

3. UCB and LBNL should expand Outreach and Education on new construction and ongoing procurement							SOURCE: draft recommendations <i>business meeting facilitators</i> MIG suggestions
	Strategies/Programs	Partners	Beneficiaries	Expected Results	Performance Measures		
	UCB/LBNL will:	In Partnership	For the Benefit of:	For these Results:	Measured by:	Notes:	
A.	Assign dedicated staff to manage outreach and education activities		<i>Small business, UCB</i>	<i>X number of dedicated staff</i>	<i>Staff to participant ratio</i>		
B.	Promote, create, or attend vendor outreach events including Business roundtable		<i>Small business</i>	<i>X number of events per year</i> <i>Develop coordinated programming</i>	<i>Attendance</i>		
C.	Facilitate preconstruction Matching Workshops between prime contractors and subcontractors		<i>Small business</i>	<i>Increased Transparency</i>	<i>Classes and and programs that lead to work project</i>		
D.	Develop a Supplier mentor/protégé program that includes incentives for prime contractor participation		<i>Small business</i>	<i>x number of participants who include reference to matchmaking program in bids</i>	<i>Balanced mentor/protégé participation</i> <i>Tracking and highlighting of wins</i>	<i>Bidding and getting work is relationship based, bidding of subs often functions on "who you know"</i>	
E.	Create a one stop shop on the BGC Campus for access to information about procurement bids						

1. UCB and LBNL should invest in and/or partner with Richmond strategies, programs and partnerships that:						SOURCE: draft recommendations <i>business meeting facilitators</i> <i>MIG suggestions</i>
Recommendation	UCB/LBNL will:	In Partnership with:	For the Benefit of:	For these Results:	Measured by:	Notes:
increase access to capital	A. Contributes to an established a program that awards grants and funds loans for capital improvements, and additionally contributes funds to expand the City of Richmond's Revolving Loan Fund.	Richmond Community Foundation, a CDFI, City of Richmond	Local businesses in the geographic area specified	Increase # of local business that receive a capital improvement loan. Business ability to be sustainable for 3-5 years in general. Increase in business/sales tax Growth of revolving loan fund	Number of loans received vs. repaid Number of people employed Performance of the business with the UCB/LBNL # of business that secure contract with UCB/LBNL	<i>City has a revolving loan fund, CDFI more flexible, perhaps use both. Need different kinds of money. CDFIs: Pacific Community Ventures, LISC, LIS, Low Income Investment Fund.</i> <i>Grants have a benefit, don't have to pay back.</i>
	B. Fund incentives that require coordination of the local small business support system (incentive for partners)	<i>City of Richmond, companies, foundations</i>	<i>Primes and subs, UCB, small business</i>			<i>Prioritized by Richmond Businesses that attended 8/4 business breakfast</i>
	C. Require prime to establish and/or contribute to a Collateral pool or guaranteed line of credit that serves as a \$5M set aside for small businesses	<i>Independent, City, UCB/LBNL, Master developers, Philanthropic organizations</i>	<i>Small Business</i>	<i>• Minimal defaults with gains in jobs • Letters of bondability for Richmond businesses</i>	<i>The Fund earns interest and continues to operate</i>	<i>Prioritized by Richmond Businesses that attended 8/4 business breakfast, facilitators. CWG requested some rationale for \$5M figure.</i>
address bonding challenges	D. Work with local partners to improve bonding availability or couple with prime-sub contracts Bonding types include: bid bonding, payment bonding, performance bonding; waive bid bonds, GC/CM provide bonding for subs	Richmond BUILD Contractor's Assistance Center SBDC	Local businesses in the geographic area specified			
	E. Require primes to require wrap-around insurance policies as opposed to contractor default that covers prime only		<i>Small Business</i>	<i>• Good faith effort should not be perfunctory • rolling, project specific, cheaper insurance, volume purchase</i>		
build capacity of Richmond businesses to compete	F. Work with local partners to increase the numbers of Richmond businesses that are certified by hold training sessions to teach local partners on certification application and by simplifying application process	<i>Boost, Big Primes, Business Development Centers</i>				
	G. Provide, fund, and/or support a Blueprint room for construction contractors and/or dedicated center for use of contractors beyond construction	<i>Boost, Big Primes, Business Development Centers</i>				
	H. Create and/or support a new fund for launching and building capacity of small, locally and worker-owned businesses	<i>Boost, Big Primes, Business Development Centers</i>	<i>Small, locally and worker-owned businesses</i>	<i>Increase in capacity of small, locally and worker-owned business</i>	<i>% of increase in small, locally and worker-owned businesses</i>	<i>Hold training sessions to teach local partners on certification application. Simplify application?</i>
	I. Support and/or participate in capacity building workshops (including classes or other learning)	<i>Boost, Big Primes, Business Development Centers,</i>	<i>Primes and subs</i>	<i>Increase in sub capacity</i>	<i>Points earned for capacity building</i>	<i>Example of bidder's conference - model is Contra Costa County. Can be convened by public or nonprofit entity.</i>
	J. Establish a "Certifications" Reciprocity agreement and common licensing agreements where one certification or license counts across various jurisdictions	<i>Boost, Big Primes, Business Development Centers</i>		<i>Streamline certification process Numbers of vendors that are certified.</i>		<i>San Francisco and Oakland models</i>
	K. Extend partnerships, especially beyond construction including cleaning, HVAC maintenance, building controls systems maintenance.		<i>Primes and subs</i>	<i>Increase in sub capacity, continued coordinated partnerships through one system</i>	<i>Establishment of one system to coordinate partnerships</i>	
L. Create and/or support a program that provides back office administrative support, including for example accounting, bid support, payroll services	Richmond BUILD, Richmond Main Street, other Richmond service providers		An actual physical location providing the relevant services	Actual richmond businesses that benefit from it		

