



Equity in Contracting Annual Report

Expanding opportunity through contracting

FY 2016-17

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photo courtesy of Oregon Tradeswomen, Inc./Dawn Redstone

Why does equity in contracting matter?

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. Research shows that regions with greater racial inclusion and smaller racial income gaps attain more economic growth.¹ 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.

Inclusion also helps COBID-certified firms build capacity to compete for other public projects by providing them with experience with the public solicitation process and establishing relationships with Metro staff. This year, the Procurement Services team continued to create additional opportunities through collaboration with Metro departments, and other agencies in the Portland region to encourage COBID certification, to engage certified firms and to increase access to public contracts.

¹ Treuhaft, S., Blackwell, A.G., & Pastor, M. (2012). America's Tomorrow: Equity is the Superior Growth Model. Retrieved January 2016: http://www.policylink.org/sites/default/files/SUMMIT_FRAMING_WEB_20120110.PDF

FY 2016-17 COBID contracting

Summary

During FY 2016-17, Metro awarded a total of \$55,580,888 through competitive procurements and direct awards less than \$10,000. COBID-certified firms earned a total of \$8,628,714 in contract awards – representing 15.5 percent of Metro's total contracts. While this represents a slight percentage decrease over FY 2015-16, the total dollar value of awards to COBID-certified firms increased by \$735,088.

Total contracts awarded	500
Non-COBID contracts awarded	377
COBID contracts awarded	123
MBE contracts awarded	35
WBE contracts awarded	33
SDV contracts awarded	0*
ESB contracts awarded	55
Total contract dollars awarded	\$55,580,888
Total COBID contract dollars awarded	\$8,628,714
Total spending	\$53,563,552
Total COBID spending	\$7,007,355

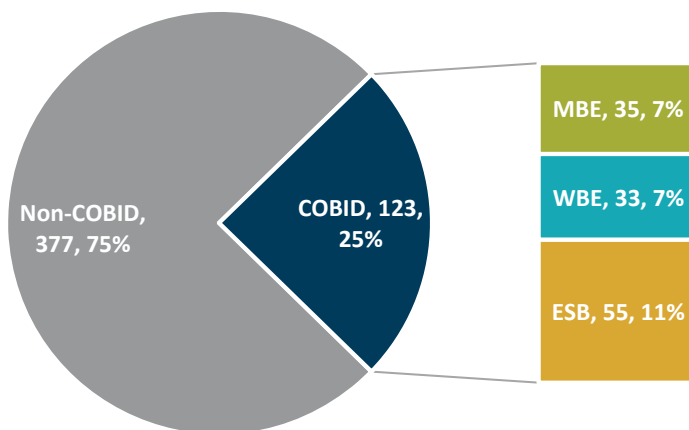
*note that SDV certification began in January 2016 and as of June 30, 2017, there were only 39 SDV certified firms in Oregon



Number of contracts awarded

During FY 2016-17, Metro awarded 500 eligible contracts through competitive procurements and direct award of contracts less than \$10,000. This does not include intergovernmental agreements or grants. Of the total contracts awarded, 123 went to COBID-certified firms. These awards represent 25 percent of contracts awarded, a slight increase from last year.

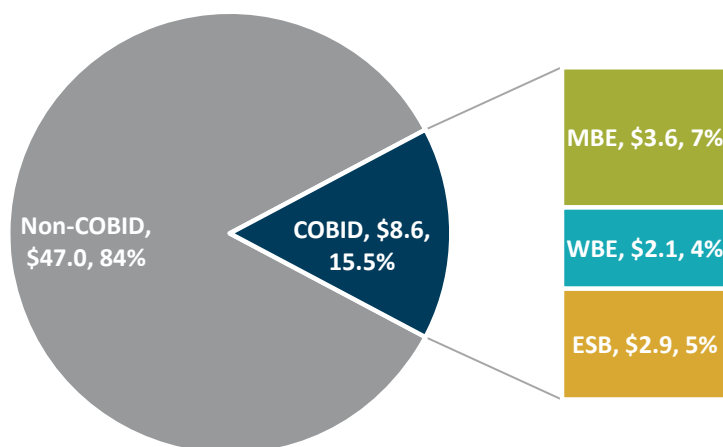
Number of contracts awarded in FY 2016-17



