

# Equity in Contract Report Calendar Year 2022



*Per Metro Code, on a yearly basis, Metro reviews and reports on our equity in contracting program, broadly describing the efforts, highlighting specific activities and programs undertaken to advance equity and inclusion, and quantitatively detailing the outcomes.*

## Metro's Equity in Contracting Program Overview

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.

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## Program Highlight

2022 is Metro's highest year in COBID award and COBID spend to date, with specific numbers included in the "Outcomes Section" later in this report. Specifically, the Parks and Nature Department awarded \$18 million to COBID Firms.



## Program Details

### Addressing Barriers

Metro released a survey in March & April of 2022 to better understand the training and engagement needs of diverse businesses. This survey was sent to about 600 firms, and 64 responses were received. We offered opportunities to comment on the existing trainings and what trainings they may want to see. Additionally, firms commented on their preference between virtual (75%) and in-person (25%) offerings.

#### Existing Trainings

Meet and Greet/open house  
Bid and proposal writing training  
Metro office hours/navigating Metro's procurement process  
Mentoring while under contract  
  
Marketing your business/teaming up  
Back office training/organize day-to-day paperwork

#### New Trainings

Construction bonding  
Teaming with larger prime proposers  
More meet and greet opportunities with project managers  
How to find out about direct contracting opportunities

### *Example Survey feedback*

*I just filled out the survey, and I also wanted to let you know this week I connected with Olena Turula with Metro Parks and Nature and we had a great conversation about future possibilities. Thanks so much for the encouragement and resources as I learn the ropes in this process.*

*Have a great rest of your week,*

*Bethany*

Bethany Rydmark (she/her), PLA, ASLA  
landscape architect + garden designer

## Small Business Trainings and Technical Assistance

- **Office Hours – How to do business with Metro**

This training is offered by Metro Procurement staff and is about how to navigate the procurement process and what to know about the Equity in Contracting program. This program is in high demand.

Metro provided four trainings in 2022 and plans to provide eight in 2023 to better meet the need. See below for a table that shows the demographics of attendee firms.

MBE	WBE	ESB	SDV	In Process	Total
19	7	7	3	4	40

- **Sharpen the Pencil**

Back office tasks how to manage all that paperwork, invoicing Metro, keeping your books while under contract with Metro. This was a pilot training with ten firms attending (six MBE, two WBE, two ESB). This training was very successful and demand for future offerings is high. Small businesses expressed strong interests in more of this training, which we plan to provide in 2023.

- **Proposal Clinics**

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.



MBE	WBE	ESB	In Process	Total
2	4	1	2	9

### RFP 4119 On Call Racial Equity and Inclusion Training, Facilitation, and Coaching Services

- Nineteen proposals received, and ten proposers were awarded a contract.
- Five out of the ten were COBID certified (four MBE, one WBE).
- Two proposers (MBE firms) took advantage of the proposal writing assistance and both succeeded in securing an award.
- **Metro provided Bid and Proposal writing training and mentoring with NAMC Oregon.** This specific session resulted in a contract with an MBE/WBE certified construction company for On-Call General Repair and Maintenance Services Metro agency-wide for residential and commercial properties.

- **Business Development Strategies Workshops**

Two workshops were held:

*Partnering and building teams to propose on larger Metro RFPs*

*Small Business Marketing - Social media and website strategy*

MBE	WBE	ESB	SDV	In Process	Total
13	15	6	2	3	39

Both were highly regarded by attendees and filled up quickly.



- **Testimonial**

Martin (House of Lopez Campa)

*Can't help but thank you forever for the mentorship you have provided for our company the past couple months. From your proofreading ability, creative ideas and amazing networking intel, you have really gone above and beyond for us! Really is an honor to have you as a friend.*



## Outreach by Metro Staff

- **Outreach**

Metro Staff conducts ongoing outreach to the local minority business communities.

