



# **TOOLS FOR EQUITY**

## In Public Spending

**Outreach Workshop**  
**March 16<sup>th</sup>, 2023**

# How to Participate

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GoToWebinar allows you to engage with us in two ways:

- Use the **Questions** tab to type written questions or comments
- Use the **Raise Hand** function to show us you would like to speak



The orange arrow on your control panel displays options

# Requirements

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- **Executive Order 22-01** – Review, incorporate, and adopt, as appropriate, the Washington State Tools for Equity in Public Spending.
- **RCW 39.19.060** – Compliance with public works and procurement goals— Plan to maximize opportunity for minority- and women-owned businesses
- **RCW 39.26.090(6)** – Encourage and facilitate the purchase of goods and services from Washington small businesses, microbusinesses, and minibusinesses, and minority and women-owned businesses to the maximum extent practicable
- **DES Policy POL-DES-090-06** – Supplier Diversity



# TOOLS FOR EQUITY

## In Public Spending

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- Forecasting
- Internal Processes
- Inclusion Plans
- Statewide Contracts
- Outreach

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- 
- Purpose: create awareness of and provide access to the state's projects and programs
  - Can involve:
    - working with community organizations
    - holding events
    - directly contacting companies

Outreach is one of the tools that the 2019 Disparity Study recommended implementing and was developed by the Governor's Subcabinet on Supplier Diversity.

# But what am I supposed to do?

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- Depending on your role:
  - Organize and host an event
  - Attend an event
  - Send out information about a procurement effort
  - Search for certified businesses (market research)



Don't panic! You probably do not have to all of these. In fact, you most likely only need to do market research and/or send out information about a contract opportunity.

# DES Supplier Diversity Policy (SDP)

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- Purpose: To encourage and facilitate the purchase of goods and services from small, diverse, and veteran-owned businesses to the maximum extent possible.
- Agencies must take action to remove barriers that prevent small, diverse, and veteran-owned businesses from receiving equitable access to state goods and services procurements.

# SDP Handbook

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- Includes guidance and tools that can help remove barriers and create opportunities for Washington small, diverse, and veteran-owned businesses.
- The tools include outreach activities with these businesses.
- There are three types: General, Targeted Solicitation, and Targeted Industry.



# Checklist

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- Links the Tools for Equity with the DES Supplier Diversity Policy
- Shows essential “to-do” lists for:
  - Tools for Equity
  - Supplier Diversity Policy

## **Checklist 1: For Cabinet Agencies**

This checklist is for all cabinet agencies and those that have accepted the invitation to follow the [Executive Order 22-01, Equity in Public Contracting](#). Full compliance also requires adherence to the Supplier Diversity Policy.

GO TO CHECKLIST 1

# Checklist



## Supplier Diversity Checklist 1

Required for all cabinet agencies and those that have accepted the invitation to follow the Executive Order 22-01, Equity in Public Contracting. Full compliance also requires adherence to the Supplier Diversity Policy. All sections are collapsible. Each section provides an icon link with hover-over text to resources or additional information.

Checklist Icons:

- Link to OMWBE, - Link to Online Handbook, - Additional information, - Link to DES tools

### Leadership

<input type="checkbox"/>	Assign staff to oversee implementation of EO 22-01.	
<input type="checkbox"/>	Designate agency supplier diversity leader(s), posts contact info on agency website (note: this may be the same staff as person above).	
<input type="checkbox"/>	Completed updated Executive Management training by March 01, 2023	

### Training

<input type="checkbox"/>	Staff who work with contracts have completed DES supplier diversity training by March 1, 2023, and have attended OMWBE Toolkit Workshops.	 
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### Outreach

<input type="checkbox"/>	Collaborate on outreach with OMWBE, DES, DVA.	
<input type="checkbox"/>	Post bid opportunities to OMWBE website and to WEBS.	 
<input type="checkbox"/>	Search WEBS and OMWBE directories for certified minority-, women-, and veteran-owned businesses that can provide the goods or services the agency seeks prior to entering into new contracts, including Statewide contracts	 

<input type="checkbox"/>	Agency searches for minority, women, and veteran owned businesses within Statewide Contracts.	
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- Icons show source regulations
- refers to the Tools for Equity
- refers to the Supplier Diversity Policy

# General Outreach

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- This is the act of communicating, sharing information, and building relationships.
- General outreach includes attending outreach events such as the DES organized networking and matchmaking trade shows.
- These events allow agencies to conduct outreach with many small, diverse, and veteran-owned businesses in one setting.

