

**Minority,  
Women and  
Small  
Business  
Enterprise  
Program  
Management  
Oversight  
Report  
2021-2022**



## History and Overview

- Since 1993, the MWSBE Office has proactively worked to increase the participation of minority, women and small businesses through inclusive procurement activities.
- In 2004, CMS conducted a disparity study that resulted in 21 recommendations.
- In 2005, the Board of Education adopted a new policy and a MWSBE regulation was created, leading to the enhancement of Lawson to track our spend, establishment of MWSBE aspirational goals, expansion of outreach and the revision of the MWSBE procedures manual and database.
- In 2005-2006, the first full year of implementation of all the changes, there was a focused effort to increase CMS utilization of MWSBE firms. The changes resulted in a period of growth until the economic downturn.





## History and Overview

Success is measured using the following program objectives:

- Marketing and Outreach
- Certification
- Utilization
- Monitoring and Reporting
- Training and Technical Assistance

# Driving Governance

- **CMS Policy DJA**

Minority-owned, women-owned, and small business enterprises (collectively “M/W/SBE”) as well as other responsible vendors shall have a fair and reasonable opportunity to participate in CMS business opportunities

- **General Statutes 143-48**

Purchase and Contract: cooperation in promoting the use of small contractors, minority contractors, physically handicapped contractors, and women contractors

- **General Statutes 143-48.4**

Statewide uniform certification of historically underutilized businesses

- **General Statutes 143-128.2**

Minority Business Participation Goals (defines good faith efforts and the full scope of the law)

- **General Statutes 143-128.3**

Administration (Public Entity Responsibilities)

- **General Statutes 143-128.4**

Historically Underutilized Business (2007 Amendment Definition)

- **General Statutes 143-131**

Informal Bidding: scope of applicable law for construction projects less than \$500,000 (increased from \$300,000 in 2007 legislation)

- **Senate Bill 914, Session Law 2001-496 December, 2001**

To enhance and improve good faith efforts to recruit and select minority businesses for participation in public construction contracts

- **NC Administrative Code – 301 Minority Business Participation Goal**

Rules governing minority participation goals and responsibilities of owners, Historically Underutilized Business (HUB) office, designers, contractors, HUB contractors, and State Construction Office

# Aspirational Goals

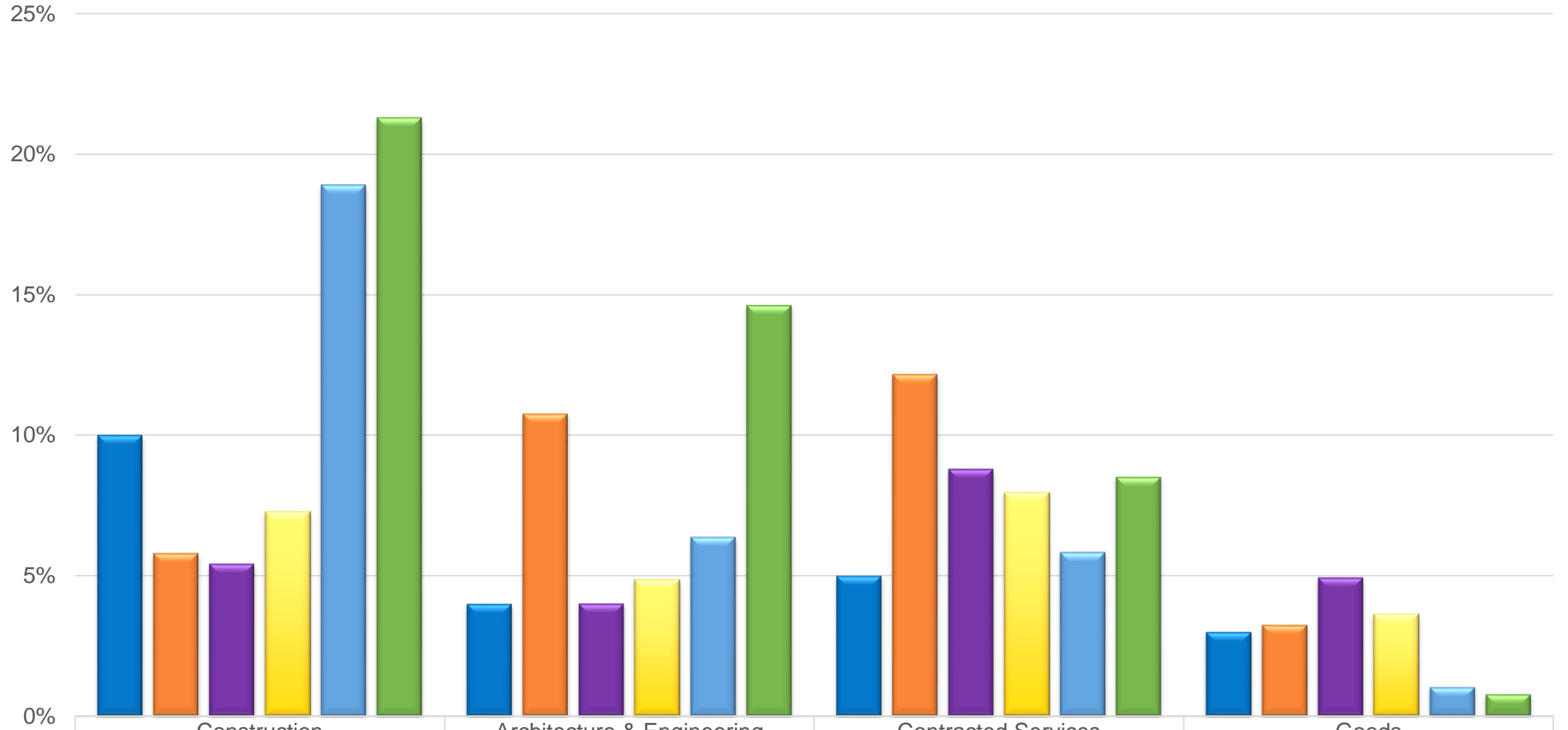
Category	MBE Goal	WBE Goal	SBE Goal	MWSBE Goal
Construction	10%	6%	5%	21%
Architecture, engineering and surveying	4%	7%	5%	16%
Contracted services (other than construction)	5%	4%	5%	14%
Goods	3%	3%	5%	11%

