



# Purchasing

2011 ANNUAL REPORT



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## CONTENTS

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MESSAGE FROM PURCHASING MANAGER	1
PURCHASING'S ROLE	4
ACHIEVEMENTS—PURCHASING	5
ACHIEVEMENTS—MWESB & SOCIAL EQUITY	7
ACHIEVEMENTS—SUSTAINABLE PURCHASING	13
ACHIEVEMENTS—CONTRACT SYSTEM REDESIGN	16
ACHIEVEMENTS—PURCHASING PROGRAM & STAFF	18
PERFORMANCE MEASURES	21
PCRB AND ORS REPORTING	28
APPENDIX I—CONTRACT AWARDS MADE TO MWESB & QRF FIRMS	31
APPENDIX II—PAYMENTS MADE TO MWESB VENDORS	32
APPENDIX III—DEFINITIONS	34
APPENDIX IV—COMPETITIVE PROCUREMENT THRESHOLDS	36

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## MESSAGE FROM PURCHASING MANAGER

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Fiscal year 2011 has been a challenging year, full of big projects and the rapidly approaching culmination of several key projects after many months of planning and development.

During the year, we processed over 60 formal procurements, including several of the largest ever done by the County. I committed several staff full time to supporting the Sellwood Bridge project, including the Construction Management/General Contractor solicitation process.

This was an unprecedented undertaking and involved many dozens of staff, senior leaders, stakeholders, and other partnering state and federal public agencies.

We also completed our first year of electronically processing contracts and have reduced the time it takes to process the average contract by more than a third.

The Sustainability and MWESB program continues to expand and push into areas that have not traditionally used MWESB contractors, especially in Weatherization and Personal Services. Sustainability, as implemented by our new Sustainable Purchasing and So-

cial Equity Policy, continues to develop and mature as programs embrace both the requirements and the intent behind the policy.

The County's contracting improvement project--the Contract System Redesign, begun early in 2009—gathered momentum and the Departmental teams began to finalize many of the processes, tools and supporting documents that will be the lasting hallmark of the effort.

This project will result in significant process improvements, implementation of best practices, automation of processes, and reductions in the use of paper.

Through the last part of the year we began developing the training modules that will be required for all staff involved in each phase of making a purchase and issuing a contract. This program will be completed in early 2012.

We also began initial software development and testing of several new modules to bring procurements, vendor management and contracting into the SAP enterprise system.

This project has been an enormous undertaking, leading us to

reassess virtually every aspect of how we do business as we move our business processes into an electronic environment while keeping them fully integrated with the existing financial programs we've used for years. It will fundamentally change—for the better—how we do business in the County, yielding a far more coordinated and efficient system.

My staff continued to earn praise and recognition from within and outside the County.

- We helped our local professional organization earn recognition as the Local Chapter of the Year from the National Institute of Governmental Purchasing;
- Sophia Cavalli was recognized as Oregon Public Purchasing Association Manager of the Year;
- Kathi Braeme-Burr received the Columbia Chapter NIG Buyer of the Year award;
- and Multnomah County acknowledged Ken Scholes as Innovator of the Year.

Multnomah County continues to develop a reputation as an outstanding leader in public purchasing and has received recognitions from the National Institute of Governmental Purchasing, National Association of Counties and Oregon Public Purchasing Association.

These recognitions are a credit to the professional staff who consistently strive to provide the best value for the County. It is my pleasure and honor to work with such skilled, dedicated and committed staff.

Without the support of departmental staff, we would not have been able to reach many of this year's key milestones, including the highest number of contracts and total dollars ever awarded by the County to MWESBs, and the completion of procurement processes for two of the County's largest projects to date.

All in all, this year has been both demanding and inspiring, full of challenges to overcome and opportunities to innovate-- and next year looks to be more of the same. I wouldn't have it any other way.



A handwritten signature in black ink, appearing to read "B. R. S.", with a long, sweeping flourish extending to the right.



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## PURCHASING STAFF

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Back Row (Left to Right): Paula Rickman, Barry Zimmerman, Kenneth Scholes, Karl Schorr, Lawrence Russell

Second Row: Rosie Bockowski, Lynne Waite, Sherry Taylor, Emilie Schulhoff

Front Row: Alandria Taylor, Catherine Kwong, Brian Smith, Kathi Braeme-Burr, Lisa Emery, Sophia Cavalli

Not Pictured: John Classen, Gerald Jelusich, Natacha Loudon, Nancy Walters

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## PURCHASING's ROLE

The Purchasing team supports County operations by providing an uninterrupted flow of materials and services, striving to achieve the best combination of price, quality and service with the County's average of \$400 million dollars spent each year.

The Purchasing team leads the County's efforts in building a stronger, more vital contracting marketplace. By increasing the number and diversity of businesses that are able to bid on County projects, we help provide local opportunities and create economic vitality.

Purchasing supports important County goals of socio-economic importance such as enhancing sustainability and maximizing contracting opportunities for all vendors, including Minority, Women, and Emerging Small Businesses (MWESBs).

Purchasing staff manages county processes for buying goods and services and performs analysis to determine if procedures can be improved.

In addition, Purchasing staff assists County users with information and training to ensure that all applicable County, Public Contract Review Board (PCRB) Administrative Rules, State, and Federal laws and policies are followed correctly.

During the year purchasing staff supports departments County-wide to purchase products and services in construction, health and human services, materials, and both professional and non-professional services. These purchases enable the County to provide optimal delivery of services to the community.

This 2011 Annual Report covers July 1, 2010 through June 30, 2011.

### Mission Statement

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.



## ACHIEVEMENTS—PURCHASING

### CM/GC Sellwood Bridge

In recognition of the advanced deterioration of the 90-year old Sellwood Bridge over the Willamette River, the busiest two-lane bridge in Oregon, Purchasing worked with the Department of Community Services Bridge Shop to put in place a replacement for the bridge.

Due to the complexity of the project and the critical need to contain costs, the Bridge staff sought and obtained Board approval to construct the Sellwood Bridge using a Construction Manager/General Contractor (CM/GC) approach, to:

- Influence the pre-construction design and planning efforts
- Maximize value-engineering cost savings, select the lowest risk options, expedite the schedule
- Integrate sustainability considerations into the project
- Maximize opportunities for MWESB businesses throughout the project

In addition to being only the second CM/GC bridge project ever conducted in the State of Oregon, this

was the County's largest project to date. The complexity of this \$160 million procurement resulted in a number of unique challenges, including coordination of multi-jurisdictional approvals at the state and federal levels as well as pressure to complete the procurement process under a compressed five-month schedule in order to reduce the project duration by one year and reduce overall project costs.

Purchasing incorporated innovative elements into the procurement process such as including a problem-solving exercise as part of the evaluation process. Additionally, evaluation criteria and 30% of the total points assigned were directed towards sustainability and MWESB participation.

In the area of MWESB, proposers were required to address current and past efforts utilizing MWESBs and incorporating diverse workforce, technical assistance, and mentoring. In the area of sustainability, proposers addressed waste recycling, material reuse, local sourcing, and the use of sustainability project indicators.



### **Family Neighborhood Gang Violence Prevention Project**

In response to recent local incidents, and disturbing trends of increased gang violence both locally and nationally, Multnomah County Department of Community Justice (DCJ) and Department of County Human Services (DCHS) teamed up in a joint effort to enhance gang violence prevention efforts.

