

Enhancing MWSBE Participation in Charlotte's Capital Projects

A Report Presented By

Charlotte Business INClusion & General Services
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AGENDA

- City Council Strategic Priorities
- MWSBE CIP Master Utilization Plan Overview
- Progress To Date
- Intro to MWSBE CIP Master Utilization Plan
- Community Collaboration
- Objectives, Actions, & Measures
- Question & Answers

Linking City Council Strategic Priorities to CIP MWSBE Master Utilization Plan

City Council's Strategic Priorities:

- Workforce & Business Development

City Council's Strategic Initiatives:

- Small, Minority, and Women Business Development

Plan Alignment:

- The CIP MWSBE Master Utilization Plan directly supports these priorities by leveraging the work on Capital Investment Projects to drive inclusive procurement practices and create economic opportunities for diverse businesses.



MWSBE CIP Master Utilization Plan Overview

Strategic Focus: Streamline procurement, expand outreach, and provide targeted support to enhance MWSBE participation in City projects.

Commitment to Inclusion: The City prioritizes equitable contracting, economic growth, and creating opportunities for diverse businesses to thrive.

Collaborative Development:

- Partnership between Charlotte Business INClusion and General Services
- Feedback incorporated from City Council and Community Stakeholders.

Pilot Program:

- Targeted solicitations for MWSBEs.
- Transitioning subcontractors to prime roles.
- Promoted equity and compliance in procurement.

Ongoing Goals: Monitor progress, adjust strategies, and empower MWSBEs to foster growth and inclusivity in Charlotte's economy.

PROGRESS TO DATE

June Committee Meeting

- Presented the Road to Growth Pilot Framework
- Introduced General CIP MWSBE Master Utilization Plan concept

Summer Break

- Initiated pilot framework including 10 targeted informal solicitations to the MWSBE community
- Held CBI outreach event and webinar

September

- Held small group meeting with Council Committee Members
- Engaged with minority trade associations and the CBIAC

October Committee Meeting

- Reviewed CBI & Procurement policies and procedures
- Reviewed the Road to Growth Pilot Framework preliminary results

November Committee Meeting

- Opportunities & Actions
- Early Engagement Workshop

January Committee Meeting

- Addressed Committee's Q&A
- Finalized MWSBE CIP Master Utilization Plan components

Introduction to the CIP MWSBE Master Utilization Plan

A guiding document that identifies strategies and a pathway to achieve City Council's priority to utilize and grow MWSBEs through the Capital Investment Program

The CIP MWSBE Master Utilization Plan contains 3 major components:

