Status: ORIGINAL

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA

2023-09-12	Regular School Board Meeting
CATEGORY:	O. Strategy & Operations
DEPARTMENT:	Economic Development & Diversity Compliance

Agenda Item Number:	O-1.
Consent or Open Item:	Consent
Special Order:	NO
Time for Special Order:	

TITLE:

SDOP Summary of Progress_ June 7, 2023 - July 31, 2023 Reporting Period

REQUESTED ACTION:

Receive SDOP Summary of Progress for the June 7, 2023 - July 31, 2023 Reporting Period. District-wide.

RATIONALE:

For the Requested Actions, Background/History, Alignment to the 2027 Goals and Guardrails, Measurable Outcome(s)/Return on Investment, and Financial Impact, please see the Executive Summary.

EXHIBITS:

Executive Summary
Summary of Progress
Disparity Study
EDDC FY23 Annual Report

FINANCIAL IMPACT:

There is no financial impact to the District.

STRATEGIC PLAN ALIGNMENT:

Student Focus Outcomes

OR • **Business Operations**

BOARD ACTION:

(For Official School Board Records Only)

RECEIVED

SOURCE OF ADDITIONAL INFORMATION

Name:	Judith M. Marte	Phone:	754-321-2611
Name:		Phone:	

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA

Senior Leader & Title

Judith M. Marte, Deputy Superintendent, Finance & Operations

Signature

Judith M. Marte, Deputy Superintendent Finance & Operations

Electronic Signature

Form \$4189 Revised 7/23

PBL/VSW

Approved in Open Board Meeting On: September 12, 2023

By: Lori Alhadeff

School Board Chair

For more information, please contact:

Name: Judith M. Marte
Title: Deputy Superintendent, Finance & Operations
Phone: (754) 321-2611

EXECUTIVE SUMMARY

Supplier Diversity Outreach Program Summary of Progress
June 7, 2023 – July 31, 2023

Requested Action

Receive update on the *Supplier Diversity Outreach Program (SDOP) Summary of Progress* for June 7 – July 31, 2023 reporting period and the *Economic Development & Diversity Compliance Department Fiscal Year 2022-2023 Annual Report*.

Impact if the Board Voted Yes or No

If the Board votes "Yes": The Board's request to receive monthly updates and an annual report on the progress of SDOP will be achieved.

If the Board votes "No": *Economic Development & Diversity Compliance Department (*EDDC) will continue program implementation to advance District goals for diversity spend in procurement opportunities across all industry categories.

Background/History

The local business community is a critical component of the District's supply chain, and South Florida's economic infrastructure, benefiting our students, families, and the business community. This item tracks activities undertaken by the *Economic Development & Diversity Compliance Department* to increase utilization of local small, minority, and women-owned firms.

Alignment to 2027 Goals and Guardrails

This item is categorized as Business Operations.

Measurable Outcome(s)/Return on Investment

The measurable outcome is increased District spend with local small, minority, and women-owned suppliers.

Financial Impact

There is no existing, nor additional funding necessary for this item.

SUMMARY OF PROGRESS
ECONOMIC DEVELOPMENT & DIVERSITY COMPLIANCE DEPARTMENT
SUPPLIER DIVERSITY OUTREACH PROGRAM
REPORTING PERIOD: JUNE 7 - JULY 31, 2023

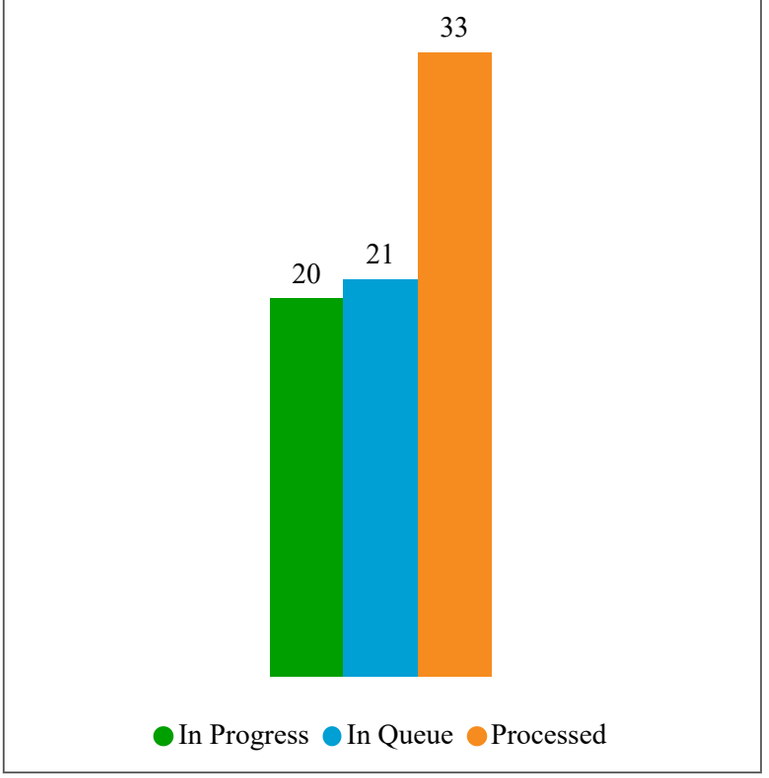
The Economic Development & Diversity Compliance Department (EDDC) oversees the District's Supplier Diversity Outreach Program (SDOP). It is governed by School Board of Broward County Policy 3330 - Supplier Diversity Outreach Program and related Standard Operating Procedures. Policy 3330 was adopted to remedy the ongoing effects of identified marketplace discrimination that continue to adversely affect the participation of Emerging/Small/Minority/Women Business Enterprises (E/S/M/WBE) in District procurement opportunities. As EDDC continues to serve as a conduit to ensure inclusive procurement activity, we are implementing additional activities to fortify the target market.

The summaries and illustrations below provide an update on the continual progress of SDOP for the June 7 - July 31, 2023 reporting period.

CERTIFICATION SECTION

551
Total Certified Firms

CERTIFICATION ACTIVITIES



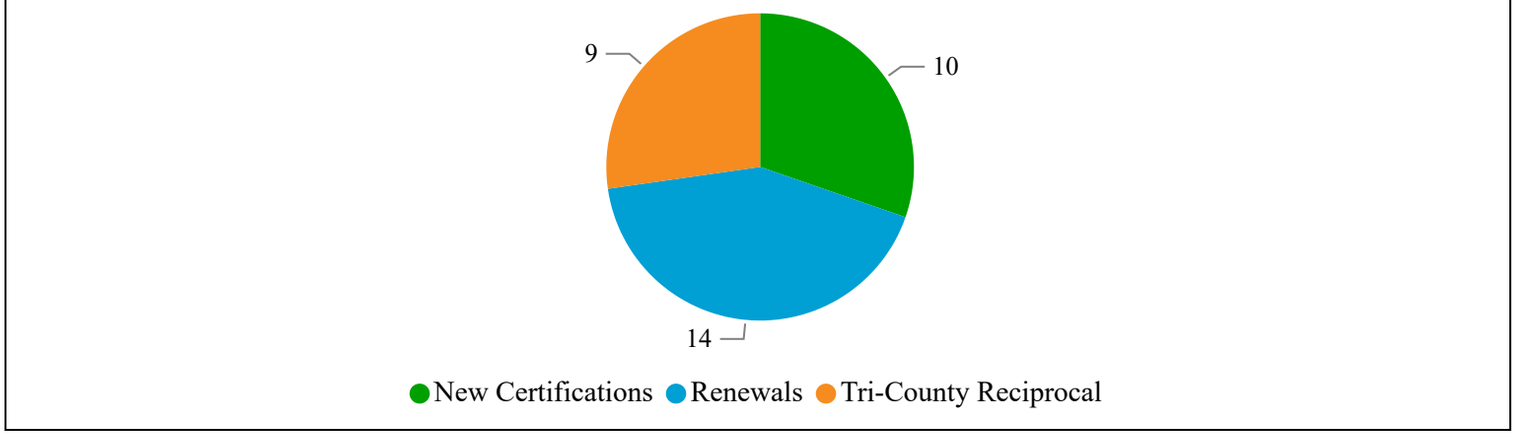
The "Files in Progress" consist of new certifications and renewal activity.

CERTIFICATION FILES PROCESSED

33
Approved

Each application reviewed during the reporting period was approved.

APPROVED APPLICATIONS

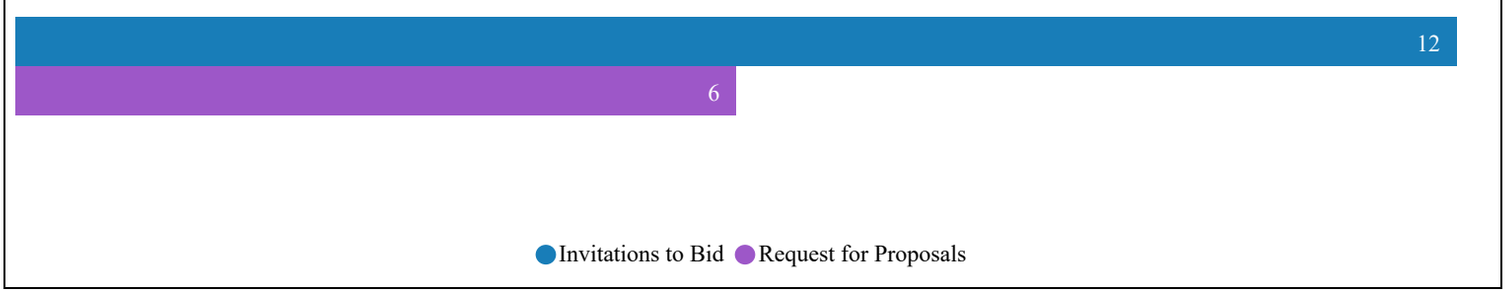


This is a breakdown of the thirty-three (33) approved certification applications.

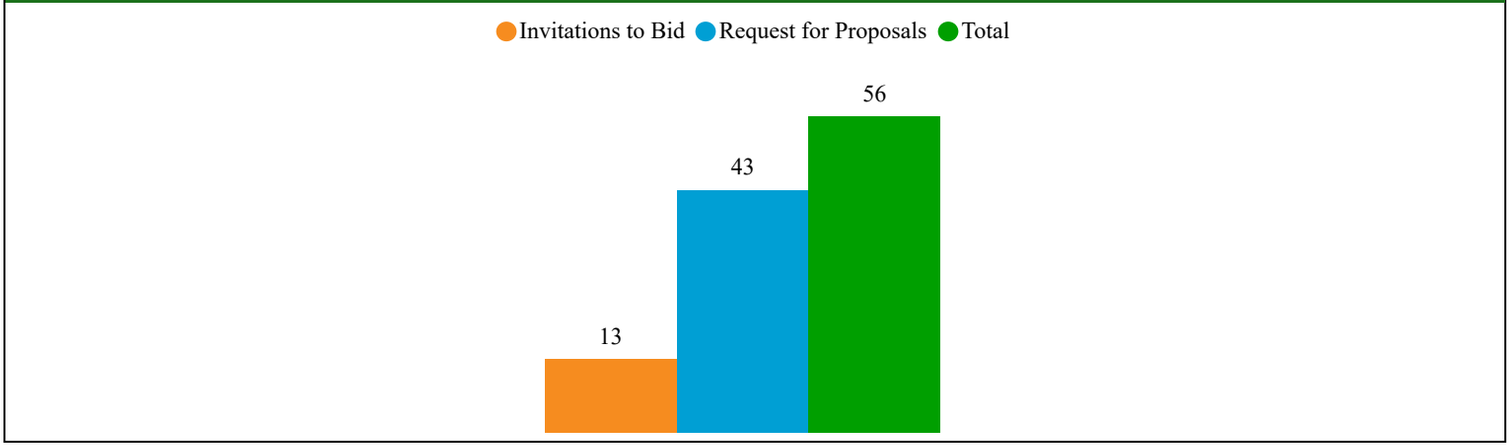
COMPLIANCE SECTION

Under this reporting period, there was a total of eighteen (18) solicitations with assigned Affirmative Procurement Initiatives (API) evaluated.

TYPES OF SOLICITATIONS ADVERTISED



TOTAL SUBMITTALS REVIEWED

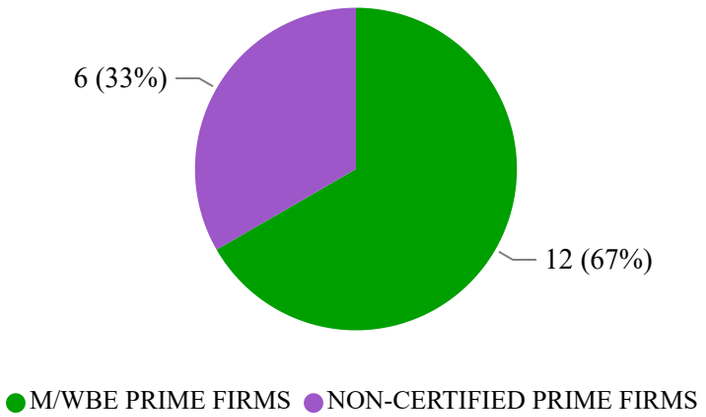


Of the eighteen (18) solicitations advertised, compliance evaluated fifty-six (56) solicitation submittals to assess the outcome and effectiveness of each assigned API.

Analysis of Solicitation Submittals and M/WBE Contract Awards

The analysis captures the prime bidders by certification status within the proposals evaluated and the M/WBE prime awards and sub contractor commitment levels.

