

Washington State Tools for Equity in Public Spending

Recognition Virtual Event

Support the economic vitality of Washington State by ensuring all businesses have competitive access to public bidding opportunities.



January 27th
10 am - 12 pm

Register on Eventbrite:
<http://bit.ly/35atqUr>

View the Toolkit:
<http://bit.ly/2X7hEWr>

**Governor's Subcabinet
for Business Diversity**



Time	Presenter(s)	Item
10:00am – 10:05am	Yến Huỳnh	Welcome & Housekeeping
10:05am – 10:15am	Chris Liu & Lisa van der Lugt	Subcabinet Overview
10:15am-10:22am	DVA Alfie Alvarado-Ramos	Commitment & Recognition
10:22am-10:30am	OMWBE certified firm Regina Glenn	Stakeholder Address
10:30am-10:40am	Yến Huỳnh	Preview of Toolkit & Support Session Schedule
10:40am-10:45am	Lisa van der Lugt	Governor's Introduction
10:45am-10:55am	Governor Jay Inslee	Governor's Address
11:00am-11:07am	DES Chris Liu	Commitment, Implementation, and Recognition
11:07am-11:14am	DSHS Dana Phelps Carolyn Cole	
11:14am-11:21am	LNI Annaliese D'Angelo	
11:21am-11:28am	WSDOT Keith Metcalf Earl Key	
11:28am-11:35am	HCA Rachelle Amerine	
11:35am-11:42am	DOC Jeannie Miller Anita Kendall	
11:42am-12pm	Yến Huỳnh	Next Steps
12:00pm	Adjourn	

Questions? Please email equitytoolkit@omwbe.wa.gov



Roadmap to Contracting Equity

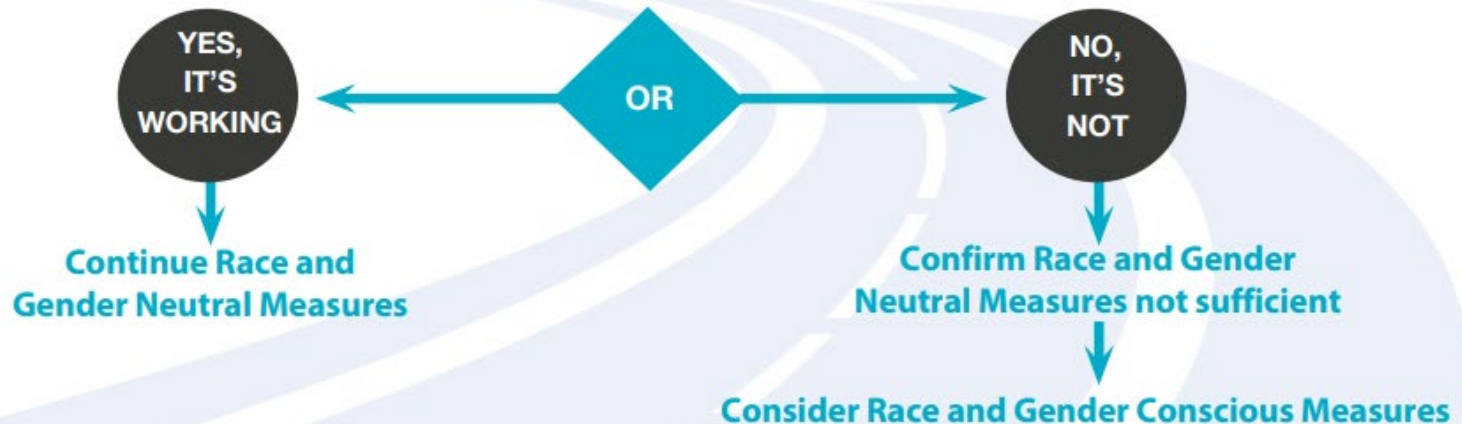
Governing Body — Governor's Subcabinet on Business Diversity

Attorney General's Legal Opinion (No. 2017-02)

Disparity Study

Standardize Race and Gender Neutral Measures*

Evaluate Race and Gender Neutral Measures



*** Among agencies - policy, procedures, measures, training, adjustments.**

Subcabinet agencies and partners: Department of Enterprise Services • Department of Social and Health Services • Department of Transportation • Health Care Authority • Department of Corrections
Department of Labor and Industries (Represent 2/3 of state spending)

Office of Minority and Women's Business Enterprises • Department of Veteran Affairs • Commission on African American Affairs • Commission on Asian Pacific American Affairs • Commission on Hispanic Affairs
Department of Commerce • Governor's Office for Regulatory Innovation and Assistance • Attorney General's Office

