

“MWESBs and SDVs are at the cornerstone of Energy Trust of Oregon’s mission to sustain local businesses. Through a headstrong reverence to diversity and those who embody it, we are helping to cultivate a statewide flourish of multicultural prosperity.”

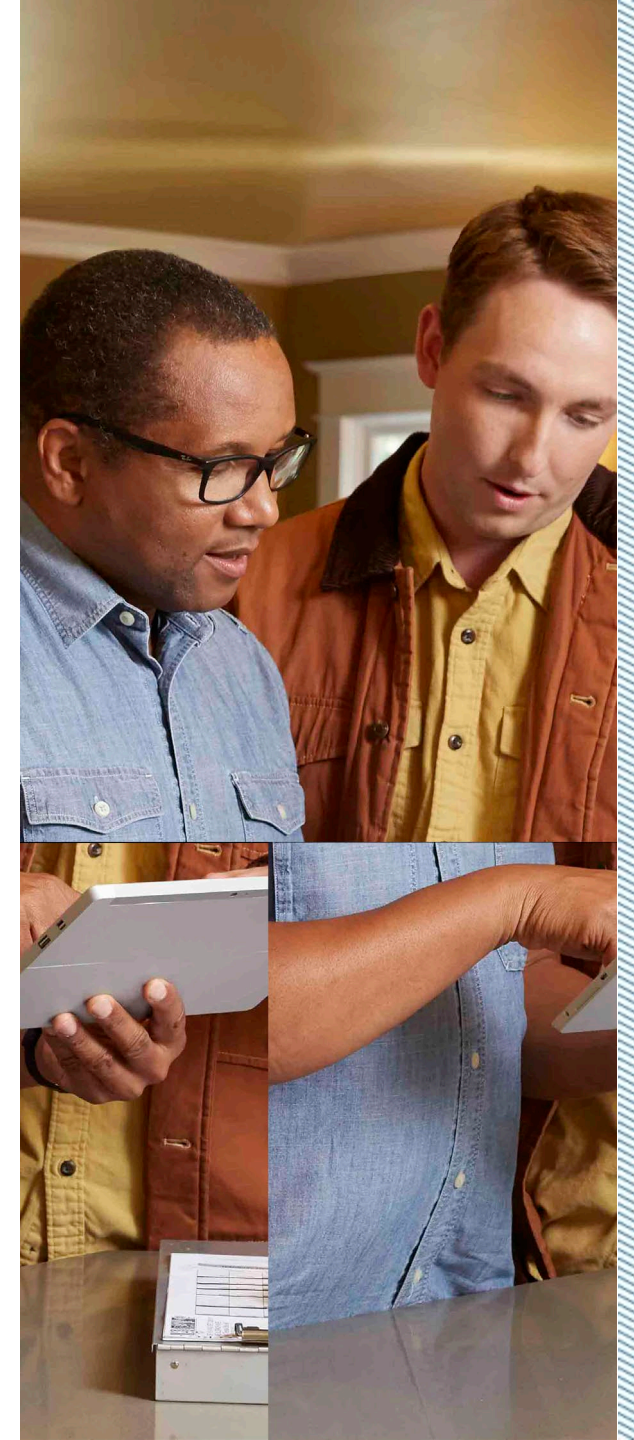
Tyrone Henry
Diversity, Equity and Inclusion Lead
August 16,2021

Energy Trust’s Supplier Diversity Program – What does it mean for you?
Current and Past Energy Trust Contractors Orientation
June 15, 2022



Overview

- What is the Supplier Diversity Program
 - Benefits of supplier diversity
 - Purpose - why we are doing this
 - Energy Trust's Supplier Diversity Program requirements
 - "Working with Energy Trust" website and resources
- COBID Certification Process
- Panel Presentation of MWBE Companies



Benefits of Supplier Diversity

- Adds economic value by encouraging the growth of diverse businesses
- Increasing diverse spending increases market share
- Promotes innovation through the introduction of new products, services and solutions
- Provides multiple channels from which to procure goods and services
- Allows companies to take advantage of new opportunities for expansion based upon shifting demographic realities

