

## CONTRACTING SOCIAL EQUITY INITIATIVES (CSEI)

CSEI apply to projects where the City of Portland (COP) is the contracting agency. See below for additional information and clarity on roles and responsibilities for three of the CSEI – Community Equity and Inclusion Plans (CEIP), Community Benefit Agreements (CBA), and the Community Opportunities and Enhancement Program (COEP).

**Community Equity and Inclusion Plan (CEIP) and Community Benefit Agreements (CBA):** These agreements are negotiated with the selected contractor post contract award and set standards for working conditions and workforce diversity for projects using alternative contracting methods with a total project hard construction contract value of \$10M-\$25M and \$25M and above respectively. Roles and responsibilities are identified per process phase.

ROLES		RESPONSIBILITIES	POINT PERSON
<b>Phase 1: Procurement</b>			
Infrastructure Bureau	Project Management	<ul style="list-style-type: none"> <li>Initiate requisition</li> <li>Provide scope, estimated dollars, funding sources</li> </ul>	Bureau Project Manager
BRFS Procurement	Procurement Lead	<ul style="list-style-type: none"> <li>Determine CSEI applicability</li> <li>Lead procurement process</li> </ul>	Lester Spittler/designee
<b>Phase 2: Contract Negotiation</b>			
Infrastructure Bureau	Project Management	<ul style="list-style-type: none"> <li>Negotiate construction contract with selected contractor</li> </ul>	Bureau Project Manager
BRFS Procurement	Procurement Lead	<ul style="list-style-type: none"> <li>Lead contract negotiations</li> </ul>	Lester Spittler/designee
<b>Phase 3: Agreement Negotiation</b>			
Infrastructure Bureau	Project Management	<ul style="list-style-type: none"> <li>Negotiate agreement goals and expectations with selected contractor</li> </ul>	Bureau Project Manager
City Attorney Office	Legal Review	<ul style="list-style-type: none"> <li>Lead negotiations</li> </ul>	Molly Washington/designee
<b>Phase 3: Post Contract Award</b>			
Infrastructure Bureau	Project Management	<ul style="list-style-type: none"> <li>Contract management</li> <li>Agreement management</li> </ul>	Bureau Project Manager
BRFS Procurement	Program Compliance	<ul style="list-style-type: none"> <li>Monitor compliance against agreed upon goals and expectations</li> </ul>	Lester Spittler/designee

**Community Opportunities and Enhancement Program (COEP):** This initiative collects 1% of hard construction costs of public improvement contract funding (excluding certain restricted funding) to be used for workforce development and technical assistance to increase contractor diversity. It applies to all City of Portland public improvement projects. Roles and responsibilities are identified for projects and COEP program management.

ROLES		RESPONSIBILITIES	POINT PERSON
<b>Project</b>			
Infrastructure Bureau	Project Management	<ul style="list-style-type: none"> <li>Initiate requisition</li> <li>Funding allocation conveyance to BRFS</li> </ul>	Bureau Project Manager
BRFS Procurement	Procurement Lead	<ul style="list-style-type: none"> <li>Lead procurement process</li> </ul>	Lester Spittler/designee
BRFS Grants	Fund Management	<ul style="list-style-type: none"> <li>Fund collection from bureau / conveyance to Prosper Portland</li> </ul>	COEP Program Manager
<b>Program</b>			
BRFS Procurement	Program Management	<ul style="list-style-type: none"> <li>IGA development / monitor compliance</li> <li>Oversight committee coordination and staffing</li> </ul>	COEP Program Manager
Office of Equity and Human Rights	Program Management	<ul style="list-style-type: none"> <li>IGA development</li> <li>Oversight committee coordination</li> </ul>	Judith Mowry
Prosper Portland	Program Implementation	<ul style="list-style-type: none"> <li>Per IGA, issue grants for workforce development and technical assistance</li> </ul>	Morgan Masterman/designee

### City of Portland Contracting Opportunities Pipeline:

- Five Years: Bureau Capital Improvement Plans / Project Pipelines. Format varies depending on bureau.
- One Year: Bureau Adopted Budgets
- Current: Procurement Open Bids: <https://procure.portlandoregon.gov/bs0/external/publicBids.sdo>