The path to standardizing race and gender neutral measures among agencies

Tools for Equity in Public Spending

The toolkit provides support for agencies including resources such as model policies, tools and best practices

2021 Coordinated toolkit implementation:
Introduce new tools quarterly



Follow up Support Sessions:
share plans for implementation
& ask questions



Final Support Sessions:
share implementation progress
& lessons learned

Existing Toolkit Resources

Current Voluntary Measures

- Improved agency guidance on supplier diversity best practices
- Established tools for agencies to increase supplier diversity with planning & forecasting, internal processes, master contracts, inclusion plans, and outreach
- Merged statewide small business information for easier access
- Improved certification process
- Utilize state's data sources to help inform supplier diversity efforts

In Progress

- Establish new aspirational goals for each agency
- Establish internal agency culture action team and technical & business assistance action team
- Improve methodology for tracking and monitoring genuine efforts through launch of Business Diversity Management System
- Conduct proof of concept; measuring participation in client services and provider contracts
- Include diverse spending data from purchasing cards
- Launch model policies

Subcabinet Agencies and Partners



YOUR Washington Department of Veterans Affairs

- WDVA is a small agency committed to invest on Veteran, Minority and Women Owned Businesses
- Toolkit is "go-to" site to navigate access to these business especially for small agencies or programs with limited contracting staff capacity
- Veteran Owned Business Certification for WEBS is unique to WA State
<https://www.dva.wa.gov/veterans-their-families/veteran-owned-businesses>
 - Certification of Honorable Discharge
 - 51% Veteran Ownership or 50/50 split between two veterans or community property
 - Proof of Business incorporation in Washington State

Why Seek and Invest in Veteran Owned Businesses?

- The military is highly diverse increasing the probability of a Veteran Owned Business also being a Minority or Woman Owned Business
- Veterans placed their lives on hold to serve their country and start business later than their counterparts
- Veteran Owned Businesses hire Veterans and Military Spouses who often experience employment challenges due to frequent moves
- It's your way to say "Thank You For Your Service" to competitive companies that have in their corporate fabric the military ethos of ethics, teamwork, timeliness, diversity, agility, and service



I offer support to this office by:

- Serving for over a decade as a member of the OMWBE advisory committee and providing insights and recommendations
- Speak on behalf of the office at legislative hearings upon request
- Distribute information to the community regarding policies and resources, like the toolkit

Regina Glenn

President, Pacific Communications Consultants, Inc.
Certified MBE, WBE, and DBE

As the Diversity and Inclusion Manager on several major public works projects, including WSDOT Megaprograms, I:

- assist MSVWBE businesses navigate requirements and the contract process
- support owners and primes in reaching out to the MSVWBE businesses and the community

How the Office has Benefited Certified Firms



It is critical for stakeholders to see from the owners their commitment to diversity and to provide guidance on how businesses can be compliant.

OMWBE :

- Provides prompt certification
- Provides accurate, updated directory of certified firms
- Forms strategic alliances with community advocacy groups as well as agencies
- Provides technical support in-person and online



This toolkit is especially unique and necessary in that it provides guidance for WSDOT staff, subcontractors, and primes.



➤ With these tools, and step-by-step guides to the process, this helps WSDOT staff to know the best kind of language to put in the contract. **Primes will not be ambiguous about contract expectations when it is written in the contract.**

➤ What is of particular note in this worksheet, it talks about *after* the event, which is a great help to subcontractors to know what should happen, and to take the initiative to follow up if they are not contacted.

➤ Information provided in the Inclusion Guide, Plans and Templates allow for primes to not guess about what is requested, and subcontractors now have a better idea of their worth for the primes to be successful. WSDOT staff has the ready tools for uniformity to put in contract language.

➤ Additionally, the outreach checklist is outstanding. **It not only tells you what to do, but why and how to do it.**