Here's a list of the meetings and events that were attended:

- Oregon Association of Minority Entrepreneurs (OAME) Youth Conference, with a staffed table
- OAME Tradeshow
- Gresham Business Chamber annual event
- Hispanic Metropolitan Business Chamber
- Oregon Native American Chamber 2022 Gathering
- Philippine American Chamber of Commerce year-end event
- National Association of Minority Contractors (NAMC) Holiday Gathering



- **Events by Metro Staff**

- **Diversity Practitioners Summit** (January 2022) – Metro sponsored and provided an Equity Contracting program overview on the Procurement Officer Roundtable.
- **Virtual Small Business Open House** (February 2022) in partnership with Multnomah County – about 200 participants Networking provided in virtual breakout rooms to meet and connect with project managers of Metro departments and facilities.
- **Virtual Meet and Greet Event**



MBE	WBE	ESB	In Process	Total
5	5	9	4	20

- **Networking with small business support organizations and staff support**

- Oregon Association of Minority Entrepreneurs (Advisory Board participation)
- Professional Business Development Group
- National Association of Minority Contractors
- Oregon Native American Chamber (Board participation)
- Business Diversity Institute (Board participation)
- Columbia Chapter National Institute of Government Procurement (Board participation)

**Metro won the OAME Public Agency of the Year Award  
Awarded on May 12 at the OAME Tradeshow**



The award is given to the public agency that best exemplifies OAME's mission to promote and develop entrepreneurship and economic development thereby reducing racism and discrimination in Oregon and SW Washington and supporting COBID firms.

## Metrics



In 2022, Metro awarded about \$126M in contracts, of which 52% were COBID eligible. This is the highest percentage in the last 5 years (compared to 31%, 13%, and 22% in the prior three years). To be COBID eligible, a contract must have been theoretically available to a COBID firm – which rules out IGAs, Leases, Grants, Non-profit Partnerships, and a few highly specialized contracts, like Metro's Banking services or the Transfer Station Operators & Waste Haulers.

Of the about \$65M in eligible, about 39% were actually awarded to COBID firms (compared to 27%, 38%, and 21% in the prior three years). Of the awards, 20%, 59%, and 21% were awarded to MBE (Minority-owned Business Enterprise), WBE (Women-owned Business Enterprise), and ESB (Emerging Small Business Enterprise) firms respectively. Compared to previous years, mostly the MBE percentages has held steady, but dollars have shifted between the ESB and WBE firms.

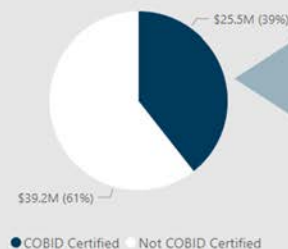
## COBID Equity in Contracting Report 2022

2022

Metro awarded \$126.4M of contracts in this calendar year, of which \$64.6M (51%) were COBID eligible

Contract awards Eligibility	Total Contract Value	% of Awards
COBID Eligible	\$64,616,178	51%
Not COBID Eligible	\$61,827,045	49%
<b>Total</b>	<b>\$126,443,222</b>	<b>100%</b>

Of the \$64.6M of COBID eligible contracts, \$25.5M (39%) were awarded to COBID certified firms



Contract awards

COBID Certified	Award Value	% of COBID Awards
ESB	\$5,347,724	21%
MBE	\$4,982,376	20%
WBE	\$15,124,281	59%
<b>Total</b>	<b>\$25,454,381</b>	<b>100%</b>



Below is a table that breaks down the total, COBID eligible, and COBID realized awards by department. It also describes the amount spent on those contracts:

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	\$9,711,554	\$9,511,554	\$3,335,115	\$1,410,780	42.3%	\$6,176,439	\$1,171,233	19.0%
Communications	\$3,374,360	\$3,369,860	\$2,200,000	\$66,781	3.0%	\$1,169,860	\$68,231	5.8%
Council	\$145,050	\$90,050	\$30,050	\$19,325	64.3%	\$60,000	\$48,000	80.0%
DEI team	\$671,750	\$95,000	\$25,000	\$4,650	18.6%	\$70,000	\$13,000	18.6%
Expo Center	\$1,290,000	\$1,270,000	\$100,000	\$0	0.0%	\$1,170,000	\$124,114	10.6%
Finance and Regulatory Service	\$2,302,033	\$1,935,750	\$0	\$0		\$1,935,750	\$121,647	6.3%
Housing Services	\$6,225,400	\$2,232,900	\$810,000	\$134,809	16.6%	\$1,422,900	\$75,154	5.3%
Human Resources	\$785,800	\$785,800	\$335,800	\$24,100	7.2%	\$450,000	\$36,873	8.2%
Information Services	\$2,054,490	\$745,490	\$190,000	\$75,652	39.8%	\$555,490	\$205,912	37.1%
Metro ER Commission	\$150,000	\$150,000	\$100,000	\$29,881	29.9%	\$50,000	\$0	0.0%
Office of Metro Attorney	\$1,189,900	\$1,189,900	\$0	\$0		\$1,189,900	\$121,800	10.2%
Office of the Auditor	\$32,980	\$32,980	\$0	\$0		\$32,980	\$0	0.0%
Oregon Convention Center	\$2,466,442	\$2,366,442	\$500,000	\$0	0.0%	\$1,866,442	\$233,310	12.5%
Oregon Zoo	\$6,142,534	\$5,272,199	\$2,101,115	\$621,797	29.6%	\$3,171,084	\$678,521	21.4%
Parks & Nature	\$30,317,535	\$18,694,528	\$10,516,253	\$1,038,992	9.9%	\$8,178,275	\$600,300	7.3%
Planning Development and Research	\$19,885,857	\$2,518,289	\$603,873	\$86,257	14.3%	\$1,914,416	\$493,435	25.8%
Portland 5 Centers for the Arts	\$1,180,000	\$1,180,000	\$250,000	\$88,726	35.5%	\$930,000	\$180,059	19.4%
Waste Prevention & Environmental Services	\$38,517,538	\$13,175,436	\$4,357,176	\$291,594	6.7%	\$8,818,260	\$2,000,702	22.7%
<b>Total</b>	<b>\$126,443,222</b>	<b>\$64,616,178</b>	<b>\$25,454,381</b>	<b>\$3,893,345</b>	<b>15.3%</b>	<b>\$39,161,797</b>	<b>\$6,172,291</b>	<b>15.8%</b>

We can note that of the COBID eligible contracts, Council, Capital Asset Management, Information Services, and Portland 5 Center for the Arts had the highest spend by percentage with COBID firms.

By awarded COBID amount, Communications, MERC Central, and Parks and Nature had the highest Percentage, with Parks and Nature having the highest pure dollar amount.





Below is a table describing the same contracts by count rather than dollar amount.

**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
Human Resources	7	7	100%	3	43%
Office of Metro Attorney	11	11	100%	0	0%
Office of the Auditor	1	1	100%	0	0%
Communications	20	19	95%	10	53%
Capital Asset Management	40	37	93%	12	32%
Oregon Convention Center	24	22	92%	2	9%
Oregon Zoo	60	55	92%	10	18%
Expo Center	10	9	90%	1	11%
Portland's Centers for the Arts	10	9	90%	2	22%
Council	5	4	80%	3	75%
Parks & Nature	129	92	71%	35	38%
Information Services	13	9	69%	2	22%
Housing Services	22	15	68%	5	33%
Metro ER Commission	3	2	67%	1	50%
Finance and Regulatory Service	13	8	62%	0	0%
DEI team	11	5	45%	2	40%
Waste Prevention & Environmental Services	173	65	38%	14	22%
Planning Development and Research	87	29	33%	11	38%
<b>Total</b>	<b>639</b>	<b>399</b>	<b>62%</b>	<b>113</b>	<b>28%</b>

For most departments, most of their contracts are COBID eligible. Ineligible contracts generally relate to IGAs, Leases, or Grants, and for some departments, in CY2022 or generally, their programming mostly falls into one of those buckets. Note that departments varied in percentage count – with Council as the highest percentage count. Parks and Nature also had the highest count of COBID contracts.



