

9.5 Summary of Key Findings and Recommendations

Figure 9-4: Key Findings and Recommendations

Finding & Recommendation(s)	Potential Actions	Procurement Cycle(s)	Recommendation Source <sup>1</sup>	Supports Study Goal
<p><b>Finding 1:</b> The four-county relevant geographic market area (RGMA) is an integrated market with small and micro businesses facing similar challenges and barriers in public sector procurements. Within the RGMA, San Mateo County is the smallest in terms of population, number of self-employed individuals, and business availability.</p>				
<p><b>Recommendations 1:</b> Coordinate regionally with public agencies and anchor institutions to maximize the participation of small and micro business in public procurement opportunities</p>	<ul style="list-style-type: none"> <li>• Develop a certification policy that leverages external certifying agency certifications (see recommendation 9a).</li> <li>• Participate in existing or help develop collaborative regional forums and conferences with other public agencies and anchor institutions.</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Planning</li> </ul>	<ul style="list-style-type: none"> <li>• Market Analysis</li> <li>• Utilization Analysis</li> <li>• Qualitative Analysis</li> </ul>	<p>Improve Outreach &amp; Capacity Building</p>
<p><b>Finding 2:</b> All diverse business groups are underutilized in County prime contracts and subcontracts and local, small, and micro businesses are underutilized in County prime contracts.</p>				
<p><b>Finding 3:</b> The vast majority of County spend with local businesses is with small and micro businesses which are more likely to be diverse business enterprises. However, only 10.4% of in-scope County contracts &amp; procurements were spent with local businesses.</p>				
<p><b>Recommendation 2/3:</b> Formalize an Inclusive Supplier Diversity Program to develop, grow and maintain a more diverse supplier base including local, small, micro, and diverse businesses (LSMDBEs)</p>	<ul style="list-style-type: none"> <li>• Develop an Implementation Plan and Policy Statement</li> <li>• Create a Supplier Diversity Manager function</li> <li>• Create new group within Procurement focused on working with LSMDBEs</li> <li>• Adopt definitions &amp; size standards for LSMDBEs</li> </ul>	<ul style="list-style-type: none"> <li>• All</li> </ul>	<ul style="list-style-type: none"> <li>• Industry Expertise</li> <li>• Procurement Analysis</li> <li>• Disparity Analysis</li> <li>• Qualitative Analysis</li> </ul>	<p>Refine Procurement Documents, Policies, &amp; Programs</p> <p>Improve Data Collection &amp; Tracking</p> <p>Improve Outreach &amp; Capacity Building</p>

<sup>1</sup> "Industry Expertise" refers the study team's public sector procurement expertise. "Benchmarking" refers to the public agency best practice benchmarking conducted.



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<p><b>Finding 4:</b> The availability of all local businesses was greatest in County contracts and procurements worth less than \$100,000 and local business availability decreased as contract size increased.</p>				
<p><b>Recommendation 4:</b> Encourage unbundling of project scope to develop smaller dollar solicitations that allow more opportunities for LSMDBEs and local small non-profits (LSNPs) to participate</p>	<ul style="list-style-type: none"> <li>Analyze standard contracts for opportunities to break out scope of work to be more accessible to LSMDBE vendors</li> <li>Utilize LSMDBE database recommended in findings 9 and 10 to better understand LSMDBE capabilities and availability</li> <li>Train staff on reviewing scope for LSMDBE/LSNPs opportunities</li> <li>Market or survey LSMDBE/LSNPs vendors to determine capabilities and availability for specific scopes of work</li> </ul>	<ul style="list-style-type: none"> <li>Procurement Planning</li> <li>Scope and Requirements Development</li> </ul>	<ul style="list-style-type: none"> <li>Procurement Analysis</li> <li>Qualitative Analysis</li> <li>Utilization Analysis</li> <li>Disparity Analysis</li> </ul>	<p>Refine Procurement Documents, Policies, &amp; Programs</p> <p>Improve Outreach &amp; Capacity Building</p>
<p><b>Finding 5:</b> Strong internal support exists for more inclusive procurement policies, programs, and practices.</p>				
<p><b>Recommendation 5:</b> Communicate the County's support and commitment to conducting more inclusive procurements and the efforts being made to do so</p>	<ul style="list-style-type: none"> <li>Develop communication plan for internal and external stakeholders that participate in procurement activities or interface with LSMDBEs</li> <li>Communicate and demonstrate executive support of programs/effort</li> <li>Share efforts internally and encourage discussion and suggestions from staff on inclusive procurement, practices, departmental challenges, and proposed solutions.</li> </ul>	<ul style="list-style-type: none"> <li>Procurement Planning</li> </ul>	<ul style="list-style-type: none"> <li>Procurement Analysis</li> <li>Industry Expertise</li> </ul>	<p>Refine Procurement Documents, Policies, &amp; Programs</p> <p>Improve Outreach &amp; Capacity Building</p>