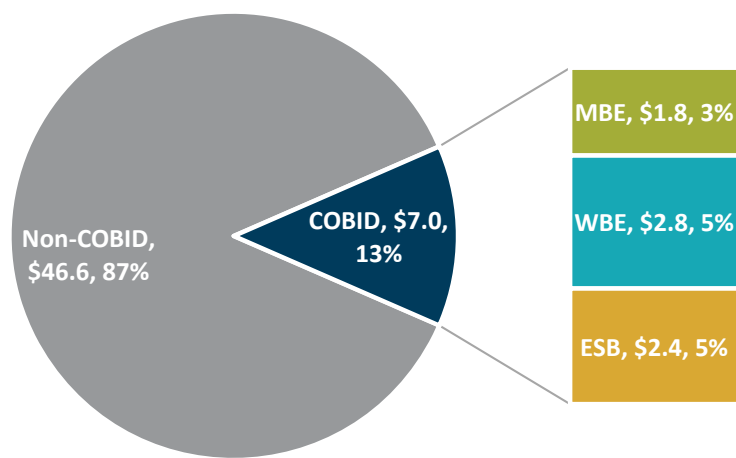
Contract dollars awarded

In FY 2016-17, Metro awarded \$55,580,888 through competitive procurements and direct awards less than \$10,000. COBID-certified firms earned a total of \$8,628,714 in contract awards – representing 15.5 percent of Metro's total contracts. While this represents a slight percentage decrease over FY 15-16, the total dollar value of awards to COBID-certified firms increased by \$735,088. This total contract dollars awarded increase is also matched with a higher distribution of those awards to minority-owned firms – the contract dollars awarded to minority-owned businesses was more than double last year's total. Of the amount awarded through contracts to COBID-certified firms, \$3,640,510 went to minority-owned businesses, \$2,114,404 went to woman-owned businesses and \$2,873,799 went to emerging small businesses.

Contract dollars awarded in FY 2016-17
(in millions of dollars)



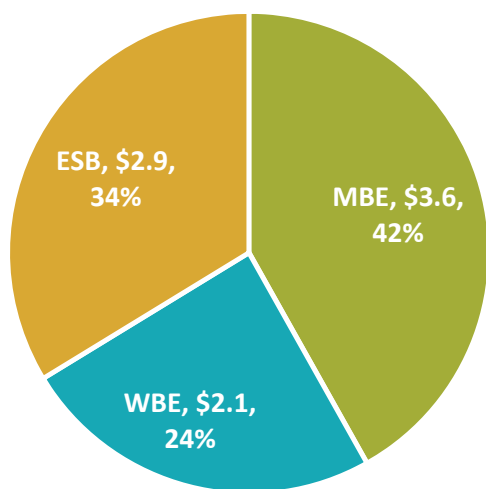
Contract dollars spent in FY 2016-17
(in millions of dollars)



Contract dollars spent

During FY 2016-17, Metro spent \$53,563,552 through competitively procured contracts and direct award of contracts less than \$10,000. Of that, COBID-certified firms earned \$7,007,355, or 13 percent by dollar amount. Of the amount spent through COBID contracts, \$1,828,029 went to minority-owned businesses, \$2,772,037 went to woman-owned businesses and \$2,407,289 went to emerging small businesses. This represents an increase in total contract dollars spent of \$265,150, though FY 2016-17's utilization rate remained unchanged over FY 2015-16.

Contract dollars awarded by certification in FY 2016-17
(in millions of dollars)



Contract dollars awarded by certification

During FY 2016-17, a total of \$8,628,714 was awarded to certified businesses: \$3,640,510 went to minority-owned businesses, \$2,114,404 went to woman-owned businesses and \$2,873,799 went to emerging small businesses.

Contracting by department

The table below shows the value of COBID contracts and dollars spent by different departments at Metro. The Communications department awarded 75 percent of its total contract value to certified firms, while the Finance and Regulatory Services and Parks and Nature departments both awarded 41 percent.

The most significant spend, representing 25 percent of the department spend and 61 percent of Metro's overall COBID spending comes from the Parks and Nature department. This represents a firm dedication to equity in contracting over many years, as spending represents the results of awards made in previous years.

Other departments showing significant utilization rates include the Office of the Chief Operating Officer, Communications department, the Diversity, Equity and Inclusion division and the Council Office.