The County sought experienced, culturally competent, community-based organizations to enter into long-term partnerships. The partnerships were designed to conduct program model planning, development, and implementation work within the community.

The new program model places a high priority on behavior change and is designed to stop gang violence by addressing its root causes:

- Lack of opportunities for legitimate income
- Lack of education
- Family distress
- Substance abuse
- Dangerous neighborhood coping strategies
- Antisocial thinking, behavior, and peer associations

Intensive family support and intervention have proven effective in successfully reducing or eliminating gang-related behaviors. The new partnerships will focus on skill-building, mentoring, educational advocacy, and positive activities to counter gang involvement.

Following a competitive process, contracts were awarded to the

following providers for gang prevention partnerships in the African American, Asian/Pacific Islander, Latino and Native American communities:

- Portland Opportunities Industrialization Center (POIC)
- International Refugee Committee of Oregon (IRCO)
- Latino Network
- Native American Youth and Family Center (NAYA)

### **Best and Final Offer**

Early in 2011, Multnomah County Purchasing released a Request for Proposal (RFP) to purchase an information management system for the County's Mental Health and Addiction Services Division.

Purchasing used a multiple-step approach to identify the best solution, with written proposals followed by product demonstrations. The RFP also included language allowing for optional discussions and a Best and Final Offer (BAFO) step, if needed.

The BAFO process allows the County to hold discussions with each proposer, identifying any deficiencies in either the RFP or the proposal, and then requesting that the proposers revise their responses based on those deficiencies.

Utilizing BAFO for the Mental Health and Addiction Services Information Management System allowed the County to conduct an additional layer of due diligence before making a software purchase of approximately \$500,000.



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## ACHIEVEMENTS—MWESB & SOCIAL EQUITY

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Small businesses are vital to our economy. Indeed, small businesses account for 95% of all businesses within Multnomah County. For more than 15 years, the County has implemented programs and policies to increase contracting opportunities for Minority, Women, and Emerging Small Businesses (MWESBs).

The following pages highlight some of these efforts.

### **Contract Awards**

The total of number of contracts awarded by Multnomah County decreased by more than one third, with dollars awarded in 2011 down 19% compared to 2010.

These declines, however, did not negatively impact MWESBs. For the third consecutive year, contracts to MWESBs have increased. In 2011, contracts increased slightly from 34% in 2010 to 34.3% in 2011.

In contrast, dollars awarded to MBEs through contract awards increased significantly. Compared to 2010, MBEs were awarded an additional \$739,000 representing an increase of 28%. MWESBs were awarded 37 contracts and over \$4.2 million.

### **Going Beyond Past Efforts**

With two of the County's largest projects occurring in 2011—the Sellwood Bridge Project and the East County Courts Project—the County had a unique opportunity to maximize MWESB participation.

Purchasing moved swiftly to leverage these CM/GC projects (and set a new standard) by implementing best practices and proven strategies for MWESB participation.

These expanded efforts included assigning evaluation points for current and past MWESB utilization, workforce diversity, technical assistance, as well as mentoring and youth development efforts.

Upon contract award, Purchasing also required a detailed Sub-Contracting Plan, outlining concrete steps and actions to maximize MWESB participation prior to and during construction.

## LEVERAGING CM/GC PROJECTS:

### Sellwood Bridge Project

The Sellwood Bridge Replacement Project represents the County's largest construction project to date. While addressing a compressed schedule, project complexities, and value engineering, the County integrated Disadvantaged, Minority, Women, and Emerging Small Businesses (DMWESB) participation into all procurements and project phases.

Working with the selected Engineering Services contractor, T. Y. Lin International, the project achieved unprecedented DMWESB participation levels. Sixteen DMWESB sub-consultants were awarded more than \$2.1 million — 15% of the overall contract value.

Going beyond contracting efforts, TY Lin International collaborated with Purchasing to establish mentoring and technical assistance efforts including:

- Offering one-on-one mentoring for all 16 DMWESBs
- Arranging for additional one-on-one technical mentoring for two DMWESBs
- Offering three technical assistance classes for DMWESBs not participating on the project

- Offering internship opportunities for female engineering and physics students

This level of DMWESB participation and mentoring was a first for Multnomah County and will serve as a model for future engineering projects.

For CM/GC services, the County selected Slayden-Sundt Joint Venture. During 2011, Purchasing began a collaborative effort with Slayden-Sundt to develop a detailed sub-contracting plan to ensure maximum participation of DMWESBs and workforce diversity in all project phases and opportunities for business and youth development. This effort included detailed action steps in multiple areas:

- DMWESB utilization
- Identification of categories and sizes of contracts
- Method for soliciting bids
- Outreach
- Technical assistance
- Internships
- Scholarships for youth
- Reporting and documentation

The inclusion of youth development through internships and scholarships was a first for the County and will serve as a model for future CM/GC projects.



## LEVERAGING CM/GC PROJECTS:

### East County Courts

The East County Courts project represents the County's second largest construction project to date. In addition to project goals related to value engineering, it was important to the County to provide maximum opportunities for MWESB businesses throughout the project and to ensure sustainability.

To address maximum MWESB participation, evaluation points were assigned to MWESB utilization. After Howard S. Wright was selected as the CM/GC, Purchasing collaborated to develop a detailed sub-contracting plan that would guide outreach and contracting efforts for the project. This provided a framework for ensuring maximum participation of MWESB sub-contractors throughout all project phases.

By the time Howard S. Wright finalized their Guaranteed Maximum Price, they had committed \$4,739,434 in MWESB participation to 23 separate firms, equal-

ing 36% of the overall project cost.

- MBE firms 16.5%
- WBE firms 16.0%
- ESB firms 3.5%

The procurement process for the CM/GC, architecture, and engineering teams integrated sustainability goals into the construction process for what will be the County's most innovative and forward-thinking building to date.

For example, the project provided grant monies to Parrish Excavation—a certified Woman-Owned Business (WBE)—to retrofit diesel equipment used in construction. Retrofitting three trucks and four pieces of equipment helped protect both worker's health and the health of the Rockwood community.

This project is anticipated to achieve LEED Gold Certification, an internationally-recognized marker of achievement in sustainable building design and construction.

## ACHIEVEMENTS—MWESB & SOCIAL EQUITY

### **PULLING IT ALL TOGETHER:**

2011 provided unique opportunities for the County to bolster MWESB participation on projects. The County's combined efforts resulted in the largest number of contracts and dollars ever awarded to MWESBs.

#### ***Multnomah County:***

- Contracts: 37
- Dollars: \$4,286,582

#### **CM/GC:**

##### ***East County Courts***

- Contracts: 23
- Dollars: \$4,877,973

##### ***Sellwood Bridge Engineering***

- Contracts: 16
- Dollars: \$2,100,000

#### ***TOTAL Multnomah County contracts and awards to MWESBs:***

- Contracts: 76
- Dollars: \$11,264,555

The total combined contracts and dollars awarded to MWESBs in 2011—76 contracts and over \$11 million—is the largest share of contracts and dollars awarded to MWESBs to date.

Moving forward, the County will continue to focus its efforts on maximizing MWESB contracting opportunities, as well as creating avenues for mentoring and technical assistance to provide even further opportunities for MWESB participation beyond contract awards.

