



CBI Policy Proposed Recommendations

January 3, 2023

Meeting Agenda

- ☐ 2022 Disparity Study Recommendations
- ☐ Charlotte Business INClusion Advisory Committee Recommendations
- ☐ Timeline to Implementing Revised CBI Policy
- ☐ Questions & Answers

2022 Disparity Study Recommendations

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Task	Completion Date
• Adopt a Mentor-Protégé Program	July 2023
• Update CBI Program administration policies and procedures	July 2023
• Implement a bonding program	July 2023
• Implement a technical assistance program	July 2023
• Provide training classes for CBI certified firms (project estimating and bid paperwork)	July 2023

2022 Disparity Study Recommendations

Task	Completion Date
• Improve long-term procurement forecast (EarlyBird)	Ongoing
• Implement a capital access program	Ongoing
• Replace NIGP codes with NAICS codes for goal setting and reporting	Ongoing
• Credit M/WBE participation only for work in firm's NIGP codes	Ongoing
• Create strategies to assist mature or experienced M/W/SBEs	Ongoing

2022 Disparity Study Recommendations

Task	Status
• Count M/WBEs' self-performance towards goals	Pending Legal Review
• Extend the Quick Pay Program beyond a GFE category	Pending Legal Review

CHARLOTTE BUSINESS INCLUSION ADVISORY COMMITTEE RECOMMENDATIONS

CBI Advisory Committee Recommendations

Recommendations – Short Term	Staff Supports?
<ul style="list-style-type: none">• Require Bidders to submit GFE paperwork at the same time as bid.	Yes
<ul style="list-style-type: none">• Add new GFE category for LinkUpCLT (City’s Mentor-Protégé Program) and establish 20 GFE points for category	Yes
<ul style="list-style-type: none">• Add new GFE category for any bidder/proposer who hosts outreach events for any solicitation and establish 15 GFE points for category	Yes

CBI Advisory Committee Recommendations

Recommendations – Short Term	Staff Supports?
<ul style="list-style-type: none">• Reference CBI policy in all solicitation documents, including when a solicitation does not have an established CBI goal	Yes
<ul style="list-style-type: none">• Establish evaluation criteria for M/WBE participation on service contracts	Yes
<ul style="list-style-type: none">• Strengthen project monitoring for M/WBE goals compliance	Yes
<ul style="list-style-type: none">• Split the CBI Policy into a Policy adopted by City Council and an operations Manual approved by the City Manager.	Yes

CBI Advisory Committee Recommendations

Recommendations – Long Term	Staff Supports?
<ul style="list-style-type: none">• Expand the use of technology for M/WBE compliance and collecting data (vs. the use of forms)	Yes
<ul style="list-style-type: none">• Explore measures to expand goal setting beyond construction	Yes
<ul style="list-style-type: none">• Facilitate more M/WBE firms obtaining contracts by breaking down scopes of work during construction design phase	Yes

Timeline to Implementing Revised CBI Policy

DATE	ACTION
January through March	<ul style="list-style-type: none">• Seek guidance from Jobs & Economic Development Committee on recommendations• Present all recommendations to City Council and seek guidance• Complete revisions to the CBI Policy• Craft communication and marketing plan concerning implementation
April through July	<ul style="list-style-type: none">• Present revised CBI Policy and Manual to City Council• Seek approval of revised CBI Policy from City Council• Obtain approval of CBI Manual from City Manager• Implement a communication and marketing plan• Implement revised CBI Policy and Manual

Questions

