



Equity in contracting dashboard

2021

Equity in contracting matters

Metro works to prepare the 1.5 million people in the greater Portland region for the future by addressing transportation, development, and environmental protection issues that cross local boundaries.

Diversity in contracting plays a critical role in the success of Metro's mission to plan for the region's future and ensure that it remains a great place to live. Inclusion of diverse businesses adds vibrancy, resilience, sustainability and breadth to the economy of the region. Each year, Metro spends millions of dollars on contracts with businesses that support efforts to provide public services for the residents of Clackamas, Multnomah, and Washington counties. By actively involving minority-owned business enterprises, woman-owned business enterprises, service disabled veteran-owned businesses and emerging small businesses (collectively referred to as COBID-certified firms) in the pool for business opportunities, Metro helps expand economic opportunities in the region.

For more information contact:

gabriele.schuster@oregonmetro.gov

Program Overview

Equity in contracting program

Metro's equity in contracting program empowers the historically marginalized businesses to engage in Metro contracting opportunities. These opportunities result in social and economic improvement for the businesses, their employees, and the Metro region as a whole. Metro provides active engagement and support services that build impactful relationships, develop firm and employee capacity, and result in Metro's spending reflecting the diversity of the community we serve. The multi-faceted approach to ensuring that COBID-certified firms are successful includes:

- regular **relationship building** through outreach and networking
- providing **business training and workshops** with topics including how to do business with Metro, preparing bids and proposals, one-on-one proposal clinic, partnering for business success, marketing, business financing, and more
- **staff training** to address unconscious bias in selection processes
- supporting **business support organizations and chambers** focused on historically under-served populations through sponsorships, volunteering and hosting meetings
- hosting an annual **Small Business Open House** where business owners can meet project managers from departments across Metro

These efforts for equity in contracting are part of an agency-wide approach to diversity, equity, and inclusion.

Program Administration

In 2021, a key ongoing impact of COVID-19 was the fact that COBID firms were disproportionately impacted, and thus there were fewer active COBID firms in the business community. With this knowledge, staff recalibrated program planning while maintaining many program activities.

Strategic planning

In 2019, the equity in contracting program team developed a strategic plan to solidify the direction of the program and sharpen focus for Metro's efforts. Staff has continued to adjust the plan as the pandemic has impacted the environment for historically marginalized business communities. Primarily, staff prioritized different actions that were more effective in providing access to Metro contracting opportunities for business owners.

*Program objective:
Increase participation of COBID firms in Metro contracting by proactively engaging, building relationships, breaking down barriers, and providing support through innovative approaches*

Workshops and training program

Continue to build on small business development workshops and trainings with topics including how to prepare a bid/proposal, finance, marketing, job estimating, proposal clinic, Clean Air Construction Standard, Construction Careers Pathways, post workshop one-on-one assistance, and more.

Support departments: projects, equity strategy and relationship building

Develop and implement equity lens to use for equity strategy meetings. Train contract managers on process and work with departments toward effective and impactful equity strategies that become part of the procurement culture at Metro. Targeted and in-depth support on key procurements. Provide support and project presence on department-specific or agency-wide initiatives when equity in contracting is involved.

Relationship building and maintenance

Maintain a consistent, personable, and accessible presence in the business community to establish trust and share information about Metro's contracting opportunities. Maintain existing relationships with business owners, networking organizations, and community partners. Build new relationships with strategic community organizations and new, COBID-eligible firms.

Reporting and tracking

Improve and expand on current reporting and tracking processes. Provide regular reporting.

Address institutional barriers to equity in contracting

Identify and address issues that make contracting with Metro daunting, difficult, or exclusive. Engage stakeholders in the process of identifying barriers and developing solutions.

Inter-agency collaboration

Work with other local governments to improve equity in contracting, to provide consistent messaging and leverage the work in other organizations.

Metrics for success

Businesses rooted in Communities of Color:

- Are aware of Metro resource opportunities and know how to apply.
- Feel prepared for and comfortable with the process to access Metro's resource opportunities.
- Believe they are well-positioned to win Metro's resource opportunities.
- Increase their capacity to access Metro's contracts
- Know about, access, and are awarded contracts at Metro
- Are awarded increasingly high dollar value contracts.
- Have contracts that are used, fully and first.
- Trust Metro to allocate resources in a way that enhances racial equity.

People of Color:

- Are included in the workforce of Metro projects.
- Become major contributing partners to Metro's success in contracting.
- Believe that they have opportunities to advance economically.