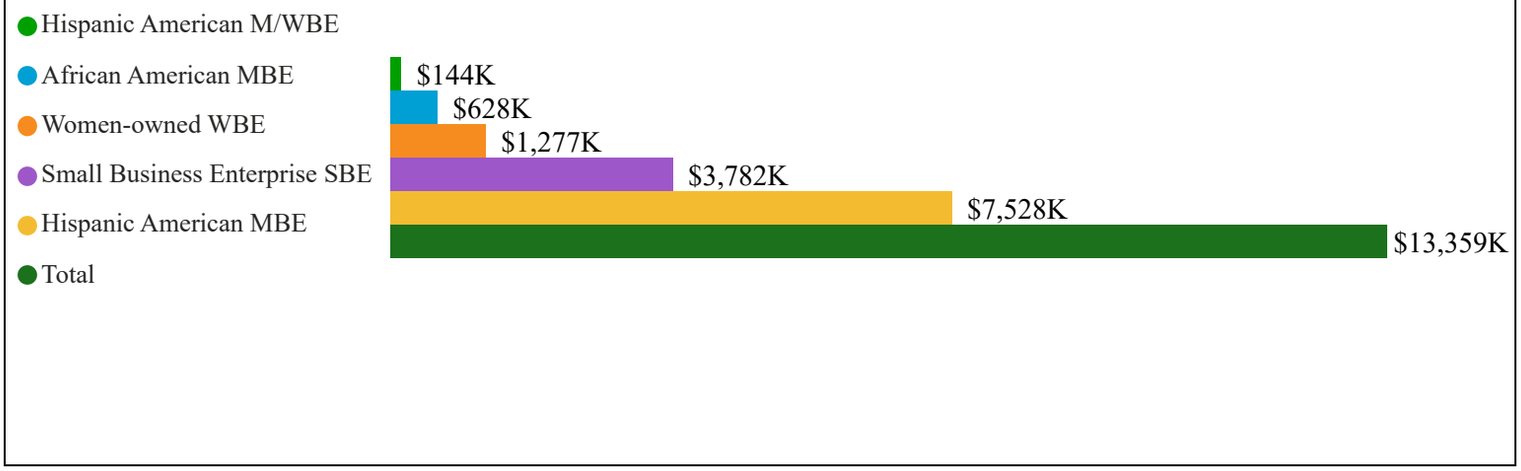
ANALYSIS OF PRIME BIDDERS



S/M/WBE PRIME SOLICITATION AWARDS & SUB COMMITMENTS

Ethnicity & Gender	# of Primes Awarded	# of Subs Based on Award
African American M/WBE	0	0
African American MBE	8	2
Asian American M/WBE	0	1
Asian American MBE	0	0
Hispanic American M/WBE	0	1
Hispanic American MBE	0	3
Small Business Enterprise SBE	0	4
Women-owned WBE	0	2
Total	**8**	**13**

M/WBE SUB COMMITMENT AMOUNTS BASED ON PRIME AWARDS

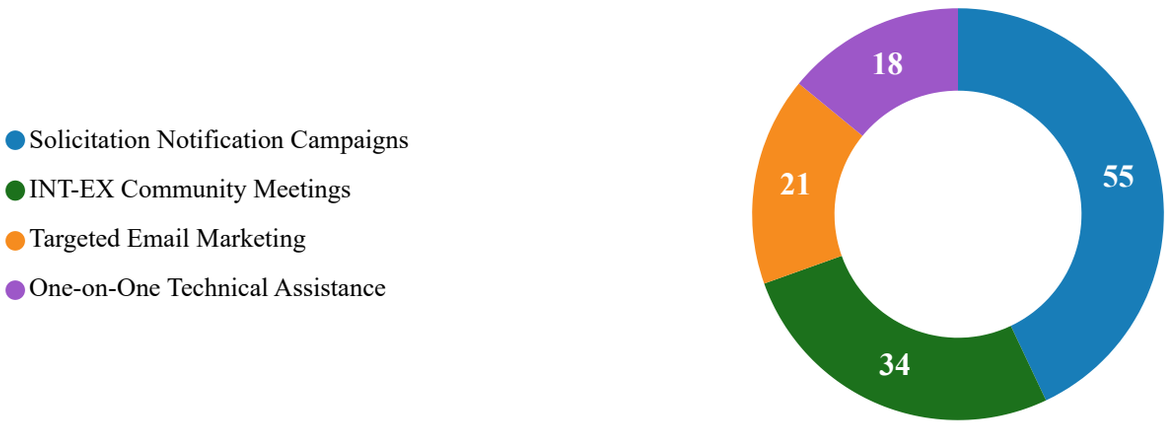


A total of thirteen (13) M/WBE sub firms were included on awarded contracts in the reporting period.

OUTREACH/MARKETING SECTION

o **Targeted Outreach**
EDDC continued to market District and local opportunities to E/S/M/WBEs in the tri-county market and assist firms in seeking to engage in local economic development opportunities. The constant objective of EDDC is to increase the participation of certified firms as primes and subs across all industry categories: Construction, Professional Services, Contractual Services and Commodities.

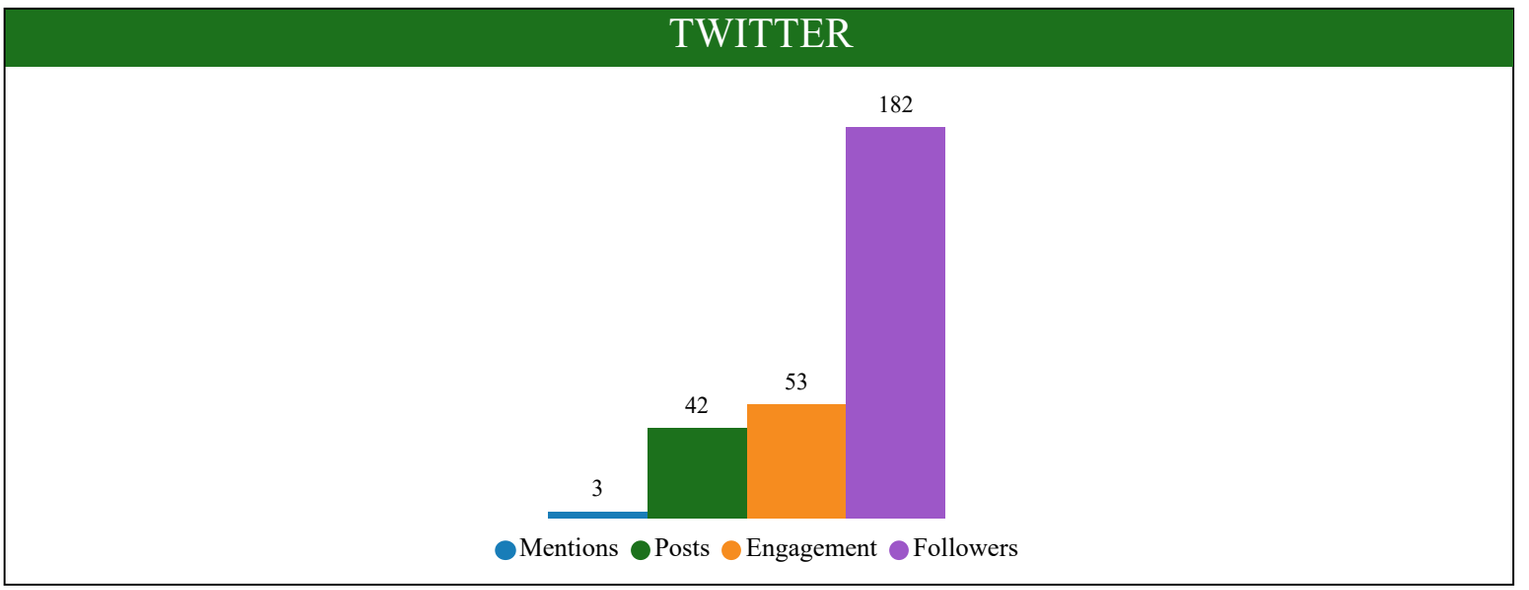
TARGETED MARKETING ACTIVITIES

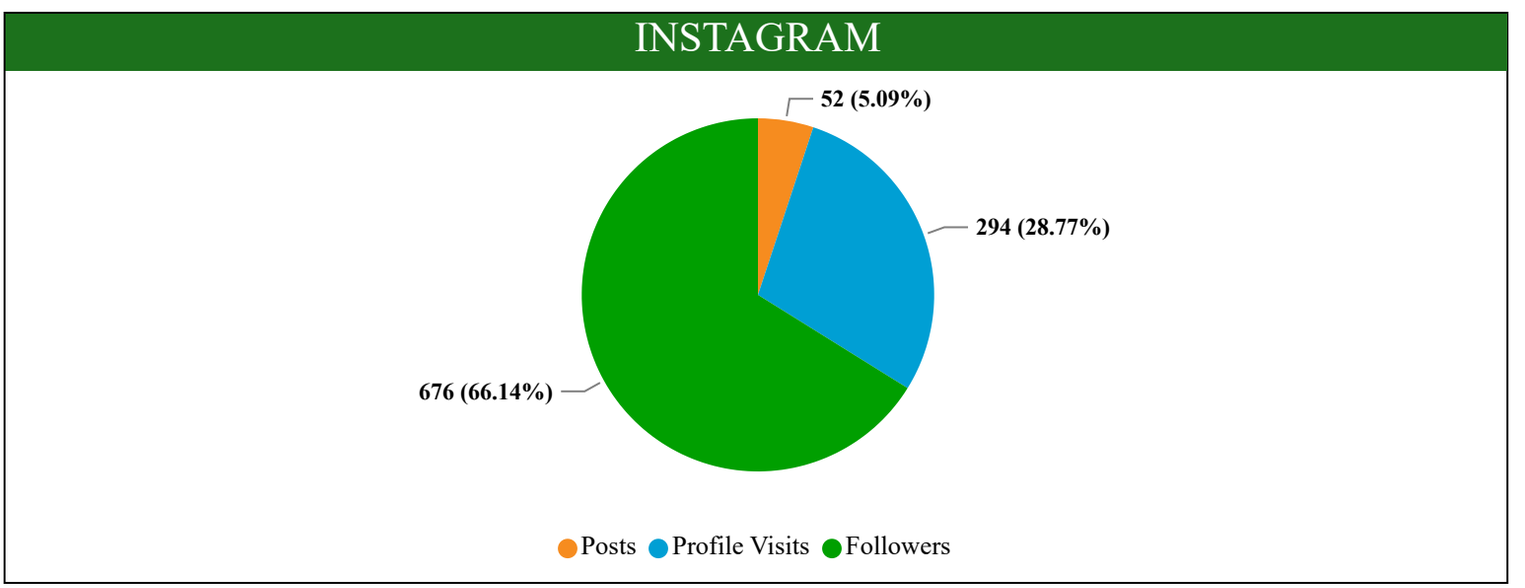


o **Social Media Communication**

The implementation of social media communication to the EDDC marketing channels has broadened connectivity with the business community and economic development partners. EDDC has a growing following and frequency of engagement on the *Twitter* and *Instagram* social media platforms.

During the reporting period, a total of 2,400 impressions occurred, reflecting the number of times users saw EDDC tweets. Also, the EDDC engagement rate was 5.33% and includes user clicks, retweets, replies, follows, and likes. The cross-industry benchmark for engagement rate is .05% on Twitter. Collectively on Instagram, 5,600 impressions occurred and the Post Engagement Rate was 6.67%. Follow us on *Twitter* and Instagram at *@BCPSEDDC.*





o **South Florida Anchor Alliance**

During the reporting period, EDDC provided the below data to the South Florida Anchor Alliance grant funder, the Health Foundation of South Florida, to establish a baseline for gauging the progress of the Regional Marketplace initiative:

- # of Vendors/ Suppliers registered: 2296
- # of certified vendors/suppliers - 540
- FY 22- 23: Total Spend for the Institution - $1,822,368,502
- FY 22- 23: Total Spend with local, Small Minority-owned business - $340,010,000

In addition, EDDC participated in two key trainings during the implementation phase of the *South Florida Anchor Alliance Regional Marketplace*. On July 5, 2023 five (5) EDDC staff members participated in a training titled *Avisare Demo_Vendor View & BCPS Capabilities* to walk-through and learn the system to prepare for hands-on technical support with our Certified suppliers as they navigate the system. In the Regional Marketplace, suppliers are able to access contracting opportunities across all participating Anchor Institutions. Additionally, the Anchors are able to identify local small businesses and learn about their products, services, and capabilities in one platform.

Lastly, an additional training occurred on July 17, 2023 when the EDDC team participated in a *Health Foundation of South Florida* training on the portal used for compliance with grant funding requirements.

INTERNAL/EXTERNAL MEETINGS & EVENTS

- **June 8**
  - Certification One-on-One Appointments
- **June 13**
  - South Florida Anchor Alliance (SFAA) Regional Marketplace Pilot Team (Check-In)
  - South Florida Anchor Alliance (SFAA) Diversity Regional Standing Meeting
- **June 14**
  - FY23-277 - Janitorial Services - Site Visits and Conference
- **June 15**
  - Civil Engineering FY24-039 Bid Opening
  - Bond Oversight Committee Meeting – FY 23 Q3
  - Certification One-on-One Appointments
- **June 20**
  - Broward Health Annual Supplier Diversity Business & Health EXPO 2023
  - 2023 Summer Youth Employment Program Intake and Orientation
  - SFAA Regional Marketplace Pilot Team (Check-In)
- **June 22**
  - EDDC Meeting with Coconut Creek (Partnering to increase local small businesses)
  - BCPS Small Business Advisory Committee Meeting
  - Certification One-on-One Appointments
- **June 27**
  - EDDC Meeting with SCORE Broward (Partnering to provide access to education, resources and increase the number of small local firms doing business with the district)
  - SFAA Regional Marketplace Pilot Team (Check-In)
- **June 28**
  - QSEC Meeting – Plantation HS
- **July 5**
  - AVISARE Demo - Vendor View & BCPS Capabilities | SFAA Marketplace
- **July 6**
  - BOC FY23 Q4 Kickoff Meeting
- **July 11**
  - RFP-FY24-117 - Non-Mandatory Proposer's Conference
  - SFAA Regional Marketplace Pilot Team (Check-In)
  - SFAA Diversity Regional Standing Meeting
- **July 13**
  - SFAA: BCPS EDDC Meeting with Health Foundation and BCPS Grants Department
- **July 18**
  - SFAA Regional Marketplace Pilot Team (Check-In)
- **July 20**
  - BCPS ITB Bootcamp – hosted by EDDC
- **July 25**
  - SFAA Regional Marketplace Pilot Team (Check-In)
- **July 25**
  - Evaluation Committee Meeting: FY24-045 - 403(b)/457(b) Program
- **July 27**
  - City of Miramar - Virtual Minority Business Spotlight Meeting

• Internal Meetings
• External Meetings

OUTREACH/MARKETING SECTION

o Bid Communication Process

Communication is fundamental to EDDC's objective to increase small business participation in District opportunities. Each thought component of the department's outreach strategy is intended to increase utilization and engagement across all commodities. Outlined below is the communication process deployed by the EDDC for the District's solicitations:



STEP 1: PWS to EDDC
Solicitations are prepared by Procurement & Warehousing Services (PWS) and given to EDDC to make recommendations to include SMWBE participation in contracts.



STEP 2: Certified Firms Identified
EDDC Certification identifies firms from the District's Certified Supplier Directory based on the scope and NAICS outlined in the solicitation[1].



STEP 3: Survey
EDDC Contact Compliance emails a potential opportunity survey to the firms to acquire their availability and willingness to provide the services/products requested. The relevant Affirmative Procurement Initiative (per Goal Setting Committee) is implemented based on the responses received by the firms. Note: EDDC does not answer any specific questions regarding the potential opportunity from the suppliers.

DEMANDSTAR
The School Board of Broward County, FL - Procurement & Warehousing Services

STEP 4: DemandStar Notification
The solicitation is posted in Demandstar by PWS. Firms with a membership receive an email notification from the system for the active bid opportunity, but all companies can view the District Bid Opportunities webpage for updates.



STEP 5: EDDC Bid Notifications
EDDC Marketing sends bid notifications within two business days of a bid posting using the following:

- **EMAILS**
  1. Certified Firms – Companies identified in our directory in the specified commodity area
  2. All Other Firms – Companies with an expired certification or have not been certified (these are generally the firms from our partner agencies); still, they can potentially provide the service/products requested. The email also includes certification information.
- **SOCIAL MEDIA**
  EDDC also uses Twitter, Instagram, LinkedIn, and Facebook to notify the community of bid opportunities. Each post includes the bid title and the link to BCPS solicitations. Community Partners assist by reposting the notifications to their respective pages.