Value of COBID contracts by department | FY 2016-17

Department	Awarded	% Awarded	Spent	% Spent
Chief Operating Officer	\$90,000	22%	\$84,918	55%
Communications	\$957,200	75%	\$37,366	36%
Council	\$0	0%	\$19,743	23%
Diversity, Equity and Inclusion	\$0	0%	\$39,174	27%
Finance & Regulatory Services	\$1,515,000	41%	\$181,012	7%
Human Resources	\$0	0%	\$11,628	4%
Information Services	\$0	0%	\$67,387	3%
Office of the Metro Attorney	\$0	0%	\$0	0%
Oregon Zoo	\$1,278,286	5%	\$1,155,233	10%
Parks and Nature	\$2,467,706	41%	\$4,254,583	25%
Planning and Development	\$578,400	9%	\$251,062	9%
Property and Environmental Services	\$792,590	21%	\$375,386	5%
Research Center	\$75,000	38%	\$0	0%
Metro Total	\$7,754,181	16%	\$6,477,491	15%
Expo Center	\$127,256	10%	\$161,062	17%
Oregon Convention Center	\$335,113	12%	\$214,861	4%
Portland's Centers for the Arts	\$412,163	17%	\$153,941	5%
Visitor Venues Total	\$874,533	13%	\$529,864	6%
Metro-wide Total	\$8,628,714	16%	\$7,007,355	13%

In FY 2016-17, Metro sponsored the following events:

- Business Diversity Institute Minority Enterprise Development (MED) Week
- Business Diversity Institute – March Diversity Practitioners Summit
- Governor’s Marketplace
- Hispanic Metropolitan Chamber of Commerce Hispanic Heritage Celebration
- Metropolitan Contractors Improvement Partnership Trade Show
- Oregon Association of Minority Entrepreneurs Tradeshow
- Oregon Native American Chamber Annual Gala
- Philippine American Chamber of Commerce of Oregon Annual Asian Pacific Islander Leadership Night.

Progress in Procurement Services team

In FY 2016-17, Metro continued to build on the successes of the recent years by continuing to engage in various types of outreach to build awareness of Metro programs and contracting opportunities. Metro staff participated in trade shows and expositions, attended chamber and business association meetings and hosted events for networking and to encourage certification.

Metro procurement staff provided training and learning opportunities to advance diversity in contracting, by presenting to procurement professionals, participating in panels and by attending small business training programs as guest presenters. In FY 2016-17, two procurement staff also joined executive boards of non-profit organizations supporting historically underutilized businesses: Gabriele Schuster, Procurement Manager, is Secretary for Oregon Native American Council and Tracy Sagal, Procurement Analyst, is Secretary for Business Diversity Institute.

Financial sponsorships support organizations who work with underserved business communities and help them to be more ready to compete for work with Metro. Metro’s Procurement Services team continues to work to educate Agency staff about best practices for engagement and outreach. Throughout FY 2016-17, staff looked for innovative and effective ways to increase the diversity of contracts awarded and dollars spent. This is measured through contract awards to certified businesses and dollars spent on those contracts.

New activities included a focus on policy and strategic planning that will give staff even greater tools to continue progress. The Procurement Services team updated its Strategic Plan in winter of 2017. Metro Council adopted updates to its procurement policy in April 2017 through the Metro Local Contract Review Board Administrative Rules. In May 2017, Metro Council adopted an updated Diversity Action Plan which provides an implementation structure and strengthened goals, objectives and actions for Metro to develop and improve an inclusive culture that celebrates all dimensions of diversity. All of these guiding documents integrate considerations to increase equity throughout.

Program improvements

Over the past few years, Metro has focused on making programmatic improvements to make Metro contracts more accessible to historically underutilized firms. Those efforts culminated this fiscal year in the approval of Metro's Local Contract Review Board Administrative Rules. Equity is embedded into these rules in two ways: indirectly and directly. Indirectly, the project team considered the impact and benefit to business with each policy decision. That

means that things like minimum timelines for bid and proposal writing, and methods for supplier notification, among others, were determined based on a balance between supplier access and staff efficiency. Directly, the Administrative Rules include an Equity in Contracting section, which solidifies Metro's efforts through programmatic priorities. This section applies to all types of procurement. The rules are summarized here.

Summary of Metro contracting rule improvements:

- COBID utilization is encouraged for small procurements less than \$10,000, or \$5,000 for public improvement work
- bids and proposals must be solicited from at least one firm representing each COBID certification for intermediate procurements up to \$150,000, or \$100,000 for public improvement work
- procurements released on ORPIN for public competition that are \$150,000 and over, or \$100,000 and over for public improvement work must also advertise in minority-focused publication
- a minimum 20 percent of points are dedicated to diversity and equity in proposal scoring
- public improvement bids are accepted from only COBID-certified firms for contracts up to \$50,000
- departments may directly award contracts for personal services up to \$50,000 to COBID-certified firms
- improved requirements for vendors to contact COBID-certified subcontractors and document those efforts, allowing Metro to reject non-compliant bids and makes non-compliance throughout the project a breach of contract
- pre-solicitation meeting required to discuss equity considerations throughout the life of the project before any formal-level solicitation is released
- departments may directly award contracts to not-for-profit organizations when both parties contribute to the decision-making process.

