



MULTNOMAH COUNTY PURCHASING

# 2014





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[www.multcopurch.org](http://www.multcopurch.org)

This 2014 Annual Report covers July 1, 2013 through June 30, 2014





# MULTNOMAH COUNTY PURCHASING 2014 ANNUAL REPORT

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## A MESSAGE FROM THE PURCHASING MANAGER



During the past year, Multnomah County Purchasing focused on improvements to our core services and began several strategic initiatives which will result in more responsive and efficient services.

Central to Purchasing's core function is to provide excellent procurement and contracting support services to our internal county clients. We conducted 85 formal (>\$150,000) procurements this year, which is more than any other previous year. Several of these are highlighted in this report. Purchasing staff assisted employees in the purchase of almost \$500M in goods and services and reviewed 850 resultant contracts and amendments. We earnestly began development of a program to manage County Surplus with the goal of implementing a sustainable and resource preserving program that will add value to the County as a whole.

We continue to stand out nationally as one of the leading public purchasing organizations. We received recognition for two initiatives by The National Association of Counties. The first was for developing a new procurement tool that is both flexible and elegant which solved a critical business need for getting and maintaining a good pool of vendors to provide certain services. The second recognized the leadership the County has exercised in our community to bring other agencies together in an effort to make it easier for MWESB firms to do business with us. Many exciting initiatives were born of these gatherings, including the first specific inclusion of MWESB objectives into the Oregon Business Plan, the state's central plan to increase and maintain high-wage jobs that support families and maintain strong communities.

Among County functions, Purchasing is at the forefront of the demographic shifts occurring in our community and within the workforce. In 2013, 53% of staff across the County in procurement and contracting positions were 55 years or older. Even as we experienced the loss of some of our most senior members this year, our recruitment and commitment to staff development has enabled us to create one of the most outstanding government purchasing teams anywhere. It is my pleasure and honor to work with skilled, dedicated and committed staff. I am proud of their efforts. Purchasing is an organization that is committed to continuous innovation in our policies, procedures, MWESB and sustainability efforts. Because of our results, Multnomah County has developed a reputation as an outstanding leader in public sector purchasing. This is a credit to the professional staff who have risen to the challenges put before them.

We continue to seek solutions by proactively examining what we do, how we do it and why we do it. In the coming year, we look forward to implementing new initiatives in the areas of reporting, contracting, training, and surplus. We will continue to support and leverage our talent, while seeking innovations that deliver the best value for Multnomah County.

Sincerely,

A handwritten signature in black ink, appearing to read "Brian R. Smith". The signature is stylized with a large, looping initial "B" and a checkmark-like flourish at the end.

Brian R. Smith,  
*Purchasing Manager, Multnomah County*



## FY 2014 PURCHASING STAFF

Doreen Blome, CPPB  
Kathi Braeme-Burr, CPPB, CCA, OBC  
Karen Brown  
John Classen, MCA  
Lisa Emery, CPPB  
Lee Fleming, CPPB, OBC  
Jerry Jelusich, CPPB  
Shawn Postera, MLIS  
Paula Rickman, CPPB  
Lawrence Russell, CPPB, CCA  
Emilie Schulhoff, CPPB  
Brian Smith, CPPO  
Tessa Steele  
Sherry Taylor  
Lynne Waite, CPPB, OBC  
Freda Walker, JD  
Kelly Sue Wilhelm  
Barry Zimmerman, CPPB

## OUR MISSION

We purchase goods and services to support the County's diverse needs. We ensure the best value for our citizens by facilitating a fair and transparent process.

## OUR ROLE

The Purchasing team supports County operations by managing County processes for buying goods and services, striving to achieve the best combination of price, quality and service. We support County goals of socioeconomic importance by enhancing the sustainability of the County's purchases and maximizing contracting opportunities for all vendors, including Minority-owned, Women-owned, and Emerging Small Businesses (MWESBs). Throughout the year, Purchasing staff support departments countywide to purchase a wide range of products, as well as both professional and non professional services. These purchases enable the County to provide optimal delivery of services to its citizens.

[WWW.MULTCOPURCH.ORG](http://WWW.MULTCOPURCH.ORG)



# 2014 IN REVIEW

**850**

CONTRACTS AND AMENDMENTS  
PROCESSED



**33**

CONTRACTS AWARDED TO MWESBs



**853**

TRAINING HOURS PROVIDED  
TO MWESBs AND FUTURE  
ENTREPRENEURS GOOD AND SE  
PURCHASED



TOTAL VALUE OF CONTRACTS AWARDED

**\$220,389,021**

**5**

BUSINESS AND WORKFORCE  
DEVELOPMENT PROGRAMS  
SPONSORED





**7,040**

TRAINING HOURS PROVIDED TO  
INDIVIDUALS INTERESTED  
IN CONSTRUCTION

**577**

TRAINING HOURS  
PROVIDED TO  
COUNTY STAFF

**\$6,341,557**

PAYMENTS MADE TO MWESB FIRMS

**84%**

STAFF WITH  
PROFESSIONAL  
CERTIFICATIONS

**130**

BUSINESS AND WORKFORCE  
PARTICIPANTS TRAINED

**1,480**

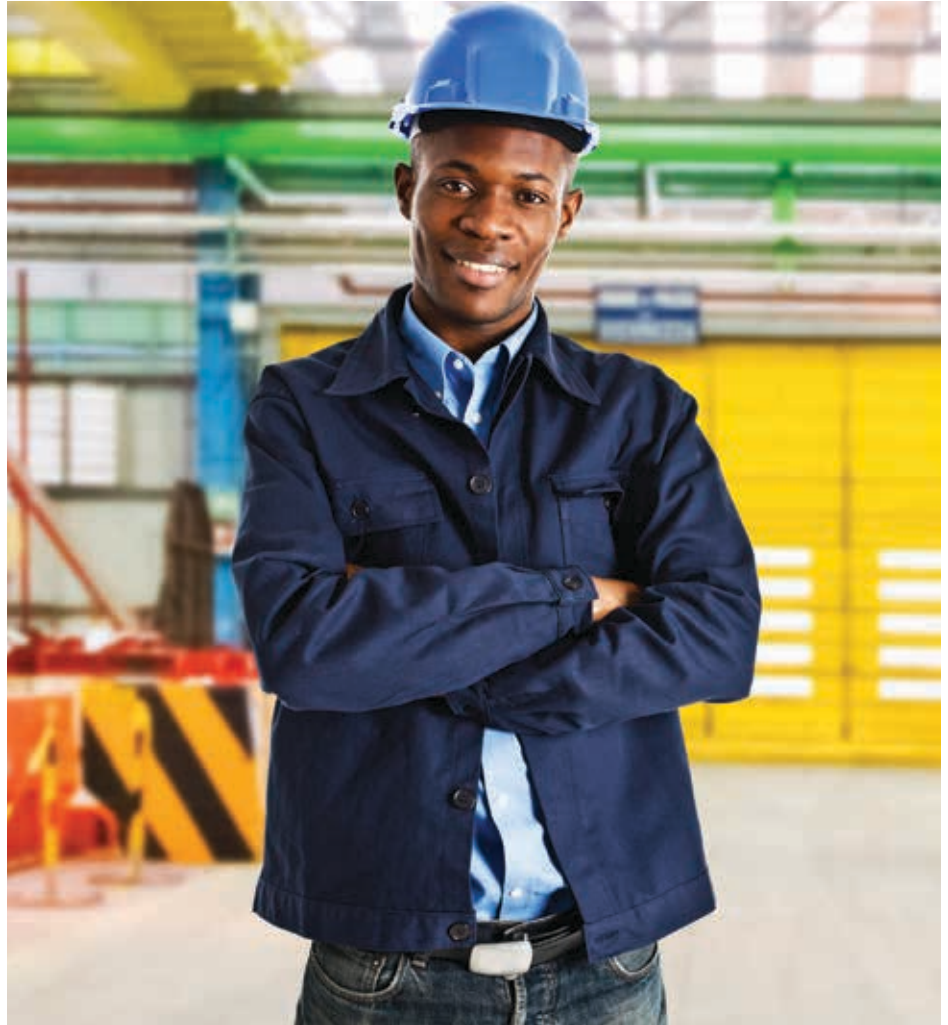
TRAINING HOURS PROVIDED TO  
COUNTY PARTNERS

# ACHIEVEMENTS

## MWESB AND SOCIAL EQUITY

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WITH SMALL BUSINESSES ACCOUNTING FOR 95% OF ALL BUSINESSES WITHIN THE COUNTY, THEY ARE VITAL TO OUR ECONOMIC AND COMMUNITY DEVELOPMENT EFFORTS.



At Multnomah County, social equity is deeply imbedded into our policies, contracting efforts, sponsorships, and regional partnerships. With small businesses accounting for 95% of all businesses within the County, they are vital to our economic and community development efforts. Through a number of existing programs, Multnomah County directs financial support to sponsor business and workforce development training for MWESBs and their employees as well as for individuals seeking to enter the construction industry. These efforts are making a positive contribution towards the success and growth of a diverse vendor pool and workforce.



## ECONOMIC & COMMUNITY DEVELOPMENT

Each of the following organizations, and the programs they operate, are focused on helping small businesses and providing a foundation for individuals to build skills and obtain meaningful employment in the construction trades. By providing financial support, staff participation and hands-on business and workforce training opportunities, Multnomah County is contributing to the vitality of the local economy and community.

### UNIVERSITY OF WASHINGTON MINORITY BUSINESS EXECUTIVE PROGRAM

University of Washington's Michael G. Foster School of Business provides training to minority business professionals in a variety of areas, including: finance and accounting, human resource management, leadership, marketing and brand strategy, relationship marketing and strategic thinking. This program provides training to approximately two dozen minority-owned businesses each year. Multnomah County sponsored one of those individuals this past fiscal year.