# Targeted Industry Outreach

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- This outreach is a communication between an agency and an industry:
  - ✓ For a noncompetitive purchase
  - ✓ With the objective of finding and selecting a small, diverse, and/or veteran-owned business to meet an agency need

# Targeted Solicitation Outreach

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- This outreach is conducted before and/or during an agency's solicitation process when conducting a procurement.
- The purpose of this outreach is to notify small, diverse, and veteran-owned businesses of a current or upcoming business opportunity.

# Outreach Guidance

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- The suggested outreach Plan will:
  - ✓ Review plan to see if outreach is effective
  - ✓ Set an outreach baseline
  - ✓ Create success measures
  - ✓ Use post-outreach follow-up

# Your Rolodex

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- Build your Targeted Outreach “Rolodex” for this Solicitation:
  - Required Steps @ DES
    - Search WEBS (Active AND Inactive)
    - Search OMWBE
    - Search **Beyond** WEBS
      - Google
      - Ask your Sourcing Team
      - King County/Seattle (Optional)
  - Include [PTAC](#)
    - Who is PTAC?



# Send the Info

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- Conduct Targeted Outreach
  - Required Steps @ DES
    - Contact via Email [Template]
      - Provide Projected Scope and Budget
      - List Commodity Codes
      - Provide Link to WEBS (and [WEBS Customer Service](#))
      - Provide Links to other resources (PTAC, OMWBE, DES-Doing Business with the State)





# Be Available

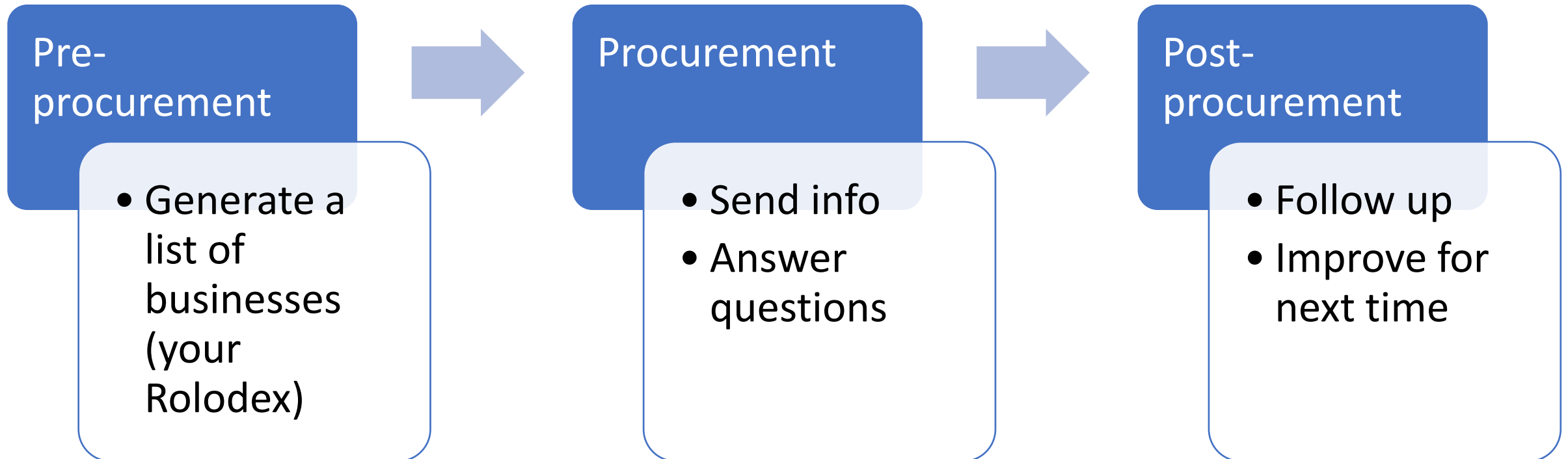
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- During the Solicitation
  - Really advertise the bid
    - Targeted Outreach is **OKAY!!!**
  - Listen to, and not “just respond” to, questions
  - Check to see who's downloaded it **before** its closed
- After the Solicitation
  - Follow up with your Rolodex, if they didn't bid, ask why