Sponsorships and Memberships

Sponsorships and memberships are a way for Metro to contribute to the great work that other organizations are doing to support historically disadvantaged businesses. In 2021, Metro partnered with the following organizations:

- Business Diversity Institute (BDI)
- Oregon Association of Minority Entrepreneurs (OAME)
- Oregon Native American Chamber (ONAC)
- Reverse Vendor Tradeshow
- National Association of Minority Contractors (NAMC)
- Professional Business Development Group (PBDG)
- Business Diversity Institute (BDI)

Workshops and Training



Proposal Clinic

Proposal Clinics are 1:1 sessions with an expert consultant on how to level up a firm's proposal writing skills to win a future Metro contract. Small business owners learn how to show their value, the unique qualifications they bring, and leverage their strengths in their next RFP response.

In 2021, Metro assisted 15 historically marginalized firms in better understanding the procurement requirements and responding to Request of Proposals.

Meet and Greet

Meet and Greet events connect prospective suppliers with project managers at Metro to help develop relationships between firms and staff. Meet & Greets are arranged by industry type and allow firms the opportunity to introduce their business to Metro staff who typically identify contracting needs and are involved in award decisions. An introduction is especially helpful when there are direct award opportunities, including the Personal Services COBID Marketplace.

Metro staff conducted two virtual Meet & Greet events in 2021 for 40 participating vendors attending 50 individual meetings in which staff and businesses actively engaged.

Metro Office Hours

Monthly Office Hours provide an opportunity for prospective suppliers to meet with a procurement analyst for 30 minute one-on-one information sessions on tips for navigating the public procurement process and how to do business with Metro.

Metro staff conducted six office hour events and consulted a total of 41 firms.

In the Community



Virtual Networking

Taking into account gathering restrictions and best health and safety practices, Metro's Small Business Open House was canceled in 2021. Staff instead put effort towards planning for a virtual 2022 open house.

While in-person networking was on hold, staff regularly attended virtual networking events, including OAME Tradeshow, Business Expo West, Minority Enterprise Development (MED) Week, and Reverse Vendor Trade Show, and regular networking with business associations including OAME, NAMC, ONAC, PBDG, BestHQ and BDI. Consistent presence at events like these is important to maintain trust and relationships with business owners.

Representation on boards

Staff actively engages with the small business and procurement communities and serves on boards for the following organizations:

OAME, ONAC, OPPA (Oregon Public Purchasing Association), NIGP (National Institute of Government Procurement) Columbia Chapter and BDI.

Program Highlights

Policy Updates

In 2021 Procurement Services implemented procedures and processes for the Clean Air Construction Standards provisions. Staff actively engaged in networking events to provide policy requirements information to small business support groups.

Partnering with other public agencies

Staff has increasingly participated in collaborative meetings with regional public agencies to streamline procurement processes and to share information about reducing barriers for historically disadvantaged businesses.

Staff presented at the Oregon Public Purchasing 2021 fall conference on how to create an Equity in Contracting program. Sharing information and successes will help to establish consistent equity strategies throughout the region and make public agency contracting opportunities more accessible to historically disadvantaged businesses.

Successful Procurement Equity Strategies

Developing solid equity strategies address common procurement barriers for historically disadvantaged firms, resulting in high participation of COBID certified firms for the following projects:

ITB 3946 Metro Regional Center Exterior Coatings

- Targeted outreach to community based business support organizations to make COBID firms aware of the opportunity
- Detailed, clarified bid schedule
- Extended timelines to bid resulted into two contract awards for one

WBE certified business in the amount of \$477,000

RFP 3928 Regional Travel Options Community Engagement

- Allowed for subcontracting opportunities to enable small firms to cover the scope of work with a team
- Shorter RFP for increased accessibility
- Targeted outreach with community based business support organizations
- Extended timelines to allow small firms enough time to respond resulted into 3 contract awards: \$250k each to WBE, MBE, and ESB.

By the Numbers

The following pages include graphics explaining in detail the outcomes of Calendar Year 2021 COBID contracting and spending.

In 2021, the total award of contracts and total award of COBID-eligible contracts went down significantly (\$361M to \$110M and \$45M to \$34M, respectively). This is not surprising as CY 2021 represents a considerable proportion of the COVID-19 economic downturn and budget constraints, and any pre-pandemic inertia was consumed. Also impacting this is the 2020 solicitations of the WPES Major Payments and the 2021 Planning contracting for Housing Bond spend. Both are responsible for a substantial percentage of COBID ineligible contracts, and the latter is responsible for significant increase in total contract count, which drove the reduction in COBID count percentage as well from 30% to 24%).