Multnomah County sponsored Rajiv Ali, PhD, PE, GE, owner of Rhino One LLC, for the 2014 MBEP program at the Foster School of Business. This innovative program has proved to be of strategic importance for Rhino One, a minority owned business in preparation for current and future entrepreneurial challenges. The program combined business nuts-and-bolts like accounting and financing with the strategic training in marketing and leadership. The sessions were led by experts from the UW faculty, speakers from major multinational companies and alumni of the program. The 2014 class has 29 participants from all over the country representing minority- and woman- owned businesses. Rhino One LLC was formed in October of 2009 with one employee and has since grown to 3 full time and 2 part time employees. Rhino One is currently providing geotechnical engineering services for the \$300 million Sellwood Bridge Project with Multnomah County and also is part of an on-call team for geotechnical engineering services. The UW MBEP program has proved extremely valuable to Rhino One and this program is recommended for other up- and coming- minority- and woman- owned firms.



## OREGON TRADESWOMEN, INC.

Oregon Tradeswomen, Inc. (OTI) provides training opportunities for low-income girls and women by holding the Building Girls Summer Camp and the Trades and Apprenticeship Career Class for Women. Multnomah County helped sponsor the January and March Trades and Apprenticeship Career Classes this past Fiscal Year. A total of, 88 low-income women benefited from the training for careers in the building, construction, mechanical and utility trades. Many graduates of OTI's training programs go on to enroll in apprenticeship programs and to become Journey level trades people.

## CONSTRUCTING HOPE

Constructing Hope is a nonprofit pre-apprenticeship training program committed to rebuilding lives through training and career placement in the construction industry. The program is focused on providing training for low income individuals. In 2014 Constructing Hope graduated 66 individuals, with 26 of those gaining entry into apprenticeship programs shortly after graduation. These low-income women and men received hands-on training in: resume writing, interviewing techniques, financial management, blueprint reading, construction math and sustainable building techniques.



## TURNER SCHOOL OF CONSTRUCTION

This training program is offered to Minority, Women and Emerging Small Business owners in the construction industry on an annual basis. Over a ten week period, participants learn about: effective business plans, banking and financial management, marketing strategies, scheduling and estimating, purchasing, daily operations, safety, billing, risk management, and measuring performance. In FY 2013 2014 Turner School of Construction graduated 37 MWESBs representing a mix of owners and employees of MWESBs. In addition to providing financial support, Multnomah County and other participating public agencies teach one of the seminars, which focuses on doing business with public agencies.





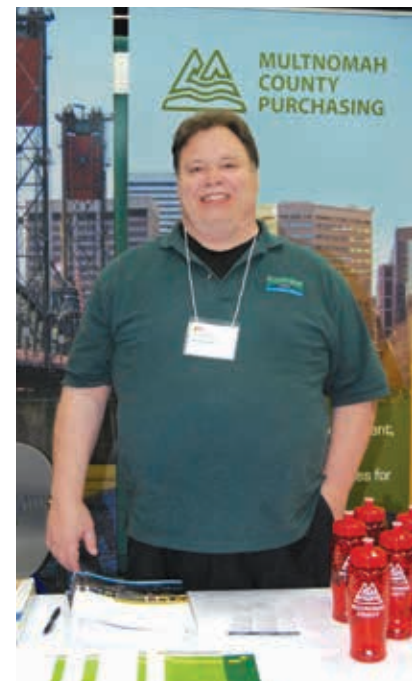
## OAME YOUTH SUMMIT

For the past 15 years OAME has hosted a Youth Conference as part of their Youth Entrepreneurship Program with more than 650 high school students participating. The Youth Conference aims to engage young people in business practices through a variety of speakers, activities, videos and presentations. During the Conference, participants work in teams to produce a business plan for a hypothetical business that is both profitable and sustainable. OAME, through their Youth Entrepreneurship Program and Youth Conference, strive to improve the entrepreneurial skills of tomorrow's leaders by sparking an interest in business at a young age. This past year, 55 young individuals took advantage of the Youth Conference training opportunity, and Multnomah County's Supplier Diversity Officer, Lee Fleming, represented the County as a speaker for the event.

## OUTREACH

Throughout the year, Multnomah County staff attended more than 90 community meetings and events to market construction contracting and personal services opportunities to the small business community. Attending community outreach events supports and strengthens our partnerships with diverse organizations and communities. Some of the more than 90 plus organizational meetings and events County staff attend throughout the year to market opportunities include:

- **Oregon Association of Minority Entrepreneurs** meetings and annual tradeshow
- **National Association of Minority Contractors of Oregon** monthly meetings
- **Hispanic Metropolitan Chamber of Commerce** monthly meetings and annual tradeshow
- **Governor's Marketplace Tradeshow**
- **Oregon Public Purchasing Association Reverse Vendor** tradeshow
- **Asian Pacific American Chamber of Commerce** meetings and events
- **Philippine American Chamber of Commerce** monthly meetings
- **African American Chamber of Commerce** meetings



# WORKFORCE TRAINING & HIRING PROGRAM



The County requires workforce training on its large construction to ensure the projects offer equal employment opportunity in the construction trades. Prime contractors with contracts of \$200,000 and greater and subcontractors with contracts of \$100,000 and greater are required to make sure 20 percent of their workforce hours, per trade, are worked by State-registered apprentices. Contractors are also required to make efforts to ensure their workforce is reflective of the diversity of Multnomah County.

By requiring apprenticeship participation on formal construction projects, Multnomah County is helping to set the standard within the industry. By requiring 20 percent participation, per contractor, per trade, the County is seeing a positive effect on apprenticeship demand and is helping create opportunities for tomorrow's workforce.

Apprenticeships typically last between two to five years and involve both a classroom training portion and an on the job training portion. Apprentices typically begin their apprenticeship earning 50 percent of a journey workers rate of pay. As they work through their apprenticeship their wages typically increase 5 percent every six months until they reach the journey worker status.

Over the past fiscal year the majority of training was provided on the Sellwood Bridge Project, highlighted in the Sellwood Bridge section of this report. Seven additional medium to large sized projects met the program requirements and presented meaningful training opportunities for apprentices. These projects include: (1) the Multnomah County Health Clinic HVAC Upgrade Project; (2) the Gresham Library; (3) the Centennial High School Health Clinic Project; (4) the Multnomah Building Elevator Upgrade Project; (5) the Central Library Painting Project; (6) the Midland Library Project and; (7) the Bridge Shop Addition Project.

A combined 33 percent apprenticeship participation was achieved on these seven projects, equaling 2,335 hours of training. Seventeen percent of the total workforce hours (7,026) were worked by minority male workers. Seven percent of the total workforce hours on these seven projects were worked by women.

Ethnic and gender diversity will continue to be central components to the County's workforce training efforts. Through County staff attendance at pre-bid and pre-construction meetings the Workforce Training and Hiring Program requirements and objectives are conveyed to the contractor community. Particular emphasis is placed on the program's diversity component – the requirement for contractors to make reasonable efforts to ensure their workforce reflects the diversity (ethnic and gender) of Multnomah County.



## FEATURED MWESB PARTNERS

### NORTHWEST GEOTECHNICAL CONSULTANTS

Recently NGI was excited to be awarded an on-call contract to provide geotechnical engineering services to the County. Their expertise in transportation and landslide hazards was almost immediately put to use in a complex street widening project in steeply sloping, landslide-prone terrain. NGI is looking forward to supporting the design and construction of county facilities.



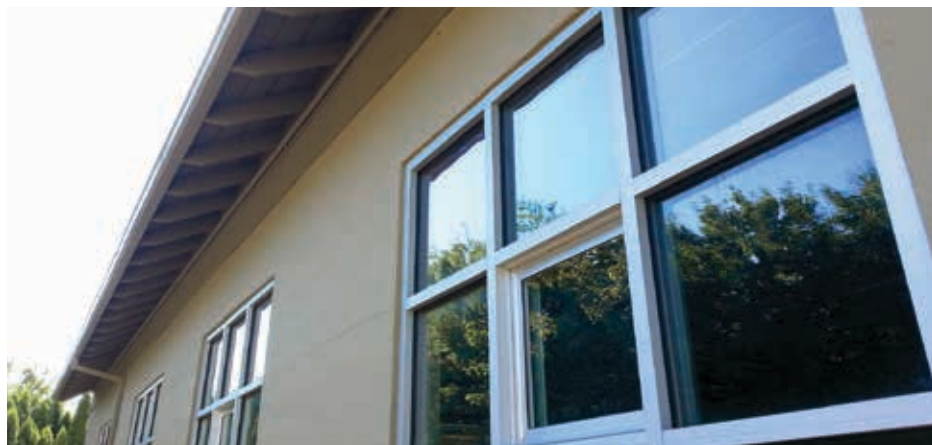
*"It is refreshing to partner with an agency that values diversity in contracting in both routine and high profile projects. We were pleased to be called upon almost immediately to support a County transportation project."*

— Thomas Ginsbach, P.E., G.E.,  
President,  
Northwest Geotech/Northwest  
Testing, DBE, ESB, VOSB



### RIVER CITY GLASS AND WINDOW, INC.

Co-owners Steve and Karla Hofmann opened River City Glass and Window, Inc. approximately ten years ago. They first worked for Multnomah County in 2009 and over the past six years have worked on a variety of glazing and storefront projects. Recently, they completed a glazing project for the County's Bridge Shop and have enjoyed a good working relationship with the County's Facilities Project Managers and staff.





THIS WORK INVOLVES MONITORING AND REPORTING THE PROGRESS OF THE COUNTIES' CONSTRUCTION PROJECTS TO ENSURE CONTRACTORS MEET THE COUNTIES' WORKFORCE REQUIREMENTS FOR APPRENTICESHIP AND GOALS FOR A DIVERSE WORKFORCE.



## GROUP AGB

Group AGB owner, Andre Baugh, began his efforts in Portland by working for the City of Portland's Bureau of Transportation as a Project Manager for six years. In 2000, Andre' founded Group AGB, Ltd., a diversity management consulting firm, which helps government agencies and businesses with diversity initiatives, policy development and implementation, workforce, monitoring, compliance, and business development/assistance. Group AGB, Ltd. specializes in providing diversity and equity products and services designed to help government agencies and corporations embed an inclusive program of Minority, Women, and Emerging Small Businesses (MWESB) firms, and a diverse workforce.

