



Equity in Contract Report

for the calendar year 2023





Metro's Equity in Contracting Program Overview

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 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

ADDRESSING BARRIERS

- **SMALL BUSINESS SURVEY OCTOBER/NOVEMBER 2023**

Metro's small business survey was launched in Autumn of 2023 with the goal of identifying the challenges and opportunities for small businesses who engage in Metro's procurement process. Metro engaged in extensive outreach, described below, which resulted in 163 people participating in the survey.

Outreach Strategy to Small Businesses to participate in the survey:

- Contacted about 3,500 firms directly, including businesses in the State's COBID database
- Advertised in the DJC and Business Tribune, OregonBuys, BidLocker
- Announced in LinkedIn, OAME meetings, BDI and NAMC newsletters, Gresham Business Chamber, and PBDG meetings

At the time of finalizing this report, the results of the survey were still being analyzed. With the preliminary results, development of strategies for the increase of equitable participation and outcomes has begun. However, more work is necessary before discussing and finalizing those strategies.



Metro offers a variety of programs directly to COBID firms. Here is a selection of those programs, describing the offering and this year's outcomes.



- **OFFICE HOURS – HOW TO DO BUSINESS WITH METRO**

Offered monthly by Metro Procurement staff. Participants learn how to navigate Metro's procurement process and learn what training and other resources Metro's Equity in Contracting program offers.

Number of trainings: 3

Number of firms by certification type:

MBE	WBE	ESB	Non	Total
15	3	3	7	28

- **SHARPEN THE PENCIL**

Coaching sessions on how to manage all that paperwork, invoicing Metro, keeping your books while under contract with Metro.

This training helps small businesses that are currently under contract with Metro to understand the billing and payment process for performed work and how to appropriately track their business transactions.

Number of trainings: 1

Number of firms by certification type:

MBE	WBE	Total
1	1	2

Small Business Trainings and Technical Assistance

- **BID WRITING TRAINING**



Cost estimating and bid writing can pose a barrier for historically marginalized firms. Metro contracts with PBDG and NAMC Oregon to address these barriers and provide training from construction and trade services subject matter experts. These trainings are tailored to specific solicitations.

PBDG

Bid writing assistance for ITB 4133 Roofing Repair and Maintenance

Number of trainings: 1

Number of firms by certification type:

MBE	WBE	Total
1	1	2

- \$250,000 Contract awarded to 1 WBE certified business who attended the training.

NAMC

Bid writing assistance for ITB 4167 Maintenance and Repair Paving and Seal Coating and ITB 4133 Roofing Repair and Maintenance

Number of trainings: 1

Number of firms by certification type:

MBE	WBE	Total
10	5	15

- \$250,000 Contract award result ITB 4167: 1 WBE certified firm
- \$250,000 Contract award result ITB 4133: 1 veteran owned business (certification eligible)

- **PROPOSAL WRITING TRAINING**

Proposal Clinics are 1:1 sessions with an expert consultant. Participants learn how to strengthen their writing skills and highlight their unique qualifications and experience to build a successful proposal template.

Number of trainings: 2

Number of firms by certification type:

MBE	WBE	ESB	Small non-certified	Total
3	3	1	4	11

1:1 proposal writing assistance

This training provides technical assistance sessions designed to write proposals for specific Metro RFPs. Training is provided at the time of an open RFP and targets the need of how to read and understand Metro’s RFP requirements and how to respond to it. The goal of this training is to submit a competitive and successful proposal.

- RFP 4170 A&E On-call services, agency-wide
 - » 1 MBE certified firm resulting into a \$150,000 contract
- Waste Collections and Recycling RFP
 - » 1 MBE certified firm (Contract award in 2024)



Small Business Trainings and Technical Assistance

- **BUSINESS DEVELOPMENT STRATEGIES WORKSHOPS**

Teaming for large Metro Projects

This training provides a hands-on approach to teaming up with other small businesses to propose on larger Metro projects. One of the key barriers that many small businesses experience is that some of Metro’s larger projects seem inaccessible with their current capabilities. The workshop specifically addresses how a team of small businesses can partner up to cover different parts of a project and propose an approach that can successfully compete with a larger firm.