Tools for Equity in Public Spending

Tools for Equity in Public Spending

Schedule for Virtual Support Sessions

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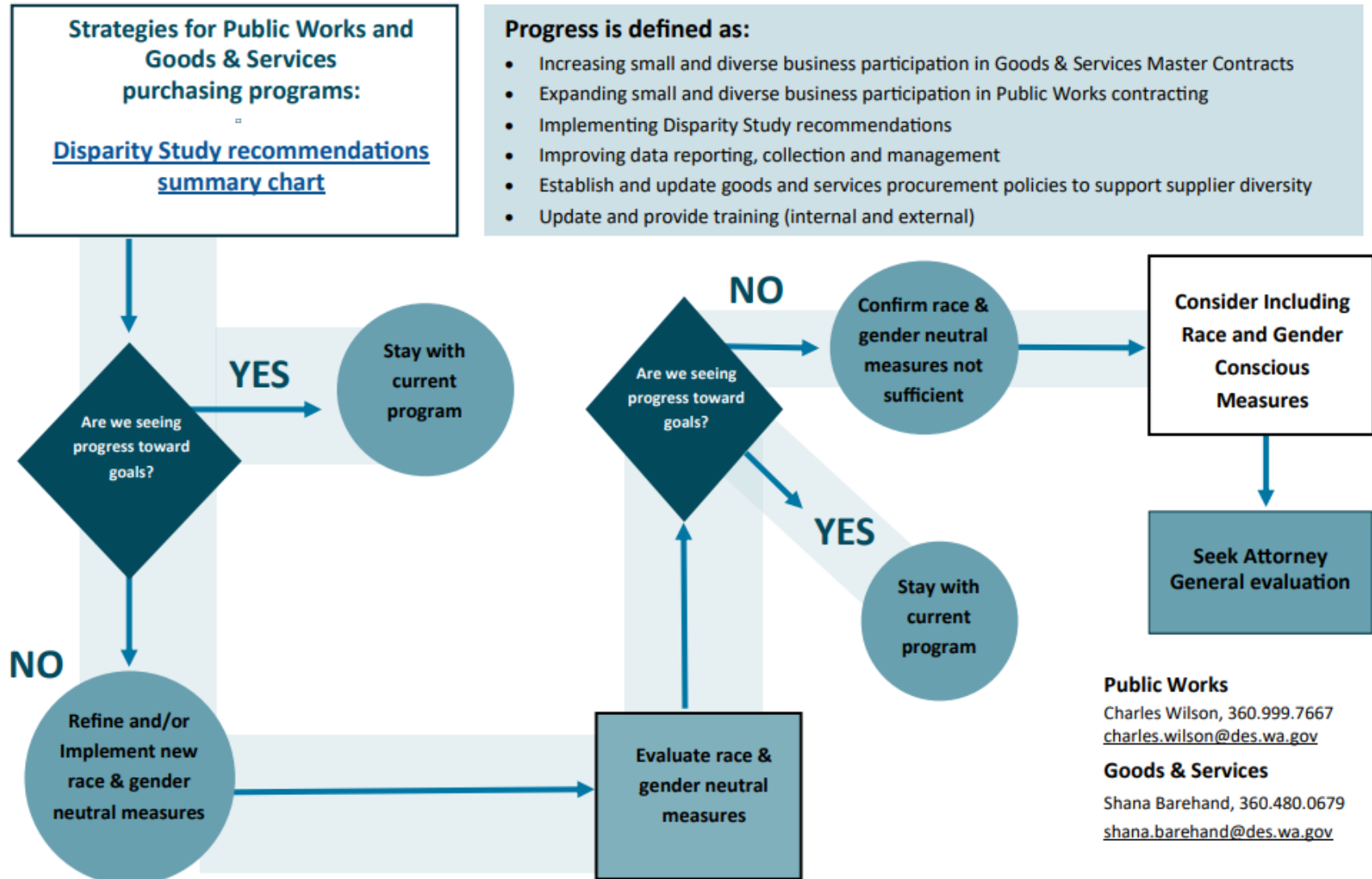
2nd Tuesday of each month at 1:30 pm

More details on Eventbrite!

- **Forecasting / Master Contracts**
 - February 9th
 - March 9th
 - April 13th
- **Internal Processes**
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Path to Achieving Equity in State Contracting and Procurement