Group AGB provides MWESB management and coordination for large construction and design projects, including as a sub-consultant on the Sellwood Bridge project. At Group AGB, Ltd., André Baugh has worked with Multnomah County on various projects over the past five years. Beginning in August 2009, Group AGB has provided Workforce Training and Hiring compliance to capital projects. This work involves monitoring and reporting the progress of the Counties' construction projects to ensure contractors meet the Counties' workforce requirements for apprenticeship and goals for a diverse workforce. Andre' takes pride in the role he plays helping to secure a more prosperous economic future for historically underserved individuals and companies.





# SUSTAINABLE PURCHASING

## AN EXCERPT FROM THE SUSTAINABLE PURCHASING AND SOCIAL EQUITY POLICY

Benefit the community by contributing to environmental and social objectives:

- **REDUCE** greenhouse gas emissions and air contaminants;
- **IMPROVE** energy and water efficiency;
- **REDUCE** the use of hazardous chemicals and substances;
- **REDUCE** waste and supporting reuse and recycling;
- **REDUCE** the environmental impacts associated with food production, consumption and disposal;
- **PROTECT** and encourage the local food and sustainable agriculture sectors, which are central to our region's economy;
- **PROMOTE** contracting opportunities for State certified MWESB firms; and
- **PROMOTE** employee health care.



Multnomah County's Sustainable Purchasing and Social Equity Policy provides guidance into the way we do business; including the goods and services we buy. The Sustainable Purchasing Program, housed in Central Purchasing, coordinates with Strategic Sourcing and County departments to share the tools and resources that guide the County's sustainable purchasing decisions.

The policy furnishes staff with a critical framework which assists in buying decisions while integrating social and environmental considerations into purchases of services and goods and services. Multnomah County seeks to conduct business with vendors who demonstrate responsible businesses practices through sustainability and social equity innovations. Through a collaborative process with departments, Purchasing continues to make significant improvements to existing tools, resource materials and website updates guiding this effort.

In FY 2014 we continued to expand our network of Going Green Together by joining the Regional Public Sector Sustainability Coordinators Community of Practice. This partnership has allowed Multnomah County to start sharing our knowledge and experience with other public agencies seeking to adopt sustainability and social equity innovations into their purchasing policies and business practices. We are sharing promising practices in how we create a space that and empowers all who participate in procurement at all levels of the organization and community to meaningfully engage in sustainable and socially equitable decision making and resource allocation process.

We are continuing to build and implement a process that allows cross-sector solutions that will be sustainable and allow for improved conditions and resources for existing and future populations.



# SURPLUS PROPERTY PROGRAM



IN FY2014, MULTNOMAH COUNTY PURCHASING, IN PARTNERSHIP WITH THE COUNTY OFFICE OF SUSTAINABILITY AND DIVERSITY SOLD SURPLUS PROPERTY WORTH \$16,078.99

During FY2014 Multnomah County Purchasing, in partnership with the County Office of Sustainability and Diversity, began planning for a regional surplus property solution. With a record of success in FY 2014 selling \$16,078.99 worth in assets, the County recognized we were not the only jurisdiction needing to address surplus property concerns.

Purchasing, the Strategic Sourcing Council, and the Office of Sustainability joined forces to bring together staff from other local and state agencies to share their concerns, to foster collaboration and explore the possibility of developing a regional, sustainable solution to manage surplus property. This effort also looked at possible alliances with local non-profits that might have greater local economic impact through the development of local employment opportunities. Thus the Regional Surplus Property Working Group (RSPWG) was formed to meet this challenge.

Based upon the County's Values of Public Safety, Health, Integrity, Stewardship, Creativity & Innovation, Sustainability and Social Justice, the RSPWG identified that surplus property:

- Is not being reallocated internally by agencies and with other jurisdictions and non-profit agencies;
- Requires a process and system to share and manage surplus property inventories;
- Requires metrics for reporting purposes;
- Recycling efforts could be improved with multiple vendors including Qualified Rehabilitation Facilities;

Looking toward FY2015, Multnomah County has initiated a Pilot Project for Surplus Property management. The Surplus Property Pilot Project is set-up in three tiers: Multnomah County employees, non-profit agencies, and other governments.

This pilot is in development, but the initial program focus is to:

- Acquire information for a regional solution;
- Identify and reduce risks involved with a regional roll-out;
- Gain acceptance by all staff;
- Develop and incorporate end-of-lifecycle and total lifecycle property management considerations in purchasing processes.

## **STRENGTHENED ORGANIZATION CAPACITY**

Purchasing built capacity in the areas of staffing leadership, structure, finance, and planning.

## **INTERNAL BASE OF SUPPORT**

Purchasing listened to Strategic Sourcing, Facilities, and other internal stakeholders and agreed to put their concerns into action.

## **BUILT ALLIANCES**

Purchasing convened and connected government agencies, potential QRF's, and non-profits to discuss surplus property.

**SUSTAINABILITY**

**STEWARDSHIP**

**HEALTH**

**INTEGRITY**

MULTNOMAH C



# Surplus Property Pilot Planning

## SHIFT IN SOCIAL NORMS

Purchasing began shifting the values and behaviors by convening regional surplus property meetings and conducting a survey.

## CHANGES IN IMPACT

Needed a pilot to explore mechanisms to share and reallocate surplus internally and externally, & recycle surplus sustainability.

## IMPROVED POLICY

Policies reviewed, FIN13 and PUR-8.



**PUBLIC SAFETY    SOCIAL JUSTICE    CREATIVITY & INNOVATION**

**COUNTY VALUES**



Sept. 17, 2012



Apr. 12, 2013



Aug. 26, 2013

## SELLWOOD BRIDGE PROJECT

**41,825 HOURS  
APPRENTICESHIP  
TRAINING**

**183 DIFFERENT  
APPRENTICES**

**94,245 HOURS WORKED  
BY MINORITY JOURNEY-  
& APPRENTICE-LEVEL  
TRADESPEOPLE,  
46,948 OF THOSE  
HOURS BY FEMALE  
WORKERS**

After three years of construction, significant progress has been made towards completion of the new Sellwood Bridge. Similarly, the project team and the dozens of subcontractors working on the project have realized significant progress towards meeting the project workforce training and diversity goals and the project's DMWESB subcontractor participation goals. By project completion the general contractor, Slayden-Sundt Joint Venture, and their subcontractors are tasked with achieving a workforce apprenticeship participation goal of 20% and workforce diversity goals of 14% female and 20% minority workforce participation.

Through the end of the fiscal year, those contractors responsible for meeting apprenticeship training targets had achieved 41,825 hours of apprenticeship training, equaling 21% of the contractors' total combined workforce hours on the project. A total of 183 different apprentices had worked on the project through the end of this reporting period. In addition, 94,245 hours (28%) had been worked by minority journey and apprentice level trades people combined. The project team has also made significant progress towards the female workforce participation goal with 46,908 hours (14%) having been worked by journey and apprentice level trades women.





July 21, 2014



Dec. 19, 2014

Progress towards the project DMWESB contractor participation goal has been trending up, but current participation is short of the 20% target. As of the end of June, 2014, \$32,139,348 had been subcontracted to DMWESB businesses (15%). A total of 192 different subcontracts had been issued with 105 of those having gone to DMWESB businesses. The dollar distribution by certification type shows \$13,410,367 being awarded to DBE certified subcontractors; \$9,783,040 to MBE certified subcontractors, \$6,463,900 to WBE certified subcontractors and \$2,482,041 to ESB certified subcontractors.



# PURCHASING PROGRAM

Multnomah County Purchasing is comprised of 18 professionals who conduct formal procurement and contracting tasks on behalf of the County. On-going professional development, leadership, and training are key to the continuing value this office lends to purchasing and contracting throughout Multnomah County.



## PROFESSIONAL RECOGNITION

In FY2014 Multnomah County Purchasing received two awards for innovations from the National Association of Counties (NACo):

- Leadership in ensuring business opportunities with the County and other agencies throughout the State of Oregon are more easily accessible and available to Minority-owned, Women-owned, and Emerging Small Businesses (MWESB).
- The creation of the procurement tool: Request for Programmatic Qualifications. An open-continuous process for certain human services.

Business Diversity Institute awarded Sophia Cavalli the Leadership Award for her work in helping to increase contract awards to MWESB firms as well as her work in the development and ongoing support of the quarterly MWESB Summits.

## LEADERSHIP

Multnomah County Purchasing is actively involved with NIGP - the National Institute of Governmental Purchasing, through Oregon's two local chapters, the Columbia Chapter and the Oregon Public Purchasing Association (OPPA). By teaming with these local chapters, Multnomah County is able to provide additional training resources, utilizing networking and technology to identify contracting opportunities, as well as identifying upcoming legislative items of impact to the County's business operations.

Purchasing staff participated on governing boards, committees, and provided workshops nationally during FY2014 as follows:

**Brian Smith** served on the Legislative Committee for OPPA and chaired the Professional Outreach Committee for OPPA.

**Barry Zimmerman** served as the Education Director for OPPA and served on the OPPA Web and Program Committees

**Kathi Braeme-Burr** served on the OPPA Program Committee and as Professional Development Director for Columbia Chapter NIGP.

**Gerald Jelusich** co-chaired the Reverse Vendor Trade Show Committee.

**Lawrence Russell** served as the President for Columbia Chapter NIGP.

**Sherry Taylor** served as the Membership Director for Columbia Chapter NIGP.

Multnomah County employees are also encouraged to participate in other forms of leadership development. Multnomah County's Office of Diversity and Equity hosts the County's Employee Resource Groups, which are based on providing support, enhancing career development, and contributing to personal development in the work environment.