Number of trainings: 2

Number of firms by certification type:

MBE	WBE	ESB	Non	Total
12	7	1	3	23



Outreach work is a critical part of creating an equitable environment for small businesses to succeed. Metro staff frequently attends regular meetings and events to connect with small business communities and provide information about contracting opportunities and the process on how to access those opportunities.

Events:

- OAME Youth Conference
- OAME Tradeshow
- Gresham Business Chamber annual event
- Hispanic Metropolitan Business Chamber annual event
- ONAC 2022 Annual Gathering
- APACC annual event
- NAMC Tradeshow
- NAMC Holiday Gathering

February 15, 2023, Small Business Open House, in partnership with Multnomah County

After a two year pause of the in-person event, the Metro and Multnomah County Small Business Open House welcomed back 250 small businesses to connect with Metro project managers, build relationships, and explore contracting opportunities. An additional 35 firms attended the virtual



portion of the event to talk to Metro staff about upcoming project needs.

January 2023

Metro staff conducted a PBDG presentation about Metro ITB requirements including construction careers pathways and clean air construction. Bidding requirements can be a barrier for small

businesses to participate in

the procurement process, especially firms that are new to working with governments. Metro staff connected with PBDG members at this in-person event and provided in depth explanation of the bidders checklist.

Metro staff provided a presentation at OAME about how to do business with Metro and how to navigate the contracting process, followed by Metro Council President Peterson's presentation on Metro's commitment to supporting small business communities and Metro's policy developments in regards to diversity, equity and inclusion.

Outreach by Metro Staff

April 2023

Metro staff attended an in-person PBDG Membership Meeting to present the RFP4170 A&E On-Call Services and provided information about how the RFP was designed to allow for small firms to propose as a prime contractor.

Virtual Meet and Greet Event November 2023

Meet and Greet events connect prospective suppliers with project managers at Metro to help develop relationships. Meet & Greet events 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. This is especially helpful for non-competitive decisions, like small procurements.



- 39 meetings

MBE	WBE	ESB	SDV	Non-certified	Total
12	7	4	1	3	27

Collaboration and networking

- OAME regular meetings
- PBDG membership meetings
- NAMC membership meetings
- ONAC luncheons
- Washington County Westside Open House
- BDI quarterly diversity summits

Board Participation

Metro staff participates on various boards of small business development organizations.

- ONAC
- BDI
- OAME Advisory board
- NIGP Columbia Chapter

Particular equity strategies

All Formal (\$150,000) competitive procurements that Metro conducts have a strategy session and document that outlines specific, tailored actions that will be undertaken as part of the solicitation to infused equity into the process. Below are some examples from 2023.

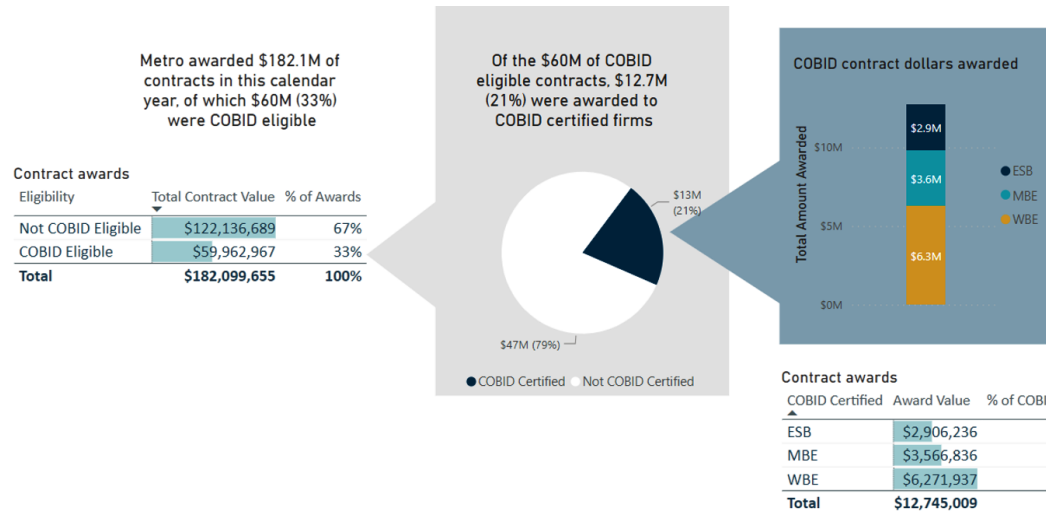
RFI 4186 - Procurement conducted a competitive process to refresh the small business development program trainer list for proposal writing and small business assistance, including conducting a survey. Out of 12 COBID certified proposers, 5 COBID certified firms were selected for Metro’s small business development program.

