

# Program Evaluation of Contracting and Procurement Equity

*County of Dane, WI*

*Final Report Presentation*

*Executive Committee*

August 17, 2017



# PRESENTATION AGENDA

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- Project Team
- Study Objectives
- Study Methodology
- Findings
- Recommendations
- Questions and Answers



# PROJECT TEAM

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## MGT TEAM

- *Dr. Fred Seamon*, Executive-in-Charge
- *Reggie Smith*, Project Director
- *Vernetta Mitchell*, Project Team Leader
- *Andres Bernal*, Senior Analyst
- *Diana Goldstein*, Researcher

## MGT'S SUBCONSULTANT

- *Oppenheim Research*

# Study Objectives

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- *To conduct an evaluation of Dane County Government's Contracting and Procurement Policies and Processes.*
- *To provide recommendations for strategies and actions that will further advance racial and social equity in Dane County contracting and procurement opportunities.*



# Study Methodology

- Policies, Procedures, and Programs Review
- Best Practices and Peer Analysis
- Historical and Vendor Pool Analysis
- Development of Vendor Pool Database
- External Stakeholders Input Analysis
  - Interviews
  - Focus Groups
  - Surveys
- Recommendations and Report Development

# Findings

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## Collaboration

- There is an opportunity for greater collaboration between Office for Equity and Inclusion (OEI) and County Departments during the planning, RFP, and bid processes for County contract services.

## Data Management

- The County does not have a centralized system that enables OEI and procurement to update and maintain information and data on Targeted Business Enterprises (TBEs) and registered vendors.

## Anecdotal Comments

- Barriers
  - Prime contractors - competing with larger firms (20% of TBEs).
  - TBE firms
    - Short or limited time given to prepare bid package or quote – 12.3%.
    - Selection process/evaluation criteria – 10.4%.
    - Proposal/bid specifications – 7.5%.

# Findings

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## Anecdotal Comments (Cont'd)

- Disparate Treatment of TBEs
  - An informal network outside of Dane County government precluded their firms from obtaining work in the private sector. – 17.9%.
  - Seldom or never being solicited when there were no TBE goals – 34%.

# Recommendations

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## Data Management

- The County should consider a centralized system that enables the Purchasing Division and the OEI to update and maintain a list of TBE and registered vendors.
- The OEI should create and maintain a database that contains profiles of TBE firms.
  - Regularly updated.
  - Used to facilitate outreach efforts.
- Data on subcontracting opportunities should be maintained by the OEI.
  - All departments should be required to use MUNIS or a centralized database to update subcontract awards and payments for all subcontractors.
- OEI should consider obtaining a diversity management software system to help track TBE prime and subcontractor awards and payments.

# Recommendations

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## Outreach

- Conduct semi-annual marketing events promoting Dane County as an employer and diversity and inclusion focused organization.
  - Interested in doing business with all available businesses in the marketplace.
- Develop a comprehensive “Guide to Doing Business in Dane County” that can be downloaded or printed for distribution as an information and referral resource.

## Collaboration

- The Purchasing Division and the OEI must work in close collaboration in order to effectively serve as a vital and comprehensive resource for departments and staff to provide information, technical assistance, and support.

# Recommendations

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## Collaboration (Cont'd)

- For RFP for services issued by DHS in April of each year, DHS and OEI should collaborate on identifying agencies that can serve as fiscal agents for smaller organizations that provide services in communities of color.
  - This type of collaboration would create nonprofit joint ventures.
  - Should be implemented on a pilot program basis for a two-year period.
- It is imperative that OEI be involved in meetings and discussions regarding upcoming contract opportunities for the County. Additional resources may be required to fully implement this recommendation.



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