# How are we performing?

# Results (2021-2022)

Category	Analyzed	MWSBE Firms
Total eligible expenditures	\$470.7 million	\$155.5 million
Construction	\$182.4 million	\$94.2 million
Architecture and Engineering	\$9.9 million	\$1.7 million
Contracted Services	\$116.5 million	\$20 million
Goods	\$161.9 million	\$39.6 million

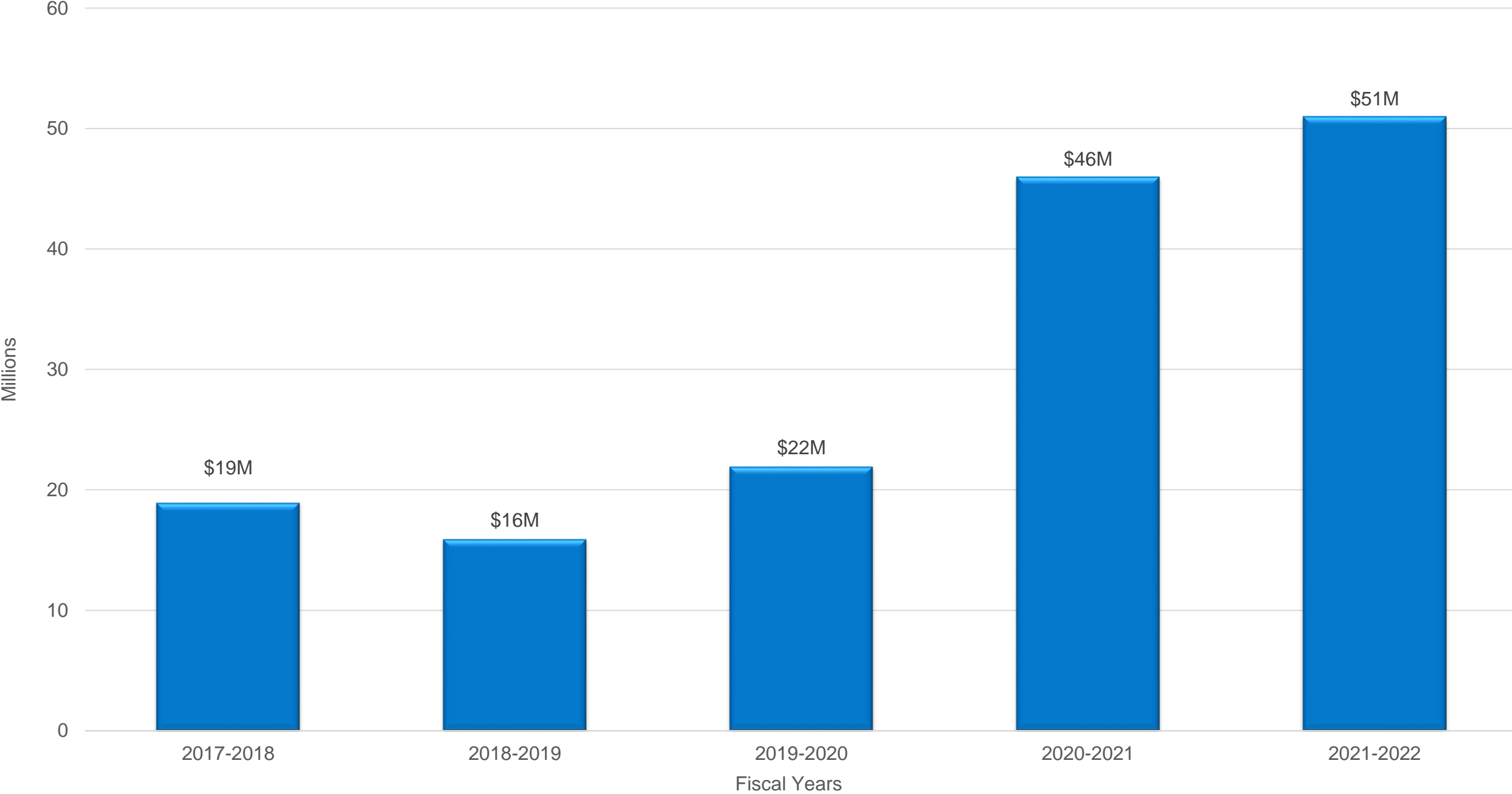
# Overall Minority Business Enterprise Utilization FY 2021-2022



Overall MBE Goal	10%	4%	5%	3%
Annual % Total 17-18	5.81%	10.75%	12.15%	3.26%
Annual % Total 18-19	5.42%	4.00%	8.79%	4.93%
Annual % Total 19-20	7.28%	4.86%	7.97%	3.63%
Annual % Total 20-21	18.90%	6.37%	5.83%	1.03%
Annual % Total 21-22	21.30%	14.63%	8.53%	0.78%