### **DEVELOPMENT**

Through a number of existing programs, Multnomah County directs financial support to sponsor business and workforce development training for MWESBs and their employees and individuals seeking to enter the construction industry.

By providing hands-on business and workforce development services, Multnomah County is making a positive contribution towards the success and growth of a diverse vendor pool and workforce.

The programs listed below provided over 16,000 hours of hands-on training to 188 participants.

### **BUSINESS DEVELOPMENT**

***Turner School of Construction*** provides training to Minority, Women and Emerging Small Business owners in the construction industry.





## ACHIEVEMENTS—MWESB & SOCIAL EQUITY

Over six weeks, 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 FY11 Turner School of Construction graduated 40 MWESBs representing a mix of owners and employees of MWESBs.

***Metropolitan Contractor Improvement Partnership***, a construction business training program, assists minority-owned firms with ways to improve and implement business management systems as well as on the job mentoring and project management.

Program participants also receive one-on-one consultation in financial management; projections and job costing; estimating; human resources; insurance and bonding; technology; safety planning; and project management. Provided assistance to 44 Minority-owned businesses.

***University of Washington Minority Business Executive Program***

University of Washington's Michael G. Foster School of Business provides training to minority business professionals, including finance and accounting; brand management strategy; leader-

ship; entrepreneurship and innovation; marketing strategy; human resource management; and business ethics. This program provided training to 26 Minority-owned businesses.

**Workforce Training and Development**

***Oregon Tradeswomen, Inc.*** provided training opportunities for low-income girls and women by holding the Building Girls Summer Camp and the Trades and Apprenticeship Career Class for Women.

As a result of this sponsorship, 31 low-income women and 21 high-school girls benefited from the training for careers in the building, construction, mechanical and utility trades.

***Constructing Hope*** is a non-profit 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.

Last year, 26 low income women and men received hands-on training in resume writing, interviewing techniques, financial management, Blueprint reading, construction math and sustainable building techniques.



### Outreach

Throughout the fiscal year, Purchasing staff attends more than 90 community meetings and events to market construction contracting and personal services opportunities.

A wide range of meetings and organizations are incorporated into Multnomah County outreach efforts, some of which included:

- African American Chamber of Commerce
- Business Diversity Institute
- Hispanic Metropolitan Chamber
- National Association of Minority Contractors of Oregon (NAMCO)
- Native American Chamber of Commerce of Oregon
- Oregon Association of Minority Entrepreneurs (OAME)
- Philippine American Chamber of Commerce of Oregon

Attending community outreach events supports and strengthens our partnerships with diverse organizations and communities.

Additionally, Multnomah County staff are able to provide diverse communities the information and resources necessary for doing business with Multnomah County.

### REGIONAL SUMMITS

Since 2010, Multnomah County has been leading, facilitating, and co-sponsoring quarterly MWESB summit meetings with other public agencies across the region.

The goal of the MWESB summit meetings is to share information, collaborate on new and existing policies, identify areas for improve-

ment, and where ever possible, look for opportunities to implement policies and procedures consistently across agencies.

More than 16 agencies from local state and federal governments actively participate.

Each summit meeting has been cosponsored by Multnomah County and one other agency. During 2011, summit meetings covered topics such as Workforce Training and Development, Technical Assistance, and Leveraging Resources.

### SHOWCASING SOCIAL EQUITY

In August 2011, Purchasing was invited to present and provide training at the national level at the 24<sup>th</sup> annual National American Contract Compliance Association (ACCA) Conference in Indianapolis, Indiana.

Purchasing trained and shared tools, best practices and policy highlights related to the County's Sustainable Purchasing and Social Equity Policy.

Some of the highlights shared included how Multnomah County defines and quantifies social equity in the areas of workforce diversity, utilization of MWESBs and employee healthcare benefits.

Defining social equity in this manner:

- Ensures the longevity and participation of MWESBs and a diverse workforce.
- Leverages the County's purchasing power to bolster MWESB economic development.
- Prepares and assists MWESBs for the new marketplace with training, tools, resources, and advocacy.



## ACHIEVEMENTS—SUSTAINABLE PURCHASING

### SOCIAL EQUITY IMPLEMENTATION

For more than 20 years, Multnomah County has demonstrated its commitment to the environment, the community, and the local economy with more than 30 sustainability policies across County Departments.

With close to \$400 million in annual County purchases, it was only fitting that Purchasing formalize our commitment to sustainability by enacting a sustainable purchasing policy.

Purchasing implemented the sustainable purchasing policy (the County's 32nd sustainability-related policy) at the outset of the new fiscal year. The policy provides a critical framework for staff to make buying decisions while integrating social and environmental considerations into purchases of services and goods.

#### Taking it to the Next Level

Moving to a formalized sustainability policy has been a journey, not a sudden transformation. Accordingly, later in the year the County updated the sustainability policy to include a greater emphasis on social equity.

These changes included:

- Mandatory allocation of 25% of proposal evaluation criteria for sustainability and social equity
- Allocation of social equity points in three areas:
  - Utilization of MWESBs
  - Workforce diversity
  - Inclusion of employee healthcare and other benefits
- Requirements that purchases between \$5,000 and \$150,000 must contact at least three MWESBs

The County's unique approach to sustainable purchasing enables departments to choose the sustainable and social equity criteria that best meets their needs, whether they are purchasing mental health services, library books, or a new building.

#### Electronic Tools & Resources

Prior to and since implementing our formal policy, Purchasing has partnered on sustainability projects with departments across the County. Through a collaborative process, Purchasing has learned a great deal and made significant improvements to existing tools.



With the support of a temporary Sustainable Purchasing Coordinator, Purchasing was able to develop and implement a number of long-term tools to assist staff:

- Electronic checklist
- Best practice guide
- Model language library
- Customized training to department staff
- Collection of other resources online

#### **Collaborations with Office of Sustainability**

In addition to coordinating on the County's Sustainable Purchasing and Social Equity policy, the Office of Sustainability assisted Purchasing with specific procurements and projects.

#### **Food Service Contract**

In 2011, the Multnomah County Sheriff's Office signed a contract with Aramark's Correction Services Division to provide food services for Multnomah County jails.

As a result of the County's sustainable purchasing policy, and state legislation drafted by the Office of Sustainability, the new food services contract successfully integrates elements of the policy to promote sustainability and the local economy.

For example, per the contract, the jail food service provider is conserving energy, minimizing packaging waste, composting food waste, has eliminated the use of Styrofoam products, and is maximizing the purchase of local food.

#### **County Diesel Emissions**

Purchasing and the Office of Sustainability worked with the City of Portland procurement and the City's Office of Sustainability to complete an innovative joint procurement for equipment retrofit services which piloted clean diesel contracting requirements on several County projects.

As a result, 28 County fleet vehicles were retrofitted with the latest technology for emission control devices. The retrofits completed as part of the pilot project will reduce public health impacts from diesel emissions by an estimated \$20 million dollars.

#### **Vendor Survey**

In an effort to gain insight into what businesses already know about sustainability and sustainable purchasing, and to learn what businesses needed, Purchasing conducted a survey of 490 vendors that had done business with the County in the previous 30 months.

- With a 23% response rate, 115 vendors replied to the survey.