DISPARITY STUDY RECOMMENDATIONS			Status	2019/2020	July	Aug	Sept	Oct	Nov	Dec	Jan 2021	Feb	March	April	May		
Data	Implement Electronic Data Collection and Monitoring System for all State Agencies Develop Performance Measures	Data – Create Direct Buy tracking method			BDO – Begin Process Improvement/ Sprint planning for future implement.				On Hold			SBD – Tracking DES Spending Project- track Direct Buy/Internal MC spending and Amazon Spending	Form DES implementation team		Train and implement DES Divisions		
		Data - Create Amazon Spend tacking method			Monitor Amazon spend re small business missed opportunities?		Monitor spend		On hold			Analyze Amazon and spend and Create strategy to decrease					
		Data – Team to determine how to measure contract & spending trend with small/ diverse/vet businesses		Checking		Request Data Quarterly	Request Data Quarterly, review data and fine tune how to label data to tell the story										
Creating a Culture of Procurement Inclusion and Equity	Increase Access to State Contracting Information	Contracts – Conduct Pre bid conferences for all solicitations		Checking	Track number of pre-bid attendees, drive SOV to attend pre-bid and ask questions												
		Contracts - Publicly Post winning bids		Creating language for posting of bids	Create process for posting	Ensure bid tabs sent w/RSB draft Desk Manual guidance to cost within 25 days of award	Place in Desk Manual and begin implementing	Checking									
	Lengthen Solicitation Times	Contracts – Extend time solicitations are available for businesses to bid		Checking, High risk solicitations 45 days, all others 30 days. Contracts in Gap may not be left open that long.													
		Contracts – Follow unbundling, multiple-award guidance		Drafting internal policy, first for C&P then for entire DES.										Implementing C&P policy, creating procedures, solicitation language, put into Desk Manual	Brief leadership on internal, fresh procedures and implementation tools		
	Review Contract Sizes and Scopes	Policy/Training – Train on new solicitation processes – timing, unbundling, inclusion plans, insurance analysis		Held supplier diversity policy workshop, began work on internal policy to use inclusion plans	Policy refinement period, Drafting Internal Policy/drafted C&P	Continue work on internal policy/ procedure/ creating content for best practices							Supplier Diversity				
	Adopt "Quick Pay" Policies	Contracts - Conduct stakeholder work		Following DCH community contracts, providing tech assist to identify if this is a barrier to faster print, Most small, new to government, need time for on-boarding/payment.							Produce 3-pg report on lessons learned from DCH pilot						
	Policy - Develop, implement quick pay policy with stakeholder input		Consulting with stakeholders, <u>E can</u> require all MC users pay in 14 days? If so how?														
	Review Insurance, Bond, Experience Requirements	Contracts - Follow new insurance guidance		C&P legal – Training developed & provided to DES Contracts Specialists- this will be added to IMS trainings										C&P legal – continue trainings every 4 weeks in 2021			
Building a Pipeline	Increase Outreach to W/WBES	Contracts - 100% consultation with PIT as develop solicitation & follow new process to document outreach efforts		Work with Strategy Team to include robust vendor outreach steps & include in Desk Manual and Solicitation process	Creating forms on Trifles for MC, Develop suite of outreach tools	Creating Trifles checklist & tracking tools	Complete Trifles Design PIR procurement	Engage in every DES and MC solicitation, documenting time, SOV interactions, pre bid participation, and develop model strategy									
		Outreach - Conduct outreach to small/diverse businesses not fully represented on state contracts		Monthly meeting with Business Diversity Advisory Group													
		Outreach – Host at least two DES networking events each year		On Hold	Conduct targeted outreach to SOV Prof Service providers	Engage with Alliance business conference											
		Outreach - Provide procurement training to small/diverse/vet businesses		Developed/delivered DES 101 to over 500 SBDB events w/Small Business Liaison Team	Expand 101 morning	Continue 101 schedule/ promotion method, Develop 102 & schedule	Implement DES targeting training strategy, Engage BDAG & business organizations to members to identify methods for enhancing training strategy, SBDB for Vet (2) in Spanish (2)	Develop, record and post training on DES website									
	Increase Technical Assistance	Outreach - Establish and implement a 2-year outreach calendar, with budget		Tracking, adjusted events/spending re CANAS	Track, Move to virtual events	Tracking, Assess virtual efforts and revise plan through December 2020	Begin testing @ events for 2021-2022	Create an outreach calendar for 2021									
		Outreach – Ensure outreach/tech assist process for MWBE businesses re procurement opportunities		Check OMWBE list, when doing research for contracts and contact them to ensure re BEBS	Confirm tracking of M/W firms referred to register in BEBS and/or update their profile for any competitive development efforts	Track and report number of OMWBE firms reached out to for each solicitation, Track increase in WBES and OMWBE database by quarter.											
		Outreach - Provide technical assistance (TA) to small/diverse/vet businesses who request it.		Tracking the TA desk by PRE Program and referring others to PTAC	Work to provide funding to external sources to help with TA	Launching OW Education for SOV businesses	Provide funding for PTAC and refer SOV to PTAC for technical assistance.										
		Outreach –IT Professional Service and Business professional services		DEI requirements for all professional service contracts	Identified/implemented pilots per spend analysis	Freeze on equipment, changes to MC, Confirm potential impacts/migration strategies	Provide funding for reliable technical assistance for										
		Develop/Pilot Small Business Target Market				Begin research for various software contracts											
		Outreach - Automotive															