RFP 4170 – Capital Asset Management conducted a procurement to identify qualified firms for Architecture & Engineering work across the agency. Proposal writing assistance was provided for this RFP. The project team decided to award contracts, not only to full teams of prime and sub-contractors who are typically small firms, but also directly to COBID firms that would normally be subcontractors. This allows departments to work directly with smaller/COBID firms of their choice rather than going through Primes that might limit or dictate the amount of work awarded to the smaller firms.

Awarded Contracts	
Non-certified	5
WBE	2
MBE	2
ESB	3
Small, local firms	6
Total	18



COBID Equity in Contracting Report 2023



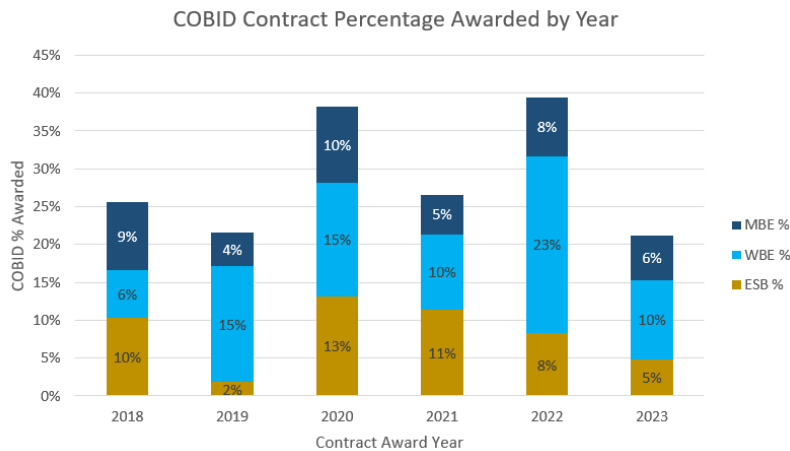
Overall, Metro's total contract award increased significantly from 2022 (\$111.8M), but most of that is in the Not COBID Eligible category. Of the total, about 33% was eligible for COBID, meaning, it was reasonably possible for a COBID firm to secure the award. Common reasons that a contract would not be COBID eligible include the goods or services not being offered by any COBID firms, the agreements being with individuals for Advisory committees, the contracts being directly awarded through a special procurement, the contract being with a not for profit (which are not eligible to become certified), or the contract being outside of our procurement process (IGAs, Leases, Grants).

COBID Contract Dollars Awarded by Year



In 2023, 21% (\$12.7M of \$60M) of eligible contracts was awarded to COBID firms. Of that, 28% went to MBE (Minority Business Enterprises), 49% to WBE (Women Business Enterprises), and 23% to ESB (Emerging Small Business). A firm can be certified in more than one category. To account for this, we report with priority in that same order. Comparing to prior years (2022 – 39%, 2021 - 27%, and 2020-38%), Metro achieved overall lower percentage allocation. However, this is only for **new** contracts.

COBID Contracts

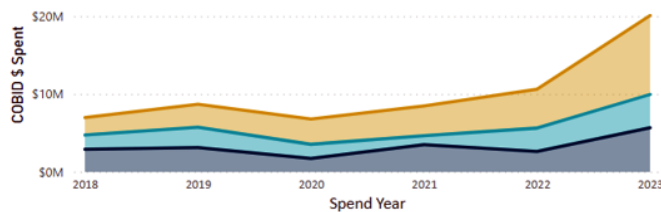


In the graph above, we see the COBID Contract Award by percentage of eligible contracts by year. The percentage shown inside the bar refers to total available, not total awarded.