## ACHIEVEMENTS—SUSTAINABLE PURCHASING

Significantly, three quarters of vendors believe that sustainable business practices and sustainable purchasing can reduce costs.

In addition to energy savings, recycling, and waste reduction, business are starting to implement the following sustainability practices:

- Green cleaning—42%
- Toxics reduction—35%
- Sustainable purchasing policy— 29%

Most business indicated that sustainable practices are compatible with their core business. However, vendors indicated that lack of knowledge, training and resources are barriers. As a result resources and training materials were developed and placed on Purchasing's website.

### Expert Training

In partnership with the City of Portland, Purchasing brought Scot Case, international and national sustainability expert, to train purchasing staff. Over two days, Scot trained more than 70 participants from County and City

staff, along with staff from six other public agencies.

During hands-on training sessions, staff learned about a wide-range of tools and resources for buying green services and goods, and studied examples of greening specifications for services, goods, Requests for Proposals and bids.

### Sharing Knowledge

As active members of their profession, Purchasing staff shared innovative processes, tools, and lessons learned with other purchasing professionals by providing training.

At a joint workshop for both the Oregon Public Purchasing Association (OPPA) and Columbia Chapter of NIGP, Purchasing trained over 40 purchasing professionals from across the state on keys to implementing a Sustainable Purchasing Policy.

## ACHIEVEMENTS— CONTRACT SYSTEM REDESIGN

In October 2008, Purchasing led a multi-departmental Contracts Action Team (CAT), to assess the County's contracting processes and make recommendations for an improved system.

In January of 2009, the Board approved the creation of a Contract System Redesign (CSR) Project to implement the CAT's recommendations.

Those recommendations and the CSR deliverables completed as of end of FY11 are:

1. Adopt and implement a clear structure for the contract process County-wide.
2. Assess the risk for each contract to appropriately scale the contracting process.
3. Focus resources where they add the greatest value.
4. Train and support the staff responsible for contracting activities.
5. Acquire new electronic tools essential for implementing this framework.
6. Implement quick fixes immediately.

Make continual improvements to maintain and upgrade the adopted framework.

During the past year, Purchasing developed numerous improvements to existing system and procedures. The County utilizes a financial management software system called SAP. Within SAP, a new procurement module is being developed that will:

- provide transparency
- automate manual steps
- increase outputs
- support a paperless system

Moving to a standardized electronic processing system has created various benefits for the County, including:

- improvement of contract processing time by 37%
- increase in ease of contract retrieval via a centralized contract repository
- reduction of paper usage for close to 1000 contracts and amendments annually
- Purchasing was tasked with providing training to support to



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## ACHIEVEMENTS— CONTRACT SYSTEM REDESIGN

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approximately 350 County staff that perform contracting and purchasing functions across County departments.

In response, Purchasing developed six classes utilizing an e-learning model--a first for Purchasing and the County.

Migrating to e-learning enables Purchasing to provide a greater level of service to our Departmental clients and allows employees to:

- access the training at any time
- learn at their own pace and convenience
- access additional tools and links
- use the resource as a quick desk guide

This e-learning module is cost-effective, paperless, and sustainable long-term.

After conducting research into best practices, a structured service risk assessment tool was also developed.

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## ACHIEVEMENTS— PURCHASING PROGRAM & STAFF

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### Leadership

Purchasing is actively involved with the National Institute of Governmental Purchasing (NIGP) and its two local chapters, the Oregon Public Purchasing Association (OPPA) and the Columbia Chapter NIGP.

Partnering with these two groups provides additional resources, leverages training funds, identifies additional contracting opportunities available to the County and identifies areas of legislative concerns that may affect how the County conducts business.

Several staff members participated on governing boards and committees during FY11, including:

- Brian Smith (serves on the Legislative Committee and chairs the Professional Outreach Committee)
- Barry Zimmerman (Program Development Chair)
- Sherry Taylor (Membership Director)
- Jerry Jelusich (Vendor Trade Show Committee Chair)

### Purchasing Program Awards

During FY11, the National Association of Counties (NACo), a national organization representing county government, awarded Multnomah County Purchasing with their 2010 Achievement Award for managing insurance coverage for contracts.

### Professional Awards and Certifications

Currently 65% of Purchasing's staff hold professional certifications.

Two members of our staff earned national recognition by their professional colleagues.

- Sophia Cavalli was selected by OPPA as Manager of the Year.
- The Columbia Chapter NIGP selected Kathi Braeme-Burr as Buyer of the Year,

Additionally, Kenneth Scholes was selected as Multnomah County's Innovator of the Year.

In 2011, four staff members dedicated scores of hours of study and training to earn professional certifications.

Kathi Braeme-Burr, Lawrence Russell, and Lisa Emery earned their Certified Public Purchasing Buyer certification through the Universal Public Purchasing Council in partnership with NIGP. Lynne Waite earned her Oregon Procurement Basic Certification from the State of Oregon Department of Administrative Services Procurement Office.



## FY11 ACHIEVEMENTS—A YEAR IN REVIEW

**Goods and Services Purchased:**

**\$332,179,108**

**Contracts and Amendments  
Processed:**

**944**

**Training Hours Provided to  
County Staff:**

**538**

**Staff that Received New  
Professional Certifications:**

**4**

**Staff with Professional  
Certifications:**

**65%**



## FY11 ACHIEVEMENTS—A YEAR IN REVIEW

**Dollars Awarded to MWESBs:**

**\$11,264,555**

**Contracts Awarded to MWESBs:**

**76**

**Training Hours Provided to  
MWESBs and those interested in Construction**

**Over 16,000**

**Participants Trained:**

**188**

**Business and Workforce Development Pro-  
grams Sponsored:**

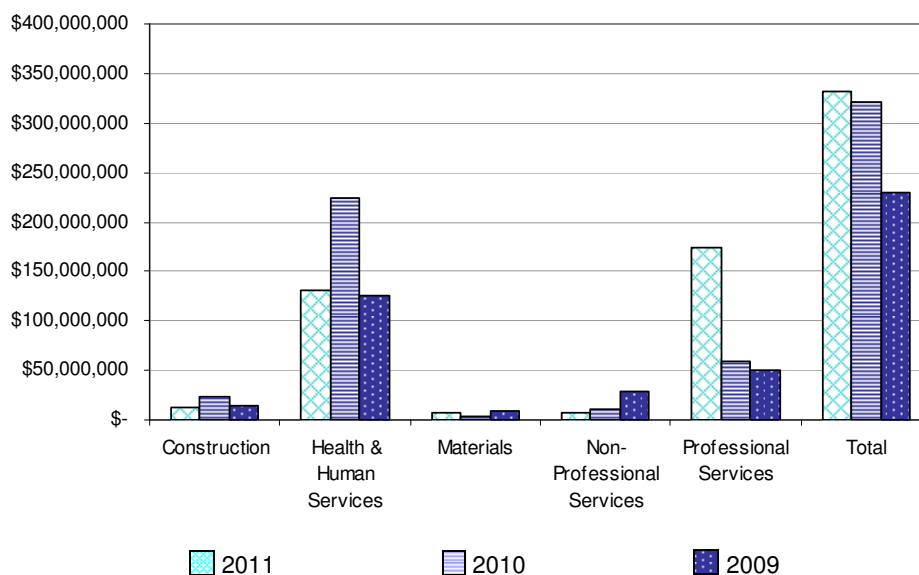
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## PERFORMANCE MEASURES

During the last year, Purchasing staff supported departments County-wide in purchasing products and services in these categories: construction, health and human services, materials, professional services, and non-professional services.