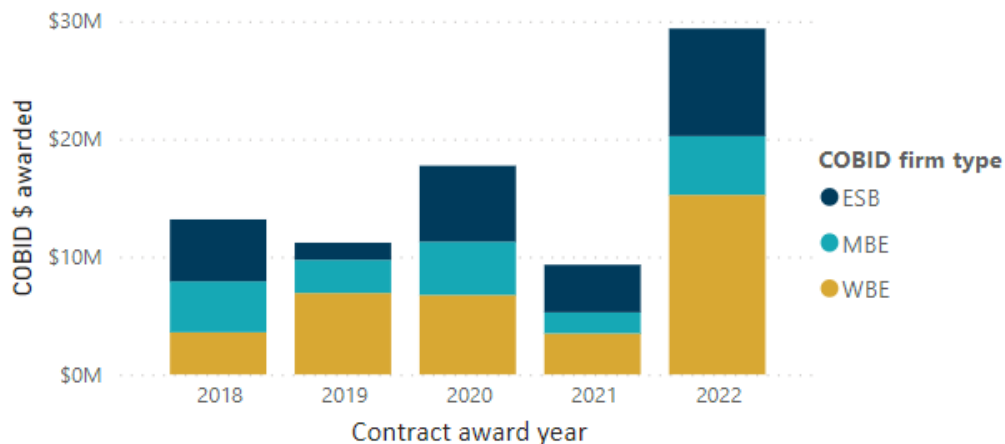
The table below shows the spend in Calendar Year by department.

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 Pcard Spending
Capital Asset Management	\$10,232,599	\$9,873,036	\$6,515,943	\$3,357,094	34.0%	\$446,158	\$147,800
Communications	\$1,643,674	\$1,643,674	\$833,122	\$810,552	49.3%	\$27,680	\$243,753
Council	\$1,072,843	\$272,784	\$212,284	\$60,500	22.2%	\$123,530	\$279,807
DEI team	\$141,333	\$36,899	\$21,269	\$15,630	42.4%	\$116,487	\$95,178
Expo Center	\$1,387,182	\$513,290	\$507,962	\$5,328	1.0%	\$501,578	\$221,032
Finance and Regulatory Service	\$1,602,662	\$911,085	\$423,356	\$487,729	53.5%	\$130,259	\$276,260
Housing Services	\$7,045,792	\$209,963	\$75,154	\$134,809	64.2%	\$2,515,684	\$36,285
Human Resources	\$595,812	\$386,507	\$332,875	\$53,633	13.9%	\$57,071	\$116,139
Information Services	\$1,975,116	\$1,119,099	\$1,026,477	\$92,622	8.3%	\$2,356,898	\$289,207
Metro ER Commission	\$195,599	\$195,599	\$273	\$195,326	99.9%	\$0	\$0
Office of Metro Attorney	\$202,916	\$201,969	\$201,969	\$0	0.0%	\$1,825	\$81,447
Office of the Auditor	\$364,600	\$364,600	\$364,600	\$0	0.0%	\$0	\$20,976
Oregon Convention Center	\$6,059,614	\$2,295,428	\$2,184,772	\$110,655	4.8%	\$4,682,924	\$894,007
Oregon Zoo	\$6,328,678	\$4,149,211	\$3,095,723	\$1,053,488	25.4%	\$2,478,871	\$2,005,597
Parks & Nature	\$19,485,035	\$12,156,081	\$6,979,232	\$5,176,848	42.6%	\$8,999,296	\$1,176,368
Planning Development and Research	\$165,238,009	\$3,478,001	\$2,931,029	\$546,972	15.7%	\$488,956	\$418,023
Portland's Centers for the Arts	\$2,159,087	\$1,416,134	\$694,286	\$721,847	51.0%	\$2,341,245	\$764,633
Waste Prevention & Environmental Services	\$93,143,108	\$10,958,319	\$9,613,746	\$1,344,574	12.3%	\$2,253,905	\$1,538,486
<b>Total</b>	<b>\$318,873,659</b>	<b>\$50,181,679</b>	<b>\$36,014,072</b>	<b>\$14,167,607</b>	<b>28.2%</b>	<b>\$27,522,368</b>	<b>\$8,604,997</b>

In this year, Parks and Nature, Waste Prevention and Environmental Services, Capital Asset Management, and the Oregon Zoo were the departments with the highest COBID eligible spending and COBID contract spending. By percentage, the MERC central spend, Housing, and Finance and Regulatory Services departments are in the lead.

In terms of off-contract PO spend, Parks and Nature is the highest. Note, a significant portion of the Parks and Nature spending is likely acquisitions of land, all of which are not COBID eligible or standard contracts.

