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To: Mayor Wheeler and Commissioners Rubio, Ryan, Hardesty and Mapps

Cc: Tom Rinehart, Chief Administrative Officer; Bureau Directors; Fair Contracting Forum; Community Equity and Inclusion Committee

From: Michelle R. Kirby, CPA, Chief Financial Officer
Bureau of Revenue & Financial Services Director

RE: Social Equity in Contracting Council Work Session

Mayor Wheeler and Commissioners Rubio, Ryan, Hardesty and Mapps:

Thank you for your time and engagement in the recent work session on the City's Social Equity in Contracting programs and policies. OMF staff walked away with a clearer understanding of the Council's priorities and perspectives, providing us important direction as the City expands and improves these programs and policies. This memo addresses a few important topics that came up during the work session or that we ran out of time to discuss during the session.

Disaggregated Data

We understand that in future briefings and work sessions, Council would like to see disaggregated data about racial minority- and women-owned contractor utilization. You will find [disaggregated outcome reporting](#) attached to this memo. That information, along with a detailed listing of [contractor demographics and payments](#), is also available on the publicly accessible [webpage](#) for the work session.

Plan for Moving Forward

The following summarizes the process by which OMF proposes to move forward towards improving the City's Social Equity in Contracting programs. Your feedback and input are critical, and we will follow up with each of your offices to ensure we understand each of your perspectives and reactions.

- 1. Overall Proposal** – Develop and implement a holistic approach to the City's Social Equity in Contracting policies and programs. This will require us to refine existing programs; expand offerings where targeted needs exist; define roles, expectations and accountability across the organization; and dedicate resources to achieve goals.



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2. **Major Next Steps for this Project** – Discussion and content shared in the work session detailed a great number of ways to improve the City’s Social Equity in Contracting programs. Our first step is to develop an agreement on the outcomes of the project to improve the Social Equity in Contracting programs. We will then build a workplan that includes short- and long-term deliverables. These deliverables will span process improvement, programmatic solutions and equity outcomes. Second, we need to reach consensus on long-term goals to evaluate existing programs and explore options for improvement, expansion and/or consolidation of the City’s overall suite of programs that align with Council’s desired outcomes.
3. **Stakeholder Engagement** – We will take these major next steps collaboratively and in coordinated partnership with numerous internal and external partners and stakeholders. Stakeholders include elected officials and their staff; bureau directors, project managers, contracting liaisons and subject matter experts; the Offices of the City Attorney, Equity and Human Rights, and Government Relations; Prosper Portland; the Fair Contracting Forum; the Community Equity & Inclusion Committee; the Contractor Prequalification Board; the Construction Careers Pathways Project and other jurisdictional partners; and other contractor and workforce diversity affinity groups. Please let us know if there are other stakeholders you want us to engage.
4. **Project Management and Status Reporting** – Tom Rinehart has assigned Shoshanah Oppenheim, Strategic Projects & Opportunities Team manager, to lead this project. In collaboration with our project team, she will ensure the many facets of this project are successfully managed and executed. Council and the public can also expect regular updates on the status of these efforts along with those relating to the September 2020 audit.
5. **Future Policy and Program Recommendations** – Ultimately, this process will produce a set of researched and stakeholder-vetted recommendations and budget requests regarding policy enhancement and program expansion. After we have developed the workplan, we will deliver a draft of proposed recommendations to Council for consideration.

Other Updates

There were two other updates we wanted to brief City Council on during the work session that we ultimately ran out of time to cover.

1. **Program Improvements Underway** – In addition to the project described above, the Procurement Services Division is working on four efforts to improve Social Equity in Contracting outcomes:
 - a. **Piloting targeted project-specific outreach** to subcontractors using existing technology to more effectively reach diverse firms.
 - b. **Revising proposal evaluation processes** to promote more equitable outcomes.
 - c. **Expanding data reporting on public-facing dashboards** to better highlight outcomes at the bureau level.
 - d. **Strengthening engagement and collaboration with community advisors and bureau partners** by bringing bureaus back to Fair Contracting Forum and engaging in intentional dialogue together, focusing on program improvement.

2. Construction Careers Pathway Project (C2P2) – C2P2 includes stakeholders from public agencies, industry, apprenticeship programs, unions and community-based organizations working with Metro to provide reliable careers to women and people of color in the construction trades. As part of the Public Owners Workgroup, the City worked with 15 other local public agencies to create a shared regional policy framework to address the challenges facing people of color and women in the construction trades. The City’s Social Equity in Contracting programs already put us in alignment with most of the C2P2 policy strategies. The ongoing efforts to implement practices in alignment with the remaining C2P2 policy strategies include:

- a. Participating in the development of a regional workforce agreement.
- b. Implementing programs and contractual requirements to eliminate harassment and discrimination and to promote retention, safety and respect on the City’s capital improvement worksites.
- c. Working with the new Construction Careers Regional Collaborative Committee to help create sustainable workforce opportunities for women and people of color in the Greater Portland region.

Thank you again for your partnership – there is much work to do. We are eager to reengage with you and all our partners to guide the City’s contracting and procurement programs to a more equitable future.