**Lawrence Russell** served as the Events Director for the Veterans Employee Resource Group.

**Barry Zimmerman** served as the Communications Director for the Veterans Employee Resource Group.





## CERTIFICATION AND TRAINING

As of June 30, 2014, a full 84% of Multnomah County Purchasing employees are professionally certified. These professional certifications reflect long hours of study and preparation. Ongoing professional education, training, and volunteer efforts by Multnomah County's Purchasing professionals is reflective of our commitment to excellence, continuous professional improvement, and service to the community. Purchasing staff have obtained and maintain the following certifications:

### **Universal Public Procurement Certification Council Certified Professional Public Buyer (CPPB) Designation**

Ryan Allen	Catherine Kwong
Doreen Blome	Lawrence Russell
Kathryn Braeme-Burr	Emilie Schulhoff
Lisa Emery	Lynne Waite
Lee Fleming	Barry Zimmerman
Gerald Jelusich	

**Universal Public Procurement Certification Council  
Certified Public Procurement Officer (CPPO) Designation**  
Brian Smith

**American Contract Compliance Association  
Master Compliance Administrator (MCA) Certification**  
John Classen

**American Contract Compliance Association  
Certified Compliance Administrator (CCA) Certification**  
Kathryn Braeme-Burr  
Lawrence Russell

**Oregon Procurement Basic Certification (OPBC)**  
Kathryn Braeme-Burr  
Lee Fleming  
Lynne Waite

**Multnomah County developed and presented training at NIGP Forum and to both chapters during FY14:**

PURCHASING REPRESENTATIVE	TRAINING	WHERE DELIVERED
Brian Smith	The 15 Minute Professional	NIGP Forum
Brian Smith	Managing Cooperative Contracts	Joint Chapter Workshop
Barry Zimmerman	Tomorrow's Teachers	OPPA
Barry Zimmerman/ Gerald Jelusich	Contract Planning	OPPA Fall Workshop
Emilie Schulhoff	RFPQ Continuously Open Procurements	Columbia Chapter

**Multnomah County Purchasing provided training to other department staff, public agencies, vendors, and the general public:**

TRAINER'S NAME	TRAINING	WHERE DELIVERED
Gerald Jelusich	Purchasing as a Second Language	Metro
Barry Zimmerman	How to do Business with a Public Agency	QRF Vendors, Oregon State Capitol
Barry Zimmerman	How to do Business with a Public Agency	OPPA Spring Conference
Brian Smith	Public Purchasing for Senior Public Officials	Multnomah County Board
Brian Smith	Feasibility and Cost Analysis	Multnomah County Labor Relations
Brian Smith	Governmental Procurement Ethics	Portland State University, Governmental Procurement Course 440





# PURCHASING ACHIEVEMENTS

## KEY PROCUREMENTS

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### MEDICAL AND PHARMACY CLAIMS PERFORMANCE AUDIT SERVICES



After 15 years of relying on the independent audits from one vendor, the Department of County Management, Benefits Division determined to competitively seek out Proposers from whom it could purchase independent Medical and Pharmacy Claims Performance Audit Services.

For approximately fifteen years, medical and dental claims administration for our self-insured plans has been provided by Moda Health. As of July, 2012, Moda Health also provided claims administration for our self-insured pharmacy benefits, leading some to suggest it was time for independent audits in light of the large dollar amounts involved. The annualized medical and prescription claims expenditures for the self-insured plans are approximately \$16,000,000. The Multnomah County Employee Benefits Program provides six comprehensive medical/prescription/vision plan options and two dental plan options for over 10,000 eligible individuals, including employees/retirees, their spouse or domestic partner and dependent children. All six plan options include a prescription component.

Although not required by rule or statute, these independent verification audits should reveal how the County might recover benefit payments, obtain significant cost savings and implement service improvements benefiting both County employees and family members as well as preserving County funding.

Multnomah County provides medical and drug coverage through a self-insured program administered by two separate third party administrators. Auditing Services provided in response to this solicitation feature an initial audit consisting of the following major components:

- Random Sampling of 250 Moda Health Medical and Vision Claims and 250 Pharmacy Claims
- Random Sampling of Med Impact Pharmacy Claims
- Review of Claims Quality Accuracy
- Analysis of Contractor Performance against Contract Performance Guarantees
- Analysis of Provider Payment Inaccuracies
- Recommendations Regarding Recovery Potentials
- Improvement and Implementation Strategies Indicated from Findings
- Request Backend Reports for system errors identified.

With each audit, Benefits is seeking a detailed critical analysis of the activity of the current third party administrators, checking in detail that the work has been done in accordance with accepted practices and there is sufficient justification for final claims adjudication and payment amounts. The first audit will be done in late 2014 with additional audits scheduled in the out years.





## LAND USE PLAN COMPREHENSIVE UPDATE

*A Fast Moving Project Highlighting a Partnership of Cooperation and Coordination*

Although small in size, the Department of Community Services Land Use and Transportation Planning Division (LUTPD) makes perhaps one of the most critical contributions to the intelligent, controlled growth of Multnomah County and the region. During 2013, the LUTPD took stock of their entire planning system – the current Transportation System Plans (TSPs) were outdated. The TSPs did not adequately address the needs and conditions of bicycle, pedestrian and transit traffic. Nor did they adequately capture the current conditions of state highways and freight routes to plan for future use and needs of such critical facilities. There have been significant changes to the transportation system in Multnomah County since these TSPs were last updated and maintaining the individual Rural Area Plans and TSPs had proven inefficient over time. The result has been repetitive regulations which were more difficult for citizens to understand and more time consuming for staff to implement and maintain.

Additionally, State law required each county to adopt a Comprehensive Plan consistent with statewide planning goals and implementing statutes. Multnomah County's current Comprehensive Plan Policy 1(F) has not had a high level re-evaluation of the goals, policies, strategies and structure since its original adoption in the 1970s. Equally important, the Program's focus had evolved from urban to rural planning over the last 40 years. Many of the urban focused plan policies had not been removed, send-

ing a confused message about the services Multnomah County currently provides.

When funding fell into place in early 2014, LUTPD undertook the ambitious revision of the entire planning system.



First, they partnered with Purchasing and embarked on a procurement development process. Ten days after first contact, a comprehensive, competitive solicitation was published, which closed three weeks later with five proposals received. Written evaluations were completed in a week. Oral evaluations of the three most promising offers were completed a week later, with Award notification being issued once oral evaluations were completed. A typical three month

formal competitive solicitation process was successfully condensed into 42 days as a result of the superbly managed coordination between the program, led by Adam Barber, and Purchasing.

The resulting contract included updating regulations to align with amended policies and procedures. It also included combining individual chapters of community development codes to simplify the land use process. This two year project will re-incorporate policies and strategies embodied in each of the Rural Area Plans and associated Transportation System Plans back into one combined Comprehensive Framework Plan document reinforcing the fact that Multnomah County serves the entire community equitably, while recognizing the unique natural and cultural settings of the communities we serve.

# PSYCHOLOGICAL & PSYCHIATRIC SERVICES FOR OFFENDERS

*Looking at the Retention of Professionals in a New Way*

The mission of the Department of Community Justice (DCJ) is to enhance community safety and reduce criminal activity by holding youth and adults accountable in a fair and just manner, assisting them to develop skills necessary for success, and effectively using public resources. DCJ is responsible for providing a balance of supervision, sanctions and services to about 9,000 adult and juvenile offenders residing in Multnomah County. DCJ has been at the forefront of developing programs and services to strengthen and improve community safety as well as working to reduce recidivism and re-offense rates through the various programs and services provided to both adult offenders and youth.

Psychological evaluations and treatment services play an essential role in determining what services are needed by both adult offenders and youths to reduce delinquent and criminal behavior. Community safety is protected by evaluating and treating offenders. In addition, psychological evaluations and treatment services support the department's key strategies of client accountability, resource management and system change. The four main services include psychological evaluations for Adult Offenders for pre-sentence investigation reports, evaluations and diagnostic counseling and treatment for Juvenile or Adult Offenders, psychiatric case consultation and treatment Services for Juvenile Offenders with medical direction services, and consultation, program support, and training for DCJ's Juvenile Services Division clinical teams.

In the past, we had required Proposers to submit detailed responses, often up to 30 pages in length, providing their specific qualifications and experience. The Proposals, often five to seven in number, then had to be carefully read by evaluators and scored in written evaluation panels. This time around, both the Program and Purchasing determined that much of the old evaluation process did little to differentiate the Proposers and mostly provided information that had already be provided to the State and other certification boards and entities. Since Psy-



chiatrists and Psychologists were already certified by the State, which included mandatory training, educational achievement and experience with specific populations, the Program and Purchasing scrapped the old process and created instead an application process that was much simpler to score. The new process would provide immediate feedback to the Proposer based on what they self-scored instead of having to wait weeks to get their final results. Points were awarded in the application based on years of experience, public sector and criminal justice system experience and sustainability. Rather than having subjective criteria, the applicant merely had to check boxes worth a set amount of points.

As a result of using the new application process, Providers found it much easier to complete it, we had fewer entry errors and found it much easier to review and confirm scoring – completing the process in one-seventh the time usually required for evaluations. The Program obtained quality candidates for significantly less evaluation time commitment. We've adopted this process as a Purchasing best practice and will use this practice where appropriate to minimize the Proposer and Program time commitments.





## SECURED TRANSPORT

*A Joint Mental Health Solicitation  
with Marion County*

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**MULTNOMAH COUNTY,  
AS THE LARGER USER OF  
THESE UNIQUE SERVICES,  
TOOK THE LEAD.**

In recent years, both Marion and Multnomah County have made a conscious effort to begin sharing information, requirements and consulting with each other over a variety of common issues, from contracts and procurements to provision of social services. In many ways, Marion County is more similar to Multnomah County than some neighboring counties, who have significantly different populations and service requirements.

One outgrowth of this sharing was the decision by both Counties to consider joint solicitation efforts where it made sense to reduce solicitation costs and to begin more uniformly providing common services, a benefit to both providers and the service organizations.

