

2023

MWBE Minority and Women Owned
Business Enterprise

ANNUAL REPORT



Meadow Park Golf Course contracted with an MWBE electrician in 2023 to achieve 100% utilization on security upgrades



2023 Minority and Women Owned Business Enterprise (MWBE) Annual Report

Abstract:

Policy No. 200.023 was adopted in 2016. Per this policy, Metro Parks Tacoma shall strive to attain an overall MWBE participation goal of 8% of public work construction dollars on projects exceeding \$20,000.

Author:

Abigail Vizcarra Perez
Equity Program Administrator – Procurement & Contracts

In Collaboration with:

Marci Kriebel
Capital Financing & Contracts Supervisor

Jay Kim
Data Analysis Coordinator

Amy Johnson
Business Intelligence Supervisor

Jenny Sims
Contract Compliance Administrative Specialist

Audrey Widner
Communications Coordinator

Executive Sponsor:

Debbie Russell, Director,
Business Administration and Planning



Metropolitan Park District of Tacoma
4702 South 19th Street
Tacoma, Washington 98405-1175

SMALL BUSINESS GOVERNMENT CONTRACTING

Meet the Agencies Panel:

- Tad Carlson, City of Tacoma
- MAJ Andre Gatlin, JBLM
- Abigail Vizcarra Perez, Metro Parks Tacoma
- Andrew Robson, Pierce Transit

Moderator: Maryam Lynch-Tate, Washington APEX Accelerator



Pierce County Office of Economic Development
Thriving Together Resource Event

Metropolitan Park District of Tacoma

Established in 1907, by a vote of the people as a special purpose district responsible for parks and recreation programs. The District's jurisdiction includes the City of Tacoma, the areas of Browns Point and Dash Point, and Northwest Trek Wildlife Park in Eatonville. The District is governed by a five member Board of Park Commissioners who are elected by voters in Tacoma and parts of unincorporated Browns Point and Dash Point to serve six-year terms. The Executive Director is appointed by the Park Board as the agency's chief executive officer who in turn appoints the organization's Directors and Officers.

Table of Contents

Executive Summary	2
Introduction & Policy Review	4
2023 Data Review	6
2023 Program Review	9
Review and Adjust Spending Habits	12
2024 Work Plan	18
Appendix	21

Executive Summary

Policy 200.023 sets a goal of 8% of the value of public works contracts over \$20,000 awarded to certified Minority and Women Owned Business Enterprise (MWBE) in a calendar year. Since this policy was adopted in 2016, MWBE participation is reported annually. Beginning with the 2020-2021 MWBE report, these reports include additional information including a program review, narrative analysis, and workplan recommendations.

The 2023 report will focus on collaboration among internal and external stakeholders and preparation for future policy updates, in addition to an overview of annual MWBE participation data.

In 2023 MWBE certified firms were awarded \$310,562, representing 5% of all expenditures on public works projects over \$20,000.

We did not reach our utilization goal, but we were able to grow our program in significant ways.

The slower pace for capital projects in 2023 presented opportunities to engage in different types of outreach. Namely, building trust among diverse stakeholders in the program. This involved participating in collaborative outreach events and training staff interested in MWBE

Factors Affecting Utilization

1. Number and frequency of bid opportunities
2. Capital Improvement Plan and budget
3. Type of work
4. Supply chain and workforce development challenges
5. State law governing public works contracting

utilization beyond that governed by our policy. It was also possible to review our spending habits with our new tracking tools. 2023 was a benchmark year because Washington State Department of Enterprise Services (DES) began implementation of their Supplier Diversity Policy.

The 2023 program continued and built upon recommendations from the 2022 report.

2023 workplan accomplishments

- North American Industry Classification System (NAICS) codes are now standard deliverables in the Architect & Engineering Agreements
- increased touchpoints with contractors
- established relationships with Department of Enterprise Services for Supplier Diversity Policy implementation
- requested enhancements to group purchasing and statewide contracting tools
- provided technical support to all interested firms
- updated our internal Small Works and Architects & Engineers Rosters
- collaborative training
- “Inreach” to staff interested in utilizing MWBE participation for public works contracts below the \$20k threshold

All of the above open doors for inclusive procurement as well as contract equity.

We continued to track data and analyze spending habits by expanding the MWBE dashboard to show outreach as well as utilization. In addition to our agency dashboard, we co-facilitated data collection efforts for a county-wide dashboard to increase accountability to the Joint Municipal Action Committee (JMAC) through Tacoma Anchor Network (TAN). Finally, our continued engagement with the DES as a thought partner will set us up for success when the time comes to review and update our MWBE policy to align with statewide efforts.



Point Defiance Boathouse contracted with an MWBE certified firm to meet electrical needs at 100% utilization on the contract

Recommendations for the 2024 work plan include continuation of

- targeted solicitations for every bid
- networking opportunities for contractors, staff and contract equity advocate
- increasing staff knowledge through training, review of spending habits, and technical support for every contract
- data tracking and reporting
- aligning with regional efforts outlined in the 2023 report

To build on these efforts, recommendations for 2024 workplan include

- expanding the MWBE dashboard
- testing feasibility of increasing utilization in discretionary spending
- additional formal staff training
- developing a process to track spending beyond public works
- keeping pace with regional trends alongside the Department of Enterprise Services
- participating as a stakeholder in relevant committee meetings for legislative updates
- pursuing policy updates for the MWBE Policy and related policies such as the Small Works Roster or Apprentice Utilization Policy



An MWBE certified small business was hired using discretionary funds at 100% utilization for electrical work at Meadow Park Golf Course.

Introduction

This report covers the percentage of utilization from all public works contracts over \$20,000 in 2023. Narrative analysis of the data and an overview of the program updates we implemented in 2023 accompany the data. The final section of the report details recommendations for the 2024 work plan.

Policy Review

According to Policy 200.023, “[Metro Parks Tacoma] shall strive to attain an overall Minority and Women Owned Business Enterprise (MWBE) participation goal of 8% of public work construction dollars awarded for projects exceeding \$20,000 including subcontractors. Following an appropriate measurement and tracking period, but not longer than 12 months following the adaption of this policy (and every calendar year thereafter), staff will make a report to the Board of Park Commissioners regarding actual MWBE utilization for public work projects.”

This report serves to fulfill this reporting requirement.

[You can access previous reports here >](#)



The 2023 report focuses on collaboration among internal and external stakeholders and preparation for future policy updates in addition to an overview of annual MWBE participation data.

The 2022 Annual MWBE Report included recommendations for the 2023 workplan that were a continuation of the work in 2021.

Contract Equity Program Expansion Opportunities by Contract Type

Public Works

- Discretionary Spending (<\$20,000)
- Related materials & supplies
- Related Services (professional and personal)

Services

- Professional (certified or licensed professionals)
- Personal (specialists)
- Purchased (routine, blanket contracts)

In 2023 we began using new contract development tools. These make it possible to track utilization by contract type.

Policy Updates

Metro Parks Tacoma's Minority and Women Owned Business Enterprise (MWBE) policy is scheduled for review in 2025. We will investigate policy updates that could potentially expand the MWBE program using data and interviews with internal and external stakeholders to guide the process.

Such updates could include tracking different types of contracts, adjusting goals or thresholds, and/or adjusting language to reflect industry standards. We will also consider regional and statewide efforts for the sake of consistency and accountability.