In fiscal year 2011, the largest amount of all dollars awarded, 92%, was for health and human services and professional services combined. Construction represented 4%, and materials and non-professional services both tied at 2% each of dollars awarded.

**Dollars Awarded by Category**



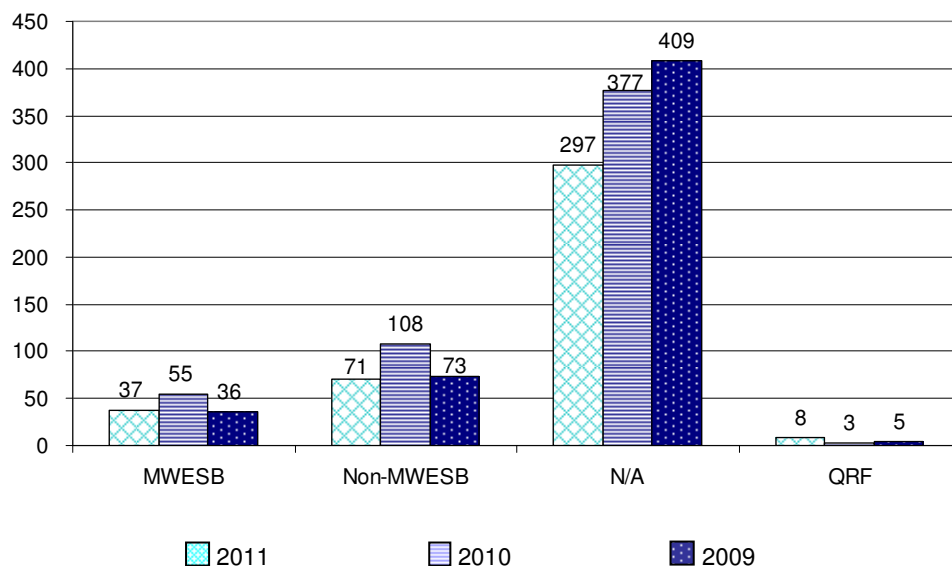


## PERFORMANCE MEASURES

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

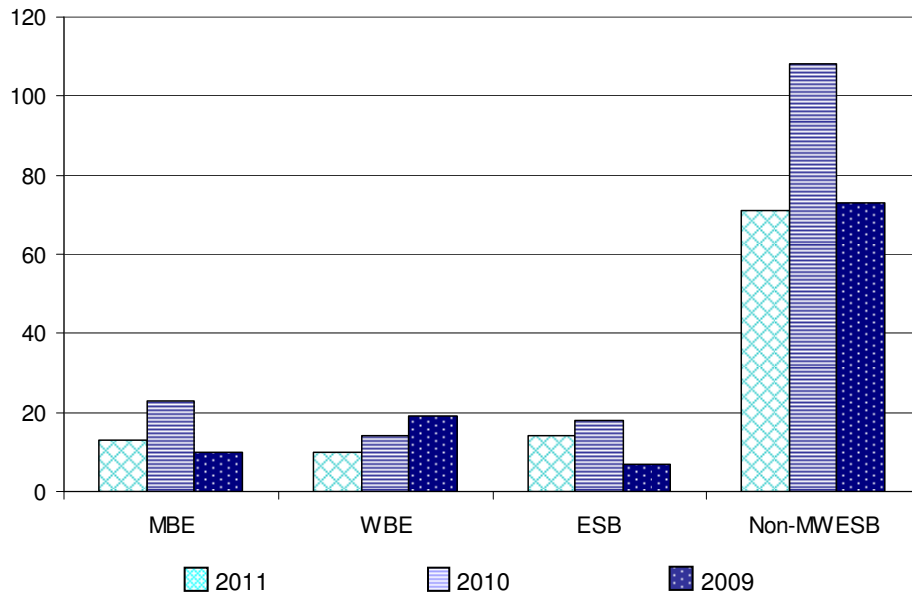
- **MWESB and Non-MWESB Awards**—These are subdivided into Minority Business Enterprises, Women Business Enterprises, and Emerging Small Businesses (MWESBs) and Non-MWESB.
- **Non-Applicable Awards**—Vendors in this category are either ineligible for MWESB certification, or they chose not to apply for 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).

**Total Number of Contracts**

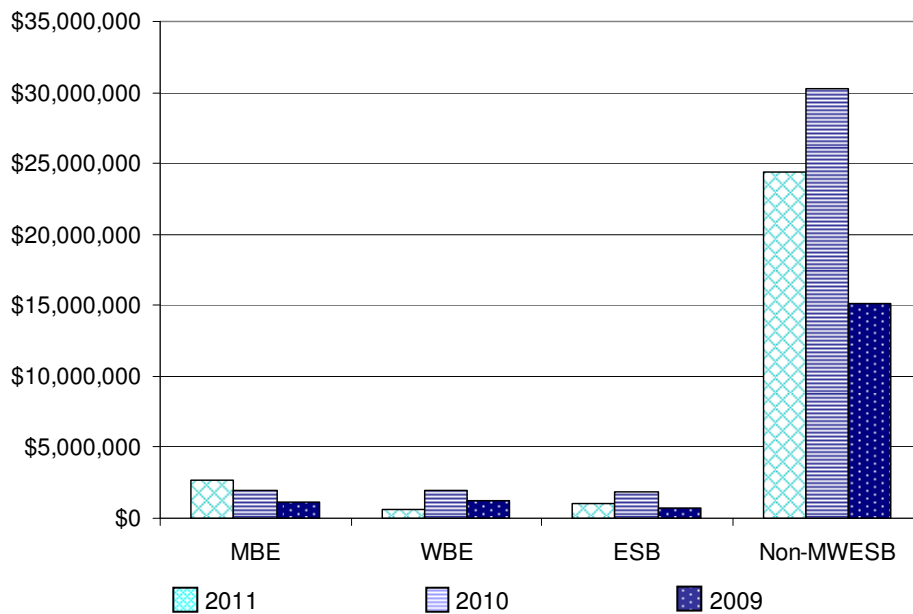


## PERFORMANCE MEASURES

**Prime Contract Awards**



**Prime Dollars Awarded**



## PERFORMANCE MEASURES

### Performance Measures:

Total contract awards were down in 2011 by 33% when compared to 2010. Additionally, the amount of dollars awarded through contract decreased by 19%. Even with substantial declines in the number of contracts and dollars awarded, contracts to MWESBs increased slightly from 34% in 2010 to 34.3% in 2011.

As overall contract awards have varied over the past three years, contracts awarded to MWESBs have increased each year. This trend demonstrates consistent progress in including MWESBs in contracting opportunities.

Another positive data trend is reflected in the total dollars awarded to Minority-owned businesses (MBEs) through contracts. Compared to 2010, MBEs were awarded an additional \$739,000 representing an increase of 28%. While the number of contracts awarded to MBEs has varied over the past three years, dollars awarded to MBEs has steadily increased.