However, we see a significant positive trend in *usage* of COBID contracts (especially those solicited

in 2020) – increasing from 14.7% of eligible spending to 22.9%. COBID eligible contract spending itself also increased from \$23.9M to \$60.4M as well as proportionally from 18.6% to 29.6%. Another positive is that as of the end of 2021, the COBID contract awards from 2020 and 2021 have a higher spend *percentage* than the non-COBID awards. This can be understood to mean that departments and project managers are trending towards or preferring higher COBID utilization on recent projects and that the focus on COBID procurements during COVID-19 resulted in more Metro dollars being spent with businesses rooted in Communities of Color.

Some care should be taken in assessing these numbers as contracts in 2017 or prior are not being considered the same way, so the 2021 increase can likely be partially attributed to a higher percentage of Metro's projects being started in the range of time considered by this data set. More time is necessary to see the effects of old contracting completely fade.

Departments leading in terms of spending on current year COBID contracts are Council and the Office of Metro Attorney

Departments leading in terms of count of COBID award are Capital Asset Management and Parks and Nature.

Departments leading in terms of percent dollars awarded on eligible contracts are Capital Asset Management and Planning, Development, and Research.

Departments leading in terms of percent of contract dollars spent with COBID firms are Planning, Development, and Research and Human Resources.

COBID Equity in Contracting Report

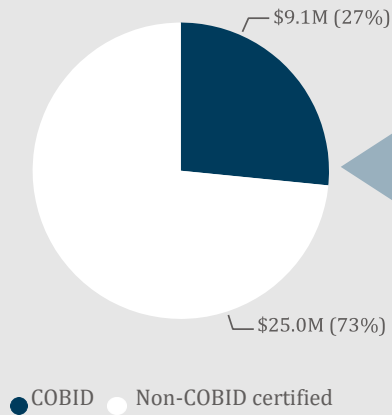
Choose AwardYear
 2021

Metro awarded \$110.4M of Contracts in this calendar year, of which \$34.1M (31%) were COBID-eligible

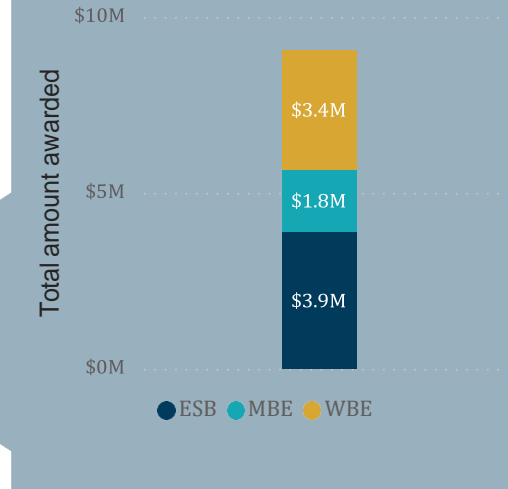
Contract awards

Eligibility	Total contract value	% of awards
Not COBID Eligible	\$76,300,156	69%
COBID Eligible	\$34,082,617	31%
Total	\$110,382,773	100%

Of the \$34.1M of COBID-eligible contracts, \$9.1M were awarded to COBID-certified firms



COBID contract dollars awarded



Contract awards

COBID Certified Award value % of COBID awards

COBID Certified	Award value	% of COBID awards
ESB	\$3,895,254	43%
WBE	\$3,385,365	37%
MBE	\$1,778,519	20%
Total	\$9,059,137	100%

COBID Equity in Contracting Report

Choose AwardYear

2021

Contract dollars awarded within selected calendar year.

- For any chosen year, contract spending in this table reflects spending on contracts awarded in the chosen year up through calendar year 2021.