We can see in the two images below that total spending in 2023 is significantly higher. The first shows spend by year of spend and allocation across type of COBID firm. We can see that 2023 is markedly higher than prior years. We can also note that this was mostly with WBE firms, but MBE firms had their highest spend since 2018 and the beginning of measurement.

Annual Spending on COBID Contracts Awarded Since 2018

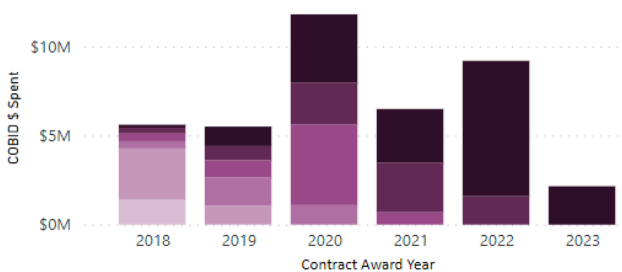
COBID Firm Type ● ESB ● MBE ● WBE



This can be seen a different way below. In this image, we can show the spend by both year of award and year of purchase. Note the darkest color showing spend in 2023 is the lion's share of 2022 award. We can also see the on-going impact of the 2020 decisions to award specific Metro contracts only to COBID firms continues to generate business for them. Effectively, 2023 is a year where we are spending a lot of money with COBID firms, so we are keeping our prior commitments to COBID firms and following through on projects we have already begun.

Spending on COBID Contracts by Year

Spend Year ● 2018 ● 2019 ● 2020 ● 2021 ● 2022 ● 2023



COBID Contract Spend

The next table shows the breakdown of contract award in 2023 by Department. The COBID eligibility, nature of the award, and spend on contracts initiated in 2023 is broken out. The table below shows the spend in Calendar Year by department.

Parks & Nature and Capital Asset Management lead in total dollar awarded to COBID firms, while Parks & Nature, Communications, DEI, and the Council lead in terms of percentage. Note that on this table the “COBID Spent” and “COBID % Spent” only relate to the 2023 contracts.

Department	Total Awards	Total COBID Eligible Awards	COBID Awards	Award % COBID	COBID Spent	COBID % Spent	Non COBID Awards	Non COBID Spent	Non COBID % Spent
Capital Asset Management	\$19,110,388	\$19,095,820	\$2,421,901	12.7%	\$206,988	8.5%	\$16,673,918	\$6,964,127	41.8%
Communications	\$1,978,333	\$1,978,333	\$860,000	43.5%	\$18,861	2.2%	\$1,118,333	\$42,774	3.8%
Council	\$751,663	\$726,663	\$273,000	37.6%	\$15,879	5.8%	\$453,663	\$106,818	23.5%
DEI team	\$1,220,602	\$1,220,602	\$484,450	39.7%	\$35,473	7.3%	\$736,152	\$154,611	21.0%
Expo Center	\$1,007,489	\$800,000	\$50,000	6.3%	\$0	0.0%	\$750,000	\$1,365	0.2%
Finance and Regulatory Service	\$1,210,000	\$850,000	\$100,000	11.8%	\$1,100	1.1%	\$750,000	\$254,963	34.0%
Housing Services	\$17,113,215	\$1,216,900	\$263,000	21.6%	\$4,279	1.6%	\$953,900	\$154,054	16.1%
Human Resources	\$1,169,491	\$913,000	\$150,000	16.4%	\$0	0.0%	\$763,000	\$41,925	5.5%
Information Services	\$3,148,560	\$400,000	\$100,000	25.0%	\$0	0.0%	\$300,000	\$2,566	0.9%
Office of Metro Attorney	\$131,500	\$131,500	\$30,000	22.8%	\$6,565	21.9%	\$101,500	\$68,536	67.5%
Oregon Convention Center	\$6,505,572	\$6,130,572	\$900,000	14.7%	\$13,410	1.5%	\$5,230,572	\$696,566	13.3%
Oregon Zoo	\$9,992,856	\$7,161,077	\$1,189,518	16.6%	\$283,770	23.9%	\$5,971,559	\$2,564,321	42.9%
Parks & Nature	\$58,405,590	\$7,916,814	\$3,658,050	46.2%	\$631,217	17.3%	\$4,258,764	\$1,070,307	25.1%
Planning Development and Research	\$37,938,676	\$4,850,775	\$1,125,500	23.2%	\$59,115	5.3%	\$3,725,275	\$262,311	7.0%
Portland's Centers for the Arts	\$2,853,087	\$2,602,342	\$469,339	18.0%	\$431,533	91.9%	\$2,133,003	\$823,365	38.6%
Waste Prevention & Environmental Services	\$19,562,634	\$3,968,569	\$670,251	16.9%	\$445,507	66.5%	\$3,298,318	\$468,897	14.2%
Total	\$182,099,655	\$59,962,967	\$12,745,009	21.3%	\$2,153,696	16.9%	\$47,217,957	\$13,677,506	29.0%