2023 Data Review

2023 Utilization

2023 utilization of OMWBE certified firms is \$310,562, which is 5% of \$6,275,446, the total contract award for all public works contracts greater than \$20,000.

This is a significant decrease compared to last year. We know many factors can cause our percentage to rise or fall dramatically- as it has done over the last two years. This report explains the work that has been done to improve utilization, expand the program and identify additional key performance indicators to measure the health of the program.

Over the last 5 years we see an average of 8.9% MWBE utilization. We can take this average into account as we consider policy updates and establish goal-setting methods. The policy provides us the option of revising the goal following the analysis of the annual report. We recommend establishing goal-setting methods that account for the fluctuations in capital expenditure. Our

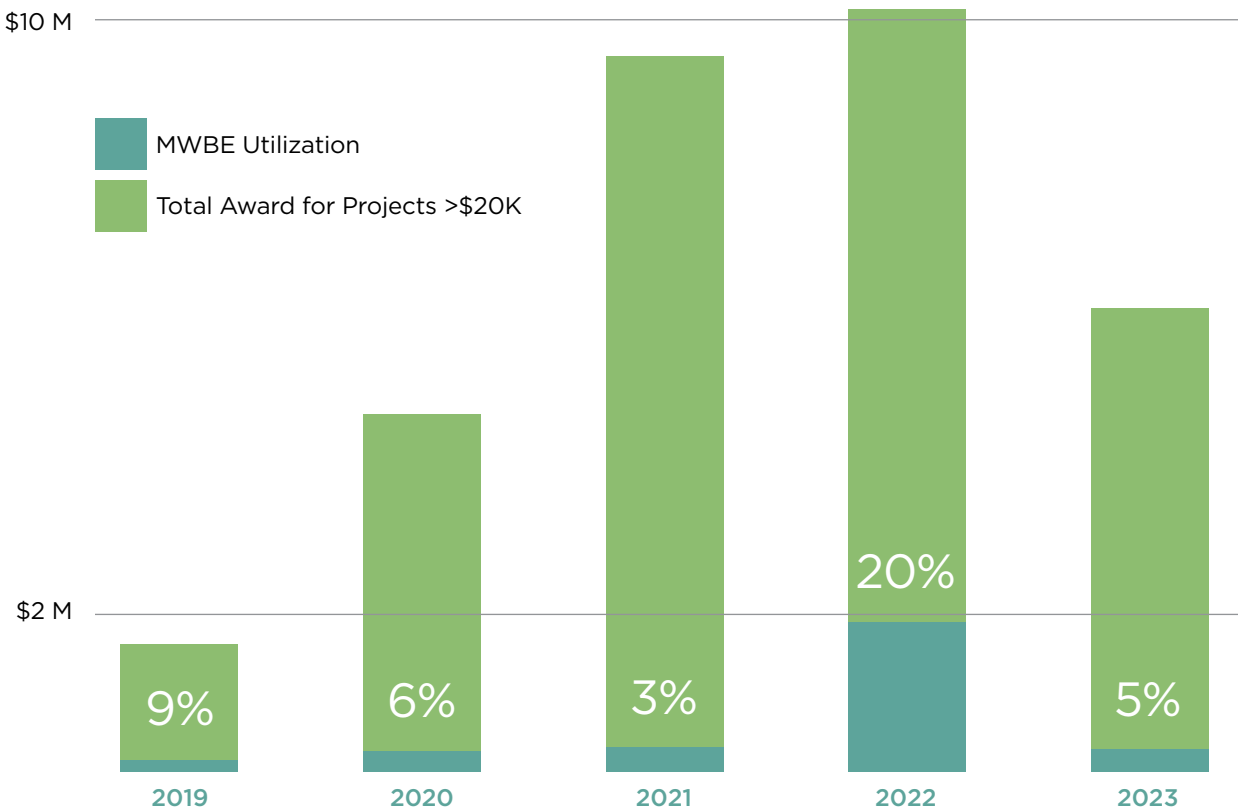
new data collection strategies and the improved reporting mechanisms will help us select key performance indicators and appropriate goals. [See utilization data for 2023 in the Appendix Exhibit 1.](#)

About the Data

We interpret our policy to **include all certification types issued by WA OMWBE**. Including all certified firms in our outreach and utilization strategies allows us to capture data and show support for small businesses regardless of race or gender. Our percentages include Small Business Enterprises (SBE) in addition to those certified as Minority or Women Owned Business Enterprises (MWBE) because we broadened our interpretation of the “MWBE policy” to include all firms certified by Washington State office of Minority and Women Business Enterprise (WA OMWBE).

We know the **MWBE Annual Report is just a snapshot** in time. For example, we added the contract for Melanie’s Park to our data set based on the Notice to Proceed date.

Percentage of MWBE Utilization vs. Total Award Over the Last 5 Years



This means that the outreach statistics were part of the 2022 report, but the contract award amount was part of the 2023 utilization calculations. If we hadn't included this contract in our data set for 2023, utilization would have been at 11% instead of 5% for 2023 and 14% instead of 20% for 2022. This is why we need the MWBE Dashboard to show both utilization and outreach. The MWBE Dashboard is updated regularly to show progress toward our goal.

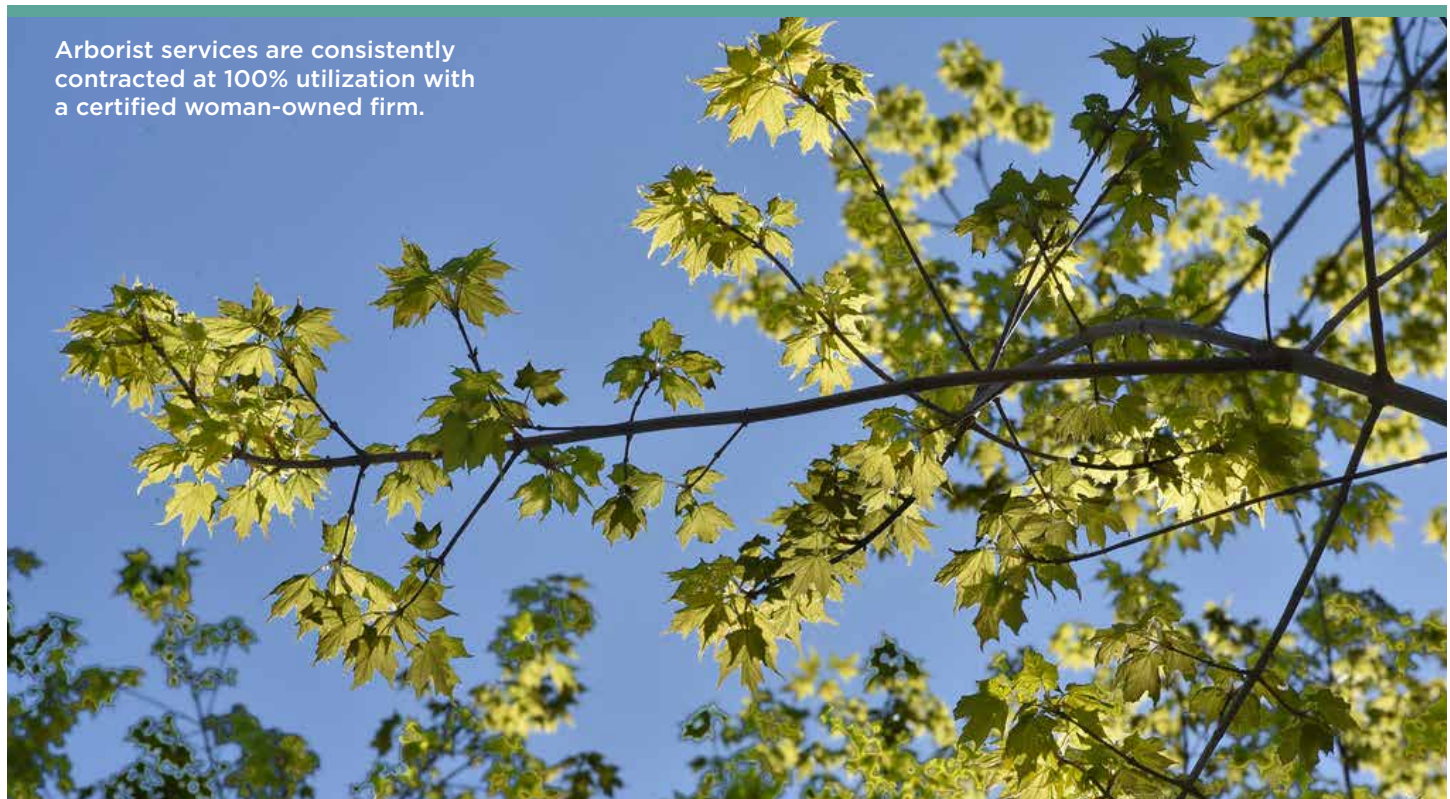
Utilization is calculated and applied based on the Notice to Proceed date and awarded amount. We apply change order dollar amounts to the year in which the change order was approved. This is our preferred tracking method. Some years we award more contracts; our data fluctuates accordingly. In years like 2023, most of the spending was tracked in previous years — only change orders for large contracts were counted after the year in which Notice to Proceed was issued.