Agency-wide training

The implementation of updated contracting rules required a refresher training program for procurement staff, project managers and leadership across all of Metro's departments. These trainings, reaching roughly 350 staff, included an in-depth discussion of the equity in contracting program.

Procurement strategic plan

In winter of 2017, Procurement Services adopted an updated Procurement Strategic Plan that guides the primary efforts of the division. The plan defines four goals:

1. Strive for excellence in customer satisfaction
2. Enhance team effectiveness
3. Add value to procurements
4. Employee engagement

Within the above four goals, many strategies, actions and measures demonstrate Procurement Services' commitment to expanding equity in contracting.

Metro is a member of:

- Asian Pacific American Chamber of Commerce (APACC)
- BESThq
- Hispanic Metropolitan Chamber of Commerce
- Metropolitan Contractor Improvement Partnership (MCIP)
- National Association of Minority Contractors Oregon
- Oregon Association of Minority Entrepreneurs (OAME)
- Oregon Native American Chamber (ONAC)

Goal 1: includes measuring the effectiveness of awareness-raising tools and communication in part by COBID-certified firm utilization increase (see strategy 1.4), as reported in this Equity in Contracting Annual Report. Strategy 1.5 calls for procurement training to internal staff. Metro's internal procurement trainer provides quarterly and upon-request Equity in Contracting trainings. Trainings on other procurement topics also include subject matter that reinforces behaviors and practices that make Metro's contracts and procurement process more accessible and fair for small, minority and women owned businesses.

Goal 2: focuses on improving the overall skills and professional proficiency of the Procurement Services team. Strategy 2.2 calls for staff development. In FY 2016-17, Procurement Services staff engaged in many training and development opportunities focused on diversity, equity and inclusion. Some highlights include staff attending the Northwest Employer Diversity Conference, American Contract Compliance Association's National Training Institute, and Metro-wide training and discussion groups surrounding leading with race.

Goal 3: recognizes equity in contracting as a key way for adding value to Metro's procurement process. Strategy 3.1 identifies the many actions and measures described in this report, including workshops, training and technical assistance, attending outreach activities, hosting the small business open house, and providing sponsorships to support organizations focused on supporting historically underutilized businesses.

Goal 4: focuses on internal communication and culture within the Procurement Services team. While this goal does not explicitly address strategies and actions for equity in contracting, the inter-personal focus of this goal is foundational to the success of those identified in the three other goal areas. With the update of this Procurement Strategic Plan, Metro's Procurement Services team has concretely declared its dedication to the efforts outlined in this report.



Outreach: engaging the community

A large part of Metro's outreach efforts involve attending community and business organization events and familiarizing area businesses with the opportunities Metro has available. In FY 2016-17, Procurement Services staff attended regular meetings of organizations that provide support to small businesses and businesses owned by people of color and women. During these networking activities, Metro staff engaged one-on-one with business owners. These visits are a productive way to provide information about Metro, answer questions, and get feedback on our outreach activities.

Construction Career Pathways Project

In the greater Portland area, there is a lack of diversity in the construction trades – especially across higher skilled construction occupations. People of color and women face multiple barriers in accessing and sustaining construction careers in the Portland region. To address these challenges, Metro has taken the lead in coordinating the Construction Career Pathways Project (C2P2). C2P2 brings stakeholders together at the regional level to learn more about the problem and identify strategies to provide reliable career pathways – from pre-apprentice and apprentice to journey level – for people of color and women in the construction trades.

Regional workforce:

- 15,000 new construction jobs in the next 10 years
- 20% of the region's workforce is nearing retirement age
- communities of color and women are under-represented.

Partners:

- local government agencies
- community-based organizations
- workforce investment board
- labor unions
- industry.

The project seeks to create a roadmap for government that will:

- support and grow a diverse construction workforce
- gain efficiencies in public construction projects
- promote equitable growth in the region's economy.

The project includes four key activities:

- regional construction workforce market study to assess the region's construction workforce supply and demand outlook to better understand its overall capacity to meet growing demand, existing opportunities for future workforce growth, and meaningful areas of cooperation between partners
- community engagement work to understand what equity looks like in the construction trades and the necessary levels of investment required to support vibrant communities and a prosperous region

- regional public owners work with partner agencies to identify tools and policies that meet the needs of community, remove barriers and create equitable job opportunities in the trades
- apprenticeship development to maximize opportunities and retention strategies for laborers of color, for example, the Hyatt Regency Hotel project at the Oregon Convention Center.