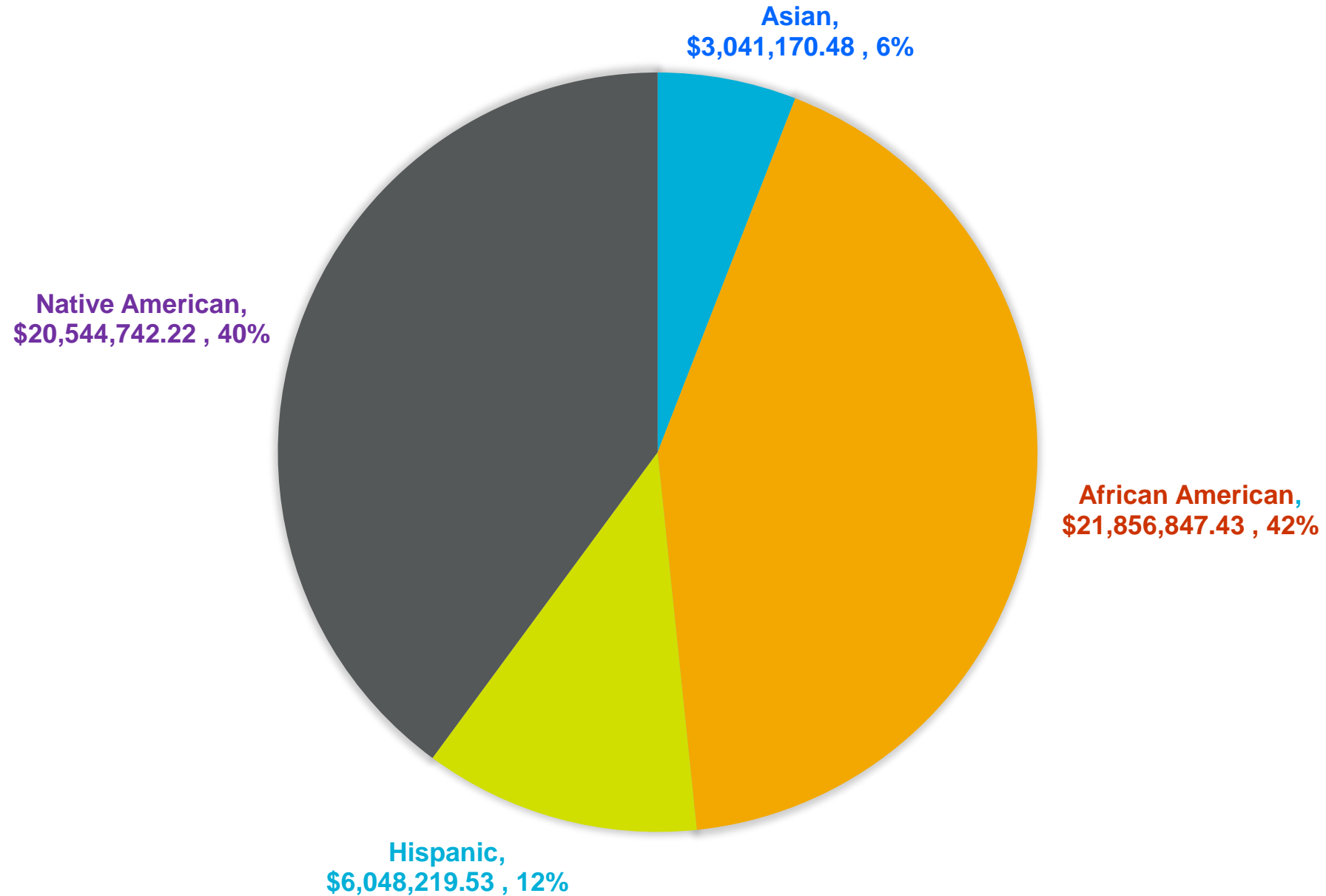


# Overall Minority Business Enterprise Spend



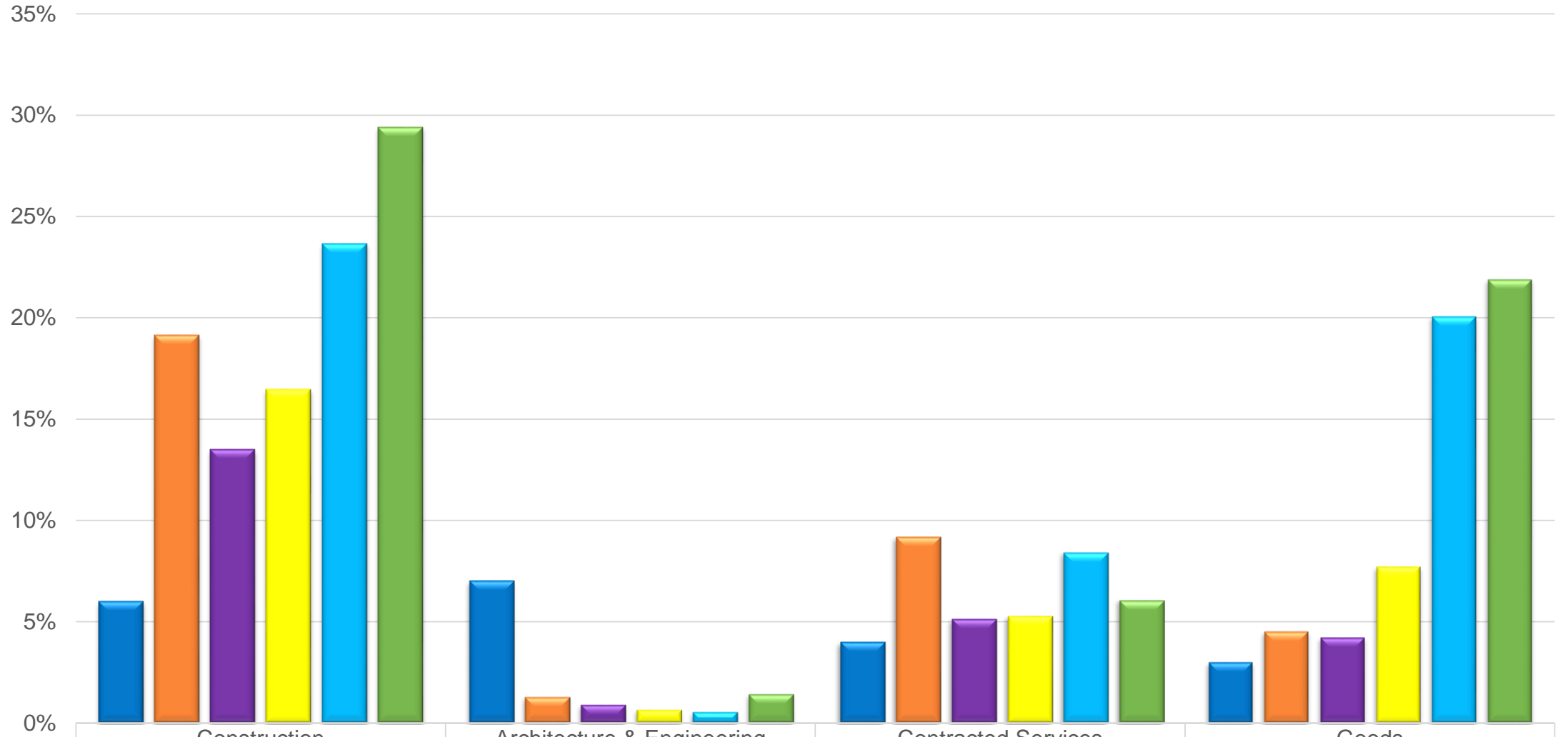