From supplier.io/blog/what-is-supplier-diversity; December 18, 2019



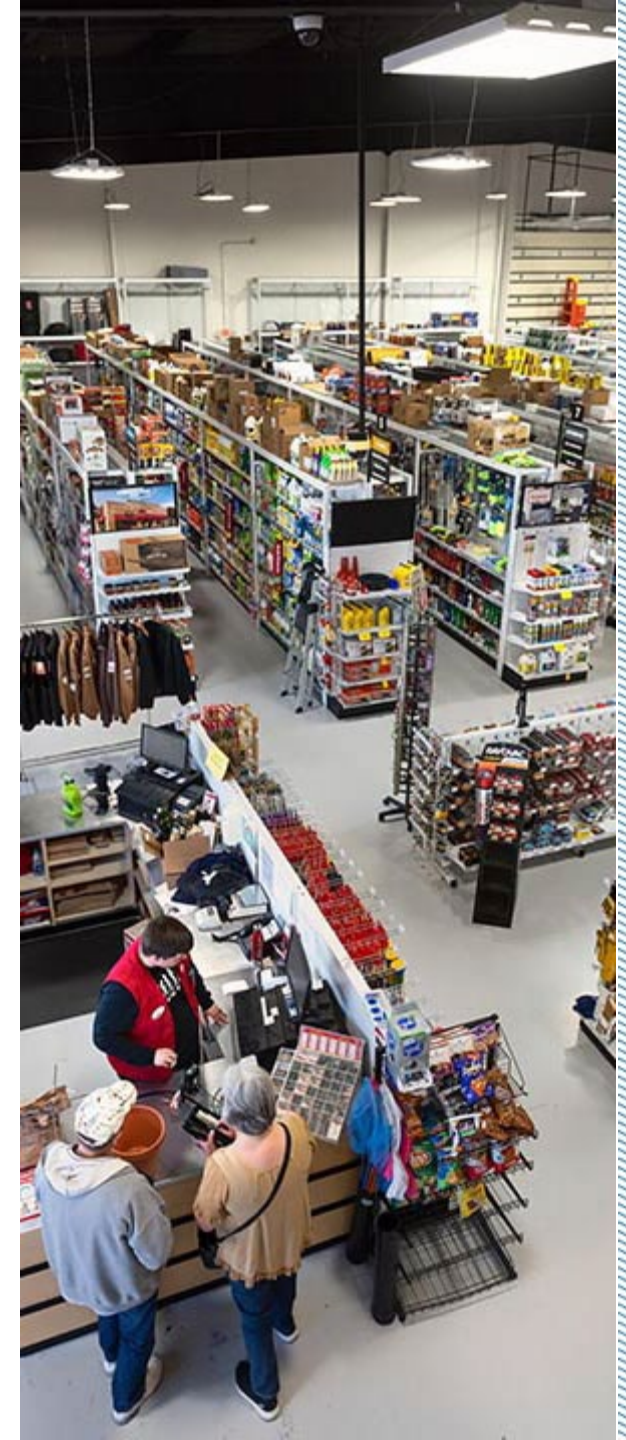


Purpose – why Energy Trust is doing this

- We have a responsibility to ensure our contract opportunities provide equitable support to the growth of diverse firms
- Energy Trust program goals should be clearly defined for participation by diverse businesses
- The application of a supplier diversity initiative for all contract types and contract amounts should be clarified
- Energy Trust should have the ability to track contracts at the direct and indirect level

Energy Trust Procurement

- In any given year, Energy Trust may have over 200 active contracts totaling more than \$175M
- Services we contract for include
 - Program Management and Program Delivery services
 - Project outreach, recruitment, development and support
 - Media buying, advertising and marketing content development and editing, photography and videography services, public relations support, interpretation and translation services and website design and development services
 - Engineering, planning and evaluation services
 - Information technology services
 - Consulting and professional services
- Contracts over \$100k are competitively solicited
- Contracts less than \$100k can be selected via a variety of procurement mechanisms



Supplier Diversity Program – Key Elements

- Explicit focus on COBID certified firms
- New requirements for contracts over \$100k
 - At least 20% of the value of the contract (not including incentive or other pass-through reimbursable expenses or costs if applicable) must be received by a COBID certified firm
 - COBID certified firms must have a meaningful role in providing the services requested by the solicitation
 - Proposals must include appropriate certification(s) for each COBID certified firm or firms
 - Certain types of goods and services are excluded from this requirement
- New Requirements for contracts less than or equal to \$100k
 - Procurement opportunities must be promoted to MWESB/SDVBE suppliers as applicable and COBID certification must be requested from all proposers
 - Contract managers must also promote the opportunity to known BIPOC- and women-owned businesses even if they are not COBID-certified

Supplier Diversity Goals

Energy Trust will establish an overall, annual contract spend goal for COBID certified firms that will represent an overall percentage of our contracts resulting from that year's solicitations.