Metro also served on the planning committee for the 2016 Diversity in the Construction Trades Summit, and is participating in the planning committee for the 2017 Summit. The summit brings the workforce diversity conversation to a larger audience and builds on the foundation of collaboration throughout the region with an opportunity for dialogue between procurement staff, project managers, general contractors and others involved in workforce diversity in contracting.



4th Annual small business open house

Metro partnered with Multnomah County again to host the small business open house on Feb. 22, 2017. Metro and Multnomah County staff hosted tables and provided information about projects and business opportunities to more than 200 participants of the small business community. This year the open house also featured breakout workshops on topics such as major project opportunities and how to do business with Metro and Multnomah County. Two additional workshops were provided by COBID certified business owners who got the opportunity to highlight their skills while providing key information to attendees. Mariette Blay of Blaze Tax Services, LLC provided a workshop on back office and business tax preparation, and Mazarine Treyz of Wild Social Media provided a communications training on social media. Trainings were rounded out with a proposal consultation with the pros session that offered attendees the opportunity to register for a 15 minute time slot to review elements of their proposal template with consultants hired by Metro. Business resource providers, including ORPIN, COBID, Health Insurance Marketplace and Small Business Assistance, were also in attendance. The open house events are an opportunity for businesses to get a deeper understanding of the projects available and of how to bid and propose on public sector work.

“Excellent information and assistance on how to find out about opportunities as well as establishing contacts for subsequent business postings! I am excited to get started.”

“Again, it was excellent. For people who are new to the procurement process, this event opened a door on how to show interest and compete for business opportunities. It demystifies the bidding process.”

“This is government at its best and so refreshing to see how it extends itself to the community in joint partnership. I want to provide services and or even explore opportunities with Metro as a result of this Open House. I believe I have some experiences and skills that could be of great value to Metro and wish to extend my deep appreciation for having this program. Simply, Well done!”

- Attendee feedback from February 2017 open house event

Recognition

In FY 2016-17, Metro staff was recognized by Oregon Tradeswomen Inc. as valuable community partners. Both Gabriele Schuster, Procurement Manager, and Riko Tannenbaum, Procurement Analyst, were presented with the Outstanding Volunteer recognition from Oregon Tradeswomen Inc. for their participation in and support of events throughout the year.

Trade shows and expositions

Metro also hosted tables at and attended a number of trade shows and expositions. These events allow businesses to network and learn about chambers, business associations, large businesses with subcontracting opportunities, and public agencies. Hosting a table at trade shows is another way to provide information about how to do business with Metro. This year, Metro attended the OAME Trade Show, Oregon Tradeswomen's Women in Trades Career Fair, the MCIP Trade Show, Governor's Marketplace and BESThq's Business Expo West.

Hosting events at Metro

Metro continues to host the bi-monthly National Association for Minority Contractors Oregon (NAMC Oregon) meetings at the Metro Regional Center. NAMC Oregon supports minority and women construction and trade contractors and provides technical support to their members. Procurement Services staff regularly participates in NAMC Oregon meetings and shares information about business opportunities and connecting with Metro project managers. Metro also hosts Oregon Native American Chamber (ONAC) bi-monthly luncheons at the Metro Regional Center. ONAC works with the community to advance educational and economic opportunities for Native Americans in Oregon and Southwest Washington. Metro project managers and department staff are invited to attend and participate on a consistent basis.





photo courtesy of Diego G. Diaz

Meet and Certify

Meet and Certify events provide an opportunity to collaborate with other public agencies and business support organizations to engage with small business owners who are not yet COBID certified, or have not yet entered into public contracting. These smaller events provide a more intimate environment for attendees to network with Metro staff and learn about the services available to them. The location is also key. These events target businesses that are located outside of the Portland core and provide engagement opportunities in the more distant communities in the Metro region. This approach has proven successful, as these events provide an opportunity for Metro to develop new relationships with many of the attendees. In FY 2016-17, Metro held Meet and Certify events in Beaverton, Hillsboro, Rockwood and Woodburn. Each event attracted about 50 attendees, most of whom had never contracted with Metro. Based on the success of these events, Metro is planning to continue to participate in Meet and Certify engagement opportunities.