We can also review the contract award by count rather than in dollar value. In this case, Parks & Nature and Capital Asset Management also awarded the highest number of contracts.

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	42	40	95%	17	43%
Communications	7	7	100%	3	43%
Council	10	9	90%	2	22%
DEI team	42	42	100%	13	31%
Expo Center	6	5	83%	1	20%
Finance and Regulatory Service	6	2	33%	1	50%
Housing Services	13	6	46%	2	33%
Human Resources	12	10	83%	1	10%
Information Services	9	5	56%	1	20%
Office of Metro Attorney	10	10	100%	2	20%
Oregon Convention Center	30	28	93%	6	21%
Oregon Zoo	134	120	90%	12	10%
Parks & Nature	117	67	57%	18	27%
Planning Development and Research	131	38	29%	10	26%
Portland's Centers for the Arts	15	13	87%	2	15%
Waste Prevention & Environmental Services	103	34	33%	5	15%
Total	687	436	63%	96	22%

Transitioning to a discussion of spending, the table below shows spending by Department, and articulates the eligibility of the contract and the COBID nature of the firm.

Department name	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	\$21,062,322	\$20,679,321	\$17,488,774	\$3,398,284	16.4%	\$247,225	\$89,438
Communications	\$2,325,657	\$2,325,657	\$1,574,295	\$751,362	32.3%	\$38,065	\$193,686
Council	\$838,633	\$349,899	\$312,300	\$110,353	31.5%	\$73,306	\$238,300
DEI team	\$668,387	\$212,845	\$147,677	\$70,250	33.0%	\$12,204	\$35,591
Expo Center	\$1,309,378	\$552,491	\$552,491	\$9,866	1.8%	\$573,501	\$130,411
Finance and Regulatory Service	\$1,630,581	\$1,133,940	\$694,164	\$452,111	39.9%	\$1,764,093	\$182,892
Housing Services	\$26,112,273	\$703,655	\$417,871	\$285,784	40.6%	\$6,189,755	\$76,084
Human Resources	\$1,018,929	\$624,740	\$557,119	\$77,978	12.5%	\$99,148	\$88,216
Information Services	\$3,775,548	\$1,631,704	\$1,481,742	\$277,610	17.0%	\$1,159,669	\$153,491
Metro ER Commission	\$112,829	\$112,829	\$42,285	\$70,544	62.5%	\$0	\$0
Office of Metro Attorney	\$359,458	\$358,651	\$352,086	\$7,372	2.1%	\$2,550	\$54,148
Office of the Auditor	\$247,825	\$247,825	\$247,825	\$0	0.0%	\$0	\$16,149
Oregon Convention Center	\$14,282,061	\$4,581,148	\$4,198,867	\$752,871	16.4%	\$2,663,589	\$682,725
Oregon Zoo	\$9,508,232	\$6,922,452	\$5,236,192	\$2,474,781	35.8%	\$3,802,649	\$1,489,083
Parks & Nature	\$19,345,697	\$17,133,179	\$10,283,143	\$6,985,374	40.8%	\$5,085,803	\$716,570
Planning Development and Research	\$78,451,546	\$3,331,780	\$2,666,882	\$736,860	22.1%	\$1,643,324	\$250,679
Portland's Centers for the Arts	\$2,796,667	\$1,951,486	\$1,256,567	\$897,041	46.0%	\$1,711,867	\$50,078
Waste Prevention & Environmental Services	\$91,542,638	\$10,954,806	\$8,432,288	\$2,740,919	25.0%	\$8,422,709	\$812,106
Total	\$275,388,660	\$73,808,408	\$55,942,570	\$20,099,359	27.2%	\$32,010,457	\$5,759,647