Business Diversity Roadmap

Washington State Department of Social & Health Services

January 27, 2021

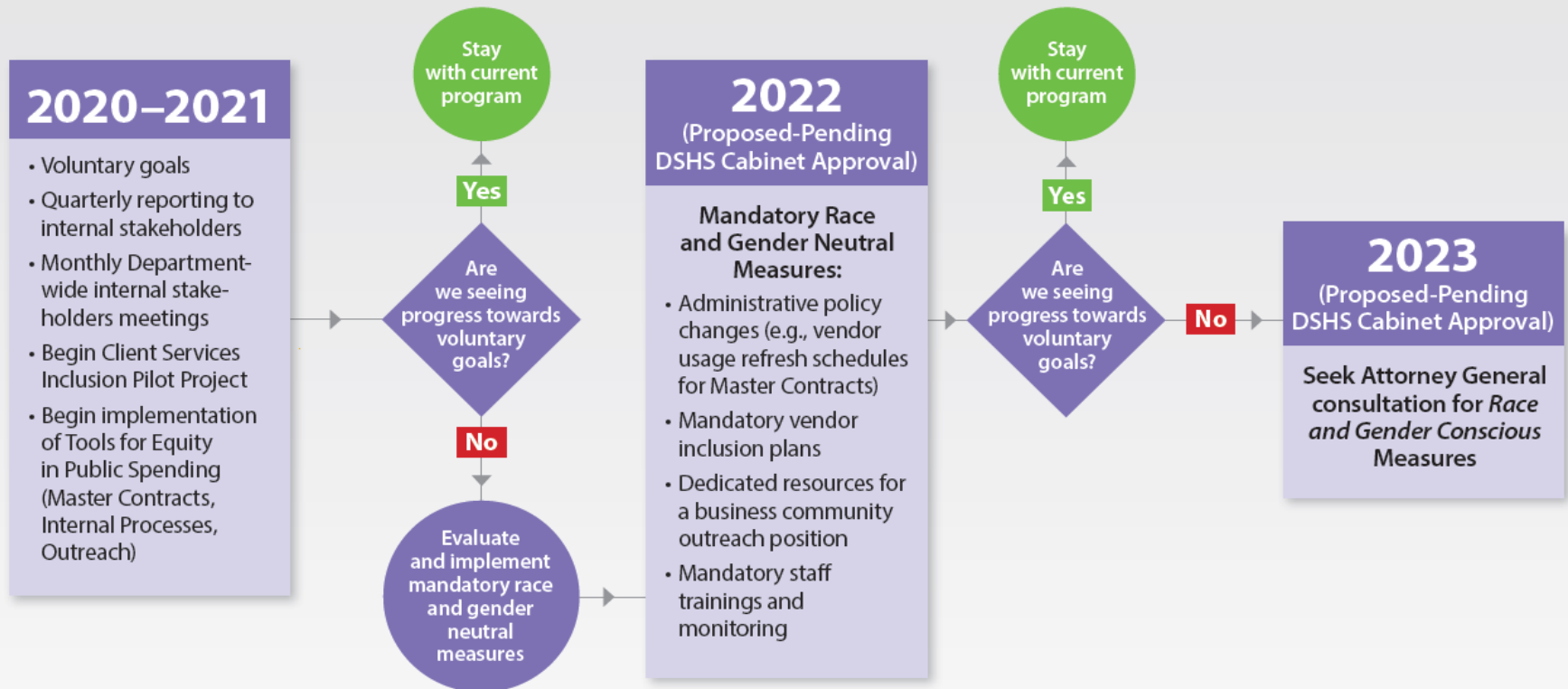
Business Inclusion Opportunity Team (BIOT) Members

Carolyn Cole
Helen Haynes
Bob Hubenthal
Nicole Kahle
David Mancuso
Edwina Martin-Arnold
Ed Maynard
Jay Minton
Brice Montgomery
Anne Nolet
James O'Brien
Angel Pele
Sarah Pendleton

Dana Phelps
Theresa Powell
William Taplin
Tavares Terry
Monika Vasil
Cassi Villegas
Julia Weese
Lisa Wolph
Richard Woodard Jr.
Russell Wrigg
Lisa Yanagida



DSHS Business Diversity Roadmap



Roadmap Success Measures:

- Client services spend inclusion in OMWBE diversity participation reports
- Meeting or surpassing voluntary goals
- Alignment of internal policies with OMWBE model policies and full integration of best practices
- Increased internal and business partnerships

Client Services Inclusion Pilot Project:

- Client services comprise the majority (over 80%) of DSHS spend
- Initial data analysis suggests that client services spend represents a category of discretionary spend in the multi-million dollar range for ten Cabinet agencies

Objective: Use the DSHS Agency Contracts Database Application (ACD) system to determine how it may be used as a client services data source for B2GNow.

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Client Services Inclusion Pilot Project

Thank you!