Meet and Certify event participants

Andersen Construction
 Besthq
 Certification Office of Business Incusion and Diversity (COBID)
 City of Beaverton
 City of Hillsboro
 City of Woodburn
 Government Contract Assistance Program
 Hillsboro Chamber of Commerce
 MercyCorps
 Merit
 Oregon Department of Transportation
 Oregon Procurement Information Network (ORPIN)
 Oregon Secretary of State
 PDXProcurementSearch.com
 Reynolds School District
 Small Business Administration
 Woodburn School District

Bid and proposal writing workshops

One of the biggest hurdles for qualified businesses to win contract awards with public agencies is navigating the bid and proposal preparation process. The skills required to complete bids and proposals for public agencies are often unrelated to the businesses' core services. Metro responded to requests from the COBID community for specific training for contractors to improve their skills in bid and proposal preparation.

Metro's Procurement Services team provided three bid and proposal writing workshops for small businesses meeting the State of Oregon COBID certification criteria. The workshops are presented by a consultant team. Attendees qualify for two hours of Metro-sponsored technical bid or proposal writing assistance from the consultant team. Metro also partnered with Oregon Department of Administrative Services to host an ORPIN training for businesses.

FY 2016-17 workshops provided:

- professional services proposal writing workshop
- doors, window hardware and replacement bid writing workshop
- ORPIN training
- general proposal writing workshop.

Metro plans to continue to provide workshops on a quarterly basis as opportunities align. Businesses who have attended the workshops improved their ability to prepare responsive and competitive bids and proposals and, as a result, many have won Metro contracts. In FY 2016-17, Metro awarded 16 contracts valued at \$1,097,057 to previous workshop attendees. In total, Metro has awarded 35 contracts valued at \$1,902,150 to workshop attendees since beginning the program.

Oregon Zoo Bond program

The Oregon Zoo Bond program and its contractors engage in a variety of activities to increase equity in contracting and utilization of COBID-certified firms. FY 2016-17 saw the opening of the Education Center and early work on Polar Passage, Primate Forest and Rhino habitat, which were all combined into a single project.

Education Center

The Education Center at the Oregon Zoo opened on March 2, 2017. The construction manager and general contractor (CM/GC) for the project was Fortis Construction LLC, a former ESB that has since grown to become the Portland metro area's third largest general contractor. Fortis exceeded its COBID utilization forecast of 26.7 percent with a total of 29.3 percent COBID utilization, representing \$4,232,148 as of June 30, 2017. This utilization rate is the result of work with 14 COBID-certified sub-contractors, and

exceeds the Zoo Bond Program's overall aspirational goal of 15 percent, which is the result of Fortis' strong outreach and relationships with certified firms, as well as collaborative engagement efforts with Metro to encourage bidding by certified firms.

Polar Passage, Primate Forest and Rhinos

Still in the design phase, the CM/GC contract was awarded to Lease Crutcher Lewis. Like with Elephant Lands, Lease Crutcher Lewis included a COBID-certified firm as an integrated part of the CM/GC team on a mentorship. Kodiak Pacific Contractors, WBE, is a local earthwork company that will develop a preliminary work plan for the earthwork and excavation scope, and will provide budgeting and constructability review for the site work package. The project design, led by CLR Design, has a projected COBID utilization rate of 26.8% as of July 30, 2017.

Marketing and solicitation of bids

ORPIN – Oregon Procurement Information Network

Metro's Procurement Services team has made a concerted effort to inform COBID-certified firms about business opportunities and to solicit bids and proposals. In 2013, the team implemented ORPIN, the State of Oregon's electronic solicitation and bidding system, in order to reach a wider range of COBID-certified firms. Staff continued to share information about how to use ORPIN and how to discover business opportunities at minority business chamber meetings, outreach events, individual meetings, and through advertising campaigns in minority-focused publications. For all formal procurements over \$150,000, Metro posts solicitations on ORPIN and advertises in one general circulation publication and at least one local minority-focused publication.

PDXProcurementSearch.com

In addition to ORPIN, Metro publicizes open opportunities through PDXProcurementSearch.com. The website provides keyword search capabilities for all of Metro's opportunities posted on ORPIN. The ESB certified company was formed by owner and developer, Steve Havelka, who saw that matching capable companies with open opportunities through industry classification codes, such as NIGP and NAICS, was becoming less effective in today's modern economy. Many businesses do not quite fit into the traditional industry categories, and therefore, are in danger of missing valuable opportunities for public contracts. PDXProcurementSearch.com provides keyword search capability of all published Metro opportunities, allowing businesses to more easily determine which opportunities are relevant. The service also provides RSS feeds and push notifications to businesses based on those keywords. Metro was one of the first agencies to sign on with PDXProcurementSearch.com in 2015, and by the end of FY 2016-17, 13 agencies had signed up with the service. As more agencies join, the website grows more effective at bringing awareness to Metro's contracting opportunities.