Objectives: Defining clear goals

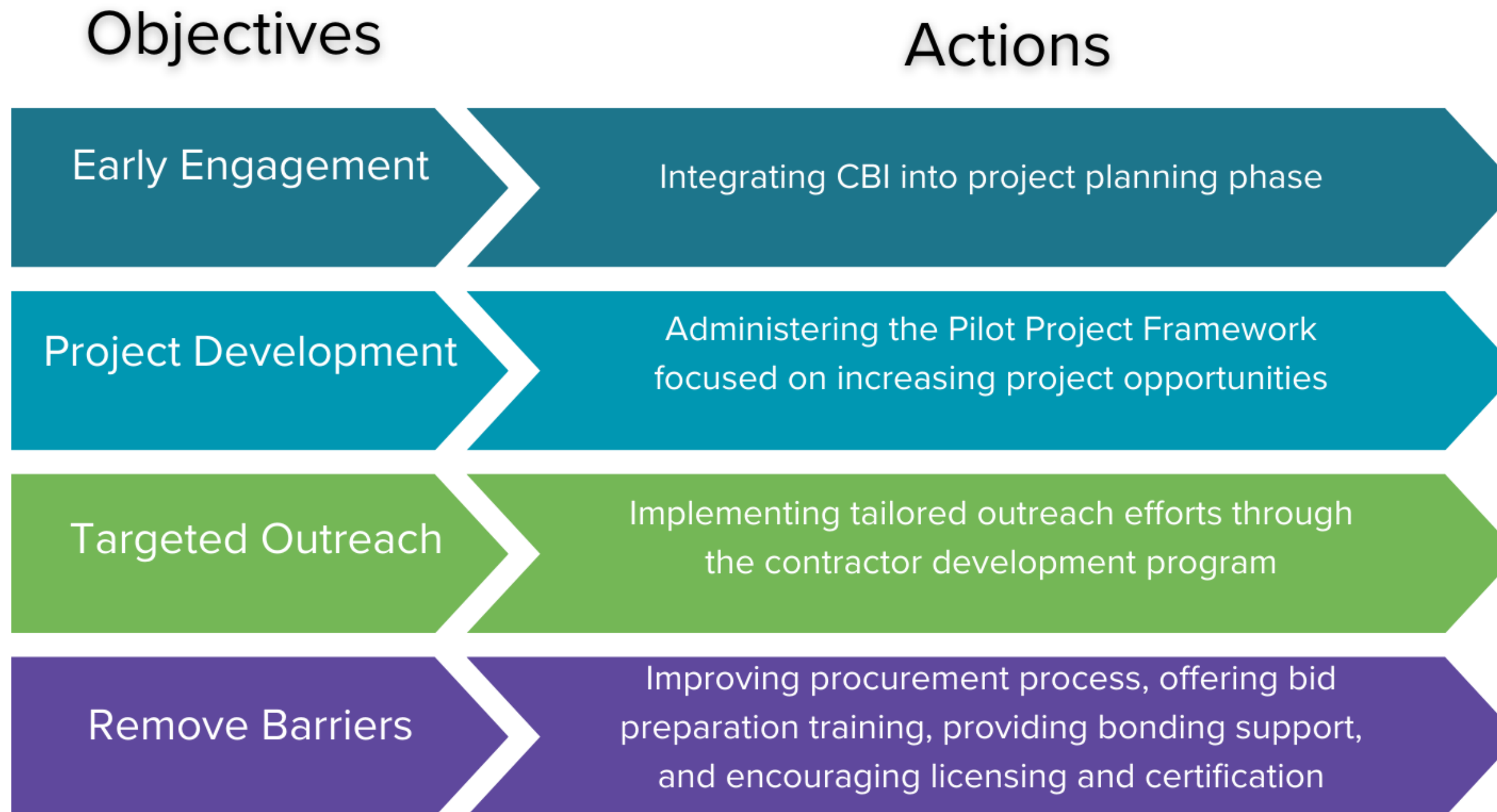
Actions: Implementation strategies

Measures: Tracking success

COMMUNITY COLLABORATION



OBJECTIVES



EARLY ENGAGEMENT

ACTION

- Integrate CBI early in the project planning process to maximize MWSBE inclusion and goal alignment.
- Assess and identify opportunities for scalable scopes of work across diverse delivery methods for city projects.
- Proactively and regularly engage the contractor community through targeted training programs and resources to equip contractors with the necessary tools to navigate the procurement process.
- Improve goal setting by developing realistic, data-driven participation goals tailored to each project.
- Create transparency and foster trust with the contractor community through collaboration and shared diversity objectives.
- Incorporate CBI in the budget planning process by updating the annual Procurement Forecast Form to include business inclusion efforts for each project.

PROJECT DEVELOPMENT

ACTION

- Expand bid opportunities for MWSBEs by unbundling larger projects into smaller components, thereby increasing the availability of smaller contracts within the target market.
- Identify and establish projects on a smaller scale, that enable subcontractors to assume prime contractor roles. These initiatives will provide essential experience and facilitate the development of subcontractors, thereby enhancing their qualifications and competitiveness for future prime contracting opportunities
- Build contractor and supplier capacity by partnering with the Contractor Development Program administrator to deliver training programs that improve MWSBE readiness (bonding, licensing, bidding, etc.).
- Deploy the project delivery method that most benefits the project and maximizes MWSBE opportunity.
- Develop tools to monitor and evaluate MWSBE participation data, to support the development of future initiatives.

TARGETED OUTREACH

ACTION

- Expand outreach efforts to identify and certify additional MWSBE vendors eligible for city contracts, thereby increasing the diversity and inclusivity of the vendor pool for city work.
- Develop and implement an informal solicitation process that actively prioritizes soliciting to MWSBEs, fostering competitive bidding among peers and promoting equity.
- Facilitate opportunities for growth and experience by directly notifying City-certified prime contractors and potential subcontractors of projects within their specific trade specialties.
- Implement targeted outreach programs to educate and prepare MWSBEs.
- Partner with local organizations to extend outreach and attract diverse contractors and suppliers.
- Host engagement events (examples: networking socials and pre-bid meetings) centered around the goal of connecting MWSBEs to project and where applicable, prime contractors.
- Increase training offerings for interpreting solicitation documents to assist contractors' and suppliers' understanding of complex requirements that may discourage participation.

REMOVE BARRIERS

ACTION

- Partner with contractor development programs specializing in supporting MWSBEs to facilitate access to essential resources, such as business coaching, networking opportunities, financial assistance, and industry-specific tools. Additionally, coordinate with the program to conduct targeted outreach to ensure MWSBEs are informed of and encouraged to participate in these opportunities.
- Increase contractor and supplier awareness of accessible communication channels for MWSBEs throughout the procurement process.
- When applicable, offer bid preparation training, bonding support, and assistance with licensing and certifications through business partner relationships.
- Consider partnerships with financial institutions to provide access to low-cost loans and bonding and/or administer a QuickPay program.
- When applicable, provide one-on-one technical assistance support through business partner relationships to help MWSBEs meet project requirements.

MEASURES

This section defines how program impacts will be tracked and evaluated. Clear measures ensure organizational efforts align with City of Charlotte goals and highlight areas for improvement and provides a framework for accountability and transparency.

Percent of Contract Goals Met



Tracks the percentage of contracts that successfully met or exceeded their assigned MWSBE goals.

Total Amount of MWSBE Contractual Spend



Tracks the total dollar amount awarded to MWSBEs across all city contracts.

Number of MWSBEs Awarded Prime Contracts



Tracks the number of certified MWSBEs that successfully secure prime contracts with the City of Charlotte, highlighting growth in their capacity and ability to lead major projects independently.



New Businesses Certified

Tracks the total number of businesses successfully certified as MWSBEs within the fiscal year.

MEASURES CONT'

MWSBE Utilization



Tracks the percentage of MWSBE participation on CIP projects measuring the proportion of total project spending directed to certified MWSBE firms.

Number of Outreach and Engagement Events



Measures the total number of events hosted or participated in by CBI to engage MWSBEs and inform them about city contract opportunities.

Number of MWSBEs Receiving Technical Assistance or Training



Measures the number of certified MWSBEs that participated in capacity-building programs, workshops, or mentorship opportunities.



QUESTIONS