Our policy is primarily concerned with the percentage of utilization on a specific set of contracts. Now that our tracking methods have improved, **we will discover additional key performance indicators** to help us prioritize specific actions.

Certifications Issued by WA OMWBE*

Federal	State
<ul style="list-style-type: none"> • DBE • ACDBE • SBE 	<ul style="list-style-type: none"> • MBE • MWBE • WBE • CBE • SEDBE • PWSBE (new in 2024)

** Our program is able to recognize firms willing to self-attest, but we do not include these firms in our data set yet.*



Arborist services are consistently contracted at 100% utilization with a certified woman-owned firm.

MWBE Program by the Numbers

2023

2022 for comparison

\$310,562

Total paid to
MWBE certified firms

\$2,024,479

5%

MWBE utilization
contracts >\$20K

20%

11

Contracts
>\$20K in progress

8

10

Contracts
>\$20K awarded

14

253

Targeted solicitation
emails sent

855

7

Bid
opportunities

18

145

WA OMWBE notified of
requests for bids

358

5

MWBE certified
firms utilized

12

4 out of 21

Contracts with
MWBE utilization

10 out of 22

Discretionary Spending (New in 2023)

2022 was the first year we included contracts under \$20K in the MWBE Annual Report. Our findings from this led to the work plan recommendation to test the feasibility of increasing MWBE utilization by including discretionary spending. The data below reflects these new tracking measures initiated in 2023. Refer to page 11 and 14 of this report to learn more.

4 out of 37

Contracts with
MWBE utilization

3 out of 20

\$334,058

Discretionary spending
total

\$198,397

\$35,577

Discretionary funds
paid to MWBE certified firms

\$36,002

11%

MWBE
Utilization

18%

2023 Program Review

Outreach Strategies

We have continued Bid Outreach, Pre-Bid Meetings, Pre-Construction Meetings, and MWBE Verification Interviews per the recommendations in the prior report.

New efforts implemented in 2023 built on the established outreach strategy in the following ways:

- **Incorporating North American Industry Classification System (NAICS) codes** in the Architect and Engineering Agreements (A&E). Staff worked on standard verbiage in all A&E agreements so that A&E firms have been providing us with the NAICS codes that are accurate, and we are able to target capable firms based on the A&E expertise.
- **Increasing touchpoints** with contractors during the verification phase has increased our ability to understand payout times and challenges. We are updating our tracking tools so that we can track utilization for each change order and continue to collaborate with the contractors to get our utilization data updated throughout the life of a project.
- **Building relationships** with Department of Enterprise Services (DES) contract managers who can help us dig in and understand how to support self-certifying firms to get their WA OMWBE certifications.
- **Collaborating as an end-user to improve systems for Group Purchasing.** When working with big firms, Group Purchasing Organizations (such as King County Director's Association (KCDA), stakeholders forums, etc., we remind them that we are one of a growing **number of their customers** working to increase MWBE utilization.

- **Providing Technical support.** Work closely with the firms to avoid paperwork mishaps. For example, our contract compliance team depends on the WA Department of Revenue to verify documents for every project. Their staff might need four months to review a project after work is completed. Interviews with subcontractors about their experiences on specific projects help us understand the barriers to prompt pay out that are beyond our control, and advocate, or look for solutions.
- **Updating Rosters.** Staff discovered room for improvement in both the Small Works Roster and Architects & Engineers Roster. We studied the rosters and the need for updated categories and contract information for WA OMWBEC firms. We recommend adjusting thresholds to align with updated laws and creating an outreach plan for A&E firms.

Network Opportunities- Collaborative Outreach

Opportunities to participate in outreach events hosted by partners, agencies, city and county made our program staff visible as part of the support system for small businesses interested in Public Works. We take advantage of the chance to ask contractors about their experiences with Public Works and gather valuable information that will help us improve our Inclusive Procurement or Contract Equity efforts.

2023 Collaborative Outreach Events

- Asia Pacific Cultural Center + Tacoma Public School District
- Pierce County Office of Economic Development's Thriving Together Resource Event with panel
- Regional Contractor's Forum and Training



Pierce County Office of Economic Development's Thriving Together Resource Event

Contract Equity Program Training 2023

Offered by MPT Staff

- WA OMWBE + DES Supplier Diversity Policy implementation
- New Growth Innovation Network

Offered to MPT Staff

- Equity Note for Policy Review
- Equity Note for Senior Leadership Team
- MWBE Recommendations for all MPT managers

Attended by MPT Staff

- MRSC Digging Into Public Works; Piggybacking; Meaningful Outreach for PW & Private training session with MRSC Subject Matter Expert on the use of Request for information for Outreach to MWBE firms
- How to do Business with the City of Tacoma & WA OMWBE Certification Training with City of Tacoma
- WCIA - Taking the Mystery Out of Insurance and Indemnity Requirements; Trust Training; Emotional Intelligence Training
- All DES trainings provided by WA OMWBE to facilitate implementation of the Supplier Diversity Policy

Increase Staff Knowledge

Providing & Participating in Formal Training

Our workplan recommendation for 2023 was to increase participation in shared training efforts. This is not just an effort to train staff, but also give them access to information that keeps them in sync with their peers across the region.

MWBE program goals for staff training were achieved in collaboration with WA OMWBE, Municipal Research and Services Center (MRSC) and Department of Enterprise Services (DES). We were able to bring in experts to train MPT staff on contract equity program elements

(such as use of Request for Information (RFI) as part of our outreach strategy), attend regional training (such as Meaningful Outreach for Public Works), and even co-facilitate training for agencies around the state (for example, we shared our data collection tools with DES and OMWBE trainers and they asked us train other agencies on developing tools like ours).