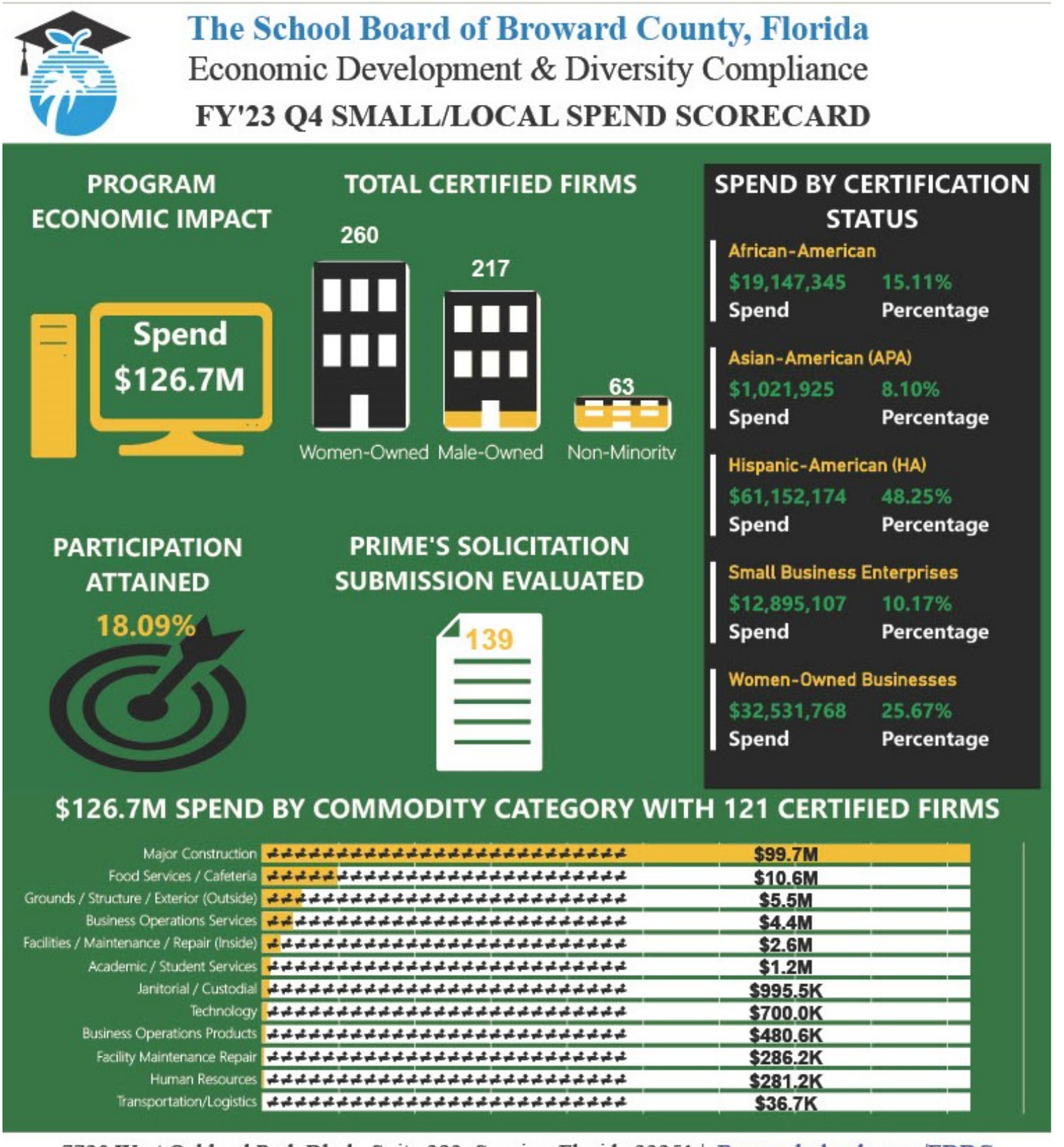
STEP 5: Pre-Bid Meetings (and Site Visits)
When applicable, EDDC Marketing will include the specifics of the pre-bid meeting in the initial bid notification. A separate notice detailing the specifics of the pre-bid meetings is sent a few days prior and on the morning of the meeting via all social media platforms.



STEP 6: Reminder
Bid notification reminders are sent via email within the last week of the due date via email and social media.

[1] If less than two certified firms can provide the requested service/product, the team sources certified vendors from the following partner agencies' directories: Broward County, Miami Dade County, Miami Dade County Public Schools, Palm Beach County, and School District of Palm Beach County to allocate potential suppliers. EDDC provides a tri-county reciprocal certification for these agencies' SBE, MBE, and WBE certifications. The certification team expedites applications for the firms working to submit a bid.

BCPS SMALL/LOCAL SPEND GROWTH



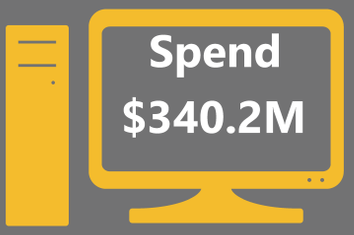
BCPS SMALL/LOCAL SPEND GROWTH

The School Board of Broward County, Florida

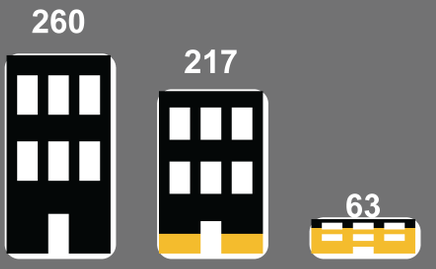
Economic Development & Diversity Compliance

FY'23 SMALL/LOCAL SPEND HIGHLIGHTS

PROGRAM ECONOMIC IMPACT



TOTAL CERTIFIED FIRMS



SPEND BY CERTIFICATION STATUS

African-American Businesses
$30,974,207 Spend | 9.11% Percentage

Asian-American Businesses
$2,835,326 Spend | 0.83% Percentage

Hispanic-American Businesses
$186,280,510 Spend | 54.77% Percentage

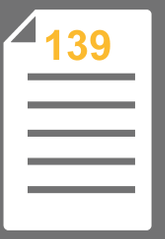
Small Business Enterprises
$18,124,506 Spend | 5.33% Percentage

Women-Owned Businesses
$101,909,633 Spend | 29.96% Percentage

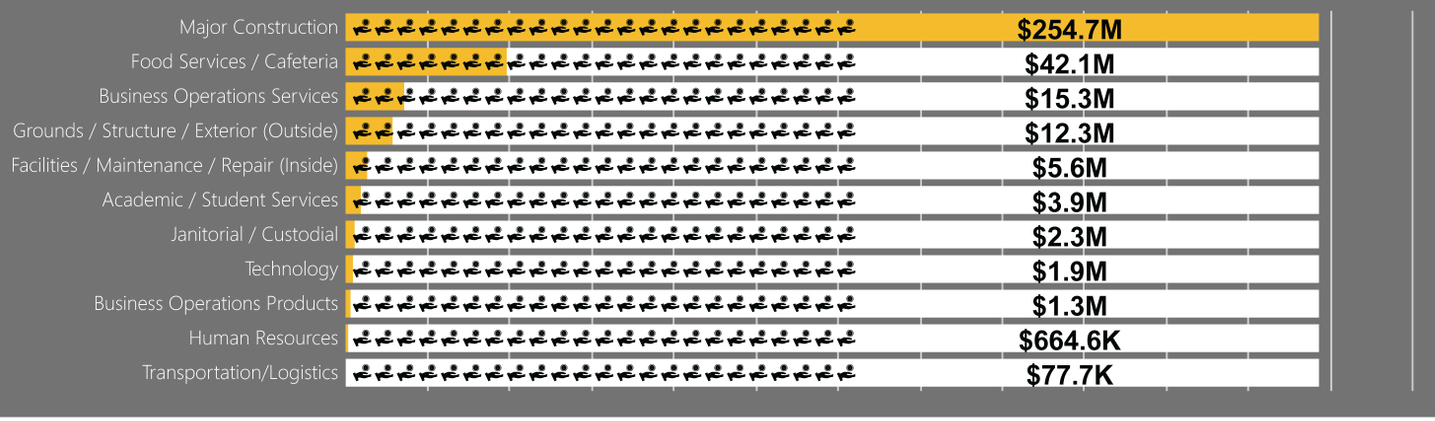
PARTICIPATION ATTAINED



PRIME'S SOLICITATION SUBMISSION EVALUATED



$340.2M SPEND BY COMMODITY CATEGORY WITH 120 CERTIFIED FIRMS



7720 West Oakland Park Blvd., Suite 323, Sunrise, Florida 33351 | Browardschools.com/EDDC

BROWARD COUNTY PUBLIC SCHOOLS

DISPARITY STUDY 2023
PROGRESS STATUS REPORT



Prepared by:
Economic Development & Diversity Compliance Department

PROJECT ADMINISTRATION, MEETINGS, AND COMMUNICATIONS



- ✓ The Keen Independent Research (Keen Independent) study team met with Broward County Public Schools (BCPS) personnel for a kick-off meeting on January 5, 2023.

- ✓ The Economic Development & Diversity Compliance and Keen Independent jointly completed the following during this period:
  - News release
  - BrowardSchoolsDisparity 2023 Website
    - ➢ Study Fact Sheet

- ✓ **Schedule**: The Disparity Study will be completed in the Winter of 2023.

- ➢ **This report highlights the status of each task under the respective Category / Milestone Sections:**

CATEGORY A

MILESTONES 1 - 4



Task 1. Review procurement policies, procedures, and programs.

✓ **95** percent complete

Task 2. Determine relevant subindustries.

✓ **100** percent complete

Task 3. Determine relevant geographic market areas.

✓ **100** percent complete

Task 4. Availability analysis.

✓ **90** percent complete

Task 5. Contracting and procurement data collection.

✓ **80** percent complete

Task 6. Utilization analysis.

✓ **90** percent complete

Task 7. Disparity analysis.

✓ **0** percent complete

Task 8. Disparity analyses by industry

✓ **0** percent complete

Task 9. Further disparity analyses.

✓ **0** percent complete

CATEGORY B

MILESTONES
5 - 7



Task 1. Collection of anecdotal evidence.

- ✓ **60** percent complete

Task 2. "But-for" and "passive participant" analysis.

- ✓ **0** percent complete

Task 3. Quantitative evidence of marketplace conditions.

- ✓ **75** percent complete

Task 4. Collection of anecdotal evidence.

- ✓ **0** percent complete

Task 5. Quantitative evidence of marketplace conditions.

- ✓ **0** percent complete

CATEGORY C

MILESTONE 8



Task 1. Development of neutral remedies.

- ✓ **0** percent complete

Task 2. Development of race- and gender-conscious remedies.

- ✓ **0** percent complete

Report Summary

Keen Independent has made considerable progress analyzing BCPS contract data and policies since the project kicked off in January 2023.

- June/July 2023, The Keen Independent study team contacted BCPS via phone and email regarding the launch and administration of the availability survey.
- The study team (including sub-consultant Mosaic Group) continued scheduling and conducting in-depth interviews with local trade organizations, business associations, and local businesses participating in the availability survey.
- The study team also began analyzing data from the Census Bureau and other sources for quantitative marketplace analyses.

REPORTING ON ANY SCHEDULE OR PROJECT ISSUES



The study team continues to review, analyze and synthesize information on the following Tasks:

- BCPS procurement, policies, procedures, and programs
- Contracting and procurement data collection
- Availability analysis.
- Utilization Analysis
- Collection of Anecdotal evidence
- Quantitative evidence of market conditions

Established 1915
BROWARD
County Public Schools

ECONOMIC DEVELOPMENT & DIVERSITY COMPLIANCE

FISCAL YEAR 2022-2023 ANNUAL REPORT

Browardschools.com/EDDC

ABOUT THIS REPORT

The Fiscal Year 2022-2023[1] Annual Report provides a progress overview of the Economic Development & Diversity Compliance Supplier Diversity Outreach Program. The report also shares the department's Program & Initiatives and Fiscal Year 2023-2024 Strategic Priorities.

[1] Unless otherwise noted, all references to FY22-23 in this report refer to the Fiscal Year July 1, 2022, to June 30, 2023.

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LETTER FROM SUPERINTENDENT OF SCHOOLS

DR. PETER B. LICATA

The School Board of Broward County, FL
Kathleen C. Wight Administration Center
600 S.E. Third Avenue
Fort Lauderdale, FL 33301

School Board Members, local business owners, and key stakeholders:

As the new Superintendent of Schools, my primary focus is on academics. However, it is important to recognize that when the small business community is successful, our students, teachers, and schools also benefit. With that in mind, I am pleased to present the Broward County Public Schools (BCPS) *Economic Development & Diversity Compliance Department (EDDC) Fiscal Year 2022-2023 End of Year Report*.

At BCPS, my motto is "*Every 1 Counts*", and my goal is to be student-centered, teacher-supported, and principal-led. Local businesses support this goal at our elementary, middle, and high schools, and their contribution to the *Broward Education Foundation* is essential to numerous ongoing education initiatives, including student scholarships, teacher grants, and school supplies.

The District's Small, Minority & Women-owned Business Certification Program, Outreach & Engagement Activities, contract compliance monitoring, and spending data reported here make me confident in our commitment to do business with small & local certified firms. I am eager to study, plan, and implement initiatives to maximize the economic impact BCPS has in Broward County and beyond.

In closing, I express my deepest appreciation to our proactive School Board for building a path for small business success at Broward County Public Schools. As a District, we know that success positively impacts our greatest commodity: our students and families. I am proud of the progress we have made and confident local small and diverse businesses will continue to contribute to student success.

With appreciation,

Dr. Peter B. Licata
Superintendent of Schools



LETTER FROM
OFFICER, TASK ASSIGNED

JASMINE M. JONES

The School Board of Broward County, FL
Kathleen C. Wight Administration Center
600 S.E. Third Avenue
Fort Lauderdale, FL 33301

Dr. Peter B. Licata
Superintendent of Schools
Kathleen C. Wight Administration Center
600 S.E. Third Avenue
Fort Lauderdale, FL 33301

Judith M. Marte
Deputy Superintendent, Operations & Finance
Kathleen C. Wight Administration Center
600 S.E. Third Avenue
Fort Lauderdale, FL 33301

Dear School Board Members, Superintendent of Schools, and Stakeholders:

Broward County Public Schools (BCPS) is pleased to provide the Economic Development & Diversity Compliance Department (EDDC) Fiscal Year 2022-2023 End of Year Report. Over the last several years, even as we endured COVID, the District has intensely focused on increasing spending with our certified small, minority, and women-owned firms. The good news is that our data reflects a great return on investment. Year-over-year, since the inception of EDDC, in October 2019, our Certified spend has been trending on an upward trajectory, and we are extremely proud of the economic impact the District has on local firms. Below are the cumulative Certified spend totals by fiscal year since 2019:

- FY'19/20 Spend $100.37M
- FY'20/21 Spend $109.66M
- FY'21/22 Spend $231.32M
- FY'22/23 Spend $340.01M

Feel free to access the EDDC Quarterly Scorecards for a detailed view of our spend with BCPS-certified small businesses across all business categories.