# Outreach and Procurement

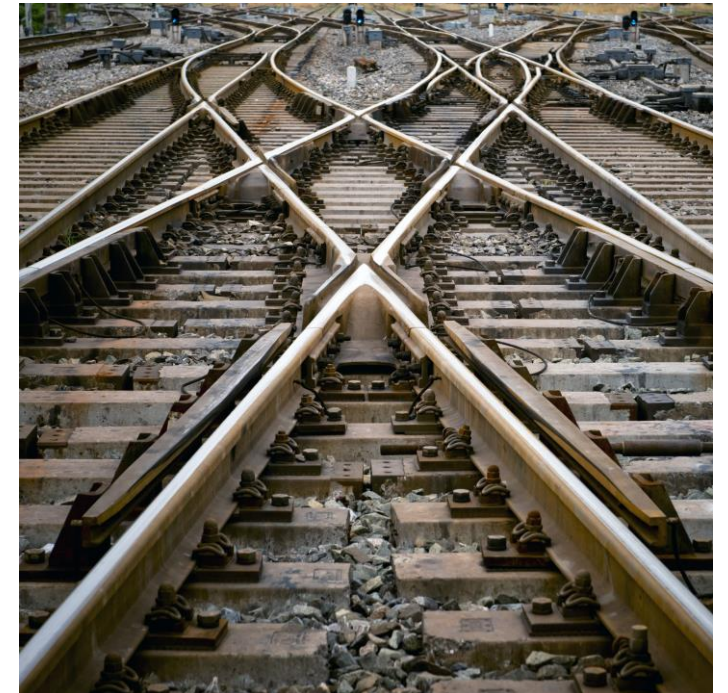
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# Tracking Outreach Efforts

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- Necessary to show compliance with EO 22-01
- Spreadsheet trackers
  - Date, subject/procurement, description, businesses contacted
- Coming Soon: Access Equity
  - Build vendor lists for distribution
  - Send out procurement notifications
  - Pull reports summarizing outreach activity











# Spreadsheets

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- Procurement Staff
  - Date and subject/procurement
  - Industry codes (NAICS or NIGP)
  - Notes
- DEI Managers and Procurement Team Managers
  - Date and name of the event
  - Other agency participants




# Procurement Specific Outreach


AutoSave <input type="checkbox"/> Off    Outreach Tracker Spreadsheet • Saved  <input type="text" value="Search"/>					
File Home Insert Page Layout Formulas Data Review View Help					
E10  :    <input type="text"/>					
	A	B	C	D	E
1	Date	Procurement ID#	Procurement Title	NAICS Codes	Notes
2	2/16/2023	2023-015	Facility Rennovation - Kennewick Office	NAICS 23618 and 236220	Kennewick location Sent by email, Used the Facility Renovation vendor list; 17 vendors
3	2/23/2023	2023-019	HVAC Service - King County Offices	NAICS 238220	Sent by email, Used the HVAC Service vendor list For Seattle Downtown, Tukwila/Seattle South
4					
5					
6					


# General Outreach

AutoSave 


Off







Outreach Tracker Spreadsheet

 Search

File

Home

Insert

Page Layout

Formulas

Data


Review


View


Help

D7

:







	A	B	C	D
1	Date	Event Name	Location	Notes
2	10/26/2022	Small Business Summit	Lynnwood	Tabled w/Sharon
3	2/3/2023	Wealth Gap CLE	Lacey	Interagency contacts; 50+ attendees
4				
5				

# Outreach Module

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- Web-based application running on the B2G platform
  - Build Vendor Lists
  - Send info about procurement opportunities – Outreach Campaigns
  - Manage info sessions – Events
- Rolling out to agencies in 2023



# Vendor Lists



## Search Parameters

BUSINESS NAME/DBA

Enter business name, DBA name, Tax ID number, or System Vendor Number; all searches are wildcard (e.g. \*text\*).

☒ Search **any** ☐ Search **beginning**

CONTACT PERSON

First name

Last name

Contact Type

Users

CITY

Seattle

STATE/PROVINCE

WA

ZIP CODE/POSTAL CODE

Search for multiple zip codes and post codes by separating with commas

DISTANCE SEARCH

Within

5 miles

of zipcode

98119

*(this new parameter is currently in beta test)*

PHONE AREA CODE

COMMODITY CODES

Click to Lookup Commodity Codes

Search Commodity Codes

Enter a search term and click **Search**. If multiple codesets are available, you can change the selected codeset in the drop down list under the search box. Click **Browse Codes** to view the code set list. When finished, click **Finish** to close this panel.

Search

NAICS: North American Industry Classification System

Browse Codes

Finished

BUSINESS DESCRIPTION

If one of more certification options are selected below, search of above location parameters will be based on certification data; otherwise vendor profile data will be used.