## TOTAL SPEND BY RACE

# Minority Business Enterprise Spend



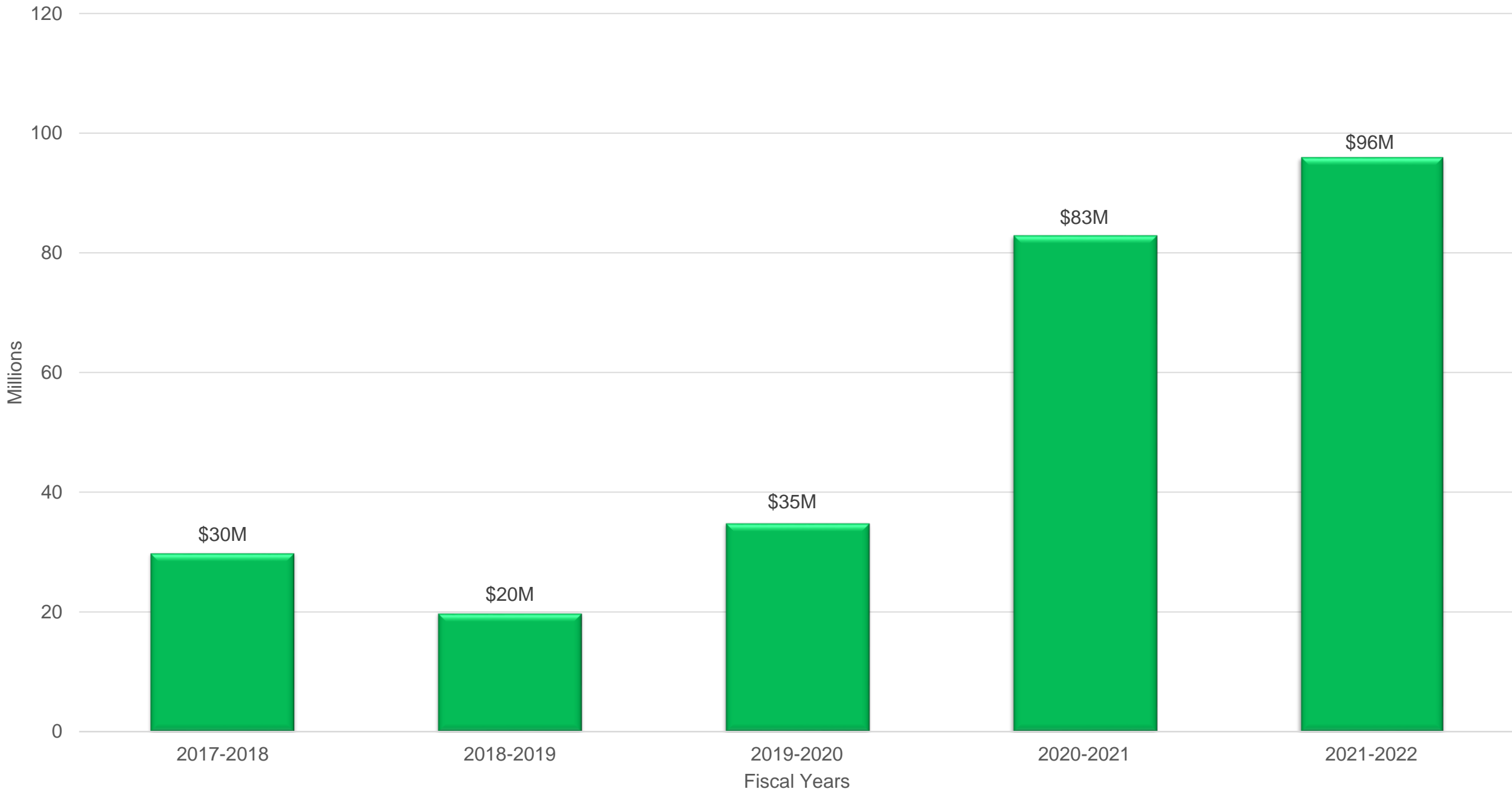
We turned over ~243 new classrooms and over 566,190 square feet