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<b>Finding 6:</b> Although the County administrative policies encourage the use of local and small business suppliers and vendors, the County does not have small or local business programs to explicitly promote participation.				
<p><b>Recommendation 6a:</b> Implement small/local business measures</p> <p><b>Note:</b> Federally funded contracts and grants may not allow for local preference measures and this provision may need to be modified for these contracts.</p>	<ul style="list-style-type: none"> <li>• Define goals and measures, as applicable, which may include:                             <ul style="list-style-type: none"> <li>▪ Local and small goals</li> <li>▪ Local and small preference points (see recommendation 9b)</li> <li>▪ Small business set-aside</li> <li>▪ Mentor-Protégé program for larger projects (i.e., construction contracts)</li> </ul> </li> <li>• Develop programs and update solicitation documents as needed</li> <li>• Develop and implement metrics for tracking local and small business performance and program effectiveness</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Planning</li> <li>• Contract Award</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Analysis</li> <li>• Qualitative Analysis</li> <li>• Industry Expertise</li> </ul>	<p>Refine Documents, Policies, &amp; Programs</p> <p>Improve Outreach &amp; Capacity Building</p>
<p><b>Recommendation 6b:</b> Publish regular local, small business participation reports for transparency</p>	<ul style="list-style-type: none"> <li>• Initially create reports that are available internally and aim to share externally on County website</li> </ul>	<ul style="list-style-type: none"> <li>• Contract Award</li> <li>• Contract Management</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Analysis</li> <li>• Industry Expertise</li> </ul>	<p>Improve Data Collection &amp; Tracking</p> <p>Improve Outreach &amp; Capacity Building</p>
<b>Finding 7:</b> County departments need additional support from central County procurement for general procurement and LSMDBE-targeted efforts.				
<p><b>Recommendation 7a:</b> Update existing County procurement-related documentation to assist County Staff in addressing the needs of LSMDBEs</p>	<ul style="list-style-type: none"> <li>• Revise procurement documentation to reduce barriers and encourage greater participation of LSMDBE vendors and suppliers in County procurements</li> <li>• Add language and procedures to improve LSMDBEs access to procurement opportunities</li> <li>• Remove unnecessary or overly burdensome requirements to create better access and bid on procurement opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• All</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Analysis</li> <li>• Qualitative Analysis</li> <li>• Industry Expertise</li> </ul>	<p>Refine Procurement Documents, Policies, &amp; Programs</p>



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<p><b>Recommendation 7b:</b> Provide County Staff (procurement and contract managers) LSMDBE-related training on a regular and ongoing basis</p>	<ul style="list-style-type: none"> <li>• Identify number of courses and develop curriculum to cover LSMDBE topics including but not limited to:                             <ul style="list-style-type: none"> <li>▪ The importance of Supplier Diversity</li> <li>▪ LSMDBE definition</li> <li>▪ Conducting LSMDBE Outreach</li> <li>▪ Identifying opportunities to unbundle project scope to allow LSMDBE participation</li> <li>▪ Parameters of Proposition 209</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• All</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Analysis</li> <li>• Industry Expertise</li> </ul>	<p>Refine Procurement Documents, Policies, &amp; Programs</p> <p>Improve Data Collection &amp; Tracking</p>
<p><b>Recommendation 7c:</b> Continue regular training, and develop refresher courses, for County staff on procurement policies and practices to foster greater consistency in the application of procurement practices</p>	<ul style="list-style-type: none"> <li>• Review existing procurement training courses and curriculum to develop refresher courses</li> </ul>	<ul style="list-style-type: none"> <li>• All</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Analysis</li> </ul>	<p>Refine Procurement Documents, Policies, &amp; Programs</p> <p>Improve Data Collection &amp; Tracking</p>
<p><b>Finding 8:</b> Most departments or divisions do not actively identify or seek out LSMDBEs or lack the resources, particularly staff time, to source LSMDBEs that can perform the work out for bid.</p>				
<p><b>Recommendation 8a:</b> Implement recommendations 2/3, 7a, 7b, 7c, 9 and 10b to facilitate County-wide active identification of LSMDBEs for procurements</p>	<ul style="list-style-type: none"> <li>• See recommendations for 2/3, 7a, 7b, 7c, 9 and 10b</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Planning</li> <li>• Sourcing/RFP Process</li> <li>• Scope &amp; Requirements Development</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Analysis</li> <li>• Utilization Analysis</li> <li>• Disparity Analysis</li> <li>• Qualitative Analysis</li> <li>• Industry Expertise</li> </ul>	<p>Refine Documents, Policies, &amp; Programs</p> <p>Improve Data Collection &amp; Tracking</p> <p>Improve Outreach &amp; Capacity Building</p>