PDXProcurementSearch.com registered 1,184 unique search users in FY 2016-17. The 148 Metro opportunities listed on the site displayed to those users a total of 261,447 times as search results. That resulted in 9,836 direct views of Metro's open projects. "Metro" was also among the top 15 keywords searched.

Finding Metro contract opportunities

Although state law only requires agencies to contact three businesses to bid or propose on contracts under \$150,000, Metro provides additional opportunity for firms to win work by releasing opportunities of more than \$10,000 on ORPIN.

This means Metro's opportunities are available for any certified firm to bid or propose.

Businesses receive the opportunities through automated email notifications using commodity codes for different work categories. ORPIN reaches more than 70,000 businesses and contractors, of which roughly 3,700 are COBID-certified firms.

Publications where advertisements for contracts are published include:

- Portland Observer
- The Scanner
- Asian Reporter
- El Hispanic News
- Portland Tribune
- Oregon Procurement Information Network (ORPIN)

A Metro-wide approach of diversity, equity and inclusion

Metro's focus on diversity, equity, and inclusion goes beyond procurement and contracting – the effort is part of a broader initiative across Metro to examine and update internal operations and external programs. Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion (Equity Strategy) identifies five long-term strategic goals. Each of these five strategic goals is defined through specific objectives and actions.

Metro's Equity Strategy identifies racial equity as the approach to ensure that all people who live, work and recreate in the Portland region have the opportunity to share in and help define a thriving, livable and prosperous place.

Read more about the Equity Strategy at oregonmetro.gov/equity.

Metro's contract utilization reporting method

To improve the accuracy of measuring diversity efforts, Metro's utilization reporting method removes work that cannot reasonably be performed by a COBID-certified firm from the utilization rate calculation. This method of reporting is common. The data used in this report does not include work contracted through the Zoo Bond program, which will compile a separate report.

Metro excludes the following types of contracts and payments from the calculation:

- services provided by another public agency that do not compete with the private sector. Services for which there is a single or limited group of businesses, none of which are COBID-certified
- services mandated by ORS to be provided by qualified rehabilitation facilities.

Metro's Equity in Contracting program at work

Business spotlight: R Franco Restoration, Inc.

Working with R Franco Restoration

Metro has worked with natural resource management contractor R Franco for the almost two decades. The firm, and its owner, Rosario Franco, offer a wide range of services that are needed by Metro's Parks and Nature Program, ranging from plant installation and weed abatement to wildfire response. Rosario is a highly dedicated professional who constantly scrutinizes the quality of work done by his staff, and the effects of the treatments they perform. The firm is an extremely valuable resource to our agency, and R Franco's influence on Metro's natural area portfolio has been significant.

-Curt Zonick, Metro project manager

Proposal writing workshop

In preparation for this solicitation, Metro hosted a proposal writing workshop for COBID-certified and -eligible firms. The workshop focused on improving the firms' ability to prepare responsive, competitive proposals. The workshop was presented in partnership with state representatives from COBID and ORPIN. Attendees were eligible for three hours of one-on-one proposal writing assistance. With the help of this workshop, the solicitation resulted in 64 percent contract awards to COBID-certified firms.



R Franco Restoration, Inc.

Rosario Franco, President
rfranco restoration@hotmail.com
503-580-3988
MBE, ESB #5469

Business specialties

Restoration and preservation of:

- natural areas
- river banks
- parks
- wildlife habitats
- forests
- wetlands.

Contract awarded

Contract value: \$1.5 million for services:

- manual and mechanical site preparation, seeding and maintenance
- planting
- forest stand management
- prescribed burn and wildfire response services
- project management.

Working with Metro

I started working with Metro back in the 90's. I was also the first contractor that started doing restoration Work at Metro.

*-Rosario Franco,
R Franco Restoration*

McDermott Fence & Construction

Diane Sowle, President
diane@mcdermottfence.com
503-256-3060
WBE, ESB, DBE #5402

Business specialties

- fencing and enclosures
- chain link, wood and vinyl
- gates (standard and custom)
- animal enclosures.

Contracts awarded

McDermott Fence & Construction holds four contracts with Metro for a variety of work, including zoo animal enclosures, construction fencing and natural areas fencing.

McDermott Fence & Construction has won three contracts through Metro's COBID Marketplace program.