# Overall Women Business Enterprise Utilization FY 2021-2022

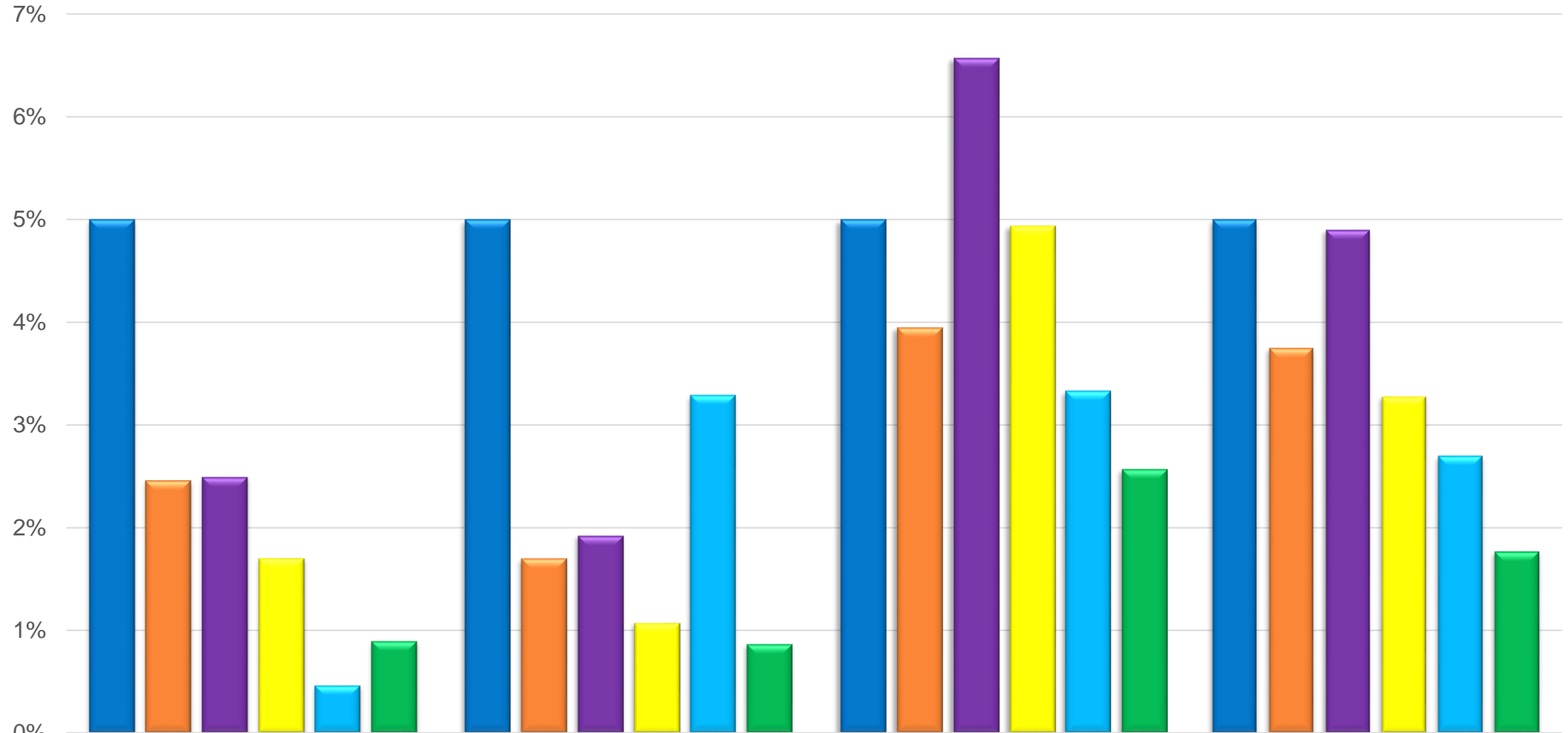


Overall WBE Goal	6%	7%	4%	3%
Annual % Total 17-18	19.13%	1.28%	9.20%	4.53%
Annual % Total 18-19	13.50%	0.90%	5.14%	4.23%
Annual % Total 19-20	16.45%	0.65%	5.26%	7.70%
Annual % Total 20-21	23.67%	0.54%	8.44%	20.07%
Annual % Total 21-22	29.42%	1.43%	6.11%	21.91%