As we continue to trend in the right direction, we are reviewing our processes and procedures to ensure timely payment for products and services rendered. Additionally, contract monitoring, using the B2Gnow platform, is key to ensuring the commitment to certified sub-contractor utilization is actualized.

Finally, we began our Disparity Study Update in November 2022. The incoming results, in November 2023, will act as a compass, guiding us forward with data-driven results.
BCPS is entirely committed to doing business with our local certified suppliers, and we fully appreciate the effect on the students and families we serve.

Sincerely,

Jasmine M. Jones

The School Board of Broward County, Florida



Chair, Lori Alhadeff
District 4



Vice-Chair, Debra Hixon
Countywide At-Large
Seat 9



Dr. Allen Zeman
Countywide At-Large
Seat 8



Daniel P. Foganholi
District 1



Torey Alston
District 2



Sarah Leonardi
District 3



Dr. Jeff Holness
District 5



Brenda Fam, Esq
District 6



Nora Rupert
District 7

ABOUT EDDC

The Economic Development & Diversity Compliance (EDDC) department administers Policy 3330 Supplier Diversity Outreach Program (SDOP) to help Small, Minority, and Women-owned Business Enterprises (S/M/WBE) participate in Broward County Public Schools (BCPS) procurement and contract activities. The department is steadily advancing the cause for S/M/WBE suppliers, a principal component in the District's supply chain and South Florida's economic infrastructure.

MISSION

To grow the economic base of Broward County to benefit our Students, Families, and Business Community.

PILLARS

C

CERTIFICATION

The EDDC department provides S/M/WBE certifications to local small businesses. Certification positions suppliers for success through access to a vast network of support, business opportunities, increased visibility in the District's supply chains, education and development programs, capacity building, networking and mentorship opportunities.

O

OPPORTUNITIES (Contracts & Compliance)

EDDC utilizes the SDOP tools and solicitation incentives to safeguard the maximum opportunities for S/M/WBEs to do business with BCPS and provide equal opportunity for all segments of the contracting community. The Superintendent's Goal Setting Committee (GSC) establishes the S/M/WBE program goals based on industry categories, vendor availability, project-specific characteristics, and S/M/WBE utilization.

R

RESOURCES

To address the challenges suppliers encounter in business growth and sustainability, EDDC combined a comprehensive slate of resources that can be used through the lifecycle of entrepreneurship. Suppliers have first-hand access to the education, support, and tools needed to grow and succeed.

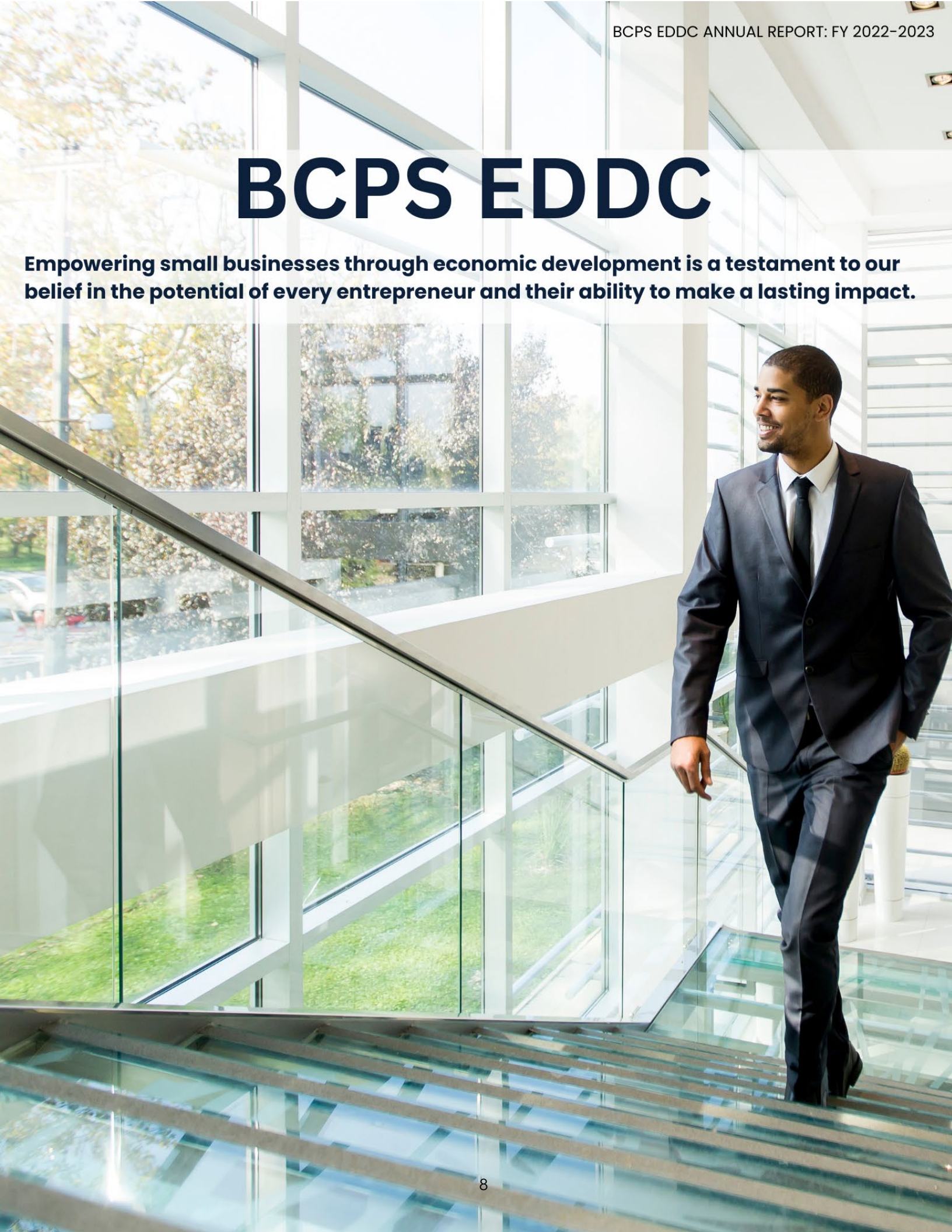
E

EDUCATION (Executive)

EDDC enhances the readiness of certified suppliers through its executive educational program through workshops, webinars, and trainings. Our business development program offers a specialized curriculum designed to develop capacity and increase the competitiveness of small businesses and their leaders.

BCPS EDDC

Empowering small businesses through economic development is a testament to our belief in the potential of every entrepreneur and their ability to make a lasting impact.



HISTORY

DISPARITY STUDY RECAP

In 2015, The School Board of Broward County, Florida (SBBC) initiated a Disparity Study to review the impact of the District's procurement activities. The study considered five years of data from July 2008 to June 2013. Statistical evidence revealed the significant underutilization of available and qualified local, small, minority, and women-owned businesses in School Board contracts and the overall marketplace.

Policy 3330 was adopted on January 18, 2017, to establish the Supplier Diversity Outreach Program to remedy the ongoing effects of identified marketplace discrimination that adversely affected the participation of S/M/WBEs in School Board contracts. The SDOP was implemented in July 2017 and employed Affirmative Procurement Initiatives (APIs) based on race and gender-conscious remedies throughout all procurement activities.

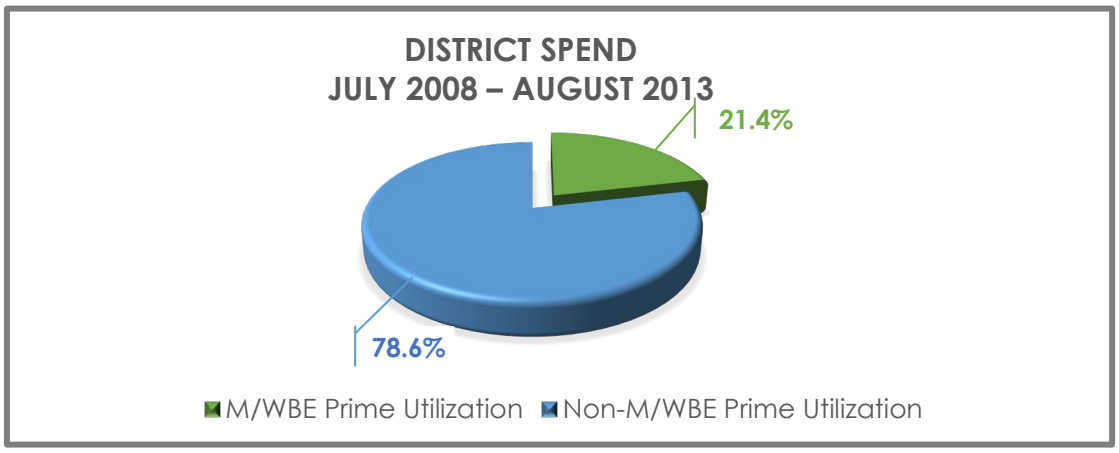


Diagram 1-1: M/WBE Spend vs. Non-M/WBE Spend

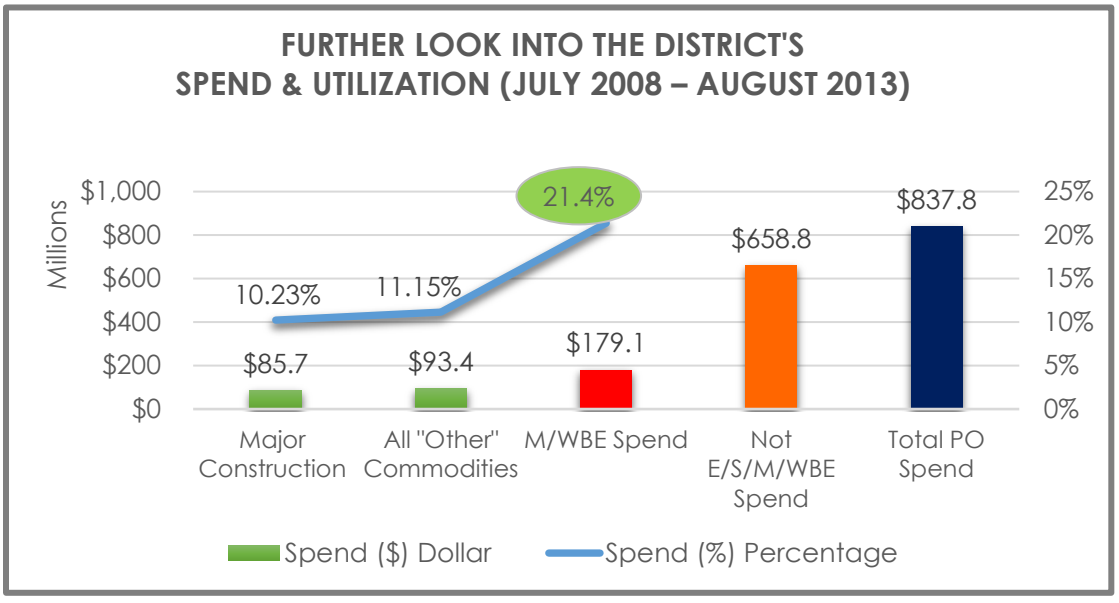


Diagram 1-2: Overview of District Spend & Utilization

DISPARITY STUDY UPDATE

Broward County Public Schools seeks to ensure equitable opportunities for small, minority, and women-owned businesses (S/M/WBEs) in its contracting and procurement. Industry best practice recommends that agencies analyze whether there are disparities in using S/M/WBEs in District contracts and the local marketplace every five years. Following School Board approval on November 14, 2022, the District contracted Keen Independent Research to conduct the 2023 Disparity Study, which is expected to be completed in the winter of 2023. *Keen Independent Research* is a national economic consulting firm whose team members have performed more than 200 similar disparity studies, including for Atlanta Public Schools in Georgia and Clark County School District in Nevada.

The 2023 Disparity Study will provide data about marketplace conditions, potential disparities in the District's contracting practices, and insights from business owners and other groups. The results will help BCPS assess its current equity efforts and identify possible new ways to encourage the participation of diverse businesses in its contracts.

The study includes a phone survey of area businesses to identify companies that can work on specific contracts and subcontracts available with BCPS and in-depth interviews with area businesses and trade associations. Keen Independent Research will then compare the utilization and availability of S/M/WBEs for contracts with the District.
Keen Independent has made considerable progress analyzing BCPS contract data and policies since the project kicked off in January 2023. In May 2023, Keen Independent launched the Availability Analysis. A list of businesses was compiled in the Geographic Market Area (GMA) that perform work relevant to District procurement. The study team combined these businesses with the list of firms that had previously expressed interest in working with the District.

Study sub-consultant, Customer Research International, continues making availability survey phone calls to thousands of businesses in the GMA. Sub-consultant Mosaic Group continued scheduling and conducting in-depth interviews with local trade organizations and business associations.

The study team continues to analyze and synthesize information on the following tasks:

- BCPS procurement, policies, procedures, and programs
- Relevant sub-industries
- Relevant geographic market area
- Contracting and procurement data
- Utilization Analysis
- Anecdotal evidence
- Quantitative evidence of market conditions

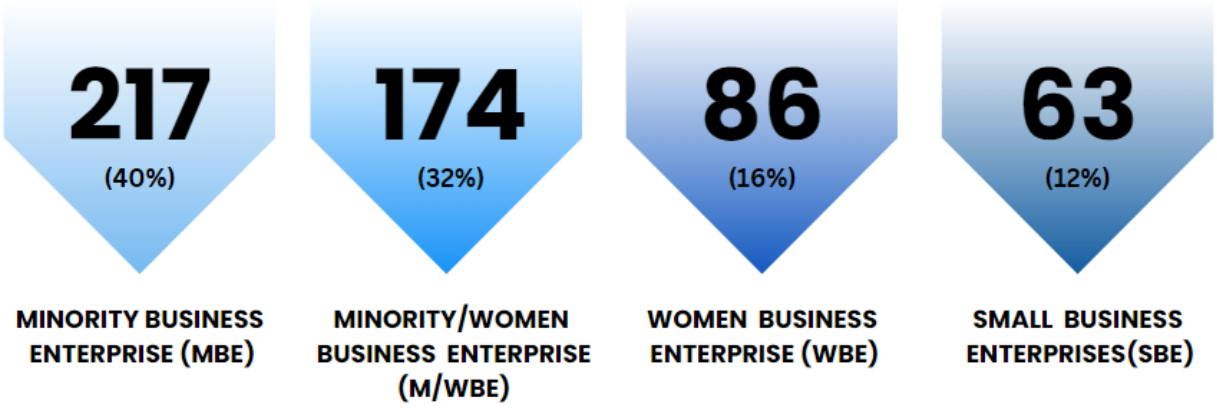
Stakeholders can track the progress of the 2023 Broward County Public Schools Disparity Study at keenindependent.com/browardschoolsdisparity2023 or call 305-204-6952.

