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Charlotte Business INClusion  
Policy Revisions

April 3, 2023

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## OBJECTIVES

- DISCUSS NEW PHILOSOPHY FOR CBI PROGRAM
- OUTLINE THE CBI POLICY AND CBI MANUAL
- HIGHLIGHT NEW “SELF-PERFORMANCE” OPPORTUNITY
- PRIORITIZE MBE GOALS AND WBE GOALS GOING FORWARD
- PROVIDE NEXT STEPS TO COUNCIL COMMITTEE

 CITY of CHARLOTTE

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## NEW PHILOSOPHY FOR CBI PROGRAM

- Current CBI Policy only focused on subcontracting opportunities for MWSBEs.
- In the revised policy, there is a strategy shift which aligns with new focus on helping more MWSBEs subcontractors grow into prime contractors
- Revised CBI Policy will focus on contract opportunities regardless of dollar amount

## CBI POLICY AND CBI MANUAL

- Current CBI Policy includes policy and operational components. Policies typically do not contain administrative procedures
- Revised CBI Policy will address policy and will be adopted by City Council
- Revised CBI Manual will address operational components and signed by City Manager

## REVISED CBI POLICY OVERVIEW

- Is ten (10) pages in length
- Defines the scope of the CBI Policy
- Outlines the CBI Program roles and responsibilities for the City Manager, Department Heads, Business Inclusion Officer, and City Attorney's Office
- References the CBI Administrative Procedure Manual
- Outlines the City's enabling legislation and process for adopting the 2022 Disparity Study

## CBI MANUAL OVERVIEW

- Is thirty-four (34) pages in length
- Provides operational procedures and allows for faster and consistent response times to stakeholders and emerging trends
- Requires staff to operate within the authority granted by City Council through the CBI Policy. If additional authority is needed, then staff will seek authority from City Council beforehand
- Would be signed by the City Manager as citywide policy

## **“SELF-PERFORMANCE” OPPORTUNITY**

### **Previous CBI Policy**

- Did not allow MWSBEs to count any self-performance towards a contract goal
- Required all prime contractors to seek MWSBEs as subcontractors
- Inhibited opportunities for MWSBEs to become prime contractors

### **Revised CBI Policy and CBI Manual**

- Allows MWSBEs to use their own workforces towards a contract goal
- Creates opportunities for MWSBEs to become prime contractors
- Will be offered on Solicitations starting on July 1, 2023

## **PRIORITIZE GOALS MBE AND WBE GOALS GOING FORWARD**

### **North Carolina General Statutes § 143-128.2**

- Entitled “Minority business participation goals”
- Outlined statewide standards for MWBE participation on contracts



## PRIORITIZE GOALS MBE AND WBE GOALS GOING FORWARD

### Charlotte City Charlotte Section 8.88(b)

- *The small business enterprise program authorized by this section is intended to supplement and not replace the requirements of G.S. 143-128.2, 143-131, or 143-135.5. Any goals or efforts established to achieve minority and women business participation consistent with said provisions of law shall take precedence over goals for small business enterprise participation established under the program authorized by this section. A small business enterprise program established pursuant to this section shall be deemed consistent with the public policy of the State of North Carolina to promote and utilize small and underutilized business enterprises as set forth in G.S. 143-128.2, 143-128.3, and 143-135.5.*

## PRIORITIZE MBE AND WBE GOALS GOING FORWARD

- City contracts will only set MBE Goals and WBE Goals
- We are NOT eliminating the SBE Program. City contracts will set SBE Goals when there are no available MBEs or WBEs
  - Available MBEs or WBEs means three (3) or more registered in the CBI database and in the same scope of work
  - Correct: three MBE architects or three WBE security firms
  - Incorrect: one MBE landscaper, one WBE hauler, one MBE supplier

## NEXT STEPS

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- Council Committee votes on staff's recommendations today
- If a majority approves, then it will be placed on the City Council agenda for April 10, 2023, for public hearing on the new CBI Policy
- If a majority approves the adoption of the new CBI Policy, then the CBI Policy and CBI Manual will become effective July 1, 2023

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## QUESTIONS & ANSWERS

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QUESTIONS/COMMENTS?



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