Minority-owned businesses are receiving larger contracts year after year. This is reflected in the dollars awarded to MBEs more than doubling since 2009. In comparison, during 2009 MBEs were awarded \$1.1 million, in 2010 that increased to \$1.9 million, and current levels are at over \$2.6 million.



## PERFORMANCE MEASURES—continued

### PRIME CONTRACT AWARDS

FY 11 Contract Awards	# of Contracts	% of Contracts	\$ Awarded	% of \$ Awarded
Minority Business Enterprise	13	12.0%	\$ 2,672,638	9.3%
Women Business Enterprise	10	9.3%	\$ 596,349	2.1%
Emerging Small Business	14	13.0%	\$ 1,017,596	3.5%
<b>MWESB Total</b>	<b>37</b>	<b>34.3%</b>	<b>\$ 4,286,583</b>	<b>14.9%</b>

<b>Non-MWESB Total</b>	<b>71</b>	<b>65.7%</b>	<b>\$24,429,330</b>	<b>85.1%</b>
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FY 10 Contract Awards	# of Contracts	% of Contracts	\$ Awarded	% of \$ Awarded
Minority Business Enterprise	23	14%	\$ 1,933,292	5.5%
Women Business Enterprise	14	9%	\$ 1,946,799	5.5%
Emerging Small Business	18	11%	\$ 1,899,660	5%
<b>MWESB Total</b>	<b>55</b>	<b>34%</b>	<b>\$ 5,779,380</b>	<b>16%</b>

<b>Non-MWESB Total</b>	<b>108</b>	<b>66%</b>	<b>\$30,296,120</b>	<b>84%</b>
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FY 09 Contract Awards	# of Contracts	% of Contracts	\$ Awarded	% of \$ Awarded
Minority Business Enterprise	10	9.2%	\$ 1,112,592	6.1%
Women Business Enterprise	19	17.4%	\$ 1,197,360	6.6%
Emerging Small Business	7	6.4%	\$ 748,100	4.1%
<b>MWESB Total</b>	<b>36</b>	<b>33%</b>	<b>\$ 3,058,052</b>	<b>16.8%</b>

<b>Non-MWESB Total</b>	<b>73</b>	<b>67%</b>	<b>\$ 15,177,670</b>	<b>83.2%</b>
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## NON-APPLICABLE AWARDS

Vendors considered non-applicable to MWESB reporting include government agencies, non-profits, utilities, and scopes of work and services that are unavailable for MWESB certification by the State of Oregon.

<b>FY 11 Contract Awards</b>	<b>Number of Contracts</b>	<b>Dollars Awarded</b>
Non-Applicable	297	\$ 301,953,024.46
<b>FY 10 Contract Awards</b>	<b>Number of Contracts</b>	<b>Dollars Awarded</b>
Non-Applicable	377	\$ 285,349,945.45
<b>FY 09 Contract Awards</b>	<b>Number of Contracts</b>	<b>Dollars Awarded</b>
Non-Applicable	409	\$ 204,811,747

## QUALIFIED REHABILITATION FACILITIES (QRF) CONTRACT AWARDS

<b>FY 11 Contract Awards</b>	<b>Number of Contracts</b>	<b>Dollars Awarded</b>
QRF	8	\$ 1,510,171.04
<b>FY 10 Contract Awards</b>	<b>Number of Contracts</b>	<b>Dollars Awarded</b>
QRF	3	\$ 193,136.52
<b>FY 09 Contract Awards</b>	<b>Number of Contracts</b>	<b>Dollars Awarded</b>
QRF	5	\$ 6,083,291

## TOTAL NUMBER OF CONTRACTS

<b>FY 11 Contract Awards</b>	<b>Number of Contracts</b>	<b>Dollars Awarded</b>
MWESB, non-MWESB, Non-Applicable, and QRF	413	\$ 332,179,108
<b>FY 10 Contract Awards</b>	<b>Number of Contracts</b>	<b>Dollars Awarded</b>
MWESB, non-MWESB, Non-Applicable, and QRF	544	\$ 321,618,951
<b>FY 09 Contract Awards</b>	<b>Number of Contracts</b>	<b>Dollars Awarded</b>
MWESB, non-MWESB, Non-Applicable, and QRF	523	\$ 229,130,760

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## PERFORMANCE MEASURES

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### Total Payments to MWESB Firms:

Payments to:	FY 11	Amount Paid	Percent
MBE	\$	2,052,908	35.3%
WBE	\$	1,734,627	29.8%
ESB	\$	2,025,991	34.9%
<b>TOTAL:</b>		<b>\$ 5,813,526</b>	<b>100%</b>

Payments to:	FY 10	Amount Paid	Percent
MBE	\$	2,126,729	35.5%
WBE	\$	1,850,065	30.8%
ESB	\$	2,021,636	33.7%
<b>TOTAL:</b>		<b>\$ 5,998,431</b>	<b>100%</b>

Payments to:	FY 09	Amount Paid	Percent
MBE	\$	1,118,121	23.3%
WBE	\$	1,636,481	34.2%
ESB	\$	2,034,530	42.5%
<b>TOTAL:</b>		<b>\$ 4,789,134</b>	<b>100%</b>

A more detailed listing of payments made to MWESB vendors is located in Appendix 2.

## PCRB AND ORS REPORTING

### SPECIAL REPORTING

FY 2011

#### Procurement Reporting:

This part of the report contains information pursuant to the following Public Contract Review Board Rules:

- Section 20-0025 (d)  
A listing of Contracts awarded through the solicitation process to contractors who did not score the highest evaluation or have the lowest responsive bid.

*There were none in FY11.*

- Section 20-0025 (e)  
A listing of Contracts exceeding the dollar limit set forth in Rule 47-0270 (1), 48-0210 (1) and 49-0160 (1), as well as Class 2 personal service contracts governed by Administrative Procedure PUR-1 for which only one bid or proposal was received.

ID No.	Description	Vendor	Contract No.	Dates	Amount
B11-10283	Electrical equipment and supplies on a requirements basis	Platt Electric Supply	4600008472	9/28/2010 — 10/08/2015	\$550,000.00
N11-10304	753 Core Case Management	Central City Concern	4600008594	1/1/2010 — 12/31/2012	\$503,006.00

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## PCRB AND ORS REPORTING

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### **SHELTERED MARKET PROGRAM REPORT AND EVALUATION**

The following information is provided pursuant to Public Contract Review Board Rule Section 60-0060 (9) which requires the Purchasing Manager to prepare a report which provides an evaluation of the Sheltered Market Program. This report shall include a recommendation on whether the program should be continued.

#### **Sheltered Market Program**

During 2011, there were no SMP contracts awarded.

In 2011, Purchasing implemented a broader policy effort as part of our updated Sustainable Purchasing and Social Equity Policy, PUR-8, to solicit quotes from MWESBs on all small purchases between \$5,000 and \$150,000. This new policy now includes goods and services, which reaches a larger and more diverse MWESB vendor pool.

#### **Recommendation:**

In September, 2011 the City of Portland officially ended their SMP and is moving to a different model, based on their recent disparity study. The County is committed to supporting the development and utilization of MWESB firms, and we continue to partner with the City of Portland and other local agencies on training, advertisement, and outreach events to support this commitment.

Since we have expanded our MWESB efforts beyond construction to include goods and services, it is the Purchasing Manager's recommendation to eliminate this Program.