CONSTITUENTS

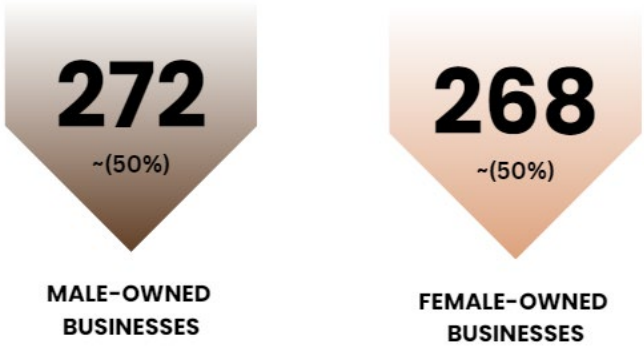
540

CERTIFIED SMALL BUSINESSES

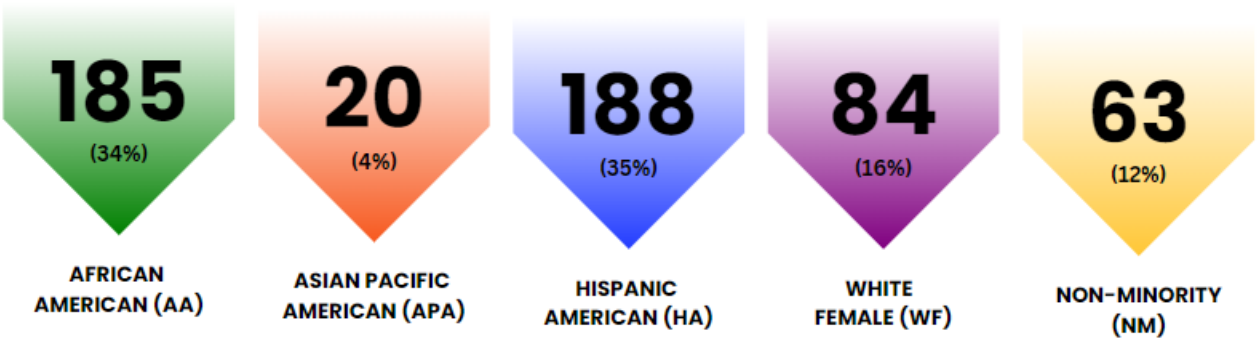
CERTIFICATION TYPE



GENDER



RACE-ETHNICITY[2]



[2] At the close of FY 22-23, there we no certified Native American-owned firms.

BUSINESS CATEGORIES[3]

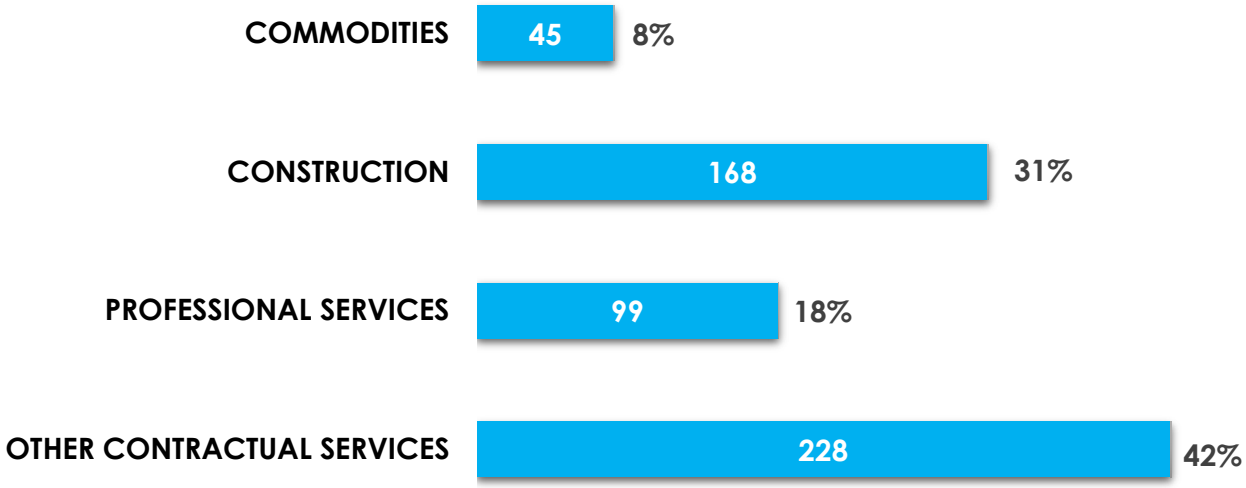


Diagram 2-1: S/M/WBE Firms by Business Categories

BUSINESS CATEGORIES BY ETHNICITY & GENDER

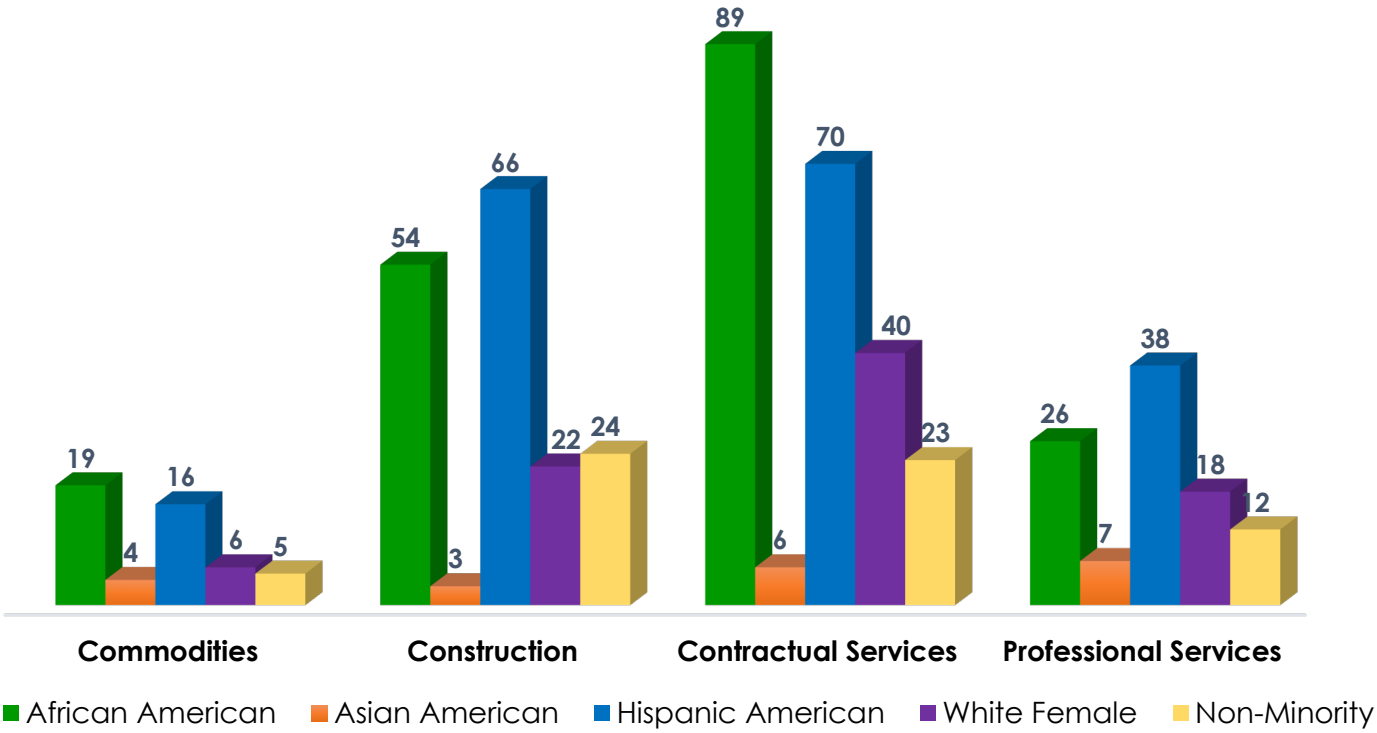


Diagram 2-2: S/M/WBE Firms Business Categories by Ethnicity & Gender

[3] Some firms provide multiple services and are categorized under more than one business category.

S/M/WBE AVERAGE GROSS RECEIPTS

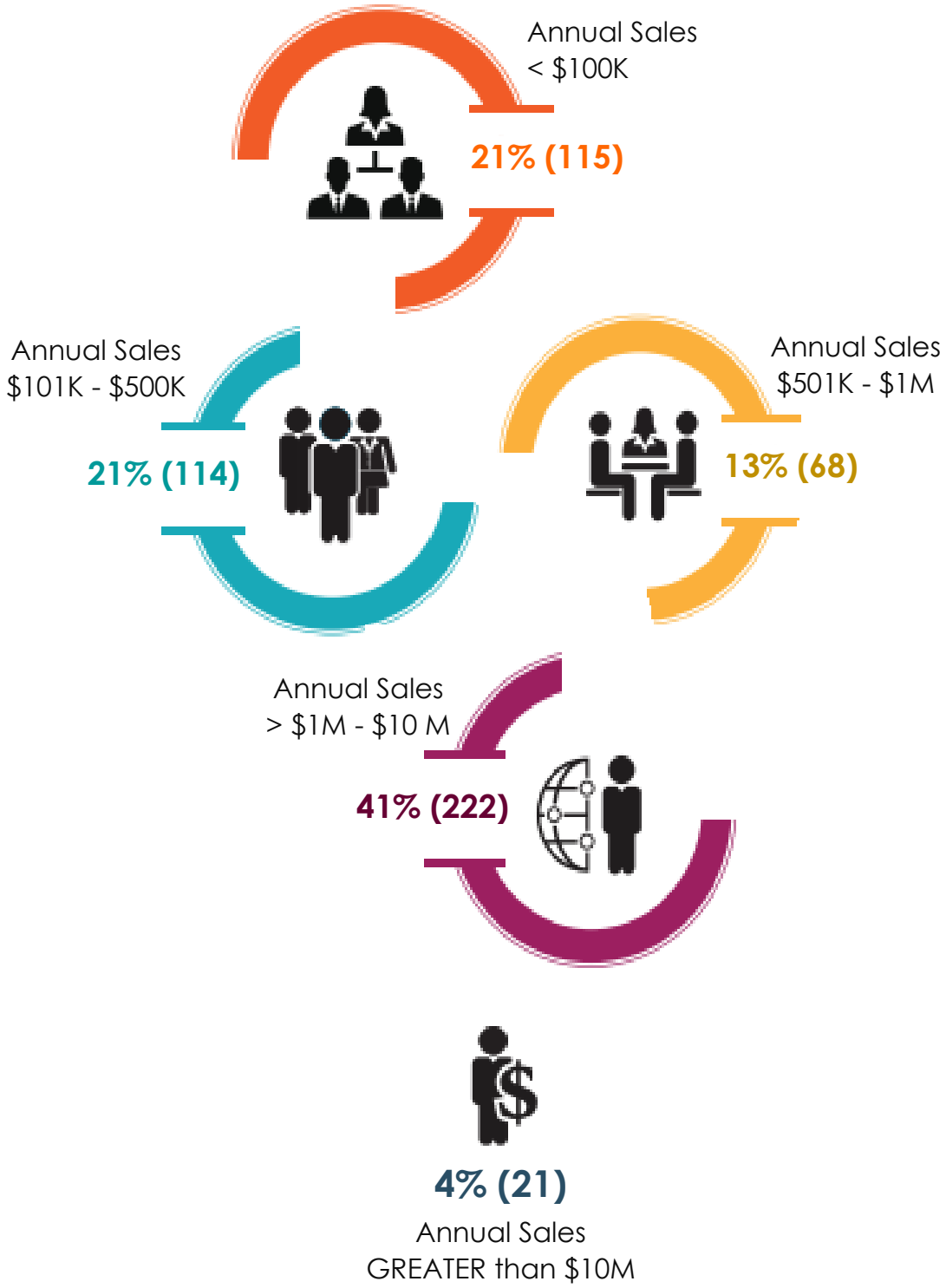


Diagram 3: Average Gross Receipts of S/M/WBE Certified Firms

ECONOMIC IMPACT



POLICY 3330 IMPLEMENTATION

The following diagrams provide an overview of the District's progress after Policy 3330 implementation. The overview incorporates five years, detailing the District's performance for FY'22-23 individually.