Over the years, McDermott Fence & Construction has held 20 different contracts with Metro for more than \$1.1 million of work.

Business spotlight: McDermott Fence & Construction

Working with McDermott Fence & Construction

"McDermott fence has a very skilled staff from the office to the field. The employees that I have dealt with over the years are dedicated, honest, loyal and always act in a professional manner. They work with us regularly to develop and build specialty caging and containment for many different animal species. They have learned and understand the codes and requirements for animal containment and build caging and fencing to meet both. They are one of the best companies all around that I have worked with."

- Randy Whitworth, Metro project manager

COBID Marketplace program

For construction projects under \$50,000, Metro solicits competition only among COBID-certified firms. This provides certified firms with access to smaller Metro contracts through competition with other similarly-sized firms. The experience that firms gain through COBID Marketplace contracts help them become better able to compete for larger contracts.

Business spotlight: Brink Communications

Working with Brink Communications

Brink Communications is our Willamette Falls Legacy Project team's go-to source for valuable strategic advice for all things communications and media-related. The firm has a well-rounded staff of experts we work with to produce compelling content, which in turn helps us to keep stakeholders and community members informed and engaged. We recently worked with Brink on a campaign to raise awareness of our project. We produced a refreshed 60-second project video shown in movie theaters throughout the Portland region over the holidays! Be sure to check out the video on our homepage rediscoverthefalls.com

- Lisa Konkola, Metro project manager

Outreach to COBID-certified firms

Brink's major contracts with Metro are the result of focused outreach efforts, including:

- announcing opportunities at Metro's annual small business open house
- offering one-on-one meetings to discuss the procurement process
- direct notification of contract opportunities
- optional pre-proposal meeting to clarify questions
- writing request with small businesses in mind.



Brink Communications

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Business Specialties

- marketing strategy and communications
- public relations
- branding
- graphic design
- social media.

Contracts awarded

Brink holds five contracts with Metro for a variety of marketing, communications, design and strategic communications, including for the Willamette Falls Legacy Project.

Total value of contracts: \$1.2 million



Work with Metro

Common contracts include:

- construction and maintenance
- architecture and engineering
- forestry and landscaping
- food service and supplies
- professional, technical and scientific services
- goods, manufacturing and supplies.

Contracting thresholds

Up to \$10,000 – competitive solicitation is not required. Utilization of minority, women-owned and **emerging small businesses is strongly encouraged.**

More than \$10,000 – solicitations are posted on ORPIN.

To become a vendor with Metro, businesses must:

1. Maintain legal aspects of business to enter into contracts and contracts and transact business in the state of Oregon.
2. Demonstrate compliance with Metro's Equal Employment and Nondiscrimination Clause, as outlined in our solicitation documents.

Getting started:

- register with ORPIN
- get certified through COBID
- visit oregonmetro.gov/contracts for workshop and training opportunities
- attend Metro's annual small business open house event
- scan the Portland Tribune and various community newspapers for Metro bid opportunities
- network with small business associations such as Oregon Association of Minority Entrepreneurs (OAME), Business Diversity Institute (BDI) and others.

How to ensure quote, bid or proposal acceptance:

- submit quotes and bids to the Metro reception desk prior to the solicitation closing date and time. This requirement is strictly enforced
- be a responsive, responsible bidder or proposer
- make sure your bid and proposal documents are complete and contain all requirements and information including any forms requested in the solicitation document
- double-check your documents before submitting.

Procurement Staff at Metro

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For more information about business opportunities at Metro, visit Metro's Equity in Contracting website:

oregonmetro.gov/how-metro-works/contract-opportunities/equity-contracting

Metro brings people together to shape the future of greater Portland and provides places, services and tools that work best at a regional scale. Led by an elected council, this unique government gives Oregonians a voice in their community.

Parks and nature

Metro protects clean water, restores fish and wildlife habitat, and connects people to nature across 17,000 acres of parks, trails and natural areas – and the Oregon Zoo.

Land and transportation

Metro plans for new homes, jobs, transportation options and access to local businesses and parks.

Garbage and recycling

Metro manages the garbage and recycling system and is a resource for information about safe disposal and ways to reduce waste.

Arts and events

Metro runs the Oregon Convention Center, Portland Expo Center and Portland's Centers for the Arts.

Metro Council President

Tom Hughes

Metro Councilors

Shirley Craddick, District 1

Carlotta Collette, District 2

Craig Dirksen, District 3

Kathryn Harrington, District 4

Sam Chase, District 5

Bob Stacey, District 6

Auditor

Brian Evans



oregonmetro.gov