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<p><b>Recommendation 8b:</b> Develop LSMDBE identification and outreach requirements and guidelines</p>	<ul style="list-style-type: none"> <li>• Assign general outreach responsibilities to a centralized procurement office/department</li> <li>• Develop outreach plan to establish level of outreach depending on procurement requirements</li> <li>• Identify, research, and develop a list of professional groups and other organizations for small businesses or minority-; woman-; veteran-; service-disabled veteran-; or LGBTQ+-owned businesses for inclusion in the outreach plan</li> <li>• Coordinate with non-profits, CBOs, and other supportive service organizations to identify LSMDBEs and support outreach efforts</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Planning</li> <li>• Sourcing/RFP Process</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Analysis</li> <li>• Utilization Analysis</li> <li>• Disparity Analysis</li> <li>• Qualitative Analysis</li> <li>• Industry Expertise</li> </ul>	<p>Refine Procurement Documents, Policies, &amp; Programs</p> <p>Improve Outreach &amp; Capacity Building</p>
<p><b>Recommendation 8c:</b> Identify top sub-industries for County procurements and develop outreach requirements and guidelines for industry trade associations</p>	<ul style="list-style-type: none"> <li>• Examine the In-Scope Contract Log provided to the County by the Study team to assess procurement expenditures by sub-industries during the study period as well as future County procurement forecasts</li> <li>• Monitor industry sectors within California and the RGMA to determine which sub-industries offer more opportunities for small and micro businesses.</li> <li>• Identify, research, and develop a list of focus sub-industry trade associations and incorporate into the outreach plan</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Planning</li> <li>• Sourcing/RFP Process</li> </ul>	<ul style="list-style-type: none"> <li>• Utilization Analysis</li> <li>• Disparity Analysis</li> <li>• Qualitative Analysis</li> <li>• Industry Expertise</li> </ul>	<p>Refine Procurement Documents, Policies, &amp; Programs</p> <p>Improve Outreach &amp; Capacity Building</p>



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<b>Finding 9:</b> The County does not have a centralized database of LSMDBE firms. However, the County has recently implemented a new procurement management system, OpenGov, which may allow for the monitoring of LSMDBE firms.				
<b>Recommendation 9:</b> Implement a vendor database that allows vendors to identify their LSMDBE business certifications, location, NAICS codes or other sub-industry classification codes, and average annual revenue	<ul style="list-style-type: none"> <li>• Determine if County’s new vendor management system (OpenGov) allows for the identification and tracking of all LSMDBEs</li> <li>• Ensure OpenGov provides access for prime contractors seeking LSMDBE vendors</li> <li>• Determine process for validating LSMDBE certifications on an ongoing basis</li> <li>• Consider including fields for tracking non-profits, including local and small, in OpenGov</li> <li>• See recommendation 13a for similar local small non-profit database</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Planning</li> <li>• Sourcing/RFP Process</li> <li>• Evaluation</li> <li>• Contract Management</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Analysis</li> <li>• Qualitative Analysis</li> <li>• Industry Expertise</li> </ul>	<p>Refine Procurement Documents, Policies, &amp; Programs</p> <p>Improve Data Collection &amp; Tracking</p> <p>Improve Outreach &amp; Capacity Building</p>
<b>Finding 10:</b> County departments do not currently collect or track LSMDBE contractor or subcontractor demographic information and metrics.				
<b>Recommendation 10a:</b> Define LSMDBE demographic data to be tracked during key stages of the procurement cycle for informal and formal solicitations	<ul style="list-style-type: none"> <li>• Determine the data collection process and needed LSMDBE forms</li> <li>• Assess the benefit of implementing a supplier diversity specific software application</li> <li>• Coordinate with the update of key procurement documents (see Recommendation 7a).</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Planning</li> <li>• Contract Award</li> <li>• Contract Management</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Analysis</li> </ul>	<p>Refine Procurement Documents, Policies, &amp; Programs</p> <p>Improve Data Collection &amp; Tracking</p>