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## PCRB AND ORS REPORTING

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### CONTRACTS SUMMARY

The following information is pursuant to PCRB rules 20-0025 (a) & (c), which require 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 FY11, Multnomah County awarded contracts totaling \$332,179,108.33. The awarded amounts represent the total value of all contracts that have a start date between 7/1/2010 and 6/30/2011. The nature of multi-year contracts can cause awarded amounts to vary considerably from one fiscal year to the next. The following tables summarize these totals by County Department for FY11.

<b>FY 2011 Department</b>	<b>FY11 Awarded Amount</b>
Community Justice	\$ 2,243,477.33
Community Services	\$ 31,845,350.58
County Human Services	\$ 130,277,905.69
County Management	\$ 131,920,426.61
District Attorney	\$ 105,331.96
Health	\$ 12,806,424.29
Library	\$ 2,044,259.84
Non-Departmental	\$ 6,148,314.43
Sheriff's Office	\$ 14,787,617.60
<b>Totals</b>	<b>\$ 332,179,108.33</b>

## PART III: APPENDICES

### APPENDIX 1

#### CONTRACT AWARDS TO MWESB & QRF FIRMS—FY 2011

Contract #	Vendor Name	Amount	Certification
4600008721	Accent Painting	\$ 150,000.00	ESB
4600008658	Avalon Heating & Cooling Inc	\$ 26,650.00	ESB
4600008684	Beacon Systems	\$ 150,000.00	MBE
4600008324	Boanerges Group LLC	\$ 30,695.70	MBE
4600008491	Boanerges Group LLC	\$ 24,107.87	MBE
4600008578	Classique Floors Inc	\$ 27,232.00	WBE
4600008673	Classique Floors Inc	\$ 32,321.00	WBE
4600008567	Corey David M PhD PC	\$ 150,000.00	ESB
4600008361	Critical Care Biorecovery LLC	\$ 75,000.00	WBE
4600008326	D&F Plumbing	\$ 43,002.00	WBE
4600008205	De Paul Industries	\$ 1.00	QRF
4600008330	Energy Comfort & Construction	\$ 6,007.00	MBE
4600008347	Energy Comfort & Construction	\$ 292,816.00	MBE
4600008640	European Security & Iron Specialties	\$ 45,000.00	ESB
4600008538	Everclear Windows & Doors Inc	\$ 50,000.00	ESB
4600008646	Flannel Thomas	\$ 75,000.00	MBE
4600008206	Goodwill Industries	\$ 1.00	QRF
4600008442	Gresham Pediatric Dentistry	\$ 1,500,000.00	MBE
4600008589	Hein Consulting Group	\$ 15,000.00	WBE
4600008462	In-Line Commercial Construction Inc	\$ 53,475.00	MBE
4600008726	In-Line Commercial Construction Inc	\$ 97,483.00	MBE
4600008581	K&S Environmental Inc	\$ 38,141.24	WBE
4600008458	Konell Construction & Demolition	\$ 97,250.00	ESB
4600008476	Kristin Lensen Consulting	\$ 178,920.00	MBE
4600008622	Linguava Interpreters	\$ 270,000.00	ESB
4600008273	MacDonald Residence LTD	\$ 1.00	QRF
4600008742	Maldens Painting	\$ 13,850.00	ESB
4600008664	McClintock Rebecca C	\$ 150,000.00	WBE
4600008353	Mechanical Inc	\$ 106,935.00	MBE
4600008322	Newberry Enterprises Inc	\$ 18,704.00	ESB
4600008396	Passport to Languages	\$ 41,863.00	WBE
4600008290	Port City Development Center	\$ 153,518.79	QRF
4600008211	Portland Habilitation Center Inc	\$ 1.00	QRF
4600008636	Portland Habilitation Center Inc	\$ 1,255,781.13	QRF
4600008514	Portland Habilitation Center Inc	\$ 75,524.04	QRF
4600008641	Professional Minority Group Inc	\$ 150,000.00	MBE
4600008327	RH Heating & Cooling Inc	\$ 31,956.00	ESB
4600008260	Rainbow Adult Living Facilities	\$ 25,343.08	QRF
4600008539	River City Glass	\$ 50,000.00	ESB
4600008490	Stryker Construction Inc	\$ 20,557.00	ESB
4600008571	Stryker Construction Inc	\$ 73,629.00	ESB
4600008657	Suh & Son Mechanical	\$ 7,198.00	MBE
4600008508	Tri-Phase Electric	\$ 150,000.00	WBE
4600008663	Tri-Star Detention	\$ 23,790.00	WBE
4600008524	Winterbrook Planning	\$ 21,000.00	ESB

**Total: \$ 5,796,753.85**

## APPENDIX 2

### PAYMENTS MADE TO MWESB VENDORS—FY 2011

Vendor #	Vendor Name	Amount	Certification
49143	3D Electrical Services Inc	\$ 16,125.20	ESB
60526	A&J Renovation LLC	\$ 16,128.00	MBE
62208	Accent Painting	\$ 3,012.00	ESB
10579	Access Services Northwest	\$ 735.00	WBE
50827	Addison Global Interiors Inc	\$ 1,710.00	WBE
57917	Affordable Electric Inc	\$ 8,715.00	MBE
28693	Anderson Krygier Inc	\$ 1,200.00	WBE
59656	Arellanos Construction LLC	\$ 14,975.00	MBE
10431	Axis Performance Advisors Inc	\$ 1,250.00	MBE
62387	Beacon Systems	\$ 30,750.00	WBE
49842	BioMed Testing Service Inc	\$ 4,874.00	WBE
52795	Blazing Stitches LLC	\$ 3,121.40	ESB
56816	Boanerges Group LLC	\$ 49,061.57	MBE
20262	Boiler & Combustion Services Inc	\$ 50,080.76	ESB
56028	Bourke Construction Inc	\$ 14,586.62	MBE
23657	Bremer Kamala	\$ 25,246.24	WBE
22097	Bristol Woodworking & Design Inc	\$ 14,789.00	ESB
53247	Bruce International Inc	\$ 14,132.62	MBE
28038	Campagraphics Inc	\$ 8,770.00	MBE
23949	Carleton Hart Architecture PC	\$ 181,496.39	MBE
58753	Chick of all Trades LLC	\$ 268,244.78	ESB
41159	Classique Floors Inc	\$ 60,776.77	WBE
56027	Collins Mechanical Inc	\$ 8,136.00	ESB
24180	Colonial Service	\$ 950.00	ESB
60475	Communitecture Inc	\$ 5,250.00	ESB
22884	Compass Computing Group Inc	\$ 263,251.50	ESB
44915	Corey David M PhD PC	\$ 30,306.25	ESB
10547	Cornyn Fasano Group The	\$ 14,175.00	WBE
60711	Critical Care Biorecovery LLC	\$ 38,859.98	WBE
25719	Critter Gitter	\$ 19,000.00	WBE
52171	Custom Imprint	\$ 987.95	ESB
21939	D & F Plumbing	\$ 7,333.20	WBE
22297	Dirt & Aggregate Interchange Inc	\$ 27,316.00	MBE
59149	Don Burke Excavation & Construction	\$ 2,812.50	ESB
58153	Donkin Construction Company	\$ 287,519.16	ESB
51383	DTS Systems Inc	\$ 1,160.00	ESB
21172	Dynamic Systems Inc	\$ 2,430.00	MBE
28554	Elite Signs	\$ 1,612.97	MBE
55168	Energy Comfort & Construction LLC	\$ 378,086.05	MBE
54334	Ensoftek Inc	\$ 270,781.25	MBE
28468	European Security & Iron Specialties	\$ 26,458.50	ESB
60529	Everclear Windows & Doors Inc	\$ 2,684.00	ESB
46691	Excel Gloves & Safety Supplies Inc	\$ 79,617.60	MBE
25171	First Inc	\$ 16,032.10	MBE
58833	Flannel Thomas	\$ 47,315.00	MBE
42867	Fox Architectural Signs Inc	\$ 48,928.00	WBE
59874	Gibson Builders LLC	\$ 146,088.21	ESB
60343	Gray Bear Construction Company	\$ 6,939.00	MBE
50518	Green Transportation Company LLC	\$ 25,976.24	MBE