In the spring, both Multnomah County and Marion County Mental Health

Authorities had a mutual requirement for the provision of secured medical transportation services for clients who suffer from mental illness and need to be transferred between facilities. Clients could be juveniles or adults. Transporters are extensively trained in dealing with the clients and their issues and may occasionally employ restraints, as necessary. Both Counties had previously been contracting for these services under exemptions, using one vendor each, which increasingly did not meet all of their requirements.

Multnomah County, as the larger user of these unique services, took the lead and worked closely with Marion County to develop a joint solicitation that met both Counties' needs. Proposers were invited to offer a proposal to serve either Multnomah County, Marion County, or one for each county. Additionally, an extensive Pre-Proposal process brought together many of the service providers who had previously only worked with one County or the other and in the process shared their unique experiences that significantly altered the initial solicitation requirements and proved to be of real value to both Counties.

A total of seven proposals were submitted, with four seeking to provide Multnomah County services and three for Marion County services. Two separate evaluation panels, one for each County, made a total of four awards, ensuring each County had two agencies to meet both current and projected service needs. The Counties' found the competitive process not only drove significant changes to the services but also helped keep a check on pricing, giving options to the Counties' that had not previously existed. As the mental health system continues to undergo extensive revision, it is hoped we can continue to join with other government agencies and partners in building a more robust and shared system of care.



Traditionally, trade services like welding have been provided either on a project by project basis or on very limited dollar Public Works Agreements on a requirements or as needed basis. While there is considerable legislative support and history for educational institutions to buy trade services on a requirements basis, there is less support for Governmental Agencies like Multnomah County to do so.

## WELDING AND FABRICATION SERVICES

### *Increasing the Efficiency of Contracting*

However, over the years it has become apparent that there is a growing need for a more flexible procurement instrument that would allow a facility manager to instantly bring in a contractor to do trade work in a more efficient and responsive manner, while maintaining the integrity of the procurement process. Nowhere was this more apparent than in County jail facilities, where broken doors and other metal equipment need to be fixed immediately which could present a significant security risk to the both corrections staff and inmates until repaired. Additionally, contractors require facility background checks which can take weeks to obtain. These considerably higher stakes and additional requirements in the jails motivated a team from Facilities and Property Management, the Department of County Management and Central Purchasing to brain storm and design a procurement and contracting arrangement that would eliminate some procurement program complexities and significantly reduce the requirement for a project by project procurement approach.

As a result, the team developed a process that featured a bid process, not for a specific project, but for a wide range of welding, metal fabrication, installation and related services. This program, implemented for a trial period of three years, would include work incidental to ironwork, boilers, plumbing, power equipment and other areas needing metal work at County Correctional Facilities on a time and material basis. This trial process would allow Facility Managers to immediately contact a single Contractor for virtually any kind of metal work that would be required in the Jails, with no delays and a minimum 8 hour response time, 24-hours a day, seven days a week. The Contractor would review the work to be done and then provide an estimate to the Facility Manager for both labor and materials. The Facility Manager could accept the estimate immediately, or could reject it and enter into negotiations regarding the proposed level of effort and costs, or elect to defer the work and obtain competitive quotes or bids through existing competitive processes. This ability to accept, negotiate or defer work helps keep the Contractor's estimates in check – a frequent problem with longer term requirements contracts.

A contract was awarded through a formal, competitive process and a MWESB firm won the contract, with a labor/material bid that was almost a third lower the other two bids received from other vendors. Initial use of the contract by the Facility Manager has been reported to be very successful and has addressed several critical issues experienced prior to the new process.



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IT HAS BECOME APPARENT THAT THERE IS A GROWING NEED FOR A MORE FLEXIBLE PROCUREMENT INSTRUMENT THAT WOULD ALLOW A FACILITY MANAGER TO INSTANTLY BRING IN A CONTRACTOR TO DO TRADE WORK IN A MORE EFFICIENT AND RESPONSIVE MANNER, WHILE MAINTAINING THE INTEGRITY OF THE PROCUREMENT PROCESS.

# OWNER'S REPRESENTATIVE SERVICES FOR NEW CENTRAL COURTHOUSE

## *At Long Last, Gathering Momentum*

Multnomah County needs a new Central Courthouse – a fact known for years and stated in many reports going back decades. The existing Multnomah County Courthouse has served the region since 1914 primarily as a Circuit Court. During this time, the population of the County has quadrupled. Several court rooms have been added by dividing up the larger court rooms both horizontally and vertically in an attempt to support increased court operations. Relatively few systems within the existing Courthouse have been upgraded. Technology enhancements and logistics improvements for the Courthouse have been extremely difficult due to the restrictions imposed by the existing structure. Seismically, the 100-year old building is not designed to survive even relatively moderate earthquakes, a definite concern in the Northwest.

In the fall of 2013, with support from many quarters including the Governor's Office, Multnomah County took its first major step towards the acquisition of a new courthouse with the release of a Request for Proposals for an Owner's Representative. The Owner's Representative (OR) team provides the necessary planning, financial, technical, and procurement assistance to assist the County in creating a refined Program Document which optimizes the best Courthouse layout, footprint, size and functional configuration for the next 50 years of predictable Courthouse needs and delivery of justice services. This OR team

will work on a planning and programming refinement and site selection process followed by an optional procurement, design and construction, and other potential follow-on activities involved in operating a new Central Courthouse for Multnomah County. The resulting contract could be effective through 2034, depending on the decisions made at critical milestones by the County.

Based on recommendations from key advisors, the OR scope of services included the following phases:

**Phase 1** – Project Management, Program and Business Case Analysis Review, and Site Planning (9 months)

**Optional Phase 2** – Procurement Process/Documents and Management

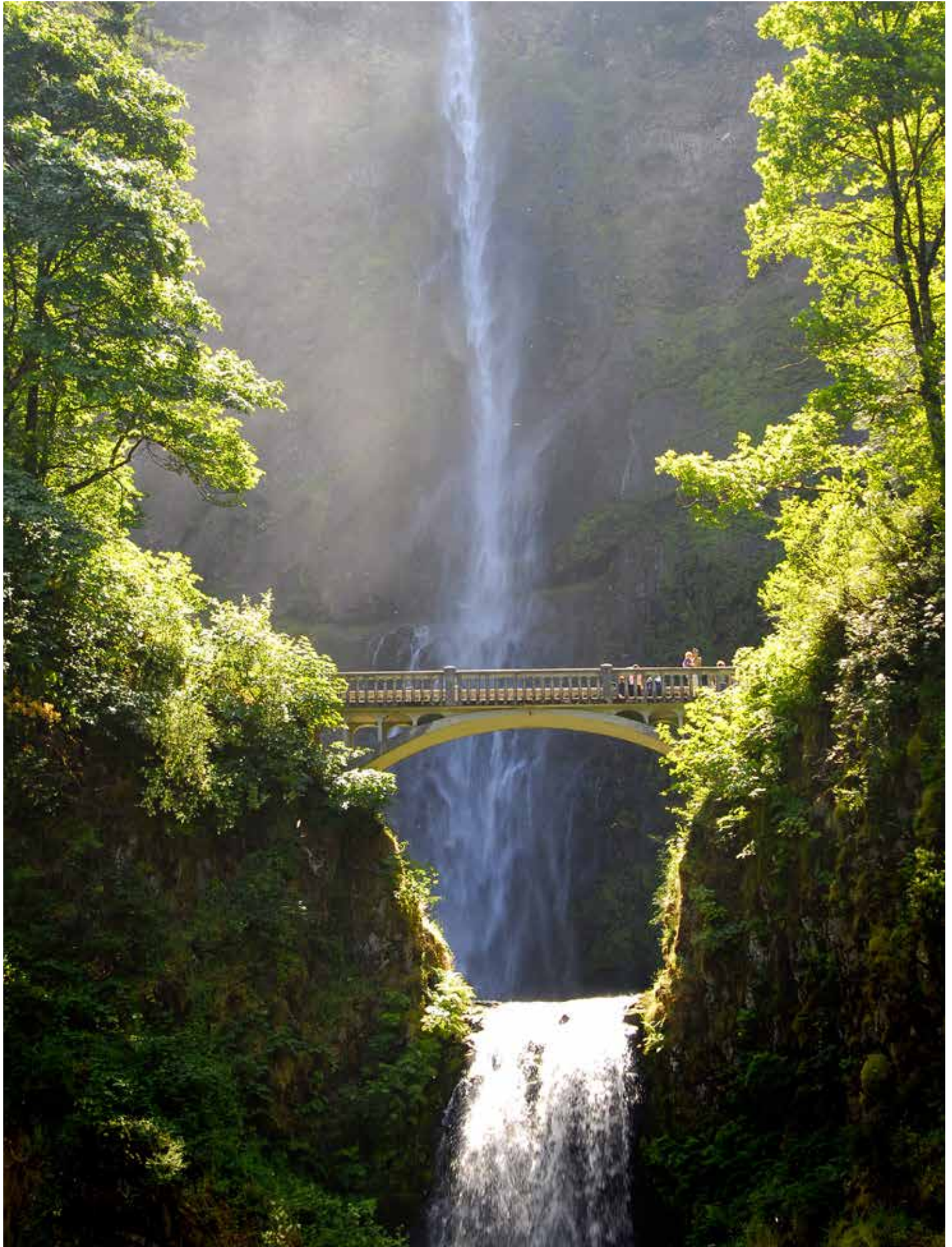
**Optional Phase 3** – Design and Construction Oversight

**Optional Phase 4** – Long Term Asset Warranty

Five highly competitive proposals were received and ultimately Day CPM and Shiels, Obletz and Johnsen were invited to follow-on oral evaluations. Day CPM, a local firm, emerged as the highest scoring agency, was offered a contract and is now performing the OR services. With the completion of the first phase, final reports have been delivered and the critical Procurement decisions are now under review and discussion.









# PERFORMANCE MEASURES



During the last year, Purchasing staff supported departments to purchase goods and services across a broad range of categories such as construction, health and human services, materials, professional services, and non-professional services.