Meeting MPT Staff Needs

One of our workplan items for 2023 was to review and analyze spending habits. We went directly to those with discretionary spending authority for public works contract requests under \$20,000, starting with the Planning and

Asset Management (PAM) District Team to ask how to include them in reaching MWBE program goals. We were able to onboard the PAM Team as key stakeholders. We reviewed all public works spending and held interviews with managers and deputies about their spending habits. They learned about the role of the Equity Program Administrator for Procurement and Contracts (EP ADMIN) while finance & Contracts staff gained an understanding of the managers' needs and priorities.

As word spread about the program trajectory, we were invited to share our preliminary recommendations with managers from every department. They shared their concerns and identified barriers to participation.

One shared concern was about the feasibility of group purchasing cooperatives or shared vendor rosters. We created a comparative analysis tool for supplier/contract type that will allow us to make informed decisions about our procurement options for specific projects (a.k.a.:

project specific procurement analysis). This has been a useful tool for clarifying procurement laws, purchasing policies and process that will support our program administrators and project managers. [For more on this project-specific procurement analysis tool, see Appendix Exhibit 2.](#)

Understanding Executive and Manager Needs

Executives and managers needed information about the procurement and contracting methods that can help us reach our contract equity goals. We're beginning to find ways to build contract equity into project design at the outset of the project, even during the envisioning process. For example, when staff wanted to reimagine contracting while they *Reimagine Meadow Park Golf Course*, we were able to explain the ways the EP ADMIN is involved in Alternative Contract Delivery methods like the method they may pursue in the near future. [For details about the role of the EP ADMIN in the Alternative Contract Delivery Method, see Appendix Exhibit 3.](#)

Review and Adjust Spending Habits

Frequently Used Contracting Methods

We interviewed staff members that frequently requested public works contracts to understand their workplans and spending habits. They showed a preference for using the Small Works Roster, so we reached out to the OMWBE contractors who do the type of work they need done and provided technical assistance for those who wanted to join the Small Works Roster.

22 firms added to SWR in 2023

12 OMWBE firms added to SWR in 2023

Even if we do not get to contract with these OMWBEC firms through the Small Works Roster (SWR) process right away, we can add them to our list of contractors who are ready, willing and able to work with us on contracts under \$300,000 or provide quotes for direct contracting. This availability is an important factor in setting our expectations and tracking potential utilization. For example, if we know we have a high percentage of OMWBEC contractors available in a certain type of work, we know that they will be better able to respond to requests for bids, if we:

- extend the bid advertising on all bids, whenever possible
- support MPT staff to solicit quotes from these firms when they have projects below discretionary thresholds
- communicate to bidders that we expect better responses on the MWBE Utilization Forms that come from General Contractors

Discretionary Spending Habits

For all public works projects in 2023, the total amount spent on all contracts <\$20K was \$34,349, of which \$23,877 was paid to OMWBE Certified Firms.

MWBE Certified Firms Utilized in Discretionary Funding with Dollar Amounts and Contract Types

Firm	Contract Total
Hunter's Tree Service (DBE, WBE)	\$5,565
Hunter's Tree Service (DBE, WBE)	\$5,200
Quad S Corporation DBA Excel Electric of Tacoma (DBE, MBE)	\$11,803
Quad S Corporation DBA Excel Electric of Tacoma (DBE, MBE)	\$11,700

Information about spending by divisions and business units helps us to prioritize outreach and training. We can look ahead to capital projects in the workplan or the Capital Improvement Plan and prioritize based on dollar amounts and contract types. The table below shows the total dollar amounts of all contracts in progress during 2023.