# Overall Women Business Enterprise Spend

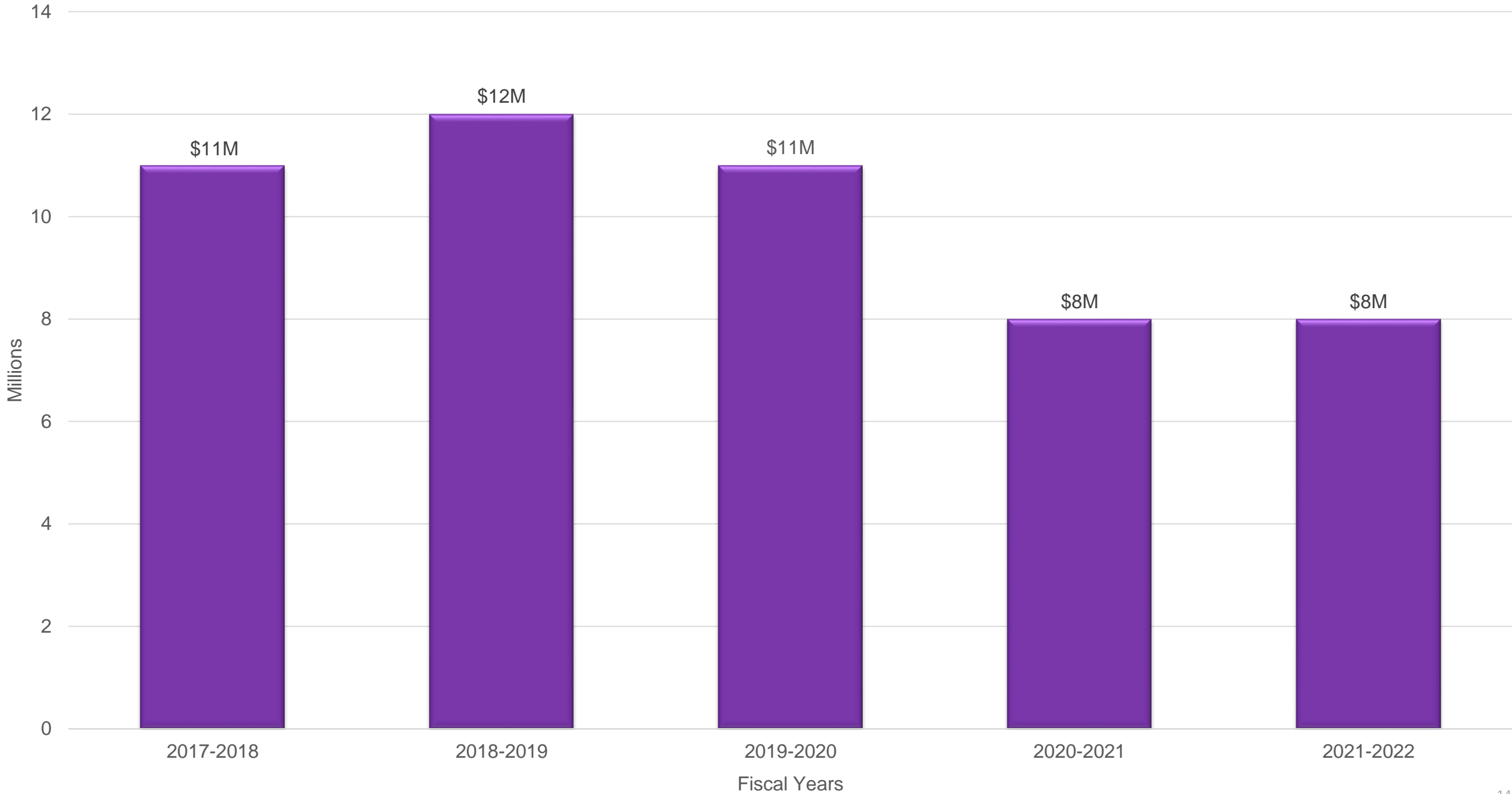


# Overall Small Business Enterprise Utilization FY 2021-2022



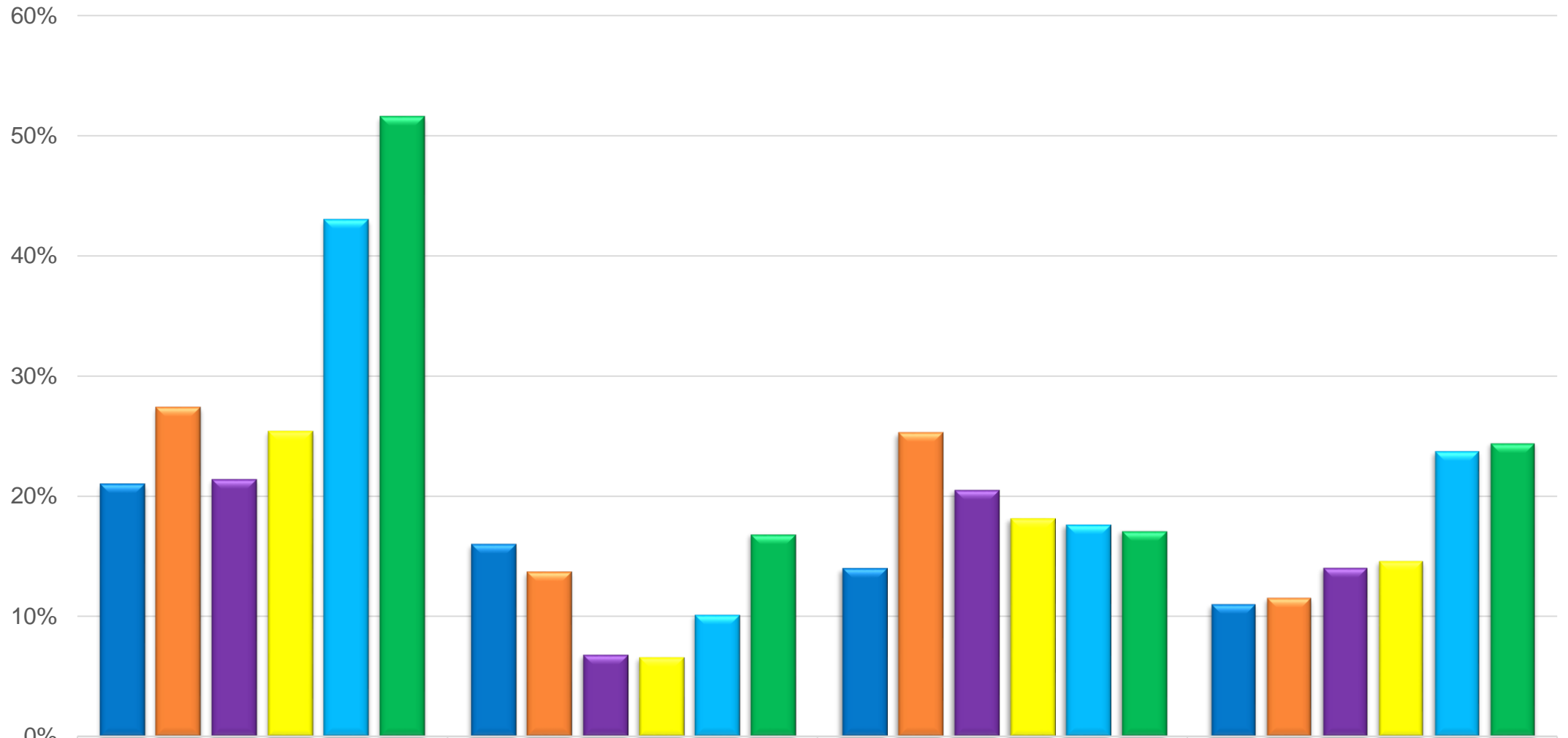
Overall SBE Goal	5%	5%	5%	5%
Annual % Total 17-18	2.46%	1.70%	3.95%	3.75%
Annual % Total 18-19	2.50%	1.93%	6.57%	4.90%
Annual % Total 19-20	1.71%	1.08%	4.94%	3.28%
Annual % Total 20-21	0.47%	3.29%	3.33%	2.70%
Annual % Total 21-22	0.90%	0.87%	2.57%	1.77%