Department	Total awards	Total COBID-eligible awards	COBID Awards	COBID Spent	COBID % spent	Non COBID Awards	Non COBID Spent	Non COBID % spent
Capital Asset Management	\$9,657,744	\$9,657,744	\$2,953,726	\$1,526,453	51.7%	\$6,704,018	\$1,328,657	19.8%
Communications	\$50,000	\$50,000	\$0	\$0		\$50,000	\$0	0.0%
Council	\$3,202,500	\$427,500	\$28,785	\$0	0.0%	\$398,715	\$208,000	52.2%
DEI team	\$309,200	\$209,200	\$30,000	\$0	0.0%	\$179,200	\$8,729	4.9%
Expo Center	\$735,394	\$735,394	\$0	\$0		\$735,394	\$9,990	1.4%
Finance and Regulatory Service	\$912,465	\$662,465	\$0	\$0		\$662,465	\$46,410	7.0%
Human Resources	\$763,149	\$417,699	\$0	\$0		\$417,699	\$113,765	27.2%
Information Services	\$567,600	\$297,600	\$0	\$0		\$297,600	\$15,628	5.3%
Metro ER Commission	\$0	\$0	\$0	\$0		\$0	\$0	
Office of Metro Attorney	\$219,026	\$214,526	\$0	\$0		\$214,526	\$88,063	41.1%
Oregon Convention Center	\$3,100,000	\$3,000,000	\$800,000	\$0	0.0%	\$2,200,000	\$311,329	14.2%
Oregon Zoo	\$2,539,425	\$2,501,925	\$634,000	\$8,333	1.3%	\$1,867,925	\$111,099	5.9%
Parks & Nature	\$9,965,758	\$6,269,758	\$1,783,542	\$306,057	17.2%	\$4,486,216	\$409,273	9.1%
Planning Development and Research	\$63,937,969	\$3,402,526	\$1,078,635	\$32,601	3.0%	\$2,323,891	\$282,770	12.2%
Portland'5 Centers for the Arts	\$769,212	\$769,212	\$200,000	\$12,869	6.4%	\$569,212	\$16,044	2.8%
Waste Prevention & Environmental Services	\$13,653,331	\$5,467,068	\$1,550,450	\$217,875	14.1%	\$3,916,618	\$871,106	22.2%
Total	\$110,382,773	\$34,082,617	\$9,059,137	\$2,104,187	23.2%	\$25,023,480	\$3,820,864	15.3%

COBID Equity in Contracting Report

Choose AwardYear

2021

Number of contracts awarded within selected calendar year.

Number of contracts awarded by Metro department in calendar year

Department	Total # of contracts	Total COBID eligible contracts	% COBID eligible	Total COBID contracts awarded	% of eligible contracts awarded to COBID firms
Capital Asset Management	45	45	100%	15	33%
Communications	5	5	100%	0	0%
Council	9	4	44%	1	25%
DEI team	7	6	86%	1	17%
Expo Center	7	7	100%	0	0%
Finance and Regulatory Service	8	7	88%	0	0%
Human Resources	7	4	57%	0	0%
Information Services	6	4	67%	0	0%
Metro ER Commission	1	1	100%	0	0%
Office of Metro Attorney	11	10	91%	0	0%
Oregon Convention Center	18	17	94%	5	29%
Oregon Zoo	23	21	91%	4	19%
Parks & Nature	114	75	66%	24	32%
Planning Development and Research	93	32	34%	9	28%
Portland'5 Centers for the Arts	15	15	100%	3	20%
Waste Prevention & Environmental Services	113	58	51%	14	24%
Total	482	311	65%	76	24%

COBID Equity in Contracting Report

Select Spend Year

2021

Purchase Order and Purchasing Card spending by calendar year.

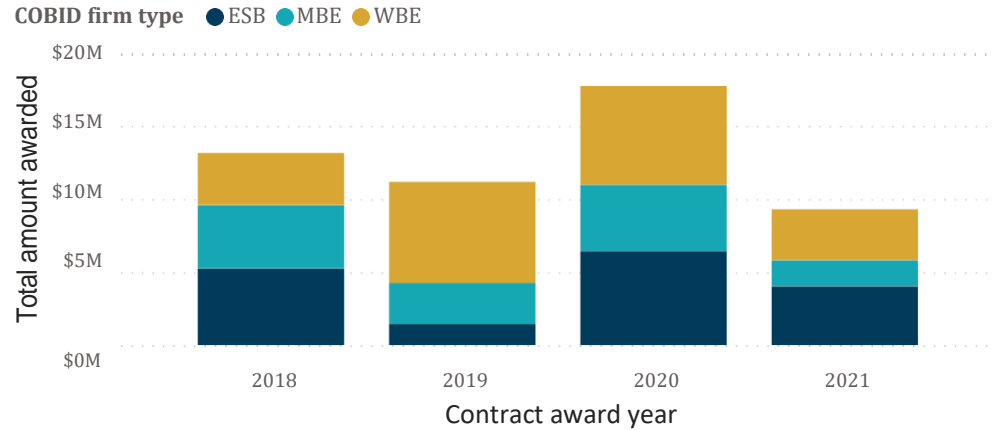
- All spending within calendar year, regardless of when a contract was issued. Any spending on contracts issued before 2018 have not been vetted in the same way as contracts 2018 and after.