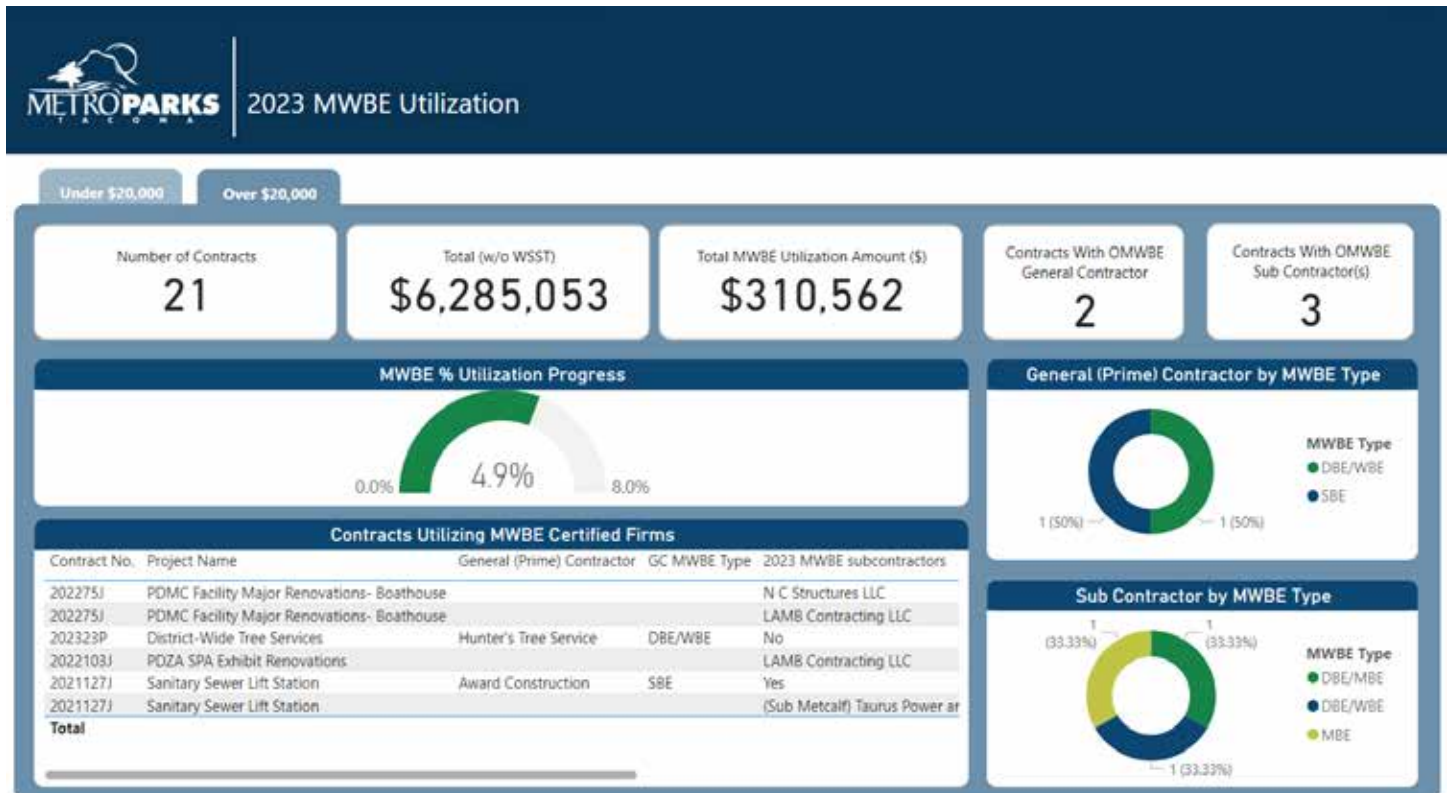
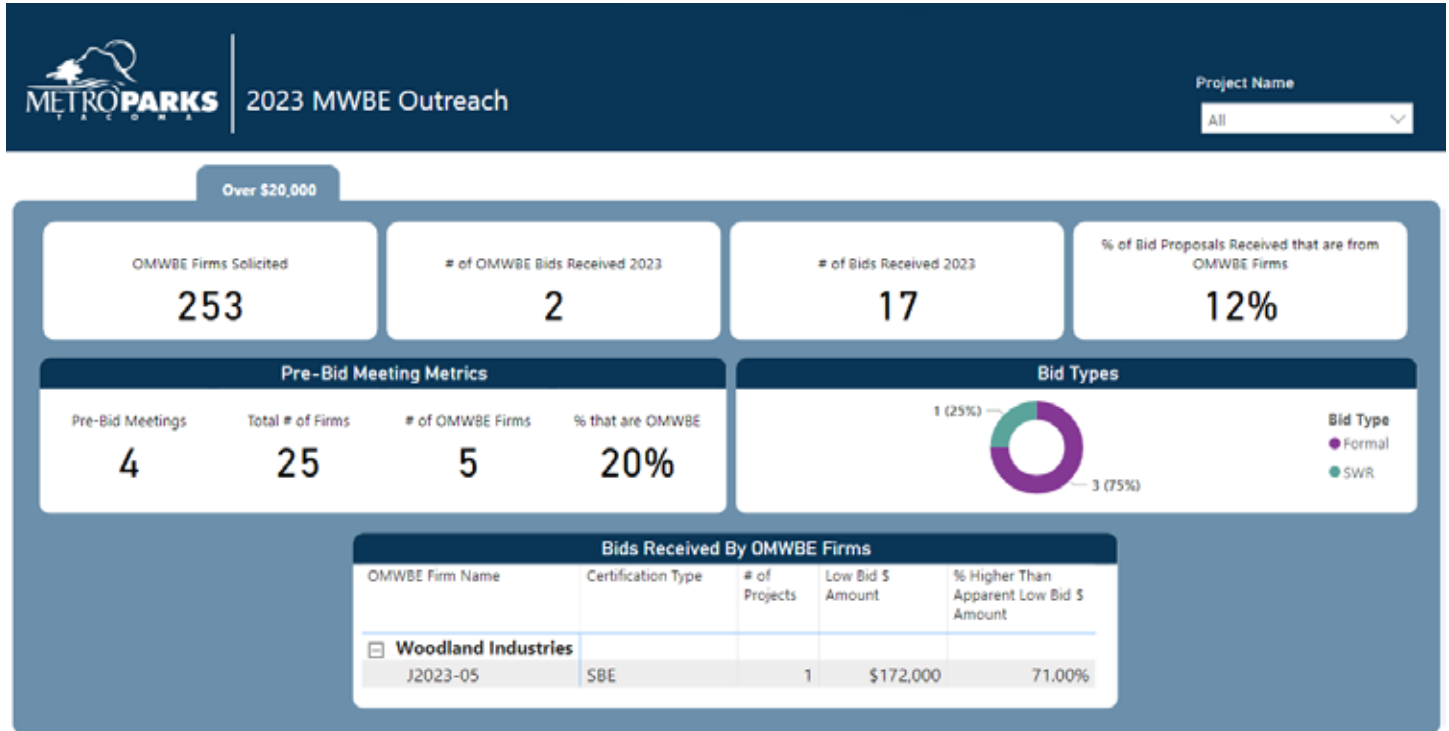
Total Public Works Contracts in Progress in 2023 by Service Area

Contract requested by	Total for all Public Works Contracts
Regional Parks	\$4,524,037
Community & Neighborhood Parks and Facilities	\$1,191,562
Enterprise	
Point Defiance Marina	\$146,402
Meadow Park Golf Course	\$13,648
ZEED	
Point Defiance Zoo & Aquarium	\$4,650,836
Northwest Trek Wildlife Park	\$188,109

Tracking Data

Outreach and Utilization Dashboard Development

The Data Service Team has been extremely supportive of our data tracking, reporting and systems development. As a result of their work on the dashboard, we are better poised to analyze spending habits and develop the process for other contract types. The dashboard is currently available on the intranet for the remainder of 2024. We will ensure our protocols are reliable and look into making the dashboard public in 2025.





Point Defiance Boathouse electrical updates for enhanced security were completed by an MWBE certified firm

Understand Concurrent Efforts

TAN Local Procurement Landscape Working Group

Our commitment in 2023 was to remain accountable to Joint Municipal Action Committee (JMAC) through Tacoma Anchor Network (TAN).

Tacoma Anchor Network secured a 2023/2024 grant through the New Growth Innovation Network’s Small and Mid-Size Cities Hub to develop data collection systems and increase transparency around our procurement habits. We are also working on a method for “democratizing the data” so we can make the data accessible to stakeholders. This funding will be used to:

- highlight the opportunity for small business growth in our county
- set expectations for inclusion practices among the Tacoma Anchor Network participants
- designate the boundaries of our Local Procurement efforts and articulate our rationale for selected boundaries.

The TAN Local Procurement Working Group (LPWG) enables MPT to participate in local efforts to improve conditions for MWBE firms. LPWG leaders believe that Pierce County workforce demographics are increasingly diverse. As the workforce grows, there is an increase in the number of individuals that would own businesses eligible