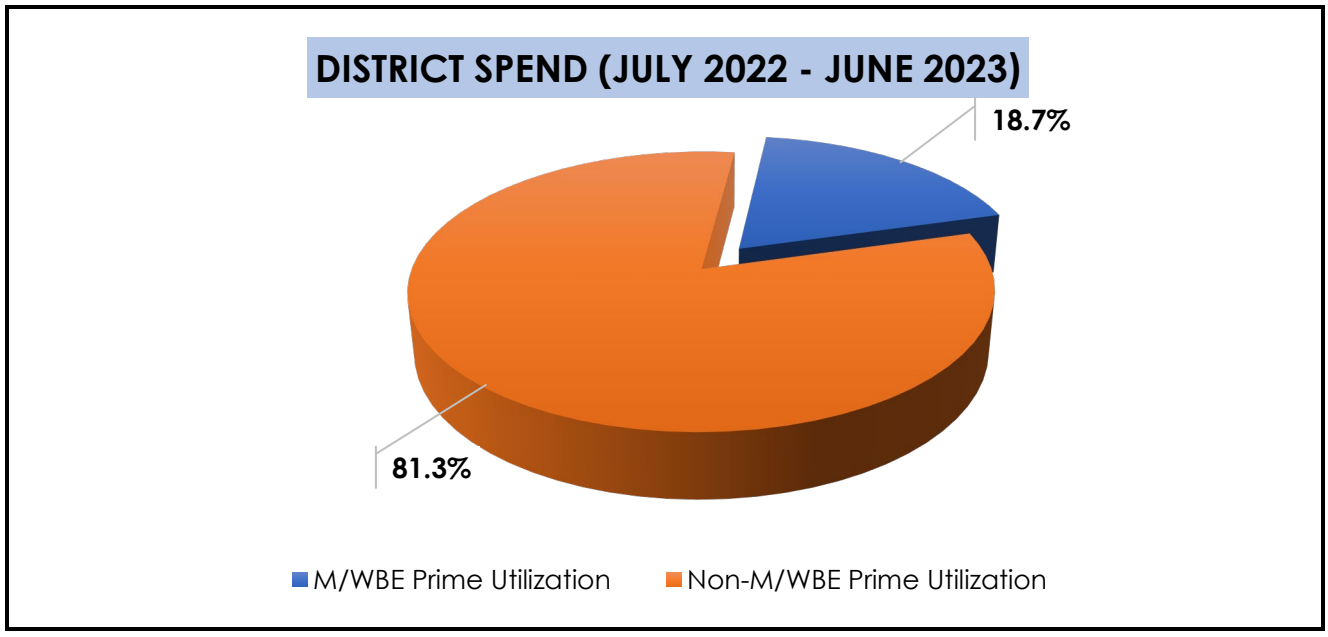


Diagram 4-1: M/WBE. Spend vs. Non-M/WBE Spend | July 2022 – June 2023

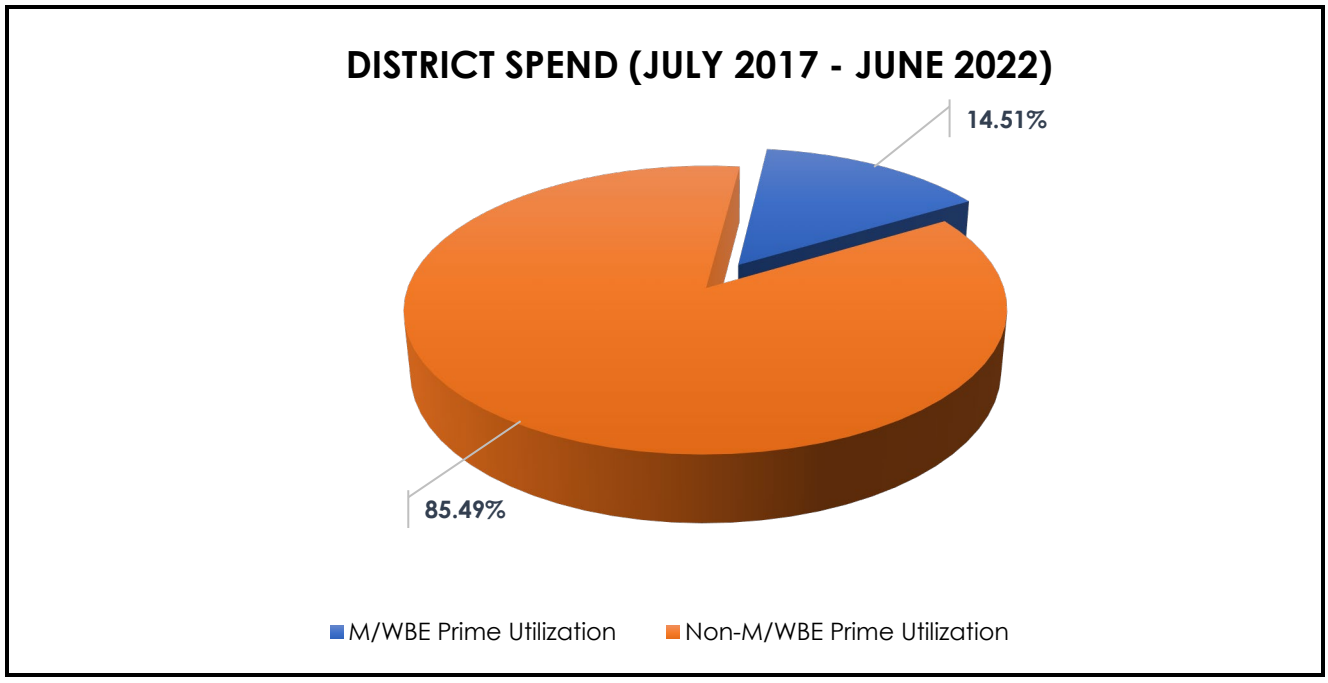


Diagram 4-2: M/WBE Spend vs. Non-M/WBE Spend | July 2017 – June 2022

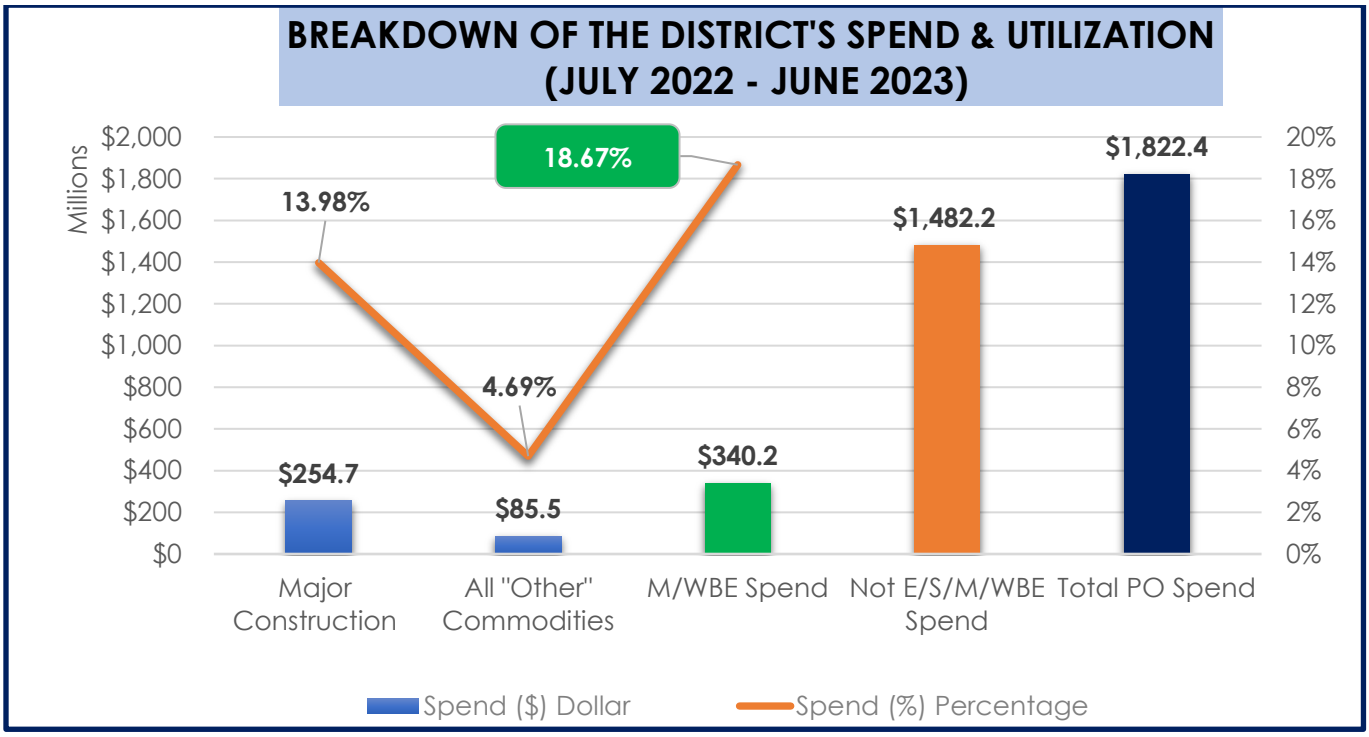


Diagram 5-1: Overview of Spend & Utilization | July 2022 – June 2023

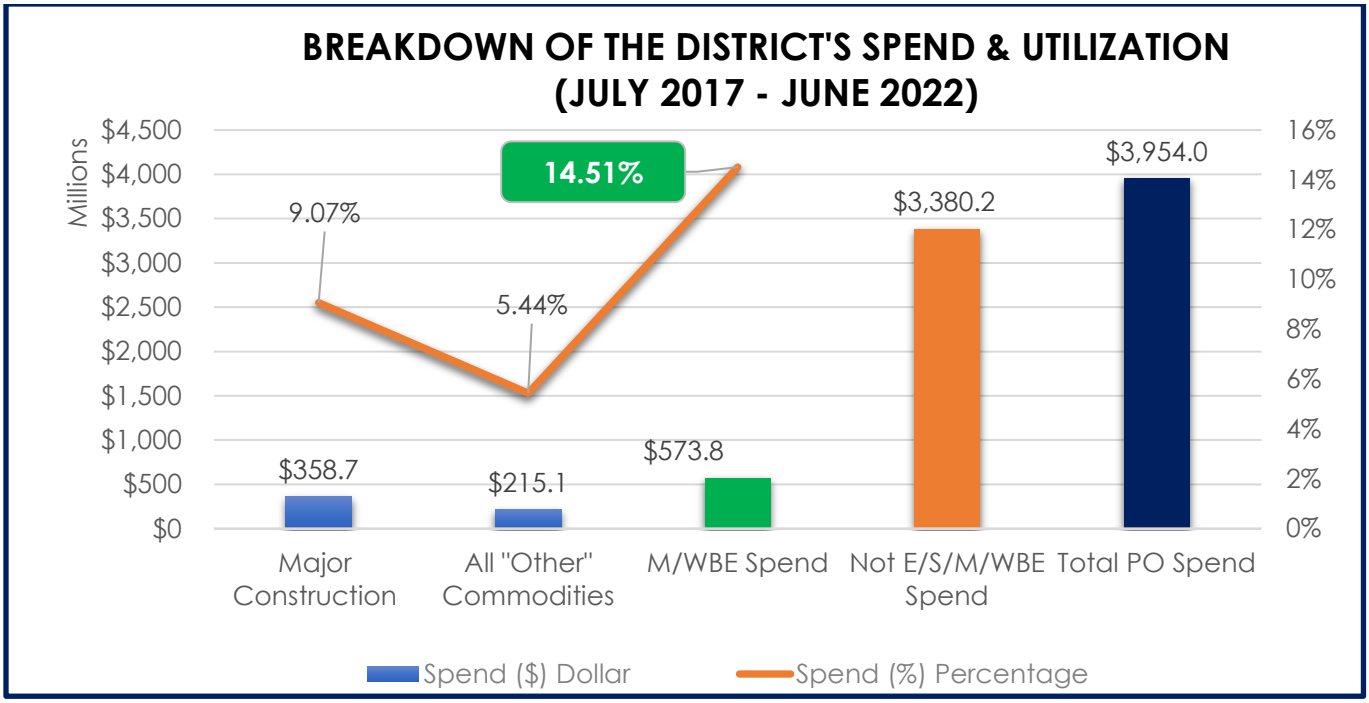
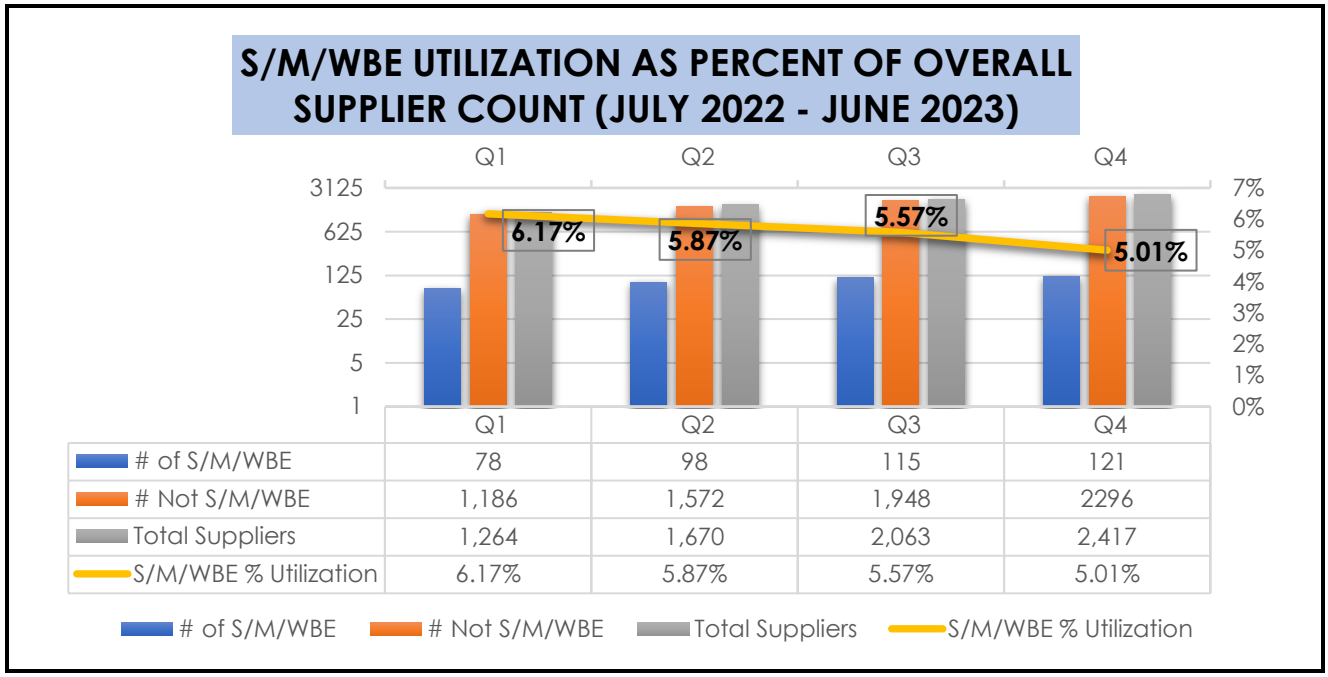


Diagram 5-2: Overview of Spend & Utilization | July 2017 – June 2022

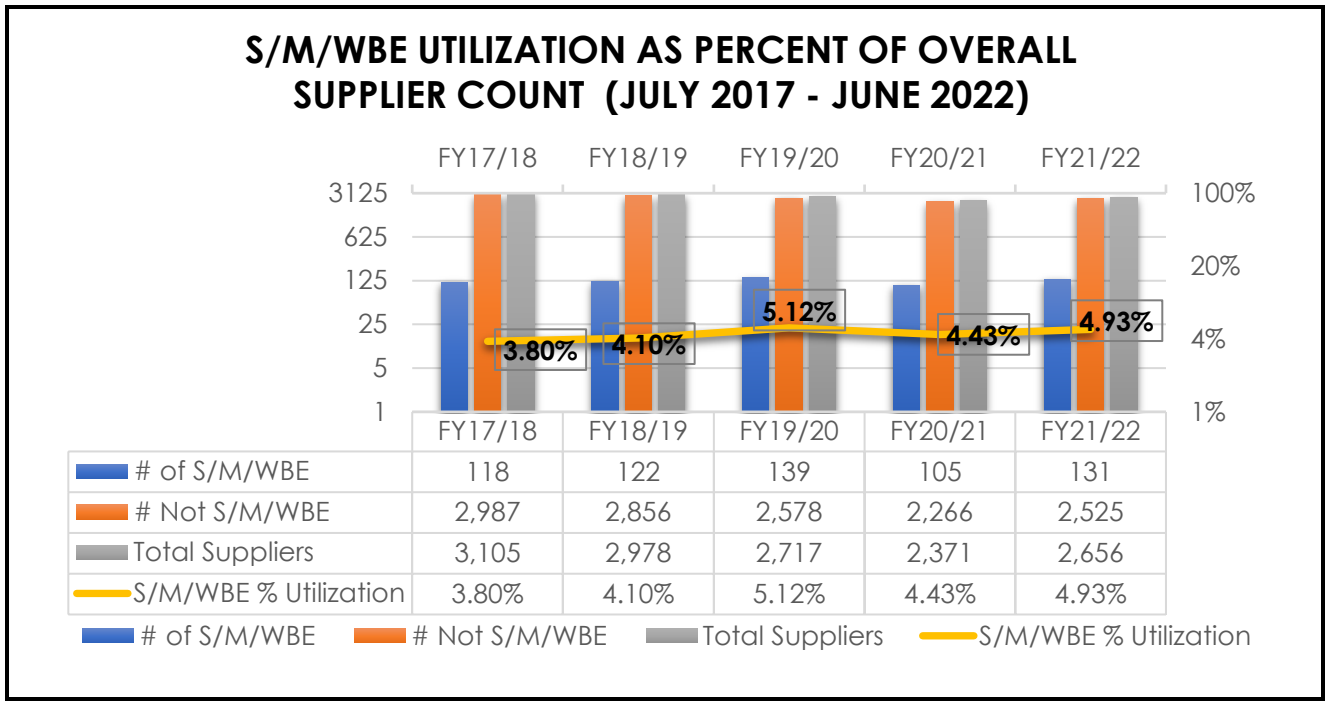
ANALYSIS: S/M/WBE UTILIZATION: S/MWBE Vs. Non-S/M/WBE

Diagram 6 compares the total number of S/M/WBE and Non-S/M/WBE firms participating in District contracts.