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<p><b>Recommendation 10b:</b> Set performance metrics to monitor the use of LSMDBEs</p>	<ul style="list-style-type: none"> <li>• Develop a metric to measure Diverse Supplier participation: number or percentage of small, local, or diverse businesses participating in the procurement process at each stage</li> <li>• Develop a metric to measure Diverse spend dollars or percentage of contracted dollars spent with small, local, or diverse businesses.</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Planning</li> <li>• Contract Management</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Analysis</li> <li>• Industry Expertise</li> </ul>	<p>Refine Procurement Documents, Policies, &amp; Programs</p> <p>Improve Data Collection &amp; Tracking</p>
<p><b>Recommendation 10c:</b> Develop forms to collect prime and subcontractor bidder information for all firms submitting bids</p>	<ul style="list-style-type: none"> <li>• Include both accepted and rejected subcontractors</li> <li>• Analyze bidder information at least annually to review market area</li> </ul>	<ul style="list-style-type: none"> <li>• Contract Management</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Analysis</li> <li>• Industry Expertise</li> </ul>	<p>Improve Data Collection &amp; Tracking</p>
<p><b>Finding 11:</b> The County does limited outreach, technical assistance, and training that targets LSMDBE suppliers and vendors.</p>				
<p><b>Recommendation 11a:</b> Develop and implement outreach strategies to reach various groups of LSMDBEs</p>	<ul style="list-style-type: none"> <li>• Identify key LSMDBE demographic groups based on the County market area</li> <li>• Update and expand list of Community Based Organizations (CBOs) and Industry Associations on an ongoing basis</li> <li>• Conduct ongoing focus groups or outreach to stay up to date on LSMDBE needs</li> <li>• Develop outreach strategies to address identified needs</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Planning</li> <li>• Scope and Requirements Development</li> <li>• Sourcing/RFP Process</li> <li>• Contract Management</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Analysis</li> <li>• Qualitative Analysis</li> <li>• Disparity Analysis</li> </ul>	<p>Refine Procurement Documents, Policies, &amp; Programs</p> <p>Improve Outreach &amp; Capacity Building</p>



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<p><b>Recommendation 11b:</b> Formalize a process to identify and outreach directly to LSMDBEs with relevant procurement opportunities as allowed under Proposition 209</p>	<ul style="list-style-type: none"> <li>• Develop a set of guidelines for identifying LSMDBEs</li> <li>• Identify different approaches and media to conduct effective outreach</li> <li>• Review and Identify contracts and LSMDBE categories with greatest potential for subcontracting based on Supplier Diversity Study and other data</li> <li>• Send procurement opportunities directly to LSMDBEs via a targeted contact list</li> <li>• Conduct outreach to include LSMDBEs prior to pre-proposal meetings</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Planning</li> <li>• Scope and Requirements Development</li> <li>• Sourcing/RFP Process</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Analysis</li> <li>• Qualitative Analysis</li> <li>• Disparity Analysis</li> </ul>	<p>Refine Procurement Documents, Policies, &amp; Programs</p> <p>Improve Outreach &amp; Capacity Building</p>
<p><b>Recommendation 11c:</b> Facilitate networking events with prime contractors to help LSMDBEs gain subcontractor work</p>	<ul style="list-style-type: none"> <li>• Develop guidelines for conducting networking events</li> <li>• Consider adding networking event as part of Request for Proposal (RFP)</li> <li>• Aim to conduct pre-proposal meetings with LSMDBE networking component</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Planning</li> <li>• Scope and Requirements Development</li> <li>• Sourcing/RFP Process</li> <li>• Contract Award</li> <li>• Contract Management</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Analysis</li> <li>• Qualitative Analysis</li> </ul>	<p>Refine Procurement Documents, Policies, &amp; Programs</p> <p>Improve Outreach &amp; Capacity Building</p>
<p><b>Recommendation 11d:</b> Develop a dedicated LSMDBE webpage with links to useful resources to become a vendor and how to do business with the County</p>	<ul style="list-style-type: none"> <li>• Review similar agencies for key information to include on webpage</li> <li>• Determine County LSMDBE programs and initiatives to be included on the webpage</li> <li>• Include forms, FAQs, tutorials, open solicitations, County contacts, etc.</li> <li>• Consider creating a vendor/supplier feedback form to gather information on county procurement process</li> </ul>	<ul style="list-style-type: none"> <li>• Sourcing/RFP Process</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Analysis</li> <li>• Qualitative Analysis</li> </ul>	<p>Improve Outreach &amp; Capacity Building</p> <p>Improve Data Collection &amp; Tracking</p>