# Overall Small Business Enterprise Spend



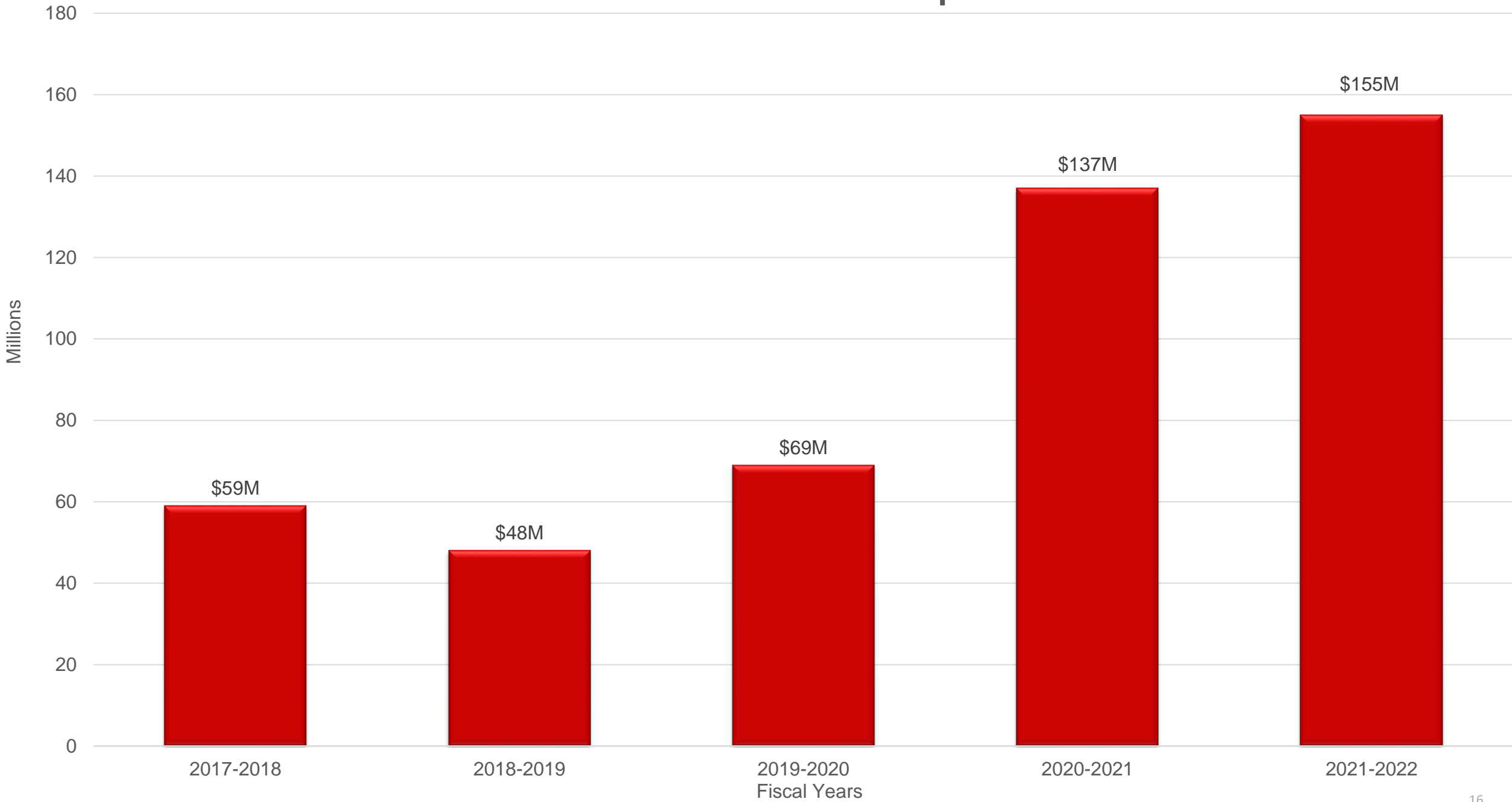


# Overall MWSBE Utilization FY 2021-2022



Overall M/W/SBE Goal	21%	16%	14%	11%
Annual % Total 17-18	27.40%	13.73%	25.31%	11.54%
Annual % Total 18-19	21.41%	6.83%	20.51%	14.06%
Annual % Total 19-20	25.45%	6.60%	18.17%	14.61%
Annual % Total 20-21	43.04%	10.19%	17.67%	23.76%
Annual % Total 21-22	51.62%	16.93%	17.21%	24.48%

# Overall MWSBE Spend



# Accomplishments

- At 33.03% of eligible spend, CMS achieved \$155.5 million in total MWSBE spending, 13% increase over previous year – **Highest in CMS history**
- Exceeded aspirational goals in all four categories (construction, architecture & engineering, contracted services and goods)
- Achieved/Exceeded MBE aspirational goals in three of the four categories (construction, architecture/engineering and contracted services), 11% increase over previous year - **Highest utilization and spend in CMS history**
- Exceeded WBE aspirational goals in three of the four categories (construction, contracted services and goods), 16% increase over previous year - **Highest utilization and spend in goods in CMS history**



# Keys to Success

# CMS Departments and Schools: MWSBE Spend Analysis

## Goods

### Top Department Spend with MWSBE firms:

1. Information Systems & Support: \$21.9 million
2. Inventory Management: \$2.1 million
3. Academics: \$1.3 million
4. Career & Technical Education: \$4.3 million
5. Food Warehouse: \$1.3 million

### Largest Areas of Spend:

- Technology
- Inventory (furniture, books, classroom supplies)
- Nutrition Services/Food Warehouse
- CTE

59/75 departments or 77% and 157/176 schools or 89% utilized MWSBE firms to procure goods

## Contracted Services

### Top Department Spend with MWSBE firms:

1. Maintenance: \$45.9 million
2. Information Systems & Technology: \$4.5 million
3. Driver Education: \$2.2 million
4. Academics: \$1.1 million
5. Information Systems & Support: \$1.3 million

### Largest Areas of Spend:

- Building Services
- Technology
- Drivers Ed
- Academics

32/61 departments or 52% and 25/101 schools or 35% utilized MWSBE firms to procure contracted services

# Economic Impact: Detailed Impact Channels

## Income Impact:

	Direct Impact	Supply Chain Effect (Indirect Impact)	Community Effect (Induced Impact)	Total Impact
<b>Employment</b>	1,265	226	345	1,836
<b>GDP</b>	\$210,048,657	\$49,789,122	\$55,163,670	\$315,001,449
<b>Income</b>	\$94,913,228	\$18,349,479	\$19,257,759	\$132,520,466