2. UCB and LBNL will set a specific goal and adopt policies for increasing procurement from Richmond businesses in construction and through regular procurement: Local Definition includes Richmond, North Richmond, and Unincorporated areas of North Richmond. Second Priority is San Pablo.

SOURCE:
draft recommendations [business meeting](#)
[facilitators](#) [MIG suggestions](#)

	Strategies/Programs	Partners	Beneficiaries	Expected Results	Performance Measures	Notes:
	UCB/LBNL will:	In Partnership with:	For the Benefit of:	For these Results:	Measured by:	Notes:
NON CONSTRUCTION	A. Set a goal for increasing NON CONSTRUCTION procurement from Richmond Based Businesses over five years, including incentivizing procurement officers to meet goals		<i>Richmond based companies</i>	<i>x number of awarded contracts Assess capacity of Richmond based companies</i> <i>50% percentage increase from what is currently done</i>	<i>% of contracts awarded to Richmond based companies</i>	
CONSTRUCTION (including design-bid-build) (In the event that a third party developer is enlisted to build the BGC then the programs shall be part of the master construction contract)	B. Ensure that Formal preferences for 25% local spend are integrated into contracts to produce legally binding results	Richmond Chamber, SBDC, City of Richmond, Richmond Main street, WCCBDS, Philanthropy,	<i>Richmond based companies</i>	<i>25% local spend</i>	<i>% of local spend</i>	
	C. Reserve a specific percentage of Set-aside contracts for local small business		<i>Richmond based companies</i>	<i>x number of contracts</i>	<i>Number of set-aside contracts</i>	
	D. Incentivize procurement officers to meet goals		<i>UCB, Richmond based companies</i>	<i>x number of contracts</i>	<i>Reporting of results in relation to goals</i>	
GENERAL	E. Adopt prompt payment/invoicing policies that would require the prime contractors to pay subcontractors be paid 30 days maximum after invoice submission		<i>Richmond based companies, UCB</i>	<i>Prompt (bi-monthly) payments for contractors</i> <i>Prompt payment/invoice agreement</i> <i>Challenges to work performed by Independent Ombudsman</i>	<i>Payment schedule implementation</i>	<i>ideally Pay when paid policy</i>
	F. Operate a Bid Process that selects a responsible low bidder, best value, and that limits and/or minimizes any change orders			<i>Change order carries forward with same original requirements</i> <i>Good faith effort means something in the selection criteria and eventual award</i>	<i>Points to primes that have - Ask primes what they have done to build capacity</i>	
	G. Apply procurement policies to other sectors beyond construction including design-bid-build projects.					
	H. Establish socially responsible contracting policies for any procurement contracts at the new campus.					
	I. Prioritize local food procurement including provide pathway for local farms to sell local produce on new campus at weekly farmstand and via CSA (community-supported agriculture) boxes.					

4. UCB and LBNL should commit to regularly assess and address policies and protocols that create barriers for local, small and micro enterprises to assess UCB and LBNL

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Strategies/Programs		Partners	Beneficiaries	Expected Results	Performance Measures	Notes
UCB/LBNL will:	In Partnership with:	For the Benefit of:	For these Results:	Measured by:		
A. Structure contracts and bidding process to encourage inclusion of small, minority and worker-owned businesses by using a standard definition of MBE, WBE to include zip code			<i>Small businesses, local businesses, minority, and worker-owned businesses</i>	<i>Increase in bids and contracts from small, minority and worker-owned businesses</i>	<i># of participating businesses that are small, minority, and worker-owned</i>	
B. Encourage partnerships between large and small vendors			<i>Small vendors</i>			
C. Review insurance and bonding requirements to consider and address policies that present barriers to small business			<i>Small businesses</i>	<i>Increase access to small businesses for procurement activities</i>	<i># of participating small businesses</i>	<i>Review insurance and bonding requirements so they are not onerous</i>
D. Restructure contracts so smaller firms can compete by unbundling of larger contracts into smaller contracts, done by function or by contract size or by product	<i>Cal/LBNL</i>		<i>Smaller firms</i>	<i>x number of bids from smaller firms</i> <i>Certain % of contracts for smaller business</i>	<i># of bids from smaller firms</i> <i>increase in competitive bidding within smaller business as % of larger contract</i>	