Project Management training, are offered, and conducted.

TD Response:

Talent Development will support the training plan to be adopted by V/CM and, depending on the method of delivery, will update and maintain the learning management system as necessary.

Recommendation 3. Human Capital & Development (Talent Development & Workforce Services)

Document Project Management training for Project Managers when it is completed.

TD Response:

Depending on the training plan adopted by V/CM, Talent Development will:

- Create a T-code on Metro's Universal Training Tracking System (UTTS) by setting up the course.
- If an in-person training delivery method is adopted, TD will manage badge reader loans so that participants will be documented, and credit granted upon completion.
- If the training is delivered via e-learning, TD will manage and maintain the Learning Management System (LMS) so that credit is granted to learners upon completion.

Recommendation 4. Vendor/Contract Management and Human Capital & Development (Talent Development & Workforce Services)

4. Review the policy (GEN 44) biennially and update it as needed.

TD Response:

Chief People Office will partner with the designated department responsible for policy GEN 44 and assist in the review and update process as needed.

Talent Development OIG Report Response

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Recommendation 5. All Departments with Procurement Projects

Instruct and require Project Managers to attend Procurement Training, or a refresher course if they have not done the training within the last five years.

TD Response:

Talent Development agrees with the recommendation and once the training is developed and delivered by V/CM, Talent Development will use department communication tools to ensure the required employees are notified of training.

Please address questions or concerns to Maria G. Meleandez at MeleandezM@metro.net or 213 922-5229.

Cc: Seleta Reynolds, Chief Innovation Officer & Chief People Officer (Interim) Dawn Jackson-Perkins, Executive Officer, Talent Management (Interim) Debra Avila, Deputy Chief Vendor/Contract Management Officer Carolina Coppolo, Sr. Executive Officer, Vendor/Contract Management Dr. Irma L. Licea, Executive Officer, Vendor/Contract Management (Interim)

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