In fiscal year 2014, the largest percentage of dollars awarded on County contracts was for health and human services and professional services for a combined 70% of total. Construction represented 3%, materials represented 8%, and non-professional services represented 19% of dollars awarded. In comparison, the County awarded 68% of all contract dollars in 2013 to health and human services and professional services. Construction contracts represented 20% while materials and non-professional services were awarded 2% and 9% of dollars awarded respectively.

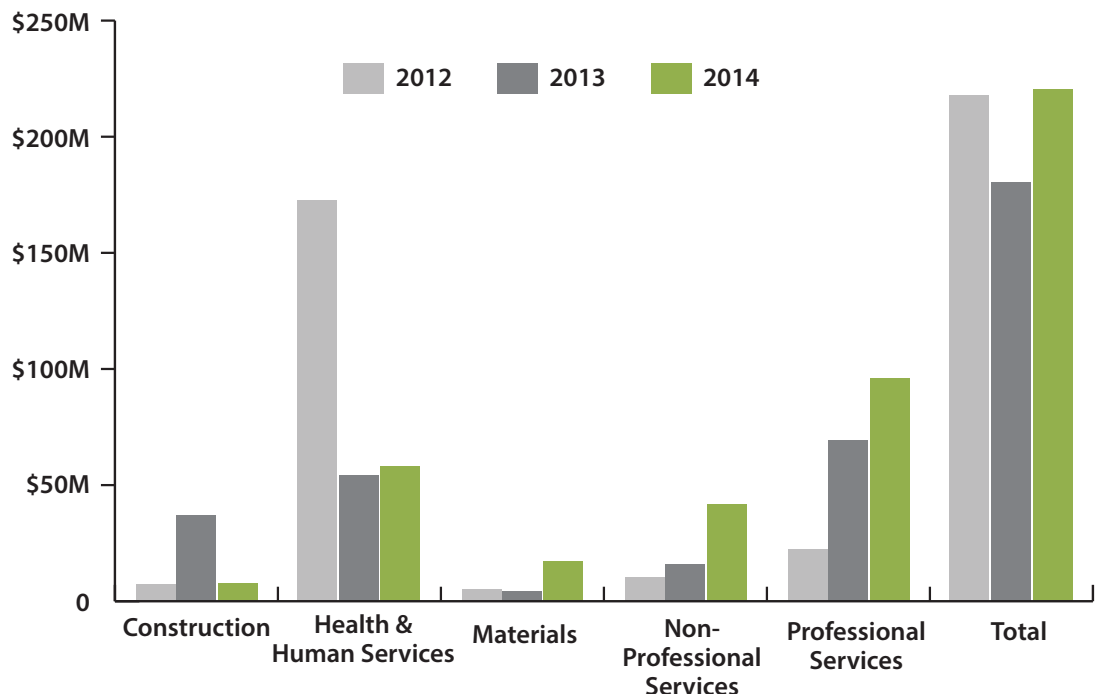
The charts and tables on the following pages have organized contracts into three main categories:

**MWESB and Non-MWESB Awards** — These are subdivided into Minority Business Enterprises, Women Business Enterprises, and Emerging Small Businesses (MWESBs) and Non-MWESB.

**Non-Applicable Awards** — Vendors in this category are either ineligible for MWESB certification, or they chose not to apply for that status. They may be government agencies, non-profits, or other non-governmental organizations such as utilities.

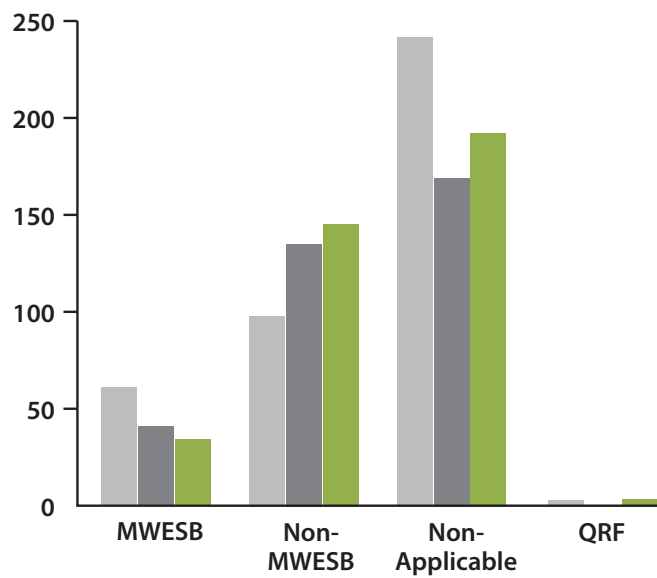
**QRF Contract Awards** — Vendors who are Qualified Rehabilitation Facilities under the State of Oregon Product of Disabled Law (ORS 279.835-279.855).

## DOLLARS AWARDED BY CATEGORY

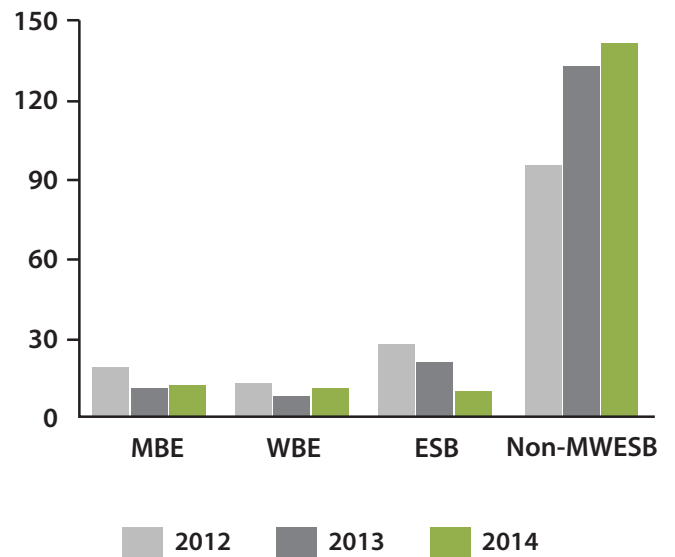




**TOTAL NUMBER OF CONTRACTS**

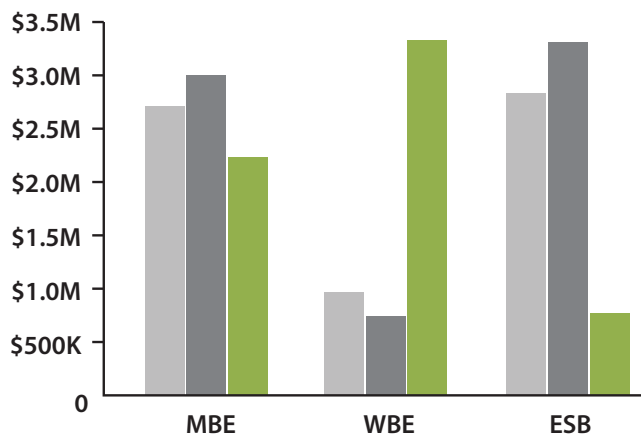


**PRIME CONTRACTS AWARDED**

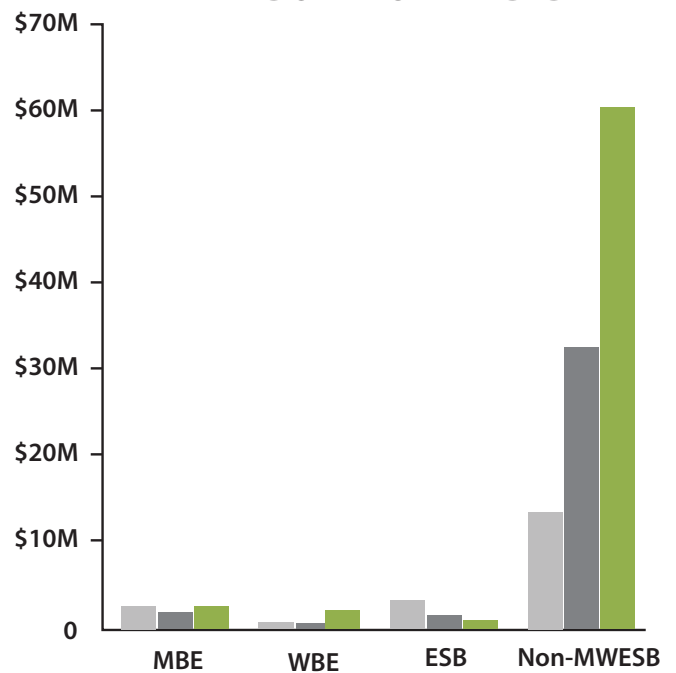


2012 2013 2014

**PAYMENTS MADE TO MWESBs**



**PRIME DOLLARS AWARDED**





## TOTAL PAYMENTS TO MWESB FIRMS

### FY2014

	\$ PAID	% OF TOTAL PAID	# OF VENDORS	% OF TOTAL # OF VENDORS
<b>MBE</b>	\$2,236,656.53	35.27	32	35.16
<b>WBE</b>	\$3,331,493.66	52.53	28	30.77
<b>ESB</b>	\$773,406.71	12.20	31	34.07
<b>TOTAL</b>	\$6,341,556.90	100.00	91	100.00

### FY2013

	\$ PAID	% OF TOTAL PAID	# OF VENDORS	% OF TOTAL # OF VENDORS
<b>MBE</b>	\$3,002,332.69	42.59	34	32.69%
<b>WBE</b>	\$738,114.10	10.47	29	27.88%
<b>ESB</b>	\$3,308,751.68	43.48	41	29.42%
<b>TOTAL</b>	\$7,049,198.47	100	104	100%

### FY2012

	\$ PAID	% OF TOTAL PAID	# OF VENDORS	% OF TOTAL # OF VENDORS
<b>MBE</b>	\$2,713,689	41.66	34	32.08
<b>WBE</b>	\$967,606	14.86	32	30.19
<b>ESB</b>	\$2,832,024	43.48	40	37.74
<b>TOTAL</b>	\$6,513,319	100	106	100

## NON-APPLICABLE AWARDS

YEAR	# OF CONTRACTS	\$ AWARDED
<b>FY2014</b>	191	\$133,938,422.98
<b>FY2013</b>	168	\$147,834,101
<b>FY2012</b>	241	\$197,316,226

## QRF CONTRACT AWARDS

YEAR	# OF CONTRACTS	\$ AWARDED
<b>FY2014</b>	3	\$20,573,027.47
<b>FY2013</b>	0	\$0
<b>FY2012</b>	2	\$583,580.00

## TOTAL AWARDS

### MWESB, NON-MWESB, NON-APPLICABLE AND QRF

YEAR	# OF CONTRACTS	\$ AWARDED
<b>FY2014</b>	371	\$220,389,020.67
<b>FY2013</b>	343	\$180,191,747.00
<b>FY2010</b>	400	\$217,980,389.00



# PCRB AND ORS REPORTING FY 14

**Procurement Reporting:** This part of the report contains information pursuant to the following Public Contract Review Board (PCRB) Rules:

## Section 20-0025(d)

A listing of solicitations awarded through the solicitation process to contractors who did not score the highest evaluation or have the lowest responsive bid.