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<p><b>Recommendation 11e:</b> Develop workshops, technical assistance, and reference documents to help LSMDBEs navigate County procurement processes and respond to requirements</p>	<ul style="list-style-type: none"> <li>• Partner with supportive service organizations to help LSMDBEs and non-profits to build capacity, understand procurement requirements, bonding &amp; insurance requirements, and provide technical assistance, etc.</li> <li>• Consider workshop topics for regularly occurring meetings:                             <ul style="list-style-type: none"> <li>▪ Doing Business with the County</li> <li>▪ Procurement Process</li> <li>▪ Proposal Writing</li> <li>▪ Marketing and Teaming</li> <li>▪ Reporting and Invoicing</li> <li>▪ Meeting Insurance Requirements</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Sourcing/RFP Process</li> <li>• Contract Management</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Analysis</li> <li>• Qualitative Analysis</li> </ul>	<p>Improve Outreach &amp; Capacity Building</p>



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<p><b>Finding 12:</b> LSMDBEs have limited resources, capacity, and/or experience to meet County procurement requirements. Some requirements may be too stringent for LSMDBE firms such as insurance, invoicing, and reporting requirements for certain funding sources.</p>				
<p><b>Recommendation 12a:</b> Develop a debriefing procedure that provide specific and useful feedback to vendors</p>	<ul style="list-style-type: none"> <li>• Determine a standard for when debriefs must be conducted</li> <li>• Consider adding debriefing language to bid documents and post-award outreach</li> <li>• Ensure competition sensitive or confidential information from selected vendors, including pricing information, is not disclosed, as applicable.</li> <li>• Conduct debriefings with LSMDBE firms to ascertain specific LSMDBE procurement challenges and needs</li> <li>• Conduct follow-up surveys with LSMDBEs that downloaded RFP but did not submit a proposal</li> <li>• Regularly evaluate debrief feedback by bidder categories to better understand challenges, and potential for improvement.</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Planning</li> <li>• Sourcing/RFP Process</li> <li>• Contract Award</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Analysis</li> <li>• Qualitative Analysis</li> <li>• Industry Expertise</li> </ul>	<p>Refine Procurement Documents, Policies, &amp; Programs</p> <p>Improve Outreach &amp; Capacity Building</p>
<p><b>Recommendation 12b:</b> Reevaluate base insurance requirements with emphasis on degrees of risk rather than preset requirements for all contracts</p>	<ul style="list-style-type: none"> <li>• Review and set standards/guidelines of insurance requirements based on the risk for the contract (e.g., cyber insurance threshold of \$5M may be too high for most LSMDBEs)</li> <li>• Consider revising contract language to allow and encourage prime contractors to lower insurance requirements for subcontractors when possible</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Planning</li> <li>• Scope and Requirements Development</li> <li>• Contract Award</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Analysis</li> <li>• Qualitative Analysis</li> </ul>	<p>Improve Outreach &amp; Capacity Building</p> <p>Refine Procurement Documents, Policies, &amp; Programs</p>