## Total Estimated Tax Impact:

	Direct	Indirect	Induced	Total
<b>Local</b>	\$1,815,697	\$969,555	\$1,250,053	\$4,035,305
<b>State</b>	\$3,662,188	\$1,235,114	\$1,521,098	\$6,418,400
<b>Federal</b>	\$15,898,631	\$3,292,776	\$3,538,965	\$22,730,372
<b>Total</b>	\$21,376,516	\$5,497,445	\$6,310,116	\$33,184,077

\*Economic impact analysis provided by Charlotte Regional Business Alliance



# Community Impact

# Outreach

- Society for Marketing Professional Services - Charlotte
- Charlotte Corporate Community Roundtable Quarterly Meetings
- Hispanic Contractors of North Carolina Meet & Greets
- Carolinas-Virginia Minority Supplier Development Council MBE Summit, Business Opportunity Conference and quarterly Metrolina Quarterly Meetings
- CMS Community Engagement Meetings
- Small Business Month
- Charlotte MED Week
- Women's Business Center Conference

# Best Practice Sharing

- American Contract Compliance Association
- Central Piedmont Community College
- City of Raleigh
- Gaston County
- NC HUB Office Reporting System Advisory Meeting
- NC Department of Administration

Join SMPS Charlotte for a panel discussion of

## The Evolution of Higher Education

Post-Covid Design, Projects, and the Future

**PANELISTS**

Kevin M. Hume	Loraine	Vicki Saville	Chiquitha Lloyd	Darren Ash
Charlotte	Central Piedmont Community College	Charlotte-Mecklenburg Schools	Mecklenburg Schools	The ROC Construction Trade School

**American Contract Compliance Association**  
NTI 2022  
Charlotte

**ACCA 2022 National Training Institute**  
Tuesday August 23, 2022 / 10:30 AM - 12:00 PM  
#260 - Supplier Diversity & Workforce Development - Leading on Opportunity  
(1.5)  
- Chiquitha Lloyd

Powered by Whova

# Technical Assistance

- ❑ How to do business with Charlotte-Mecklenburg Schools and Other Government Entities
- ❑ Creating Successful Capability Statements
- ❑ COVID Survival
- ❑ Human Capital
- ❑ Relationship Building
- ❑ Bonding & Insurance
- ❑ Emotional Intelligence
- ❑ Finance Panel





# Charlotte Minority Enterprise Development Week Honorees

## Recognition



**Sterling Construction  
Outstanding  
Achievement in  
Construction**



**Applied Data  
Outstanding  
Achievement in Supply  
& Manufacturing**



**Richa Graphics  
Outstanding  
Achievement in  
General Services**



**Syntelli  
Outstanding Achievement in  
Professional Services**



**Metcon Construction  
Corporate Advocate**



**Lissette Velez  
Diversity Advocate**



**Carolinas-Virginia**  
Minority Supplier  
Development Council

# **2021 Public Corporation of the Year**



# Workforce Development



# CMS Workforce Development Mayor's Youth Employment Program

## Key Takeaways

1. Diversity & Inclusion Office
  - Department Roles
  - Program Impact
2. CMS Leadership Meetings
  - Impact on career opportunities
  - Diversity in leadership roles
3. Team Support
  - Business and Professional Behaviors
  - Emotional Intelligence
  - Professional Connections
4. School Environment
  - Inclusive environments for all students
  - Creativity in design and technology



# Summary of Workforce Development Related Activities

<b>New Hires</b>	<ul style="list-style-type: none"><li>▪ 26 (Temporary)</li><li>▪ 48 (Permanent)</li></ul>
<b>Internships (Mayor's Youth Employment Program, CCCC Construction program and CMS college graduates)</b>	<ul style="list-style-type: none"><li>▪ 19 (High School)</li><li>▪ 12 (College)</li></ul>
<b>Activities</b>	<ul style="list-style-type: none"><li>▪ 13 student workshops/site tours</li></ul>



**Carly Morris – Rodgers Builders  
Workforce Development  
Advocate of the Year**



**Charlotte Works  
Workforce Development  
Community Partner of the Year**



**Messer Construction  
Workforce Development  
Champion of the Year**

# Best Practice Industry Partners

**PERKINS —  
EASTMAN**

**Messer**  
WeAreBuilding.

**RJL**  
**R.J. LEEPER**  
Construction, LLC

 **NewAtlantic**  
CONTRACTING, INC.

**RODGERS**  
Our Passion is Building®

**Turner**

**adw**architects  
environmentsforlife

  
**LeCHASE**  
CONSTRUCTION

**LS3P**

**La** LIL ASSOCIATES II INC

 **HOLT**  
BROTHERS

  
**EDIFICE**  
GENERAL CONTRACTORS  
The Art and Science of Construction

**BROWNSTONE**

**BRANCH**®  
CONSTRUCTION MANAGEMENT ■ DESIGN-BUILD ■ GENERAL CONTRACTING

**LITTLE**  
DIVERSIFIED ARCHITECTURAL CONSULTING

**JACOBS**®

neighboring  
**concepts**

**metcon**  
BUILDINGS ■ INFRASTRUCTURE

**FWA**  
Group

**cms**  
Charlotte-Mecklenburg Schools

# Community Resource Partners



CHARLOTTE  
WORKS



State Chapter of the National  
Association of Minority Contractors



OF CENTRAL CAROLINAS, INC.





# Office of Diversity & Inclusion Team



Skyne Betha, CCA  
Supplier Diversity  
Compliance Specialist



Rachelle Reid  
Supplier Diversity  
Compliance Specialist



Stacey Moretti, CCA  
Diversity & Inclusion  
Project Manager

# Next Steps

- Community outreach
- Pre-qualification of bidders
- Charlotte MED Week (October 10-13)
- Supplier Diversity Summit
- Business Connections Expo
- Host quarterly Workforce Advisory Group Meetings



# Questions

**Minority, Women and Small Business Enterprise Program**