**None during FY14**

## Section 20-0025(e)

A listing of contracts exceeding the dollar limit set forth in Rule 47-0270 (1), 49-0160 (1) as well as Formal personal services contracts governed by Administrative Procedure PUR-1 for which only one bid or proposal was received.

**RFP# 4-2517** MH Svs for African Americans

**Department:** Health Department

**Proposer:** Shellmire

**RFP# 4-1533** Juvenile Services Division (JSD) Community Detention and Electronic Monitoring

**Department:** Community Justice

**Proposer:** Volunteers of America, Inc.

## CONTRACTS SUMMARY

The following information is pursuant to PCRB rules 20-0025 (a) & (c), which required an index of contracts, contract price, and contractors, as well as a summary of contract totals by County Departments for the prior and current year.

In FY14, Multnomah County awarded contracts totaling \$220,389,020.67. The awarded amounts represent the total value of all contracts that have a start date between 7/1/2013 and 6/30/2014. The nature of multi-year contracts can cause awarded amounts to vary considerably from one fiscal year to the next. The following table summarizes these totals by County Department for FY14.

## CONTRACT SUMMARY BY DEPARTMENT

DEPARTMENT	FY2014	FY2013
COUNTY ASSETS	\$59,848,443.43	\$55,532,039.37
COMMUNITY JUSTICE	\$7,854,193.37	\$1,872,132.15
COMMUNITY SERVICES	\$10,144,367.67	\$1,781,550.81
COUNTY HUMAN SERVICES	\$41,840,800.31	\$48,328,680.56
COUNTY MANAGEMENT	\$81,627,685.45	\$64,785,808.47
DISTRICT ATTORNEY	\$1,659,952.88	\$273,160.92
HEALTH	\$10,977,056.00	\$5,348,175.20
LIBRARY	\$51,600.00	\$61,724.00
NON-DEPARTMENTAL	\$44,200.00	\$1,297,743.50
SHERIFF'S OFFICE	\$6,340,721.56	\$910,731.63
TOTAL	\$220,389,020.67	\$180,191,746.61



# APPENDIX

# 1

## CONTRACT AWARDS TO MWESB VENDORS AND QRF FIRMS

CONTRACT #	VENDOR NAME	\$ AMOUNT	CERTIFICATION
4400000706	ACCENT PAINTING	\$150,000.00	ESB
4400001230	ACCENT PAINTING	\$12,345.00	ESB
4400000591	BEACON SYSTEMS	\$1,000,000.00	MBE
4400000653	BRUNDIDGE & SONS INC	15,000.00	ESB
4400000873	COATES KOKES	\$30,000.00	WBE
4400000821	CRITICAL CARE BIORECOVERY LLC	\$150,000.00	WBE
4400000807	D & F PLUMBING	\$34,665.00	WBE
4400000878	DECA INC	\$49,782.00	ESB
4400000722	DEPAUL INDUSTRIES	\$4,500,000.00	QRF
4400000923	ENERGY COMFORT & CONSTRUCTION LLC	\$150,000.00	MBE
4400000829	EUROPEAN SECURITY & IRON SPECIALTIE	\$150,000.00	ESB
4400001241	EUROPEAN SECURITY & IRON SPECIALTIE	\$150,000.00	ESB
4400000601	FLANNEL THOMAS	\$150,000.00	MBE
4400000180	GREEN TRANSPORTATION COMPANY LLC	\$30,000.00	MBE
4400001259	HARMON RUTH N	\$75,000.00	WBE
4400000793	IN LINE COMMERCIAL CONSTRUCTION INC	\$20,217.00	MBE
4400000734	INNOVATIVE GROWTH SOLUTIONS LLC	\$75,000.00	WBE
4400000795	LATTE NO SUGAR CO	\$25,320.00	WBE
4400000593	MERIDIAN PARTNERS LLC	\$1,000,000.00	MBE
4600007501	MESHER SUPPLY COMPANY	\$500,000.00	WBE
4400000955	NORTHWEST GEOTECHNICAL CONSULTANTS	\$100,000.00	MBE
4400000899	NWR CONSTRUCTION LLC	\$150,000.00	ESB
4400000599	PACIFICMARK CONSTRUCTION	\$34,110.00	MBE
4400000808	PACIFICMARK CONSTRUCTION	\$30,551.71	MBE
4400000721	PORTLAND HABILITATION CENTER INC	\$16,000,000.00	QRF
4400000613	PROFESSIONAL MINORITY GROUP INC	\$46,260.00	MBE
4400000740	RA SCHWARZ HEATING AND COOLING INC	\$46,649.00	MBE
4400001020	RA SCHWARZ HEATING AND COOLING INC	\$13,500.00	MBE
4400000588	RIVER CITY GLASS & WINDOW INC	\$58,627.00	ESB
4400000714	SBS CONSTRUCTION LLC	\$201,250.00	ESB
4400001115	SERVICE-NOW.COM	\$73,027.47	QRF
4400000817	SMOCK KRISTINA	\$29,000.00	WBE
4400000916	STRYKER CONSTRUCTION INC	\$24,422.00	ESB
4400000813	TELL JODI T	\$50,000.00	WBE
4400000589	TRI PHASE ELECTRIC	\$150,000.00	WBE
4400000598	VANDERHOEWEN & ASSOCIATES INC	\$1,000,000.00	WBE
<b>TOTAL</b>		<b>\$26,274,726.18</b>	

## PAYMENTS MADE TO MWESB VENDORS

# APPENDIX 2

VENDOR #	VENDOR NAME	\$ AMOUNT	CERTIFICATION
62208	ACCENT PAINTING	\$97,683.64	ESB
59540	ACE-CUBE LLP	\$3,000.00	MBE
62928	AFFORDABLE FAMILY MEMORIALS	\$645.00	MBE
47510	AIR SYSTEMS SALES & RENTALS	\$950.00	ESB
55108	APPLEXUS TECHNOLOGIES LLC	\$310,130.00	MBE
53247	BARBIER INTERNATIONAL INC	\$57,112.52	MBE
62387	BEACON SYSTEMS	\$103,805.00	MBE
61093	BEAVERTON PLUMBING INC	\$933.00	ESB
49842	BIO-MED TESTING SERVICE INC	\$4,618.00	WBE
52795	BLAZING STITCHES LLC	\$218.80	ESB
20262	BOILER & COMBUSTION SERVICES INC	\$57,386.13	ESB
64919	BRUNDIDGE & SONS INC	\$11,980.00	ESB
62410	BUDS EXPERT TREE CARE INC	\$44,930.00	ESB
52102	BUSINESS COURIER	\$11,196.00	MBE
28038	CAMPAGRAPHS INC	\$4,692.00	MBE
23949	CARLETON HART ARCHITECTURE PC	\$6,109.27	MBE
63248	CLEAN SERVICES NORTHWEST	\$62,112.00	ESB
63158	COATES KOKES	\$22,146.95	WBE
22884	COMPASS COMPUTING GROUP INC	\$236,914.77	ESB
44915	COREY DAVID M PHD PC	\$41,255.00	ESB
60711	CRITICAL CARE BIORECOVERY LLC	\$18,570.00	WBE
21939	D & F PLUMBING	\$12,678.00	WBE
22297	DIRT & AGGREGATE INTERCHANGE INC	\$509,200.00	MBE
59149	DON BURKE EXCAVATION & CONSTRUCTION	\$2,804.00	ESB
58153	DONKIN CONSTRUCTION COMPANY	\$282,113.53	ESB
51383	DTS SYSTEMS INC	\$160.00	ESB
21172	DYNAMIC SYSTEMS INC	\$1,476.00	WBE
61001	EDGE-LEADERSHIP CONSULTING LLC	\$4,170.00	WBE
26070	EDMONDSONS DRAPERY INC	\$1,554.00	ESB
28554	ELITE SIGNS	\$276.90	MBE
55168	ENERGY COMFORT & CONSTRUCTION LLC	\$1,103,558.44	MBE
54334	ENSOFTEK INC	\$354,728.32	MBE
28468	EUROPEAN SECURITY & IRON SPECIALTIE	\$274,466.13	ESB
46691	EXCEL GLOVES & SAFETY SUPPLIES INC	\$87,400.27	MBE
63998	EXTREME PRODUCTS	\$9,579.78	MBE
60257	FIELDS PARTNERS INC	\$34,054.17	WBE
54288	FIGURE 8 CONSULTING LLC	\$11,350.00	WBE
58833	FLANNEL THOMAS	\$40,204.35	MBE
63925	FORWARD MOTION FACILITATION LLC	\$2,520.00	ESB
63300	GREEN ENERGY SOLUTIONS INC	\$132,983.89	ESB