COBID contract dollars awarded by year



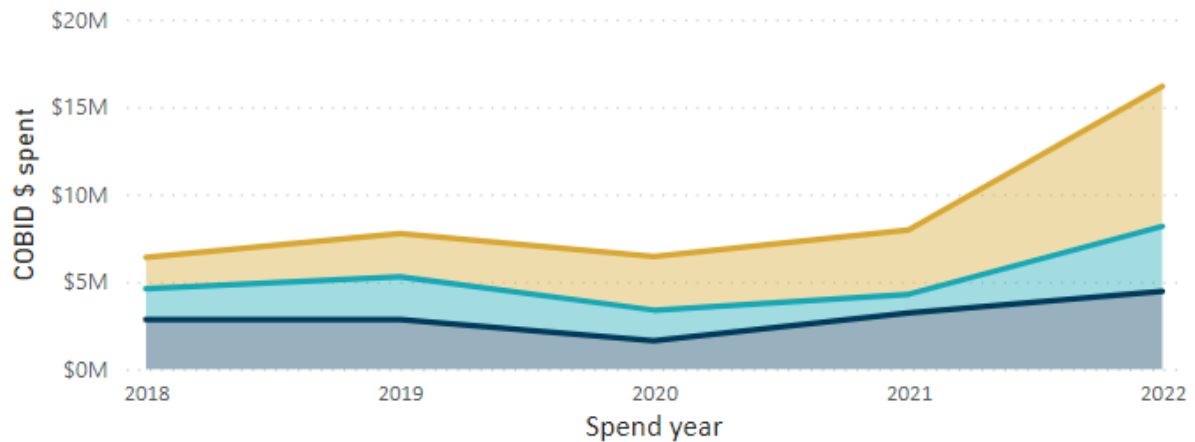
The graph to the left shows that in CY2022 Metro awarded a much larger amount of contracting dollars compared to previous years. This expanded each of the categories correspondingly. This is likely due to expansions in department contracting as the COVID 19 budget constraints are released.

Per the graph below we can see that overall spend with COBID firms is significantly increasing in all categories. This is to be expected, again, with the “post” Covid 19 budget rebounds.

### Total Spending on COBID Contracts awarded since 2018



COBID firm type ● ESB ● MBE ● WBE



### Percent of Contract Spent by Award Year

Contract Year	COBID Certified	Not COBID Certified
2018	42.9%	74.3%
2019	52.2%	75.7%
2020	52.5%	37.1%
2021	54.2%	43.2%
2022	13.5%	12.0%

Per the table to the left we can see a positive trend in terms of contract utilization. Briefly, we can see that contracts with COBID firms in more recent years have a higher spend percentage than in prior years. This points to a focus by Metro staff on emphasizing and patronizing those partnerships first.

Procurement Type	Procurement Code	Total Awards	Total COBID Eligible Awards	COBID Awards	Award % COBID
Architects and Engineers	DV48	\$10,816,271	\$10,816,271	\$4,472,779	41%
Construction	DV49	\$10,798,700	\$10,786,980	\$6,886,729	64%
Goods and Other Services	DV47	\$34,942,800	\$26,905,464	\$9,145,251	34%
IGAs, Leases and Grants	NOTP	\$52,862,638	\$0	\$0	
Professional Services	PS	\$17,022,814	\$16,107,464	\$4,949,623	31%
<b>Total</b>		<b>\$126,443,222</b>	<b>\$64,616,178</b>	<b>\$25,454,381</b>	<b>39%</b>

The table above is new in 2022. It separates the awarded contracts by type of award. First, we can see that almost all of our awards for architects and engineers and construction are COBID eligible, which shows a strong commitment to engaging historically underrepresented firms. Both Professional Services and Goods and Trade Services have some purchases (likely with non-profits or very specific industries) where no COBID participation was possible. Of the categories, we can see that 64% of our awarded construction contracts in 2022 went to COBID firms. This can best be understood as the long-term dividends of many years of consistent engagement.



**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 onward, the complete list of contracts awarded that year was classified by COBID eligibility, and COBID status was 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 (eg. non-competitive IGA)

Types of **COBID** firms:

**MBE:** Minority-owned business

**WBE:** Woman-owned business

**ESB:** Emerging small business