Spreading the Word About Our Role in Countywide Economic Development Efforts

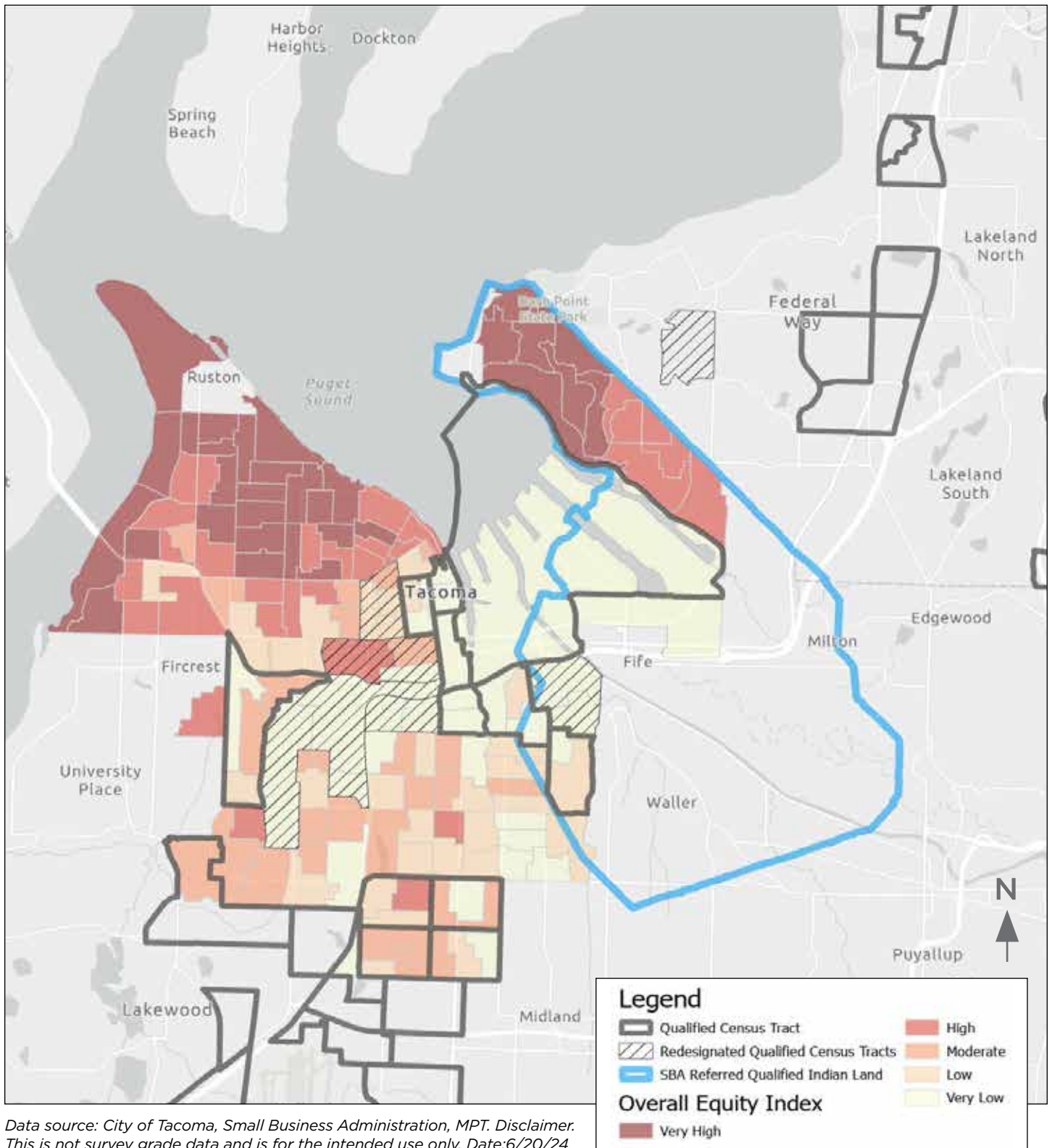
5/2 Tacoma Anchor Network presentation to City Council Study Session

9/8 Joint Municipal Action Committee

9/13 The New Growth Innovation Network LEAP

for WA OMWBE Certification. Data on the economic conditions existing businesses have faced over time also exist. For example, The Small Business Administration (SBA) designates certain areas as HUBZones: Historically Underutilized Business Zones. Some of these HUBZones are on tribal lands and areas with low opportunity scores on the Pierce County Equity Index. The Local Procurement Working Group recognizes the need for designating a local area, defined by zip codes or census tracts, so that anchor institutions can implement economic development strategies for small businesses in the designated area. The working group can use existing data from SBA and the Pierce County Equity Index to establish commitments for local procurement among the Anchor Institutions that have not yet articulated goals or defined boundaries for local procurement. The long term goal for the LPWG is to create a program to advance economic mobility for a diverse workforce in areas served by anchor institutions.

Potential Local Purchase Boundaries



Data source: City of Tacoma, Small Business Administration, MPT. Disclaimer: This is not survey grade data and is for the intended use only. Date:6/20/24

Figure 1: The City of Tacoma Equity Index shows some overlap between the areas identified as low in economic opportunity (in light yellow) and the HUBzones designated by the Small Business Administration (in blue). We are curious about the discrepancies and want to understand the difference in the metrics so we can identify areas of greatest need or opportunity for growth.

Foster Relationships that Allow for Participatory Policy Review of MWBE Policy and Goals

We are working alongside our peers at the DES to understand how to update our policy in support of annual review and revisions to our goal. We are also watching their progress to see how goals can be set, analyzed and revised annually. Rather than recommending revisions to our 2024 goal, the 2023 MWBE report will provide narrative analysis and policy update recommendations to support future annual goal adjustments as needed. Current policy allows for us to revise our goals annually. We have never adjusted our goals, but we think there is opportunity to learn from policy adopted October 1, 2022, by DES that provides more support for setting and adjusting appropriate goals.

At the request of our internal stakeholders and external stakeholders, we have been learning alongside the DES and adapting their best practices to create consistency in the region.

In 2023, the DES acted on their Supplier Diversity policy which requires them to:

- establish goal-setting methods
- issue goals specific to the forecasted expenditures for each state entity that is covered by their department
- implement more detailed tracking tools so that each agency can report on progress to meet their goal

We are currently studying the cost/benefit of aligning with these spending goals set by DES. Benefits to regional contract equity include:

- increased incentive for businesses to receive OMWBE certification
- increased utilization of certified businesses
- increased percentage of statewide contracts that utilize certified businesses

Current Recommendations for Policy Updates

- Incorporate updated language to be more inclusive of all disadvantaged business types.
 - Updates to Percentage Goals in policy
 - Update job titles and roles for responsible parties
 - Move procedural language into procedures section.
- better data on available certified businesses and best practices for engagement and utilization
 - resources available from DES for our agency to be successful in meeting this goal. These include an interactive online handbook, toolkits, trainings, editable forms and templates, and customer service staff assistance. These resources mirror those available to businesses and contractors, which helps ensure awareness and efficiency across the contracting ecosystem. Both program staff and contractors have reported finding these resources incredibly valuable, and we believe their continued use will prove beneficial.
 - a tool that guides agencies like ours through a detailed forecasting process. We can complete this work by adapting the tool, collaborating with contract coordinators and the staff that request these contracts and then setting goals according to the DES data on the availability of firms in the categories we need. We have the data that tells us what we did; now we can collect the data that tells us what we can do in the future.



How can we
continue to break
down barriers for
MWBEs?

2024 Work Plan

Continue Current Efforts

We recommend continuing the following efforts described above in the Program Review and in the 2022 MWBE Annual Report (**items in bold were added in 2023**)

Outreach Strategies

- Bid Outreach
- Pre-Bid Meetings
- Pre-Construction Meetings
- MWBE Verification Interviews
- Use of NAICS for Targeted Solicitations
- Increased Touchpoints
- Change Order Reviews
- **Spread the Word About MWBE Priorities:**
 - **Providing Technical Support**
 - **Building Relationships with Agency Peers**

Network Opportunities

- Collaborative Outreach
- Fostering Relationships that allow for Participatory Policy Review of MWBE Policy and Goals
- Increasing participation in Workforce Development

Increase Staff Knowledge

- Training for Program Support Staff
- Refine Processes
- Increase Participation in Shared Training Efforts
- Provide Annual Formal Training for Department Managers
- Review and Adjust Spending Habits & Refine Processes

Tracking Data

- Outreach KPIs
- Track Additional Data Points and Analysis
- Provide Narrative Analysis
- Outreach Dashboard (**Updated Monthly**)
- **Utilization Dashboard (Updated Monthly)**

Understand Concurrent Efforts

- Remain Accountable to Joint Municipal Action Committee through Tacoma Anchor Network

New Efforts

In order to build on these efforts we will add the following items to the 2024 workplan:

MWBE Dashboard

This data source will have multiple pages. One page will show information on outreach performance indicators and the second will show information on utilization. These can be updated by our GIS and analytics team at monthly intervals all year. We will be able to monitor exactly when and where our utilization opportunities are realized. We can also track missed opportunities, inquire as to what part of the process needs improvement and make informed updates to our process. Initial implementation was difficult. To account for this difficulty, we decided to increase the verification touchpoints will make it easier to update the data in real time. As part of this effort, we will improve our tracking tools for each individual project. For example, we will improve reporting for change orders: these tend to be deeply complex for tracking on projects over \$1 million. We can improve relationships by reaching out and collecting data as the change orders are issued.