Department	Total Contract Spending	Total COBID-eligible Spending	Non COBID Contract Spending	COBID Contract Spending	% COBID eligible spending to COBID firms	Total Off-Contract Spending	Total P-Card Spending
Capital Asset Management	\$27,157,628	\$26,475,669	\$21,784,379	\$4,691,290	17.7%	\$2,030,177	\$83,669
Communications	\$1,415,509	\$1,415,509	\$695,596	\$719,912	50.9%	\$12,344	\$22,082
Council	\$458,370	\$313,469	\$273,709	\$39,760	12.7%	\$407,413	\$82,843
DEI team	\$58,729	\$8,729	\$8,729	\$0	0.0%	\$0	\$0
Expo Center	\$146,954	\$43,846	\$32,044	\$11,802	26.9%	\$1,349,182	\$43,488
Finance and Regulatory Service	\$1,323,776	\$1,189,318	\$125,240	\$1,064,078	89.5%	\$0	\$0
Human Resources	\$580,565	\$423,411	\$368,761	\$54,650	12.9%	\$33,561	\$64,330
Information Services	\$1,164,899	\$610,316	\$258,016	\$352,300	57.7%	\$1,616,859	\$191,557
Metro ER Commission	\$353,872	\$353,872	\$29,416	\$324,456	91.7%	\$0	\$0
Office of Metro Attorney	\$256,576	\$256,576	\$252,076	\$4,500	1.8%	\$983	\$37,662
Office of the Auditor	\$355,025	\$355,025	\$355,025	\$0	0.0%	\$0	\$11,000
Oregon Convention Center	\$14,005,782	\$1,128,904	\$1,095,304	\$33,600	3.0%	\$767,651	\$182,609
Oregon Zoo	\$15,430,590	\$1,587,023	\$1,510,188	\$76,835	4.8%	\$2,836,668	\$772,630
Parks & Nature	\$19,006,531	\$12,738,024	\$10,125,535	\$2,612,489	20.5%	\$3,595,099	\$476,240
Planning and Dev Department	\$0	\$0	\$0	\$0		\$0	\$0
Planning Development and Research	\$21,970,800	\$2,929,679	\$2,394,914	\$534,765	18.3%	\$497,559	\$148,440
Portland's Centers for the Arts	\$1,244,082	\$492,483	\$166,237	\$326,246	66.2%	\$1,452,940	\$179,643
Research Center	\$0	\$0	\$0	\$0		\$0	\$0
Waste Prevention & Environmental Services	\$99,314,602	\$10,165,396	\$7,135,706	\$3,029,690	29.8%	\$3,034,803	\$751,696
Total	\$204,244,288	\$60,487,251	\$46,610,877	\$13,876,374	22.9%	\$17,635,241	\$3,047,889

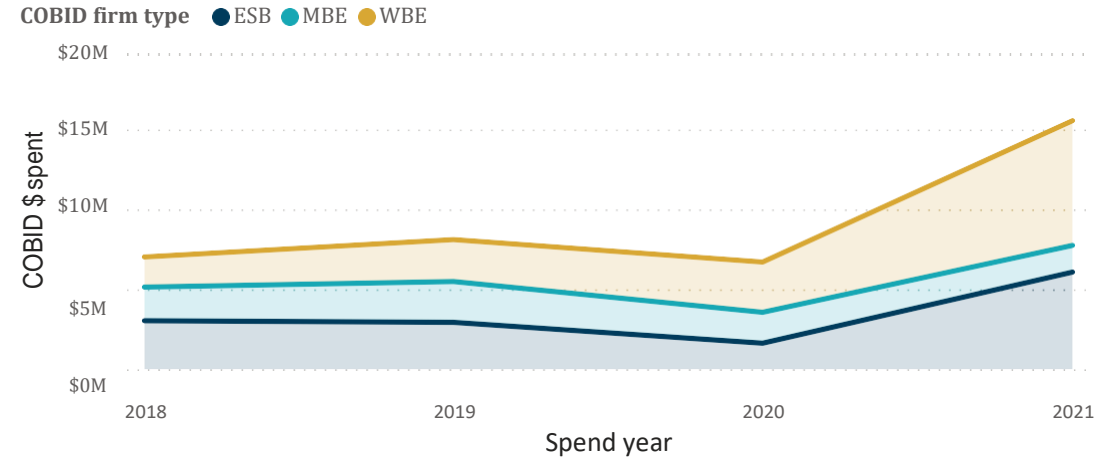
COBID Awards and Spending by Year

Currently, this does not include P-Card spending- it only includes spending from the PeopleSoft query.