Contact:

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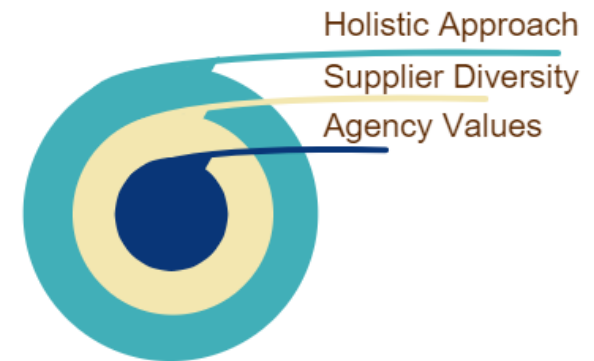
Tools for Equity in Public Spending Launch Event – Labor & Industries

A Message From L&I's Randi Warick



Reflecting on our Journey

- L&I is committed to the values of diversity, equity, and inclusion. We have an agency core value of DEI.
- Supplier Diversity Focused efforts:
 - Tammie and the L&I Procurement Team’s time, expertise, and passionate participation in the communities of practice and action teams have helped to craft and refine toolkit items.
 - Crystal Van Boven, with our Budget Office, developed L&I spending dashboard to help us understand our data and make decisions based on key data.
- Holistic Approach – Making it easy to do business with us:
 - OMWBE certification info included in prevailing wage applications,
 - Implemented more electronic versions of paperwork and processes,
 - 24-hour telephone lines for safety questions/concerns,
 - Expanding our language access services,
 - Providing COVID-19 information in 36 languages on our website,
 - And implementing online payment systems for some processes that previously required in-person transactions.



Moving Forward Together

- L&I will...
 - Weave supplier diversity into business planning,
 - Exploring how we can best apply best practices and industry standards to increase supplier diversity,
 - Continue developing even more meaningful measures, ways to view data for continued clarity in decision making.
- Continued commitment to DEI and to you
 - We will continue to serve on the subcabinet for supplier diversity and partner with others in moving this vital work forward.

Thank You

Annaliese D'Angelo (She/Her), L&I, Office of Strategy & Performance

Questions? Please email me: Annaliese.Dangelo@lni.wa.gov

State Funded Contracts - Diversity Roadmap

TODAY

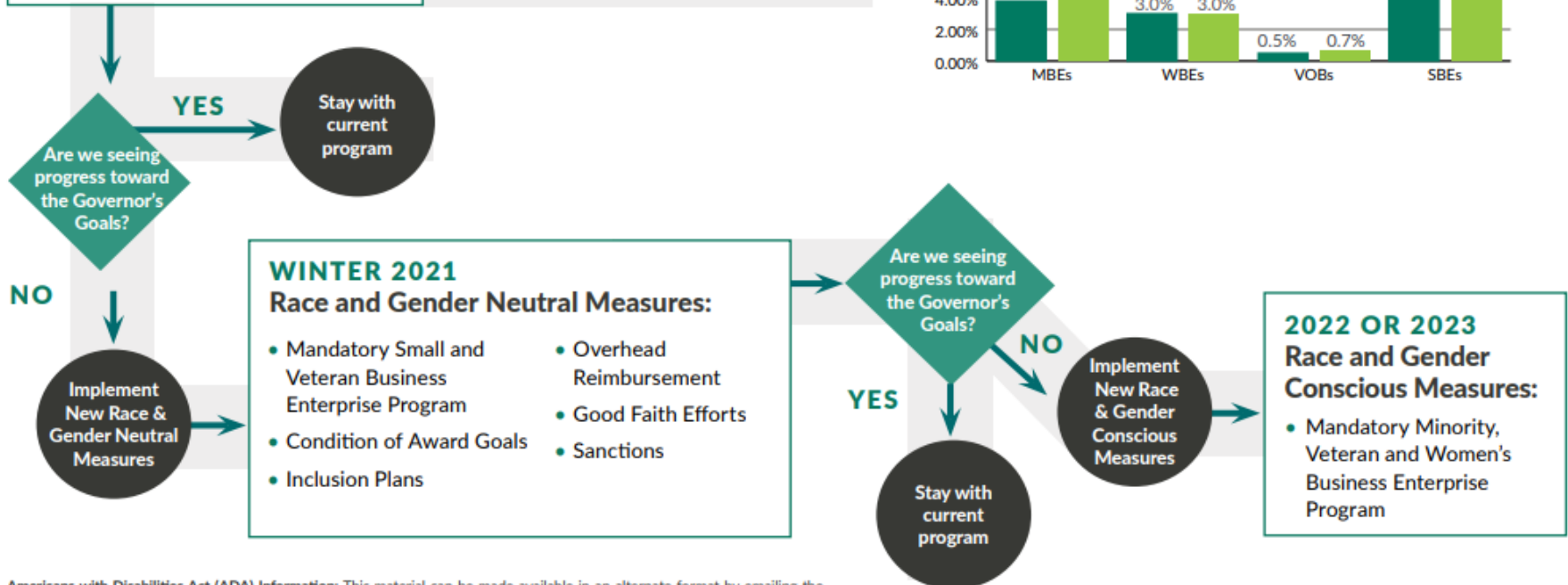
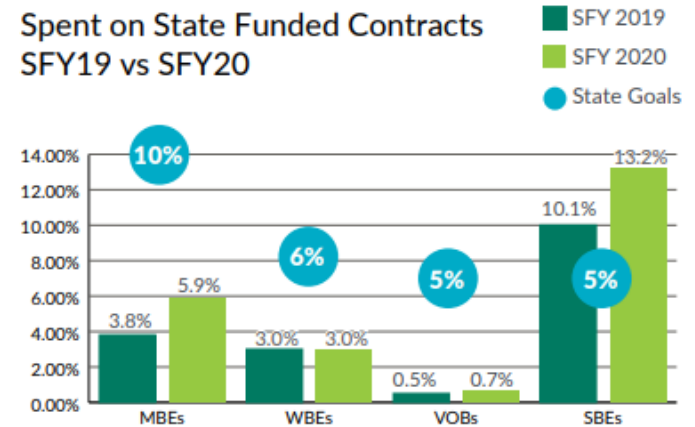
Current Voluntary Measures:

- Goals and Contract Language
- Inclusion Plans
- Community Engagement
- Technical Assistance
- Capacity Building Mentorship Program

Progress is currently defined as:

- New WSDOT subcontracts and subcontractors
- New private sector contracts
- Increased bonding
- Increased gross receipts
- Increased bidding
- Decreased disparity

Spent on State Funded Contracts SFY19 vs SFY20



Americans with Disabilities Act (ADA) Information: This material can be made available in an alternate format by emailing the Office of Equal Opportunity at wdsotada@wsdot.wa.gov or by calling toll free, 855-362-4ADA(4232). Persons who are deaf or hard of hearing may make a request by calling the Washington State Relay at 711.

Title VI Notice to Public: It is the Washington State Department of Transportation's (WSDOT) policy to assure that no person shall, on the grounds of race, color, national origin or sex, as provided by Title VI of the Civil Rights Act of 1964, be excluded from participation in, be denied the benefits of, or be otherwise discriminated against under any of its programs and activities. Any person who believes his/her Title VI protection has been violated, may file a complaint with WSDOT's Office of Equal Opportunity (OEO). For additional information regarding Title VI complaint procedures and/or information regarding our non-discrimination obligations, please contact OEO's Title VI Coordinator at (360) 705-7090.

19-04-0249

MORE INFORMATION

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2021 Action Plan for Equity in Contracting

Rachelle Amerine

HCA Contracts Administrator

January 27, 2021

HCA 2021 action plan

- ▶ Enhance internal policies, training and data collection
- ▶ Improve contracting processes
- ▶ Establish spend goals for client services contracts
- ▶ Enhanced outreach efforts

Enhance internal policies, training and data collection

- ◉ Adopt agency policy regarding equity in procurement and contracting
 - ▶ Provide guidance and training for agency procurement staff and contract managers
- ◉ Launch automated contract request portal that links to OMWBE's certified directory
- ◉ Improve data and reporting for divisions
 - ▶ Improve visibility into diversity and veteran spend
 - ▶ Create report on diversity and veteran spend broken down by direct buy vs. master contract vs. competitive
 - ▶ Create division-specific contract portfolios that include historical spend data

Improve contracting processes

- ▶ Update templates to make responding to HCA solicitations less cumbersome
- ▶ Require prime contractors to promptly pay subcontractors
- ▶ Explore opportunity to assume some risk for small businesses
 - ▶ Insurance, indemnification and limitation of liability clauses
- ▶ Audit contractor compliance with inclusion plans submitted during competitive solicitation

Establish spend goals for client service contracts

- ▶ Collect data on providers' certified status; monitor client service spend along with goods and services spend
 - ▶ Quarterly reports to enhance visibility into equity in contracting
- ▶ Collaboration with OMWBE

Enhanced outreach efforts

- ▶ Attendance at networking events and trade shows
- ▶ Spend visibility
 - ▶ Visibility into spend projections
 - ▶ Visibility into spend categories (e.g. services, goods, client services, etc)
- ▶ Improve outreach efforts when agency need is identified
 - ▶ Early notification on HCA website
 - ▶ Early notice on provider listservs
 - ▶ Provide more time in the solicitation schedule to prepare bid