	Q1	Q2	Q3	Q4
# of S/M/WBE	78	98	115	121
# Not S/M/WBE	1,186	1,572	1,948	2296
Total Suppliers	1,264	1,670	2,063	2,417
S/M/WBE % Utilization	6.17%	5.87%	5.57%	5.01%

Diagram 6-1: S/M/WBE Utilization vs. Non-S/M/WBE Utilization | July 2022 – June 2023



	FY17/18	FY18/19	FY19/20	FY20/21	FY21/22
# of S/M/WBE	118	122	139	105	131
# Not S/M/WBE	2,987	2,856	2,578	2,266	2,525
Total Suppliers	3,105	2,978	2,717	2,371	2,656
S/M/WBE % Utilization	3.80%	4.10%	5.12%	4.43%	4.93%

Diagram 6-2: S/M/WBE Utilization vs. Non-S/M/WBE Utilization | July 2017 – June 2022

ANALYSIS: S/M/WBE UTILIZATION: PROCUREMENT CATEGORIES

Diagram 7 shows the percentage of S/M/WBE firms in each procurement category that participated in District contracts.

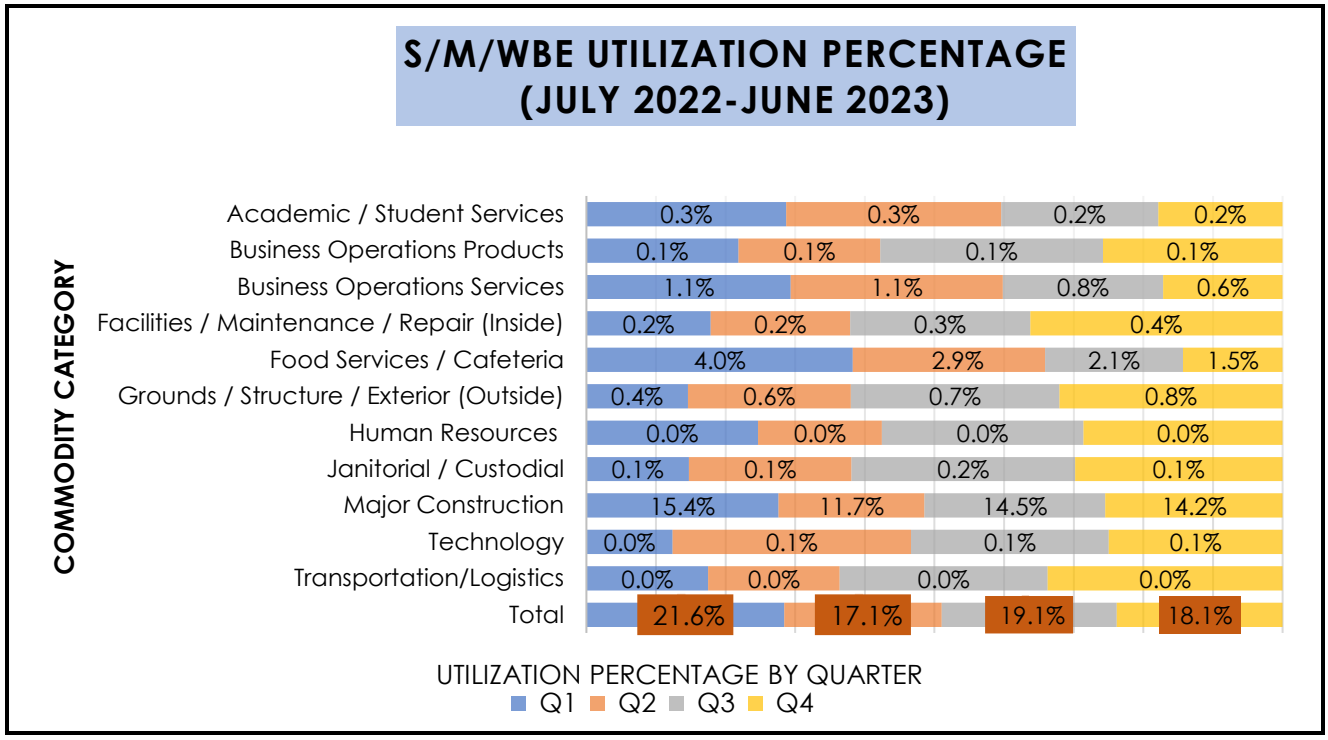


Diagram 7-1: S/M/WBE Utilization per Procurement Category | July 2022– June 2023

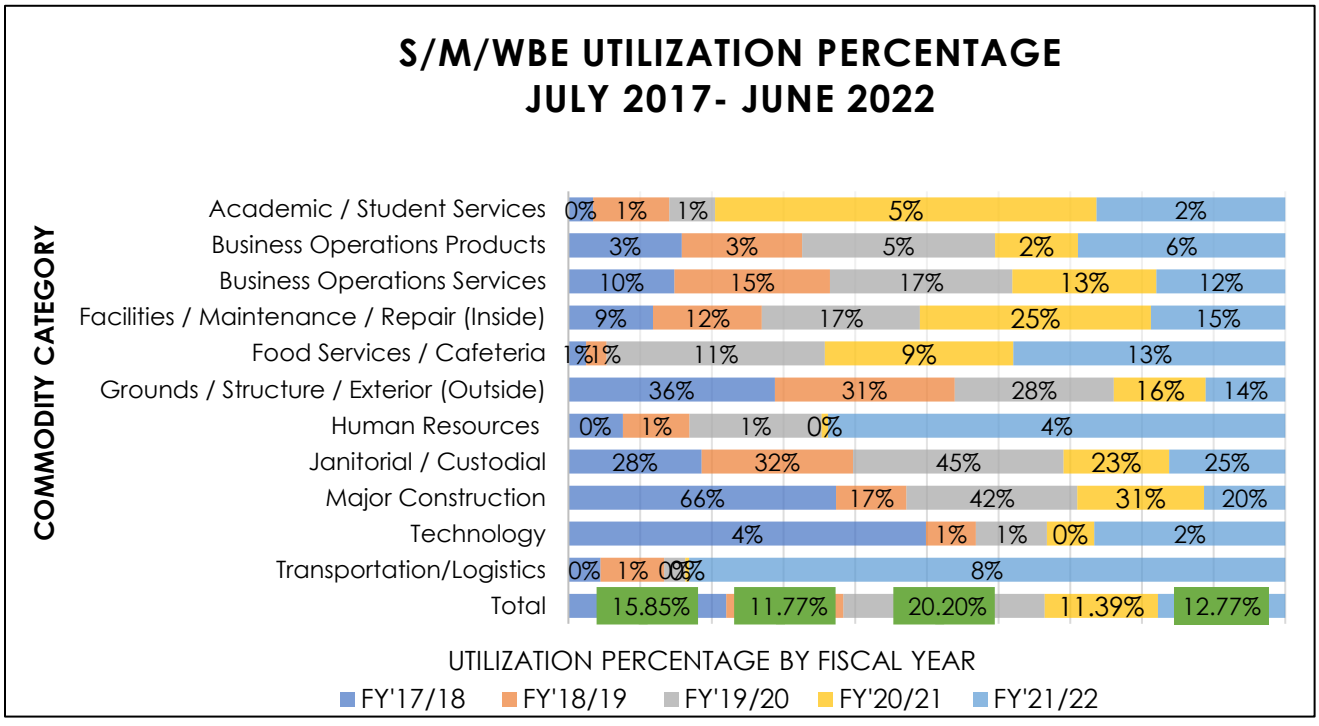
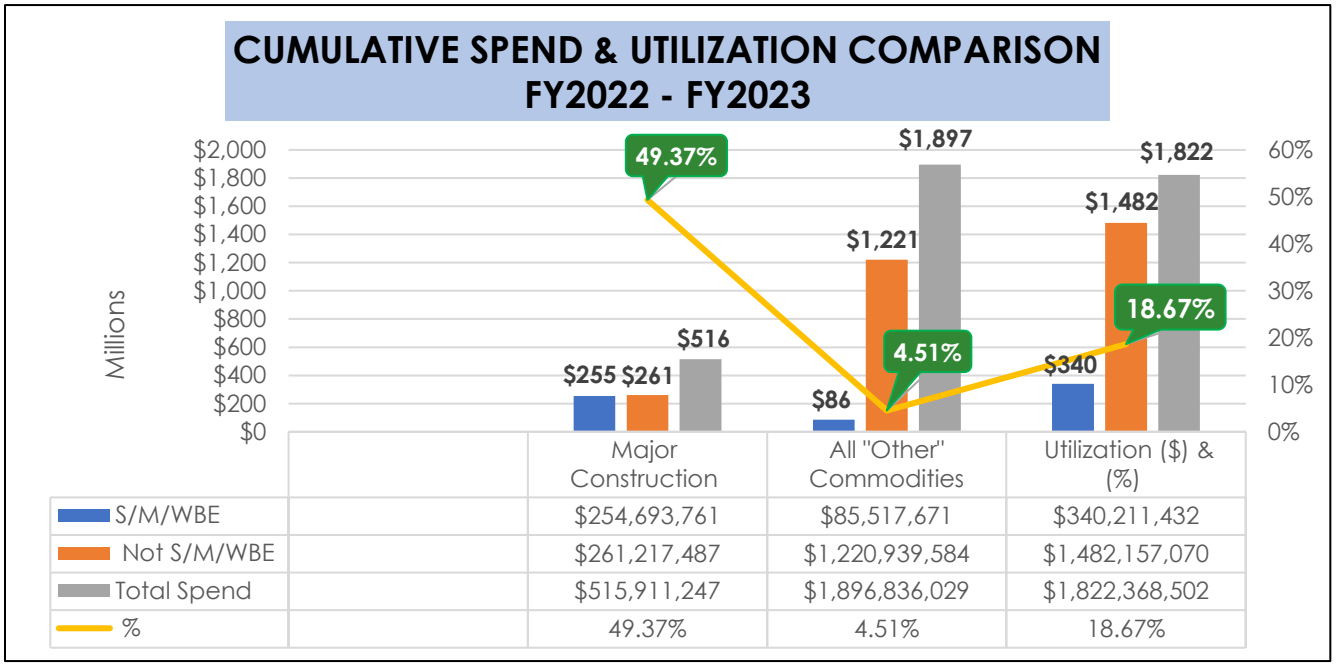


Diagram 7-2: S/M/WBE Utilization per Procurement Category | July 2017 – June 2022

ANALYSIS: S/M/WBE SPEND

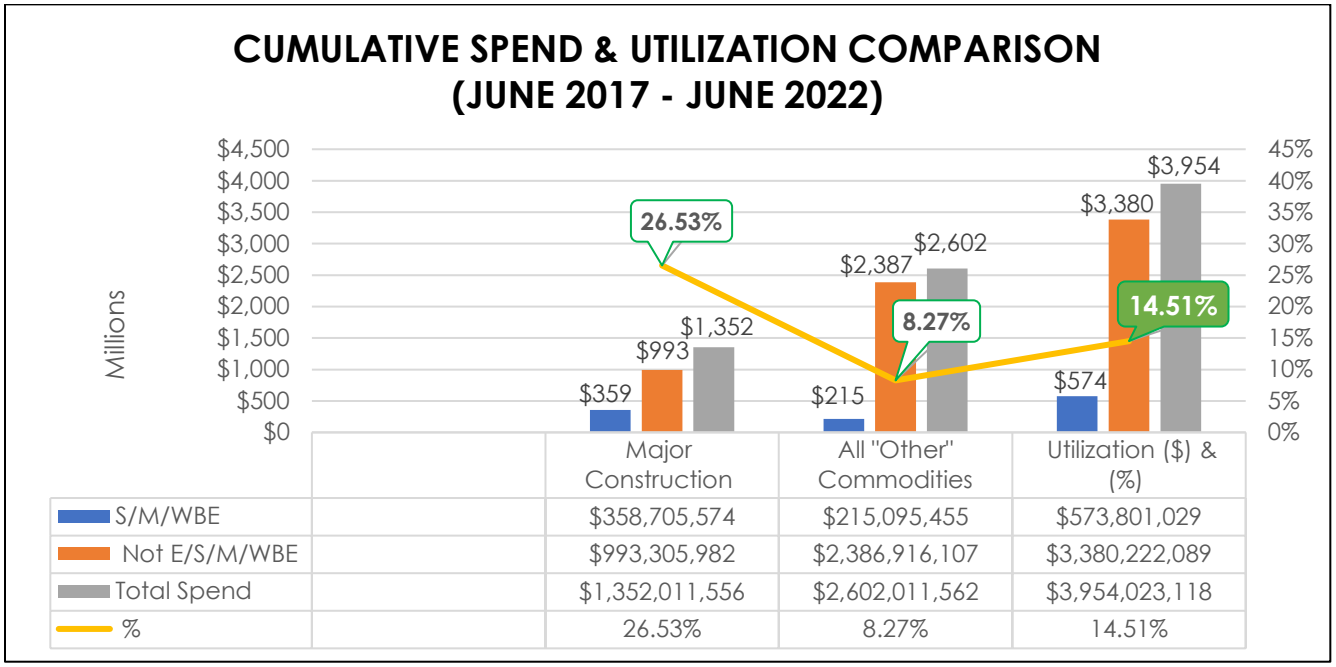
Major Construction Vs. All Other Commodities

Diagram 8 compares the cumulative spend (S/M/WBEs and Non-S/M/WBEs) for major construction contracts and all other commodities.



	Major Construction	All "Other" Commodities	Utilization ($) & (%)
S/M/WBE	$254,693,761	$85,517,671	$340,211,432
Not S/M/WBE	$261,217,487	$1,220,939,584	$1,482,157,070
Total Spend	$515,911,247	$1,896,836,029	$1,822,368,502
%	49.37%	4.51%	18.67%

Diagram 8-1: Construction Spend vs. All Other Commodities Spend | July 2022 – June 2023



	Major Construction	All "Other" Commodities	Utilization ($) & (%)
S/M/WBE	$358,705,574	$215,095,455	$573,801,029
Not E/S/M/WBE	$993,305,982	$2,386,916,107	$3,380,222,089
Total Spend	$1,352,011,556	$2,602,011,562	$3,954,023,118
%	26.53%	8.27%	14.51%

Diagram 8-2: Construction Spend vs. All Other Commodities Spend | July 2017 – June 2022

YEAR IN REVIEW



ECONOMIC PERFORMANCE

$340.2M

FY2022-2023 SMALL/LOCAL SPEND
WITH **120 CERTIFIED FIRMS**

$254.7M
MAJOR CONSTRUCTION

$42.1M
FOOD SERVICES/ CAFETERIA

$15.3M
BUSINESS OPERATIONS SERVICES

$12.3M
GROUND/STRUCTURE/ EXTERIOR (OUTSIDE)

$5.6M
FACILITIES/ MAINTENANCE/ REPAIR (INSIDE)

$3.9M
ACADEMIC/ STUDENT SERVICES

$2.3M
JANITORIAL/ CUSTODIAL

$1.9M
TECHNOLOGY

$1.3M
BUSINESS OPERATIONS PRODUCTS

$665K
HUMAN RESOURCES

$78K
TRANSPORTATION/ LOGISTICS

CONTRACT COMPLIANCE

EDDC strives to ensure that Minority/Women Business Enterprises have the maximum opportunity to do business with the District. The Superintendent's Goal Setting Committee establishes S/M/WBE program goals for the School District based on industry categories, vendor availability, project-specific characteristics, and M/WBE utilization.