**APPENDIX 2**  
**PAYMENTS MADE TO MWESB VENDORS—FY 2011**  
**- CONTINUED**

<b>Vendor #</b>	<b>Vendor Name</b>	<b>Amount</b>	<b>Certification</b>
60317	Groff Solutions LLC	\$ 6,710.00	WBE
60158	Group AGB LTD	\$ 26,080.65	MBE
21820	Harris Worksystems Inc	\$ 268,287.25	WBE
61733	Heartlink Health Services	\$ 17,370.00	WBE
44692	Hein Alanna E	\$ 7,671.50	WBE
60390	Hein Consulting Group	\$ 40,453.00	WBE
61022	Hodaie Engineering Inc	\$ 5,230.00	ESB
10421	In Line Commercial Construction Inc	\$ 492,371.00	MBE
26072	Installers Floor Coverings Inc	\$ 480.00	ESB
60210	Interwest Construction Inc	\$ 351,654.37	ESB
58014	Jama Software Inc	\$ 79,517.50	ESB
60709	Jumpstart Computer Training Inc	\$ 7,200.00	ESB
56254	Just in Time Training	\$ 20,970.00	WBE
23292	JW Underground Inc	\$ 595.00	ESB
22136	K&S Environmental Inc	\$ 38,141.24	WBE
46411	Kenney Lori	\$ 33,125.00	WBE
25267	Kipe & Associates Inc	\$ 151,506.00	WBE
61597	Konell Construction & Demolition	\$ 194,500.00	ESB
50970	Kristen Lensen Consulting	\$ 198,230.07	MBE
58451	Leewens Corporation	\$ 4,950.00	WBE
62008	Linguava Interpreters	\$ 2,340.00	ESB
58001	Maldens Painting	\$ 4,500.00	ESB
15716	Martin Eric	\$ 4,500.00	ESB
53029	McClintock Rebecca C	\$ 38,000.00	WBE
46293	Mechanical Inc	\$ 48,874.81	MBE
60111	MPD Systems Inc	\$ 4,176.92	ESB
50233	Newberry Enterprises Inc	\$ 3,617.99	ESB
59317	Nothwest Techrep Inc	\$ 104,388.50	ESB
55136	Oh Planning & Design LLC	\$ 150,623.67	WBE
24491	Omega Cremation & Burial Service	\$ 2,286.20	WBE
53142	Omni Interiors Inc	\$ 2,115.00	ESB
60110	Oneill Electric Inc	\$ 16,599.00	MBE
46135	Pacificmark Construction	\$ 15,245.00	MBE
25189	Passport to Languages	\$ 391,180.63	WBE
10009	Portland Observer Inc	\$ 8,910.60	WBE
50337	Professional Minority Group Inc	\$ 35,870.00	MBE
53720	Progressive Mechanical Inc	\$ 7,741.00	ESB
28203	Promotional Concepts	\$ 397.20	MBE
20012	R H Heating & Cooling Inc	\$ 12,582.00	ESB
56071	River City Glass	\$ 12,832.00	ESB
10701	Rose City Contracting Inc	\$ 725.00	ESB
52477	Schiller Graphics Corporation	\$ 27,457.99	WBE
55160	Sign N Print	\$ 570.00	MBE
60077	Squishy Media Inc	\$ 2,612.50	ESB
61773	Staton Companies	\$ 76,340.00	WBE
57492	Stewart Marketing Group LLC	\$ 18,433.57	MBE
22480	Storie & Associates	\$ 6,675.00	WBE
47345	Stryker Construction Inc	\$ 94,186.00	ESB
62250	Suh & Son Mechanical LLC	\$ 7,198.00	WBE

Vendor #	Vendor Name	Amount	Certification
24220	Team HR LLC	\$ 6,750.00	WBE
47704	Techknowsolve inc	\$ 1,141.50	WBE
25579	Tri Phase Electric	\$ 156,823.85	WBE
20377	Tri Star Detention Inc	\$ 3,183.60	WBE
22211	Turtle Mountain Construction Co	\$ 570.00	MBE
54339	Vanderhouwen & Associates Inc	\$ 49,071.07	WBE
20383	Waco Scaffold Company Inc	\$ 177.40	MBE
<b>TOTAL</b>		<b>\$ 5,813,525.69</b>	

### APPENDIX 3 DEFINITIONS

#### Emerging Small Business

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/Minority-Owned-Business-Certification/](http://www.oregon4biz.com/Grow-Your-Business/Business-services/Minority-Owned-Business-Certification/).

#### Formal Procurement

Formal procurements are those with a value exceeding \$150,000. They are described in Appendix 4 Competitive Threshold Guide.

#### Informal Procurement

Informal procurements have a value between \$5,000 and \$150,000. They are described in Appendix 4 Competitive Threshold Guide.

#### Minority Business Enterprise & Women-Owned Business Enterprises

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

## APPENDIX 3 DEFINITIONS—CONTINUED

- 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/Minority-Owned-Business-Certification/](http://www.oregon4biz.com/Grow-Your-Business/Business-services/Minority-Owned-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 five (5) of this appendix, but have chosen not 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 ORS 279.A.060.

### **Qualified Rehabilitation Facility**

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/grf-menu.shtml>

## APPENDIX 4

### COMPETITIVE PROCUREMENT THRESHOLDS—QUICK GUIDE

Threshold	Rule Set	Title (if any)	Competition Required?
\$5,000 or less	PCRB 47-0265 Goods & Services	Small Procurements	No—quotes where practicable
\$5,000 or less	PCRB 49-0160(4) Construction	No Title	No—quotes where practicable
Over \$5,000 and less than or equal to \$75,000	PCRB 49-0160 Construction	Informal Quotes for Public Improvements	Yes—informal quotes
Over \$5,000 and less than or equal to \$75,000	PCRB 49-0160 Transportation	Informal Quotes for highways, bridges and other transportation	Yes—Informal quotes
\$5,000 or less Per Division, Per Vendor, Per Fiscal Year	PCRB 47-0265 Goods & Services FIN-16	Direct Pay, LPO	No
Over \$5,000 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 \$5,000 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 49-0620 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 Qualification (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 * County practice, not required by rule.	PCRB 48-0220 Architects, etc.	Formal selection procedure	Yes—Formal Request for Qualification to RFP, or direct to RFP



**Multnomah County Purchasing**

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