# Vendor Lists

Community of Prac... BDMS Training - Washingt... OMWBE Intranet | Linked

Search: Vendors

To add all vendors click **Add ALL Vendors**, or select specific vendors and click **Add Selected Vendors**.

training2.gob2g.com says

Selected vendors will be added to your vendor list. Do you want to proceed?

OK

Cancel

Articulate

CL

To resort click column title. To filter

Business Name	Location	Phone Number	Select
MOLLY GIBBS & ASSOCIATES DBA JOYFUL LIVING	OLYMPIA, WA	360-412-1519	<input checked="" type="checkbox"/>
MONARCH COACHING & TRAINING	YELM, WA	360-561-6688	<input checked="" type="checkbox"/>
NANI JACKINS PARK DBA EQUITY WORKS NORTHWEST	LACEY, WA	206-715-3688	<input checked="" type="checkbox"/>
NNAMBI GROUP, LLC DBA NNAMBI GROUP	OLYMPIA, WA	360-264-4765	<input checked="" type="checkbox"/>
NORTHWIND ANIMAL SERVICES INC DBA NORTHWIND PET CARE CENTER	OLYMPIA, WA	360-561-5920	<input type="checkbox"/>
OYATE	YELM, WA	360-239-2281	<input type="checkbox"/>
PHICORE HEALTH SERVICES, LLC	OLYMPIA, WA	253-537-8544	<input checked="" type="checkbox"/>
RAFAEL ANGEL COLON DBA VOICES INTERNACIONAL	OLYMPIA, WA	360-459-7228	<input checked="" type="checkbox"/>
REED SOLUTIONS GROUP DBA LOGAN REED COACHING	OLYMPIA, WA	360-529-1848	<input checked="" type="checkbox"/>
RUTH I JOHNSON DBA RUTH I JOHNSON CONSULTANT	CENTRALIA, WA	360-388-5669	<input type="checkbox"/>
SITE RESPONSE INC. DBA SITE RESPONSE	OLYMPIA, WA	360-338-2091	<input checked="" type="checkbox"/>
SKOOKUM ENGINEERING	OLYMPIA, WA	206-747-1566	<input type="checkbox"/>
SOUL ON FIRE CONSULTING LLC DBA SOUL ON FIRE	OLYMPIA, WA	360-481-3808	<input type="checkbox"/>
STENSTROM GROUP, INC.	OLYMPIA, WA	360-754-2122	<input type="checkbox"/>
STRESS RELIEF SOLUTIONS DBA MASSAGE BOAT	OLYMPIA, WA	360-763-9439	<input type="checkbox"/>
TECHNICALLY CORRECT WRITING SERVICES DBA TCWS	OLYMPIA, WA	509-392-9423	<input type="checkbox"/>
THE LENEKER TEAM, LLC	TUMWATER, WA	360-529-0290	<input checked="" type="checkbox"/>
TRANSFORMATIONAL MINISTRIES INC. DBA TRANSFORM TACOMA	TACOMA, WA	253-777-6762	<input type="checkbox"/>
VIANNA L. MOODY	OLYMPIA, WA	360-561-7338	<input type="checkbox"/>
VICKI M JAMES DBA PROFESSIONAL PROJECT SERVICES	OLYMPIA, WA	360-951-1873	<input type="checkbox"/>

21 - 40 of 42\* records displayed: [Previous Page](#) < Page 2 > [Next Page](#)

Search Again

Add Selected Vendors to Vendor List

Add ALL Vendors to Vendor List

Cancel/Return

# Outreach Campaign



[Main](#)
[Settings](#)
[Content](#)

### New Air Conditioning for HQ

Outreach incomplete

To attach files to your campaign, click **Attach Files** and upload all files needed (note that once the campaign is sent to recipients, attached files cannot be deleted). To add/embed images into your campaign content, click **Add Images** and follow the instructions displayed.