156

SOLICITATIONS

Invitation to Bid (ITB) accounted for 76% (118) of all solicitations posted in FY22-23. There were 29(19%) Requests for Proposals and nine (5%) Requests for Quotes (RFQ).



507

PROPOSALS EVALUATED

The Contract Compliance team evaluated 302 ITB (59%), 196 RFP (39%), and 9 RFQ (2%) proposals in the fiscal year.



128

S/M/WBE[4] PRIME VENDORS

S/M/WBE primes accounted for 25% of all firms that responded to the District's solicitations: ITBs – 117, RFPs – 9, and RFQs – 2.



267

S/M/WBE SUBCONTRACTORS/SUBCONSULTANTS

One hundred eighty (67%) S/M/WBE subs primarily participated in ITBs. Forty-two S/M/WBEs (16%) participated in RFPs and 45 (17%) in RFQs.

[4] S/M/WBE may have participated in multiple projects. The total number of M/WBEs does not reflect unique companies

S/M/WBE CERTIFICATION

Under Policy 3330 - Supplier Diversity Outreach Program, EDDC provides S/M/WBE Certifications to local small businesses. Certification positions suppliers for success - access to a vast support network, business opportunities, increased visibility in the District's supply chains, education and development programs, increased capacity, and networking and mentorship opportunities.

200

CERTIFICATION APPLICATIONS PROCESSED

193
APPROVED APPLICATIONS

50
NEW CERTIFICATION

119
RECERTIFICATION

24
TRI-COUNTY RECIPROCAL

7
DENIED & WITHDRAWN APPLICATIONS

1
WITHDRAWN[5]

6
DENIED (NO SIGNIFICANT BUSINESS PRESENCE[6])

[5] One applicant firm was withdrawn from the certification process for failure to provide the required documents or following the request from the applicant.
[6] Significant Business Presence means a firm is headquartered or has an established place of business in the Tri-county region for more than one year, and at least 50% of all its employees are domiciled in the area.

OUTREACH & ENGAGEMENT

The EDDC team has realigned its outreach and engagement efforts to focus on economic impact. Targeted outreach to small businesses across all commodity categories is at the forefront of the department's economic development efforts.

574
ACTIVE SOLICITATION CAMPAIGNS

171
TARGETED OUTREACH CAMPAIGNS

133
ONE-ON-ONE TECHNICAL ASSISTANCE

4
LOCAL/SMALL SPEND SCORECARD

4
BUSINESS CONNECT NEWSLETTER

7
NEWSPAPER/ COMMUNITY MAGAZINE ADS

283
INTERNAL/EXTERNAL MEETINGS & EVENTS

HOSTED/FACILITATED BY EDDC

1
SMALL BUSINESS SUMMIT

1
COMMUNITY FORUM

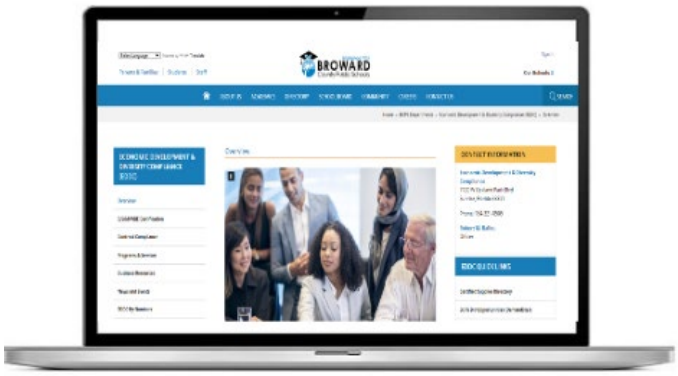
9
CERTIFICATION WORKSHOPS/WEBINARS

16
SPEAKER/PRESENTER/ EXHIBITOR

10
SMALL BUSINESS ADVISORY COMMITTEE MEETINGS


#BCPSEDDC

DIGITAL MARKETING



19,215

PAGE VIEWS

Browardschools.com/EDDC

EDDC website is a dynamic, one-stop resource for timely updates, engaging content, and opportunities for local and small businesses. Our readership includes ambitious entrepreneurs, industry and thought leaders, diversity champions, and business experts across the tri-county region.

REACH

EDDC recorded a **140%** increase in audience reach via organic and paid posts.

ENGAGEMENT

1.7K COMBINED POSTS	**36K** PROFILE IMPRESSIONS	**1.2K** ENGAGED FOLLOWERS
+3.82% AVERAGE ENGAGEMENT RATE	**2K** REACTIONS, COMMENTS AND SHARES	


SOCIAL MEDIA
@BCPSEDDC

ECONOMIC DEVELOPMENT & DIVERSITY COMPLIANCE

Established 1915
BROWARD
County Public Schools

PROGRAMS & INITIATIVES

SDOP MANAGEMENT SYSTEMS (SMS)

implementation of the SMS powered by the B2Gnow system is now completed. EDDC successfully implements the Vendor Management, Contract Compliance, Outreach, and Event Management modules. Additionally, we have full reporting capability of contract data with assigned Affirmative Procurement Initiatives as we continue to acquire sub-vendors data in the system.

AFFIRMATIVE PROCUREMENT INITIATIVE (API) IMPLEMENTATION & GOAL SETTING

EDDC continues to operate under authorization by the Superintendent's Goal Setting Committee to implement APIs and set goals contract-by-contract. Staff continues to work with department leadership to set goals for all commodity areas and to allocate the best remedial APIs where appropriate.

MARKETING & OUTREACH PLAN

EDDC proposed a new Marketing & Outreach Plan detailing the department's strategy to increase small business activities across the District in Fiscal Year 2023-2024. The objective is to effectively communicate, retain, engage, and reach small businesses across the tri-county region. To accomplish this, our marketing team will pursue the following initiatives:

Initiative 1: Invest in Accelerating Businesses Through Collaboration

Initiative 2: Become the Business Education Destination

Initiative 3: Explode Our Online Presence

Initiative 4: Anchor Hyper-Targeted Marketing

Initiative 5: Practice Corporate Social Responsibility

SMALL BUSINESS ADVISORY COMMITTEE

The SBAC demonstrated strong engagement in FY22-23. An average of eighty percent attendance was recorded in the ten meetings held during the fiscal year. EDDC is leveraging the committee's expertise to expand its reach in the community.

PRE-BID MEETINGS

The Contract Compliance team actively engaged locally certified S/M/WBEs in the District's pre-bid meetings/ proposers conference for all commodity categories. These multipurpose meetings serve as a vehicle to discuss S/M/WBE goals and reporting, allowing for S/M/WBE firms to participate in bidding.

REPORTING

EDDC maintains a web-based central repository of all reports, including:

- Quarterly Scorecards
- Monthly Summary of Progress
- SBAC Meeting Summaries And Board Committee Reports
- Quarterly Bond Oversight Committee (BOC)
- Annual Reports
- Disparity Study

Access EDDC by Numbers directly: https://www.browardschools.com/Page/69024

S/M/WBE CERTIFICATION WORKSHOPS/WEBINARS

The EDDC Certification team conducted certification-specific workshops and webinars throughout the fiscal year to assist firms with understanding the certification process and document requirements:

- **Certification Day:** In-person workshop for new firms. Staff assists attendees with their BCPS Vendors Registration, Certification Application, and Prequalification Application (as needed) on-site.
- **Recertification Webinar:** Hosted virtually to aid renewing and soon-to-expire firms with the recertification application.
- **Reciprocal Certification Webinar:** An information session hosted virtually for the target firms certified with partner agencies to get certified with BCPS.

TECHNICAL ASSISTANCE

The EDDC Certification team provides one-on-one technical assistance to new and current suppliers in certification and business development. The working sessions are conducted via Microsoft Teams at the request of small and local businesses.

SMALL BUSINESS WEEK

EDDC hosted the *Small Business Power Summit* in recognition of *Small Business Week*. This summit was designed to drive small businesses' resilience and celebrate their economic impact. Business owners gained insight into accessing the resources needed to reach new limits, learned best practices from peers who have achieved tremendous success within the network, discovered funding opportunities, and much more.

CERTIFIED SUPPLIER DIRECTORY

EDDC maintains a Certified Supplier Directory for identifying small businesses currently certified by BCPS. District offices and schools use this list for procurement purposes, and is also used by prospective bidders/proposers when responding to BCPS solicitations containing S/M/WBE APIs.



Thank You to Our
COLLABORATIVE PARTNERS

Our achievements have been made possible thanks to your continued support and partnership. We must also recognize the SBBC, the District's department heads, and community leaders who have provided mentorship and trust in our work. In FY2022-2023, EDDC established new partnerships with the City of Coconut Creek and re-established affiliations with SCORE to reach and educate local small businesses.

FY 2023-2024 STRATEGIC PRIORITIES & INITIATIVES

DISPARITY STUDY UPDATE

01

Complete the 2023 Disparity Study to analyze marketplace conditions, potential disparities in the District's contracting practices, and insights from business owners and other groups. The results will help BCPS assess its current equity efforts and identify possible new ways to encourage the participation of diverse businesses in its contracts.

INCREASE S/M/WBE SPEND IN ALL COMMODITY CATEGORIES

02

Conduct review and analyses of end-user departments' procurement projected needs, including forecasted spend, approved budget, new procurements, and ad hoc purchases quarterly, at minimum. Provide S/M/WBEs and organizations with advanced notice of forthcoming procurements to provide ample time to develop and complete bid packages and proposals and obtain any needed assistance.

BUILD RELATIONSHIP WITH INTERNAL DEPARTMENTS

03

Engage internal departments in the API process for commodities contract opportunities, including enhancing the goal-setting process to receive goal requests from end-user departments. EDDC's strategy aims to advance the inclusion and involvement of Departments coordinating commodities contracts, including:

- Academics
- Business Operations Products/Services
- Facilities/Maintenance Repair
- Ground Structure
- Human Resources
- Information & Technology
- Janitorial
- Transportation

INCREASE CONTRACT PARTICIPATION OF CURRENT M/WBEs

04

After a positive increase in SBBC-certified M/WBEs' participation as primes and subcontractors/subconsultants, the EDDC focuses on research, analysis, and design strategies for contract engagement at the prime level. The plan centers on SBBC M/WBEs that have not yet been awarded as the prime on District procurement opportunities.

CONTRACT MONITORING ACROSS ALL DISTRICT COMMODITY CATEGORIES

05

Manage and monitor all commodity categories in the B2Gnow platform, from contract award through project close-out, which is integral to fulfilling the Board and Executive Leadership's commitment to the local business community.

INCREASE SMALL/MINORITY/WOMEN BUSINESS ENTERPRISE CERTIFICATIONS

06

Reach specific small business audiences using geo-targeting in the tri-county, segmentation across all commodities, and retargeting S/M/WBE reclamations to boost certification levels. Maximize the South Florida Anchor alliance partnership to broaden the reach of certified suppliers.

07

3-QUOTES INITIATIVE

The 3-Quotes Initiative is an alternative effort to position certified suppliers to do business with the District. It is an avenue for success, with consideration for comparatively smaller firms. EDDC hopes to gain District-wide commitment from the individual department heads to considerably increase spending with small, minority, and women business enterprises. The initiative will assist in broadening District opportunities in commodities, beginning with Academics, Transportation, Information Technology, and Human Resources.

08

OUTREACH

Expand online presence using a combination of paid campaigns, new content campaigns, interactive content, live Chat, and online groups to tap into new strategic partners and appeal to a higher volume of stakeholders. Collaborate with the District Office of Communications & Legislative Affairs and BECON to broaden our reach and rebrand the District as an economic engine.

09

SYNERGY SUMMIT

EDDC will host a matchmaker that places our certified suppliers before school principals and bookkeepers. The goal is to promote small business utilization, thereby increasing their opportunity to do business with BCPS and strengthening the economic base of Broward County.

10

BUSINESS DEVELOPMENT PROGRAM

The business development program will utilize the business health check to assess our suppliers' capabilities and capacity to fulfill contractual obligations. The assessment will provide EDDC with a clear understanding of the resources, strategies, best practices, training, workshops, and initiatives each business owner and management needs to expand in the marketplace successfully. This initiative intends to fulfill the suppliers' educational needs and increase their participation in District contracts.

11

COMMUNITY PARTNERSHIPS

The team will continue to formalize regional partnerships with supplier inclusion organizations. Our goal is to leverage and build relationships to increase access to central resources supporting small business growth and development.

12

EVENTS & TRAININGS

Participate, partner, and host events to facilitate supplier network-building and matchmaking opportunities. The certification team will continue to host its monthly certification webinars/workshops for new and recertifying applicants. This allows applicants to meet with a certification team member via a live webinar for guidelines on completing the application, reviewing the required documents, and answering questions about the process.

EDDC TEAM

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The Economic Development & Diversity Compliance team is a dynamic group that promotes economic growth and fosters diversity within the educational landscape. Committed to ensuring equal opportunities and inclusivity, the team works diligently to uphold compliance standards, create partnerships, and implement strategies that support economic development initiatives while embracing the richness of diverse perspectives. Through their dedicated efforts, the EDDC team contributes significantly to the advancement of both the Broward Schools community and the broader local economy.

Executive

- Jasmine M. Jones, Officer (Task Assigned)

Administrative

- Mollie Copeland, Department Secretary

Business Intelligence & Process Management

- Lavinia Freeman, SDOP Manager (Task Assigned)

Certification, Outreach & Marketing

- Chelsea Jones Finley, Coordinator
- Winifred Cummings, S/M/WBE Specialist II

Contract Compliance

- Anne Marie Richards, Coordinator

The EDDC is supported by the SMART Inclusion team, which consists of three consultants.

SMALL BUSINESS ADVISORY COMMITTEE

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The Small Business Advisory Committee (SBAC) is a volunteer group appointed by SBBC to serve as an advisory team for EDDC. The committee is primarily responsible for encouraging the inclusion of small, minority, and women-owned businesses in the District's spend, monitoring the utilization of available S/M/WBE firms within the market area, evaluating the effectiveness of the SDOP, and providing recommendations for best practices and benchmarking for a successful small business program.

Carolyn Jones, M. Ed. | Chair
District 4

Shaheewa Gelin, Esq. | Vice Chair
Member-At-Large

Vacant
District 1

Carlton Crawl
District 2

Herbertny Perez
District 3

Sydney W. Corbin
District 5

H. Wyne Clark, Esq.
District 6

Marie Compas
District 7

Dodie Keith-Lazowick
District 8

Jimmy Witherspoon
District 9

Brian Farrell
Member-At-Large

ECONOMIC DEVELOPMENT & DIVERSITY COMPLIANCE

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