State Funded Contracts — Diversity Roadmap

Today

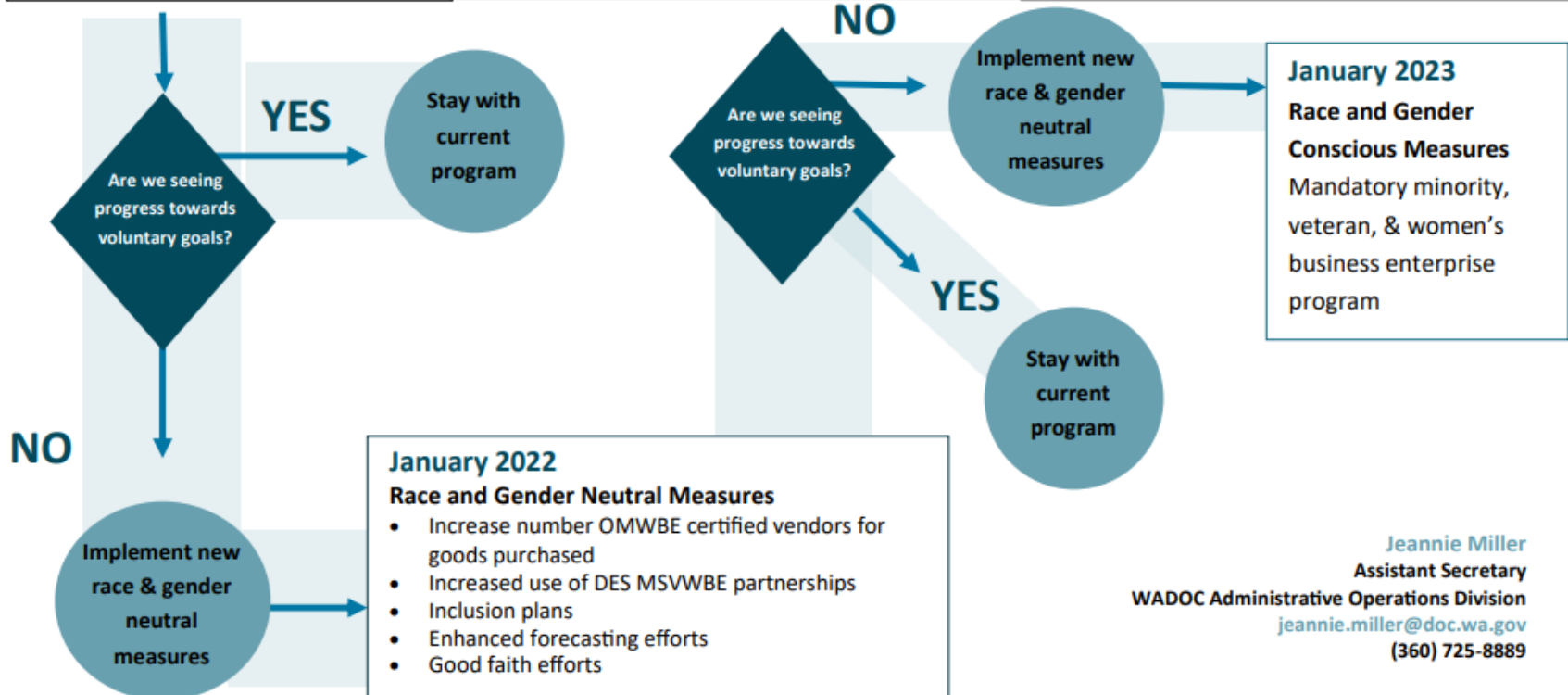
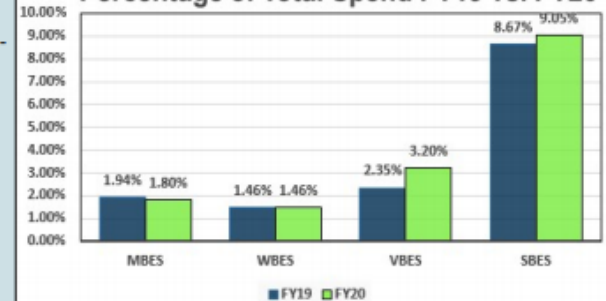
Current voluntary measures:

- Forecasting
- Monitor Procurement and Contracting Methods
- Analyze Existing Master Contracts
- Inclusion Plans
- Outreach
- Staff Training
- Partner with OMWBE

Progress is currently defined as:

- Increased state purchasing and contracting with Minority, Small, Veteran and Women's Business Enterprises (MSVWBE)
- Increased gross receipts with MSVWBE from public works
- Increased total number of MSVWBE firms
- Conduct outreach to raise awareness of business opportunities

Percentage of Total Spend FY19 vs. FY20



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