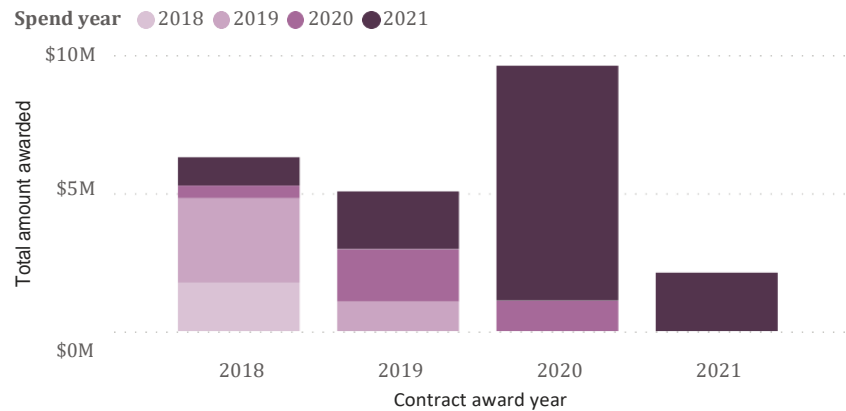
COBID contract dollars awarded by year



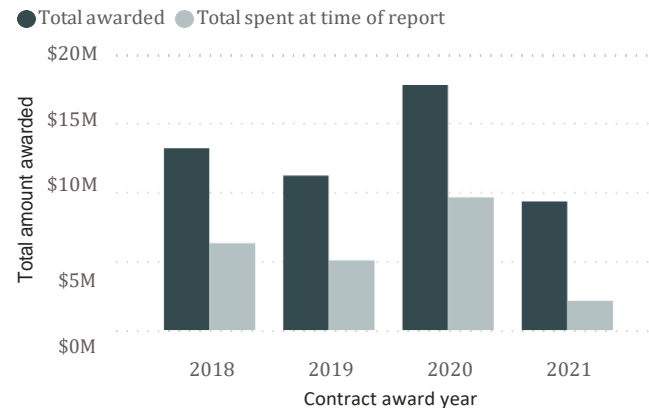
Total Spending on COBID Contracts awarded since 2018



Spending on COBID contracts by year



Spend vs. Award for COBID contracts



Percent of Contract Spent by Award Year

Year	Non-COBID certified	COBID
2018	75.2%	47.9%
2019	85.6%	45.3%
2020	28.7%	54.3%
2021	5.1%	22.9%

Awards: Contract award data is exported from PeopleSoft per year and reviewed by each department. The current year of award data, once reviewed, is merged with previous year contracts for a running total. For 2020 and 2021, the complete list of contracts awarded that year was classified into COBID-eligible and not-COBID-eligible, and COBID status determined for the contracted business. For 2018 and 2019, the not- COBID-eligible contracts were removed from the list prior to analysis.

Purchase Order Spending: Contract spend data is exported from PeopleSoft as a single table. POs issued since 2018 through the calendar year of the report are kept. For contracts with a matched award (matching Contract ID) the eligibility and COBID status is copied from the award. For on-contract spending with no award match, the COBID status is determined from the data available in the spend table, which could be outdated (in terms of COBID status of the contractor) and has not been as vetted as the award data.

P-Card Spending: Metro Purchasing Card spending is exported from PeopleSoft for all spending since 2018

COBID eligibility: A contract is not COBID eligible if no COBID firm exists that was eligible for that work (e.g. non-competitive IGA)

Types of **COBID** firms:

MBE: Minority-owned business

WBE: Woman-owned business

ESB: Emerging small business

Procurement Services

The Procurement services team facilitates the implementation of Metro's equity in contracting administrative rules and supports staff throughout the departments in developing equity strategies for procurements, identifying outreach opportunities and by organizing the annual Small Business Open House.

Procurement services is pictured below:

Front row: Daadir Shee, Kim Paul, Kadir Abdullahi

2nd row: Laura Corey, Deanna Podbielan

3rd row: Matt DeNinno, Julie Hoffmann, Riko Tannenbaum

Back row: Jon Deveaux, Gabriele Schuster

