City of Port Phillip Streamlines Contracts and Procurement with Microsoft SharePoint and Power Platform

Industry

Government/Public Sector

Products/Solutions

Circle T Document Builder

Microsoft SharePoint

Microsoft Power Platform

Microsoft Power BI

Microsoft Power Automate

Solution Summary

City of Port Phillip (Port Phillip) is a local government area of Victoria, Australia and is based on the northern shore of Port Phillip Bay. Port Phillip encompasses a vibrant community populated by 115,000 and contains a variety of residential, industrial, retail, entertainment, and leisure precincts. Staffed by 1000 and with an average annual income of $243M ($178M US), Port Phillip strives to be agile and future-ready. In order to fuel its growth and be more responsive to changes in legislation and customer expectations, Port Phillip streamlined its contracts and procurements processes by digitising and automating what used to be manual and heavily time consuming.

Challenge

Port Phillip issues about 70 high-value, highly complex tenders a year. Contracts are carefully constructed to include specifications, detailed conditions, itemised schedules and clauses. A core Contracts and Procurement team generated contracts with input from an external legal team who create and maintain contract clauses and make frequent updates to contract templates to ensure compliance to legislative requirements. Contract templates were in the form of MS Word templates which had proliferated over the years, reflective of the dynamic

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changes in legislation as well as in the nature of contracts being issued. Incompatibilities between Word versions rendered formatting and layout inconsistencies among documents, making it difficult to efficiently adapt a contract template. The absence of a centralised, version-controlled template management system exposed Port Phillip to the risk of incomplete or outdated contracts. The onset of COVID-19 further complicated matters- a decentralised model of creating tenders was adopted whereby each department became responsible for issuing tenders and contracts. This meant the Contracts and Procurement team had even less oversight on the contract and tender documents being issued to the market on behalf of the organization.

Solution Strategy

Port Phillip had an existing Microsoft 365 environment and engaged Circle T to implement a solution using SharePoint. The Circle T Document Builder, based on Microsoft 365 and SharePoint, manages the generation and processing of request for tender, request for information, expression of interest, contract and contract milestone- variations, extensions and novations- documents. Content that used to take weeks, even months, to create is now generated within minutes.

Components of solution include:

- An intuitive interface allows users to find templates quickly and easily from a central catalogue. Users can save a document to any SharePoint site including within Microsoft Teams and Microsoft 365 Groups
- A document wizard prompts the user to enter key information which then triggers the generation and assembly process
- Integration into Office applications and Circle T's digital asset library enables quick insertion of approved images and logos into the document, ensuring fit for use and purpose
- Workflows and approvals are handled by Power Automate
- Created documents are automatically tagged and discoverable via Search
- Feedback to template owners can be easily created and posted, creating a collaborative environment of transparency and continuous improvement
- Power BI dashboards and reports provide deep insight into the lifecycle of Port Phillip's contract and procurement content.

Results

By transforming the generation of the documents, Port Phillip's contracts and procurements are now streamlined and efficient. The implementation has helped Port Phillip achieve a 30% reduction in the time to create documents by enabling a "doing it right the first time approach" whereby the correct document is created with the right components. The centralised approach has also allowed Port Phillip to be more responsive to the content needs of its stakeholders. For instance, Port Phillip can now respond quickly to legal advice and update agreement clauses in a single source that will propagate to all contract templates. Provisions for external

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factors such as climate change, COVID-19 and be factored into templates quickly and efficiently. Not only is the solution a positive user experience, but a focus on accessibility has also enabled the contracts and procurement process to be more collaborative and inclusive.

Quotes:

Circle T's ability to connect and engage with the different stakeholders was commendable. They would delve into deep technical discussions with our IT team just as skilfully as they would present to our business and senior management in a meaningful way so that everyone was comfortable. Circle T was transparent and highly capable- a pleasure to work with.

Jeanene Simmons, Senior Procurements & Contracts Business Partner, City of Port Phillip

Time was of the essence with this project and Circle T's expertise meant they had tools and accelerators to deliver to our tight timelines. Circle T enhanced the transformation of our contracts and procurements processes, making it achievable and straightforward.

Kate Cornwall, Business Lead Procurements & Contracts, City of Port Phillip