Continued on following page >>>



## APPENDIX

## 2

**PAYMENTS MADE TO MWESB VENDORS** *(continued)*

<b>VENDOR #</b>	<b>VENDOR NAME</b>	<b>\$ AMOUNT</b>	<b>CERTIFICATION</b>
63301	GREEN HORIZON WEATHERIZATION LLC	\$37,972.72	ESB
50518	GREEN TRANSPORTATION COMPANY LLC	\$43,135.74	MBE
60158	GROUP AGB LIMITED	\$26,314.00	MBE
10677	HALL ELINOR	\$1,575.00	WBE
21820	HARRIS WORKSYSTEMS INC	\$191,056.03	WBE
60541	HOME ENERGY LIFE PERFORMANCE GRP IN	\$60,943.54	MBE
10421	IN LINE COMMERCIAL CONSTRUCTION INC	\$39,674.00	MBE
65108	INNOVATIVE GROWTH SOLUTIONS LLC	\$11,812.50	WBE
58014	JAMA SOFTWARE INC	\$5,309.70	ESB
56254	JUST IN TIME TRAINING	\$14,497.00	WBE
23292	JW UNDERGROUND INC	\$9,278.16	ESB
46411	KENNEY LORI	\$10,706.25	WBE
50970	KRISTIN LENSEN CONSULTING	\$99,888.10	MBE
59889	LANGUAGES TRANSLATION SERVICES	\$548.20	MBE
10328	LATTE NO SUGAR CO	\$10,349.77	WBE
62008	LINGUAVA INTERPRETERS	\$195,052.70	ESB
28101	MARCO IDEAS UNLIMITED	\$2,090.02	WBE
56159	MARY FORST ASSOCIATES	\$36,358.75	WBE
53029	MCCLINTOCK REBECCA C	\$30,850.00	WBE
46293	MECHANICAL INC	\$11,219.30	MBE
20289	MESHER SUPPLY COMPANY	\$5,079.91	WBE
60530	MOVE IN READY LLC	\$35,341.92	MBE
59936	MSD CONSTRUCTION LLC	\$15,639.21	MBE
50233	NEWBERRY ENTERPRISES INC	\$665.81	ESB
56627	NORTHWEST ELECTRICAL CONTRACTORS CO	\$406,988.18	ESB
65069	NORTHWEST GEOTECHNICAL CONSULTANTS	\$51,865.28	MBE
60289	NORTHWEST SCAFFOLD SERVICE INC	\$99,462.06	ESB
64646	NWR CONSTRUCTION LLC	\$3,750.00	ESB
55136	OH PLANNING & DESIGN LLC	\$5,097.50	WBE
24491	OMEGA CREMATION & BURIAL SERVICE	\$3,091.00	WBE
53142	OMNI INTERIORS INC	\$5,415.00	ESB
60110	ONEILL ELECTRIC INC	\$1,845.00	MBE
28854	PACIFIC WINDOW TINTING INC	\$15,029.18	WBE
46135	PACIFICMARK CONSTRUCTION	\$64,661.71	MBE
10009	PORTLAND OBSERVER INC	\$4,395.84	WBE
50337	PROFESSIONAL MINORITY GROUP INC	\$102,392.00	MBE
28203	PROMOTIONAL CONCEPTS	\$250.85	MBE
63289	RA SCHWARZ HEATING AND COOLING INC	\$58,686.45	MBE
56071	RIVER CITY GLASS & WINDOW INC	\$78,102.67	ESB
53779	SBS CONSTRUCTION LLC	\$120,008.75	ESB

*Continued on following page >>>*

# PAYMENTS MADE TO MWESB VENDORS *(continued)*

# APPENDIX

# 2

VENDOR #	VENDOR NAME	\$ AMOUNT	CERTIFICATION
52447	SCHILLER GRAPHICS CORPORATION	\$40,527.10	WBE
61190	SMOCK KRISTINA	\$29,800.00	WBE
58797	SOLID GROUND CONSULTING	\$5,625.00	ESB
11152	STAFFING SOLUTIONS LLC	\$6,254.00	WBE
22480	STORIE & ASSOCIATES	\$14,100.00	WBE
47345	STRYKER CONSTRUCTION INC	\$18,002.00	ESB
22889	SUAREZ LUCRECIA V	\$116,101.51	MBE
25579	TRI PHASE ELECTRIC	\$226,775.74	WBE
20377	TRI-STAR DETENTION INC	\$4,898.00	WBE
22211	TURTLE MOUNTAIN CONSTRUCTION COMPANY	\$1,349.00	MBE
59976	VANE AXIAL FANS MECHANICAL INC	\$58.89	ESB
<b>TOTAL</b>		<b>\$6,341,556.90</b>	



## APPENDIX

# 3 DEFINITIONS

**Emerging Small Business (ESB)** Emerging Small Business (ESB) certification applies to firms that meet the following criteria:

- Principal place of business located in Oregon
- Average annual gross receipts over the past three years not exceeding \$1 million for construction companies and \$300,000 for all other businesses
- Fewer than 20 employees
- Properly licensed and legally registered in Oregon

For more information on criteria for becoming ESB certified with the State of Oregon, check with the OMWESB website at: [www.oregon4biz.com/Grow-Your-Business/Business-services/MinorityOwned-Business-Certification/](http://www.oregon4biz.com/Grow-Your-Business/Business-services/MinorityOwned-Business-Certification/).

**Formal Procurement** Formal procurements are those with a value exceeding \$150,000. They are described in Appendix 5 Competitive Threshold Guide.

**Informal Procurement** Informal procurements have a value between \$10,000 and \$150,000. They are described in Appendix 5 Competitive Threshold Guide.

**Minority Business Enterprise (MBE) & Women-Owned Business Enterprises (WBE)** Certification given by the State of Oregon to a Minority Business Enterprise (MBE) or a Women-Owned Business Enterprise (WBE) pursuant to ORS 200.055:

- **Ownership** – minority or woman interest must own at least 51 percent of the business
- **Independence** – the minority or woman-owned firm must not be inextricably associated or dependent upon a non-disadvantaged firm or individual(s)
- **Control** – minority or woman interest must have managerial and operational control over all aspects of the business
- **Contribution of capital by minority or woman owners** – one or more minority or woman business owners must

have made a real and substantial contribution of capital or expertise to the business, commensurate with their ownership interest

- **Business size** – firms must not exceed the size standards as defined by the North American Industry Classification System (NAICS) Codes

For more information on criteria for becoming MBE or WBE certified with the State of Oregon, check with the OMWESB website at: [www.oregon4biz.com/Grow-Your-Business/Business-services/MinorityOwned-Business-Certification/](http://www.oregon4biz.com/Grow-Your-Business/Business-services/MinorityOwned-Business-Certification/).

**Non-Applicable** Vendors that include other government agencies, non-profit organizations and utilities. All other vendors are considered MWESB eligible.

**Non-MWESB** Non-MWESB vendors include firms who are eligible to be certified as MWESB firms in accordance with definition numbers one (1) and three (3) of this appendix, but have not chosen to be certified.

**Non-Profit Organizations** Non-profit organizations are agencies registered with the State of Oregon's Corporation Division for the purpose of public benefit. [www.filinginoregon.com/pages/business\\_registry/nonprofit.html](http://www.filinginoregon.com/pages/business_registry/nonprofit.html)

**Public Contract Review Board** The Public Contract Review Board (PCRB) is represented by the Multnomah County Board of Commissioners acting as the local contract review board pursuant to ORS279.A.060.

**Qualified Rehabilitation Facility (QRF)** Qualified Rehabilitation Facility (QRF) is an activity center or rehabilitation facility, certified as a community rehabilitation program or as a vocational service provider through the State of Oregon's Department of Human Services, as determined by the State Procurement Office. <http://oregon.gov/DAS/SSD/SPO/qrf-menu.shtml>



## COMPETITIVE PROCUREMENT THRESHOLDS — QUICK GUIDE

## APPENDIX

# 4

THRESHOLD	RULE SET	TITLE (IF ANY)	COMPETITION REQUIRED
\$10,000 or less	PCRB 47-0265	Small Procurement	No – quotes where practicable
\$10,000 or less	PCRB 49-0160(4) Construction	No Title	No – quotes where practicable
Over \$10,000 and less than or equal to \$75,000	PCRB 49-0160 Construction	Informal Quotes for Public Improvements	Yes – informal quotes
Over \$10,000 and less than or equal to \$75,000	PCRB 49-0160 Transportation	Informal Quotes for highways, bridges and other transportation	Yes – informal quotes
\$10,000 or less Per Division, Per Vendor, Per Fiscal Year	PCRB 47-0265 Goods & Services FIN-16	Direct Pay, LPO	No
Over \$10,000 and less than or equal to \$75,000, Per Division	PUR-1 V PCRB 47-0270	Contractor Selection Oral Quote	Yes – informal request for proposals
Over \$10,000 and less than or equal to \$150,000	PCRB 47-0270 Goods & Services	Intermediate Procurement	Yes – informal price quotes or competitive proposal quotes
Over \$75,000 and less than or equal to \$150,000	PUR-1 V	Intermediate Procurement Written/RIP	Yes
\$10,000 or less	PCRB 48-0200 A&E Related Services	Direct Appointment	To the extent practicable
Over \$10,000 and less than or equal to \$150,000	PCRB 48-0210(2) A&E Related Services	Informal Selection	Yes – informal proposals
Over \$75,000	PCRB 49-0200 PCRB 49-0620 PCRB 49-0650	Invitations to Bid, *Alternative Contracting Methods – Contact Purchasing to Discuss	Yes – formal bids *ALL require Board exemption
Over \$150,000 Per Division, Per Vendor, Per Fiscal Year	PUR-1 VI	Request for Proposal (RFP) and Request for Programmatic Qualifications (RFPQ)	Yes – formal RFP or RFPQ
Over \$150,000	PCRB 47-various	Competitive, sealed bids or proposals, competitive-range and multi-tiered proposals. Goods & Non-Personal Services	Yes – formal bids and RFPs
Over \$150,000	PCRB 48-0220 Architects, etc.	Formal selection procedure	Yes – formal request for qualification to RFP, or direct to RFP

*\* County practice, not required by rule.*

## APPENDIX

# 5

## CONTRACTS AWARDED

A list of all the County's contracts awarded in FY2014 can be found at: [www.multcopurch.org](http://www.multcopurch.org)