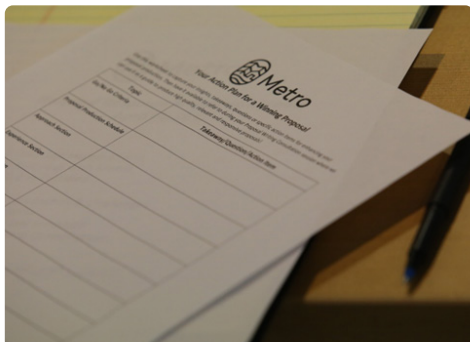
COBID Contract Spend

We can see that by total spend, Parks and Nature is highest, with Capital Asset Management, Waste Prevention & Environmental Services and the Oregon Zoo also with strong numbers. By percentage, the MERC central shared is highest, with Portland's Centers for the Arts, Parks & Nature, Housing Services, and Finance and Regulatory Services similarly positioned just a bit lower. It is worth noting that all purchases that were done via off-contract Purchase Orders and Purchasing Cards are assumed to be with non-COBID firms due to the challenges with assessing eligibility or even identifying the point of sale firm.

Finally, we can separate the contracts by type of procurement. In the image below, the contracts are grouped by the nature of the purchase:

Procurement Type	Procurement Code	Total Awards	Total COBID Eligible Awards	COBID Awards	Award % COBID
Architects and Engineers	DV48	\$9,206,838	\$9,206,838	\$2,513,853	27.3%
Construction	DV49	\$18,204,712	\$18,204,712	\$1,368,415	7.5%
Goods and Other Services	DV47	\$38,865,055	\$23,032,431	\$4,973,459	21.6%
IGAs, Leases and Grants	NOTP	\$105,698,218	\$0	\$0	
Professional Services	PS	\$10,124,832	\$9,518,986	\$3,889,283	40.9%
Total		\$182,099,655	\$59,962,967	\$12,745,009	21.3%

Naturally, all IGAs, Leases, and Grants are excluded from eligibility. We can see that of the other categories, the Goods and Services sections had the largest number of exclusions, but also the highest amount in sheer dollars of COBID award. By percentage, Metro's awards for Personal Services was the highest percentage. Comparing to previous years, Metro's Professional Services percentage is at its highest number, and has been trending consistently upward. In contrast, the other categories have performed inconsistently, especially Construction.



Glossary

Community based organizations explanation of acronyms:

APACC – Asian Pacific American Chamber of Commerce

BDI – Business Diversity Institute

NAMC – National Association of Minority Contractors

OAME – Oregon Association of Minority Entrepreneurs

ONAC/NWNC – formerly Oregon Native American Chamber – now Northwest Native Chamber

PBDG – Professional Business Development Group

Types of COBID firms:

MBE: Minority-owned business

WBE: Woman-owned business

ESB: Emerging small business

SDV: Service Disabled Veteran





If you picnic at Blue Lake or take your kids to the Oregon Zoo, enjoy symphonies at the Schnitz or auto shows at the convention center, put out your trash or drive your car – we've already crossed paths.

So, hello. We're Metro – nice to meet you.

In a metropolitan area as big as Portland, we can do a lot of things better together. Join us to help the region prepare for a happy, healthy future.

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