- For any solicitation that would result in a contract over \$100,000, bidders must demonstrate that at least 20% of the total contract (excluding incentive payments) will be received by COBID certified firms.
- For solicitations less than \$100,000, Energy Trust must ensure that the contracting opportunity is promoted to COBID certified firms as well as to any self-identified BIPOC- and women-owned firms.





What is supplier diversity?



COBID Certifications Includes:

- Minority Business Enterprise Program (MBE)
- Women Business Enterprise Program (WBE)
- Service-Disabled Veteran-Owned Business (SDVOB)
- Emerging Small Business Program (ESB)

Contracting With COBID Businesses



Certification of qualified businesses enables the state to track and validate agency-set goals and initiatives



Develops an inclusive, open, and honest business climate throughout the state



Helps diversify the energy efficiency industry



CERTIFICATION OFFICE FOR BUSINESS
INCLUSION & DIVERSITY

THE BIG THREE!!!

+
○

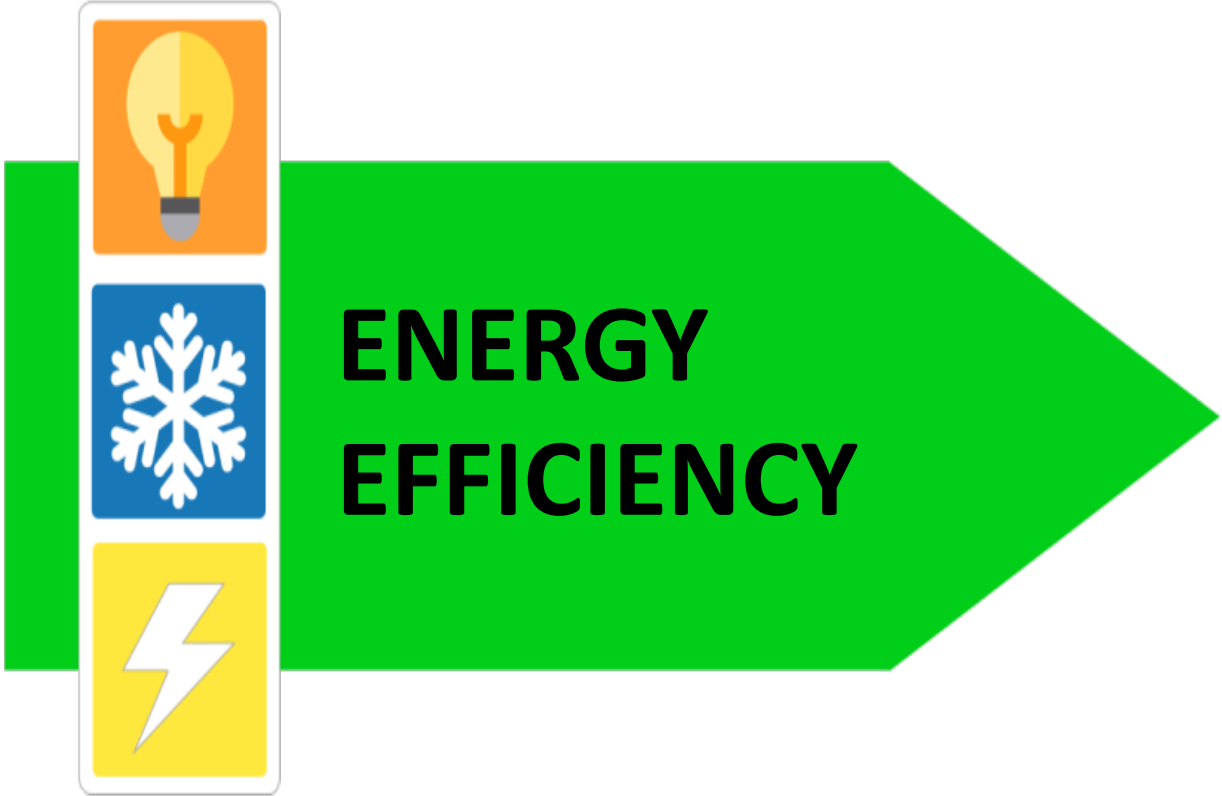


- +
-
-

Why is Being Inclusive a Priority for Energy Trust's Supplier Diversity Chain?



Let's look at the value-add-on of the social responsibility side first:



ENERGY EFFICIENCY

- Barriers that challenge startup and sustainability efforts
- Supplier diversity benefit underrepresented businesses
- Economic impact of supplier diversity

Economic Growth in Oregon

MWESB/SDV

4th
Lowest
Sales Tax

9th
Economic
Growth
Prospects

9th
Economic
Climate