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<p><b>Finding 13:</b> Concern exists that requiring vendors to be certified as LSMDBEs as well as verifying certification would be administratively burdensome for the County and that it may make the County less desirable for vendors who may see certification as burdensome.</p>				
<p><b>Recommendation 13a:</b> Develop a certification policy that leverages external certifying agency certifications</p>	<ul style="list-style-type: none"> <li>• Identify regional certifying agencies with comparative LSMDBE standards to County needs</li> <li>• Develop certification eligibility and other policies</li> <li>• Revise solicitation documents to include certification and small and local small business program measures such as goals, preferential points, or set-asides</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Planning</li> <li>• Sourcing/RPF Process</li> <li>• Scope and Requirements Development</li> <li>• Evaluation</li> <li>• Contract Management</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Analysis</li> <li>• Qualitative Analysis</li> </ul>	<p>Refine Procurement Documents, Policies, &amp; Programs</p> <p>Improve Data Collection &amp; Tracking</p> <p>Improve Outreach &amp; Capacity Building</p>
<p><b>Recommendations 13b:</b> Identify and provide access to resources for LSMDBEs to obtain certification assistance</p>	<ul style="list-style-type: none"> <li>• Develop partnerships with organizations who offer small and diverse business certification assistance</li> <li>• Develop list of organizations that provide certification support to LSMDBEs</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Planning</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Analysis</li> <li>• Qualitative Analysis</li> </ul>	<p>Refine Procurement Documents, Policies, &amp; Programs</p> <p>Improve Outreach &amp; Capacity Building</p>
<p><b>Recommendation 13c:</b> Consider implementing a local, small and micro business preference program</p>	<ul style="list-style-type: none"> <li>• Determine procurement parameters (evaluation factors, contract types, etc.) where program will apply</li> <li>• Determine the preference program dollar threshold for construction and professional services contracts</li> <li>• Determine preference percentage and points for local, small business participation</li> <li>• Develop preference program plan that details eligibility requirements</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Planning</li> <li>• Scope and Requirements Development</li> <li>• Evaluation</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Analysis</li> <li>• Qualitative Analysis</li> <li>• Disparity Analysis</li> <li>• Industry Expertise</li> </ul>	<p>Refine Procurement Documents, Policies, &amp; Programs</p>



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<p><b>Recommendation 13d:</b> Consider implementing a local and small business overall County goal for certain identified procurements</p>	<ul style="list-style-type: none"> <li>• Develop a local and small business goal plan and procedures to include:                             <ul style="list-style-type: none"> <li>▪ Size and types of procurements</li> <li>▪ Exceptions</li> <li>▪ Good Faith Efforts</li> <li>▪ Subcontract terminations</li> <li>▪ Etc.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Planning</li> <li>• Scope and Requirements Development</li> <li>• Evaluation</li> <li>• Contract Management</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Analysis</li> <li>• Qualitative Analysis</li> <li>• Disparity Analysis</li> <li>• Industry Expertise</li> </ul>	<p>Refine Procurement Documents, Policies, &amp; Programs</p> <p>Improve Data Collection &amp; Tracking</p>
<p><b>Finding 14:</b> County solicitation documents do not provide opportunities for local, smaller non-profits (LSNPs) to participate, and it is difficult to locate available local, small non-profits.</p>				
<p><b>Recommendations 14a:</b> Develop a local non-profit database</p>	<ul style="list-style-type: none"> <li>• Determine if County can utilize new online procurement system (OpenGov) to identify LSNPs or develop separate LSNP database</li> <li>• Outreach to LSNPs to register for online system</li> <li>• Outreach to larger nonprofits to identify LSNP subcontractors via online system</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Planning</li> <li>• Scope and Requirements Development</li> <li>• Sourcing/RFP Process</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Analysis</li> </ul>	<p>Refine Procurement Documents, Policies, &amp; Programs</p> <p>Improve Data Collection &amp; Tracking</p> <p>Improve Outreach &amp; Capacity Building</p>
<p><b>Recommendations 14b:</b> Consider implementing local, small non-profit preference programs</p>	<ul style="list-style-type: none"> <li>• Develop LSNP preference programs similar to recommended LSMDBE programs</li> <li>• Revise solicitation documents to include LSNP preferences</li> <li>• Revise evaluation criteria to include factors for use of LSNPs</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Planning</li> <li>• Scope and Requirements Development</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Analysis</li> <li>• Industry Expertise</li> </ul>	<p>Refine Procurement Documents, Policies, &amp; Programs</p> <p>Improve Data Collection &amp; Tracking</p> <p>Improve Outreach &amp; Capacity Building</p>



Finding & Recommendation(s)	Potential Actions	Procurement Cycle(s)	Recommendation Source <sup>1</sup>	Supports Study Goal
<p><b>Recommendations 14c:</b> Review solicitations and determine if unbundling requirements for LSNPs is possible</p>	<ul style="list-style-type: none"> <li>• Survey LSNPs to determine capabilities, capacities, and challenges with County procurements</li> <li>• Unbundle solicitations to allow LSNPs to respond and capture contracts</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Planning</li> <li>• Scope and Requirements Development</li> </ul>	<ul style="list-style-type: none"> <li>• Procurement Analysis</li> <li>• Qualitative Analysis</li> <li>• Industry Expertise</li> </ul>	<p>Refine Procurement Documents, Policies, &amp; Programs</p>