Test Feasibility of Converting Discretionary Spending to Increase Utilization

As indicated in the previous section we were able to convert some discretionary spending to increase utilization. (MPGC and Point Defiance Marina used an MWBE certified electrician). There are other contracts <\$20K that could be awarded to MWBEs.



2023 marks the 20th year we have worked with the same certified woman-owned firm to provide canopy maintenance and storm response.”

Technical Assistance for Staff

We are excited to offer guidance on the following topics

- How to engage small businesses to improve access to technical support or contract opportunities.
- The business case for MWBE Policy and Program (How does this affect the cost of the projects short-term and long term? How can I select a contract type that will keep my project on time, on budget and still meet the MWBE goals?)
- How to solicit bids from MWBEs (When, where, why and how do we reach MWBE firms?)
- Legal aspects of MWBE Program (What is the law and how does it apply to various contract types?)
- Utilizing Request for Information (RFI) during the early stages of procurement and contracting
- Purchasing Policy Procedures
- Supplemental Bidder Criteria

Develop process for tracking spending other than Public Works through a focus on data collection for program expansion

As mentioned above we have been tracking discretionary spending data for public works. We have also provided briefs to all managers in the district to let them know that we are recommending program expansion that will impact their procurement process. They have seen the list of training we will provide. We expect managers will select staff members who can attend trainings that meet their needs. The idea is that all staff can do what our capital projects teams have been able to do for public works utilization.

We do not yet know what metrics will track success or failure of their efforts because we anticipate that the amount of data is more than we have the staff to analyze. We will continue to explore the options for tracking vendor data such as MWBE certification status in MUNIS.

Without MUNIS tracking the vendor certifications, we will not necessarily be able to track utilization in all spending areas. We will need to continue to develop the process to track and analyze spending habits on Supplies/Materials, Services Contracts in order to answer questions our stakeholders are asking:

- What is the reasonable expectation around this level of spending?
- Who are the leaders who can set the reasonable goals for the stakeholders?
- What are the communication tools that we can use to teach about the expectations and how to meet them?
- Where do the Purchasing Policy and procedures update come into play?
- What culture shifts need to be initiated/what values need to be updated:
 - Is time savings more important than outreach for a quote?
 - Is a known contractor, vendor, supplier prioritized over an underutilized contractor?
 - Is this really more work over the long term?

Engage the Community of Practice and the Access Equity Tool with Department of Enterprise Services (DES)

In 2023 we participated in the collaborative lunch and learns with OMWBE to learn about Goal Setting Strategy Development. Watching what is working among those who have recently been provided with goals from DES has taught us how to assess the cost/benefit of various goal-setting strategies and proven the relevance of the tools we have built. We know their program remains race and gender neutral (unlike ours) but it has the policy in place to require tracking and reporting. The tools and trends driven by statewide contracting and the agencies that use these contracts will impact legislation that affects us and the contractors we work with. We will remain attentive to the DES Supplier Diversity Community of Practice.

We requested time with WA OMWBE representatives that train DES Agencies on the Access Equity Tool to keep pace with regional trends. WA OMWBE and DES staff were complimentary when we asked for comment on our data collection tools and protocols. In September 2023 we were asked to present our tools as exemplars. We are grateful for the opportunity because agency representatives across the state can join us in our efforts to get the word out: we're all tracking, we're supporting, and we're putting best practices in place.

Participate in Capital Projects Advisory Review Board (CPARB)

In 2024 we began to observe and participate as a stakeholder in committee meetings rather than waiting until we needed the Project Review Committee of the CPARB to approve Alternative Contract Delivery Methods. This led to an understanding of the CPARB committees as a resource. We can get updated opinions on legislation, responses to legislation and the evolution of programs that our contractors rely on. We plan to continue participating as a stakeholder in House Bill 1621 report committee, Business Equity committee and Small Works Roster Rulemaking and Small Works Committee.

Policy Updates and the Equity Note

The MWBE policy is scheduled for updates in XXXX, we recommend updates include language that would allow our program expansion to track, report, and include race and gender-neutral certified businesses to be more relevant and inclusive and update outreach requirements for public works and for services. Procedures and operating standards would be updated as part of the policy update.

A plan for MWBE A&E firms:

The section of Washington State law that directs agencies on the procurement of architectural and engineering services includes a provision to ensure equity in contracting for minority-owned, women-owned, and veteran-owned firms. In addition to directing agencies to select firms based on qualifications using data submitted by contracting firms, RCW 39.80.040 also states

“Such agency procedures and guidelines shall include a plan to ensure that minority and women-owned firms and veteran-owned firms are afforded the maximum practicable opportunity to compete for and obtain public contracts for services. The level of participation by minority and women-owned firms and veteran-owned firms shall be consistent with their general availability within the professional communities involved.”

We recommend piloting outreach to Architects & Engineers (A&E) that follows the template established for capital and construction contracts.



Electrical upgrades to Point Defiance Marina were completed at 100% utilization using discretionary spending processes in 2023.

APPENDIX

2023 MWBE Utilization:

- Exhibit 1** 2023 MWBE Utilization
- Exhibit 2** Creating and Inclusive Procurement Environment
- Exhibit 3** Role of the EP ADMIN in the Alternative Contracting Method