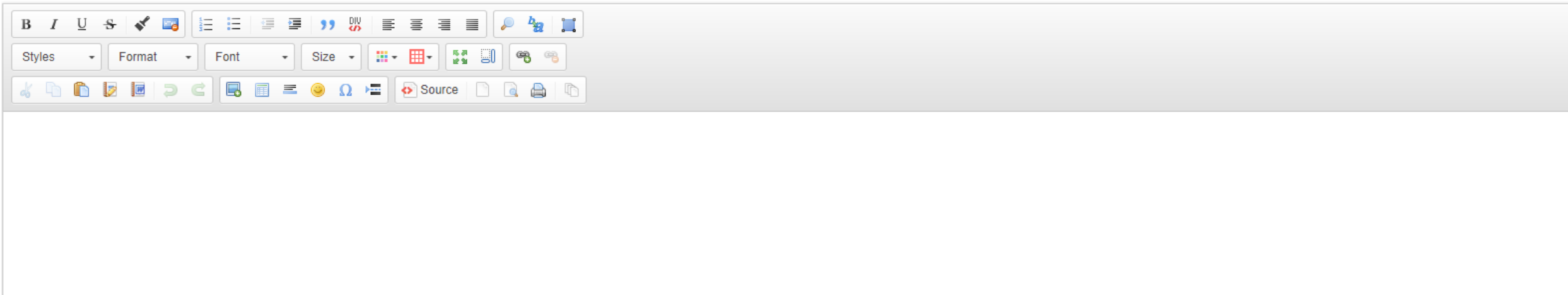
Save Draft

Save & Return

Attach Files

Add Images

Cancel



# Events

## Event Settings

EVENT TYPE \*

-- Select event type --

Education

Pre-Bid Conference

Training

Vendor Fair

EVENT START \*

EVENT END \*

ATTENDANCE LIMIT \*

USER TYPES \*

REQUIRE RSVP \*

RSVP CUT-OFF DATE \*

EVENT COORDINATOR \*

SECONDARY EVENT COORDINATOR

MOBILE CHECK-IN ACCESS \*

Pre-Bid Conference ▾

10/20/2022 at 10 : 00 ▾ am ▾ Pacific time ▾

10/20/2022 at 12 : 00 ▾ pm ▾

200

No additional RSVPs will be accepted after the limit is reached.  
An email alert will be sent to event coordinator(s) when the limit is reached.

Vendor Users and Public ▾

Event will only be viewable by the selected user types.

Yes ▾

10/18/2022

Douglas Mora ▾

Nikoel Stevens ▾

Secondary event coordinator can help edit settings and log attendance

Check in attendees using a phone/tablet friendly tool:

☐ Active

Enter a PIN between 4 and 8 numbers. Save the event to view access instructions.

☒ Not Active

## Notifications

SEND CONFIRMATION NOTICE AFTER RSVP \*

Yes ▾

SEND FIRST REMINDER NOTICE \*

Yes ▾ - 7 days before event ▾

SEND SECOND REMINDER NOTICE \*

Yes ▾ - 1 days before event ▾

SEND THIRD REMINDER NOTICE \*

Yes ▾ - Same day of event ▾

SEND THANK YOU NOTICE AFTER EVENT \*

Yes ▾

# Reports

View Report

## Outreach Campaign List

Show Description & Instructions

Start Date

End Date

1 of 1

100%

Find | Next

## Outreach Campaign List

Displaying outreach campaigns between 1/1/2021 and 6/6/2022

Total Campaigns8

Total Contacts16

Total Views79

Title	Created	Release Date	Notice Date	First Reminder	Second Reminder	Third Reminder	Owner	Public Posting	Notification Type	Settings Complete	Content Complete	Contacts Assigned	Released	Contacts	Views
OMWBE Bid Opportunity - Organizational Change Management Services	7/20/2021	7/20/2021	7/20/2021				Sarah Erdmann		Email	Yes	Yes	Yes	Yes	13	66
test campaign	6/9/2021	7/21/2021	7/21/2021				Ashley Bazurto		Email	Yes	Yes	Yes	Yes	1	8
test campaign	9/17/2021	9/17/2021	9/17/2021	9/19/2021			Ashley Bazurto		Email	Yes	Yes	Yes	Yes	1	4
grgr	9/17/2021						Ashley Bazurto		Email				Yes	0	0
OMWBE PM Test Outreach 1	3/30/2022	3/30/2022	3/30/2022				Candice Leonard		Email	Yes	Yes	Yes	Yes	1	1
Test	4/20/2022						Prabhjot Kaur		Email				Yes	0	0
testing 2	5/19/2022						Nikol Stevens		Email					0	0
testing 2	5/19/2022						Nikol Stevens		Email					0	0

Generated from the B2Gnow System

# Supplier Diversity Toolkit 2023 Workshops

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- Forecasting – April 13<sup>th</sup>
- Subcontractor Inclusion Plans – May 11<sup>th</sup>
- Statewide Contracts – July 20<sup>th</sup>
- Forecasting – August 24<sup>th</sup>
- Internal Processes – September 28<sup>th</sup>

*10:00 to 11:30*

OMWBE Supplier Diversity is continuing to find ways to make it easier for state agencies and educational institutions to track and report spending with certified minority- and women-owned businesses.

# Contact Us:

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