**Metro Parks Tacoma 2023 Public Works Awarded Contracts
>\$20,000 MWBE Utilization Report**
As of March 6, 2023

Appendix Exhibit 1: 2023 MWBE Utilization

Contract No.	Project Name	General Contractor	GC MWBE Type	2023 Contract Total w/o Sales Tax	MWBE Firms Utilized	2023 MWBE Utilization	Percentage MWBE
202143J	Meadow Park Golf Course Bridge Improvement	Wildwood Carpentry LLC	N/A	\$17,538.58	N/A	—	
2021127J	Sanitary Sewer Lift Station	Award Construction	SBE	\$11,590.06	Award Construction	\$8,220.68	71%
2021127J			N/A		(Sub Metcalf) Taurus Power and Controls, Inc	\$2,178.00	19%
202202P	Seasonal Mooring Floats Storage & Maintenance	Quigg Bros Inc	N/A	\$35,730.19	N/A	—	
202275J	PDMC Facility Major Renovations - Boathouse	Westmark Construction Inc	N/A	\$334,664.60	LAMB Contracting LLC	\$77,916.00	23%
202275J			N/A		N C Structures LLC	\$92,887.00	28%
2022103J	PDZA SPA Exhibit Renovations	Pease Construction Inc	N/A	\$446,468.00	LAMB Contracting LLC	\$56,327.00	13%
2022180J	Portland Avenue CC Fire Damage Repairs	Asher Construction, Inc.	N/A	(\$1,890.00)	N/A	—	
2022185J	PD Loop Trail - Phase 1	Sound Pacific Construction LLC	N/A	\$175,607.93	N/A	—	
2022186J	Gas Station Park Improvements	Wildwood Carpentry LLC	N/A	\$23,976.00	N/A	—	
2022214J	Melanie Dressel Park Improvements	Pease Construction Inc	N/A	\$3,536,716.00	N/A	—	
2022219P	Emergency Repair & Supplies (Boathouse PDMC)	Avila & Sorenson, Inc. dba Servicemaster of Tacoma	N/A	\$98,894.88	N/A	—	
2022220P	Remediation and Asbestos Removal from King Tides Flooding	Avila & Sorenson, Inc. dba Servicemaster of Tacoma	N/A	\$89,062.79	N/A	—	
202323P	District-Wide Tree Services	Hunter's Tree Service	DBE/MWBE	\$73,033.62	Hunter's Tree Service	\$73,033.62	100%
202325J	Baja Bay Exhibit Repairs	Pease Construction Inc	N/A	\$392,792.00	N/A	—	
202334J	Stewart Heights - Boiler Replacement & Solar Loop	Apex Mechanical LLC	N/A	\$341,242.00	N/A	—	
202349P	DW HVAC	MacDonald Miller Facility Solutions	N/A	\$207,503.51	N/A	—	
202366J	PDZA Polar Bear Exhibit Improvements	Key Peninsula Construction, LLC	N/A	\$150,573.50	N/A	—	
202367P	Preventative maintenance, inspections, diagnostics, minor repair or replacement, emergency	AAA Fire Protection	N/A	\$24,351.82	N/A	—	
202376Z	SPA Elevator Leak Down Test	Eitec/Schindler Elevator	N/A	\$21,556.37	N/A	—	
2023106J	DW Maintenance UV pool, splashpads	Aquatic Specialty Services Inc	N/A	\$31,384.84	N/A	—	
2023169J	NWT Animal Ops Well	Tacoma Pump & Drilling Co Inc	N/A	\$103,070.84	N/A	—	
2023249J	PDZA Polar Bear Minor Exhibit Improvements II	New X, Inc.	N/A	\$161,579.13	N/A	—	
Total Public Works Contracts over \$20,000 in 2023:						\$6,275,446.66	5%

Appendix Exhibit 2: Creating an Environment of Inclusive Procurement

Inclusive procurement begins when we set expectations for all kinds of purchases. For example, when PAM District Team members request to use KCDA (a group purchasing cooperative that is available to us for a few of our purchasing types) the contracts team wanted to understand the risks and benefits of purchasing through the vendors that are part of this cooperative. We created a comparison tool that allows us to compare the probability of hiring an MWBE firm for a specific bid package.

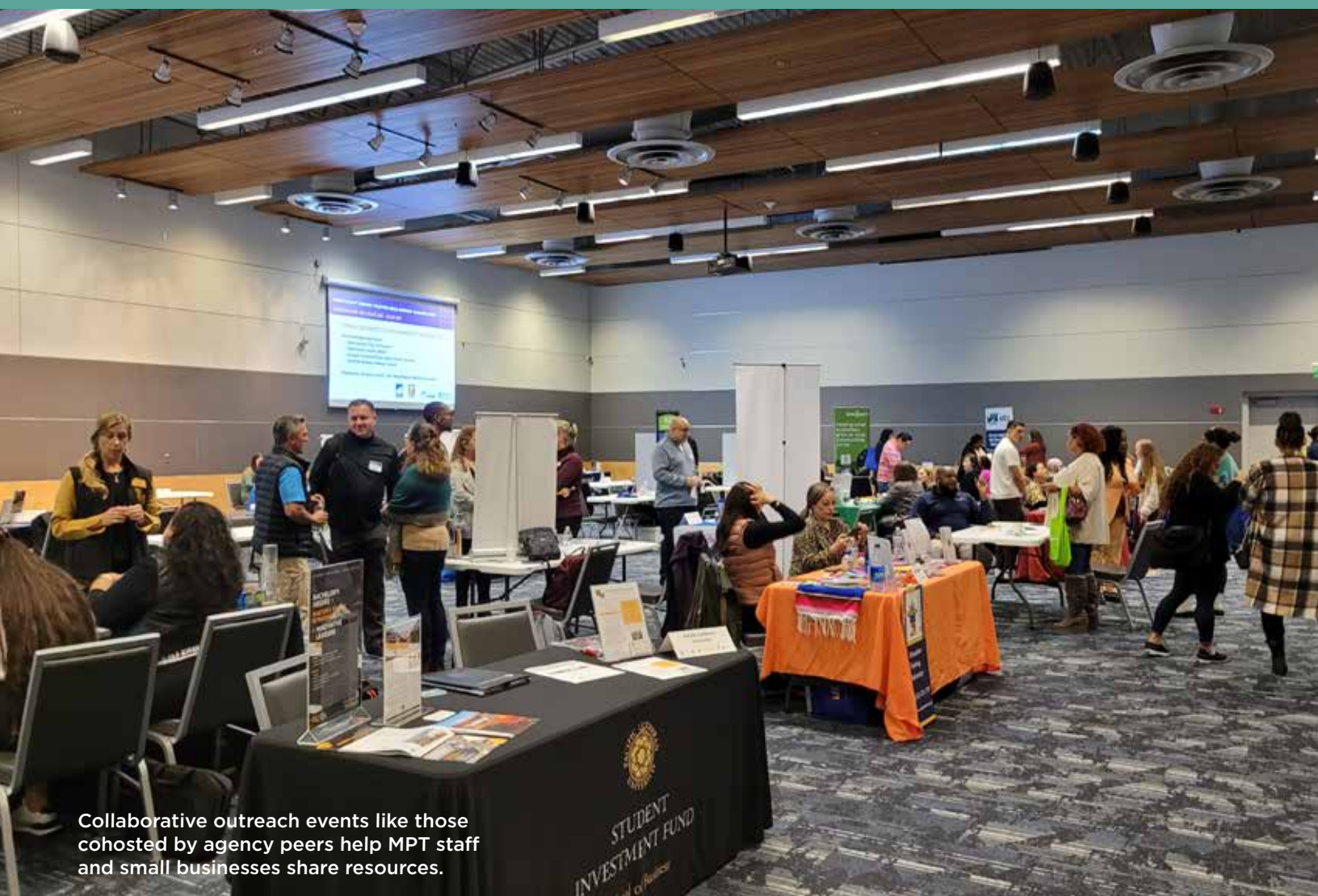
Comparative Analysis of Small Works Roster Process or Use of the Purchasing Coop King County Director's Association

		KCDA	SWR
# of firms available	Carpet	5	6 (as general contractors who sub out the installation)
	Office Furnishings	43 (vendors)	0
	Painting	0	16 as GC 5 as painting specialty
# OMWBEC firms	Carpet	?	1
	Office Furnishings	?	0
	Painting	0	4
Approx. # days from scope to Notice to Proceed	Solicit Bids: 5-7 days PO through KCDA	?	Solicit bids: 5-7 days MWBE outreach: 0 (completed) Contract Execution: 5-7 days
Policy in place		Yes	Yes
Procedures in place		No	Yes
MPT contracting timeline			Scope/design, bid, review, selection, compliance check, routing for signature

We hope to provide more analysis like this. Reviews of the purchasing coop or statewide contracts may affect our purchasing policy updates and may help us improve contract equity. We will revisit the topic when we work on policy and procedure updates.

Appendix Exhibit 3: Equity Components of the Alternative Contract Delivery Process





Collaborative outreach events like those cohosted by agency peers help MPT staff and small businesses share resources.



MetroParksTacoma.org