



**ECONOMIC DEVELOPMENT & DIVERSITY COMPLIANCE**

**ANNUAL REPORT**  
**FISCAL YEAR**  
**2021-2022**



## ABOUT THIS REPORT

The Fiscal Year 2021-2022<sup>1</sup> Annual Report provides a progress overview of the Economic Development & Diversity Compliance Supplier Diversity Outreach Program. The report also shares the department's strategic priorities and initiatives.

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<sup>1</sup> Unless otherwise noted, all references to FY21-22 in this report refer to the Fiscal Year July 2021 - June 2022.

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Dear Fellow

# STAKEHOLDERS



Society is always taken by surprise at any new example of common sense.  
— **Ralph Waldo Emerson**

The Fiscal Year 2021 – 2022 was a year of advancement for the Economic Development & Diversity Compliance Department (EDDC), even in the face of an ongoing pandemic and economic distress. We have successfully expanded our marketing reach, increased small business participation and utilization, and

implemented systems that facilitate economic growth for the local business economy.



EDDC is built upon four pillars of CORE services: Certification, Opportunities (Contracts & Compliance), Resources, and Education (Executive). As a member of the South Florida Anchor Alliance (SFAA), we collaboratively engage in regional planning to streamline access to opportunities and strategically impact supplier diversity goals and objectives. This partnership is pivotal to our business model and our ability to leverage procurement opportunities for small businesses. Additionally, our advocacy partners, including the dynamic Small Business Advisory Committee (SBAC), also forward the mission "to grow the economic base of Broward County for the benefit of our students, families, and the business community."

This annual report details the year, providing a comprehensive recap informed by a full suite of quantitative and qualitative measures. This is the essence of our endeavors and our purpose. The goal is to identify and build upon our successes and recalibrate what needs improvement. Finally, it outlines the department's priorities for the Fiscal Year 2022-2023. Our team is committed to business development and aims to reach within and help District employees see how they play a crucial role in small business success in Broward County Public Schools.

*We are pleased to report on the Supplier Diversity Outreach Program's progress and look forward to your continued support and engagement.*

Sincerely,

*Robert M. Ballou*

**Robert M. Ballou**

Officer, Economic Development & Diversity Compliance

June 30, 2022

## ABOUT EDDC

The Economic Development & Diversity Compliance (EDDC) department administers Policy 3330 Supplier Diversity Outreach Program (SDOP) to help Emerging, Small, Minority, and Women-owned Business Enterprises (E/S/M/WBE) participate in Broward County Public Schools (BCPS) procurement and contract activities. The department is steadily advancing the cause for E/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

### CERTIFICATION

**C** The EDDC department provides E/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.

### OPPORTUNITIES (Contracts & Compliance)

**O** 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 upon industry categories, vendor availability, project-specific characteristics, and S/M/WBE utilization.

### RESOURCES

**R** 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.

### EDUCATION (Executive)

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

# *Parameters of Change*

*Proclivity for Hard Work*

**Progress**



# OUR CONSTITUENTS



**MINORITY BUSINESS ENTERPRISES (MBE)**



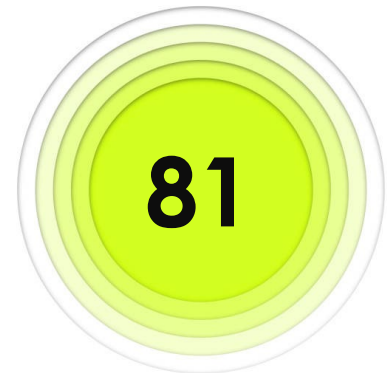
**MINORITY/WOMEN BUSINESS ENTERPRISES (M/WBE)**



# 486

## CERTIFIED E/S/M/WBEs

**WOMEN BUSINESS ENTERPRISES (WBE)**

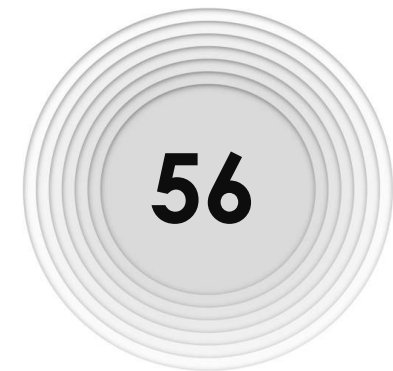


53%



47%

**SMALL BUSINESS ENTERPRISES (SBE)**



# 486 CERTIFIED E/S/M/WBES

## ETHNICITY/GENDER

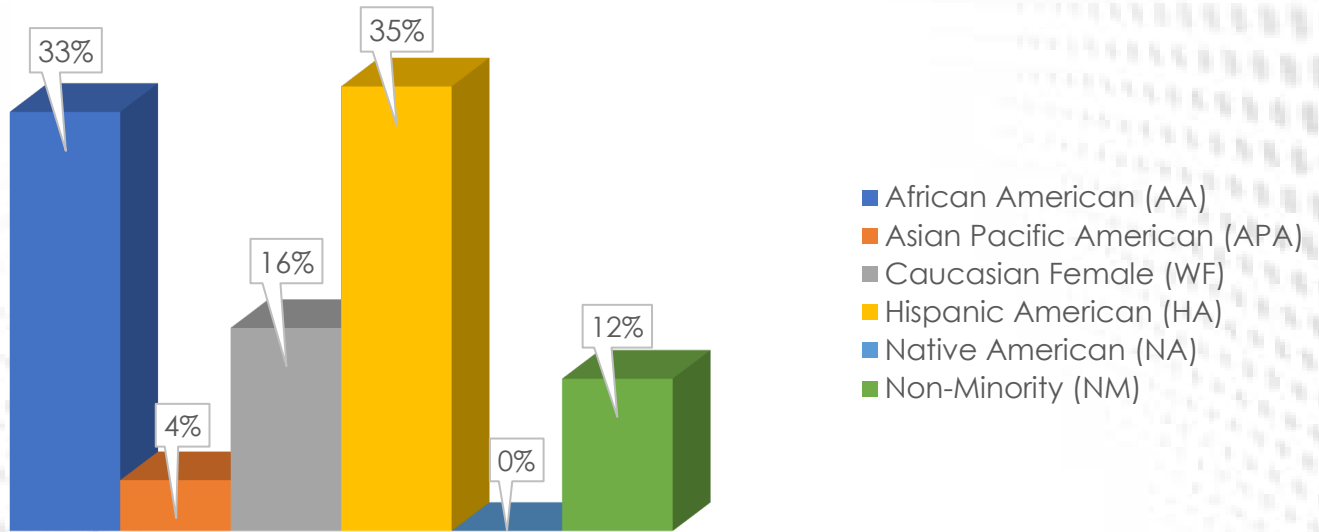


Diagram 1: E/S/M/WBE Firms by Ethnicity & Gender

## PROCUREMENT CATEGORIES

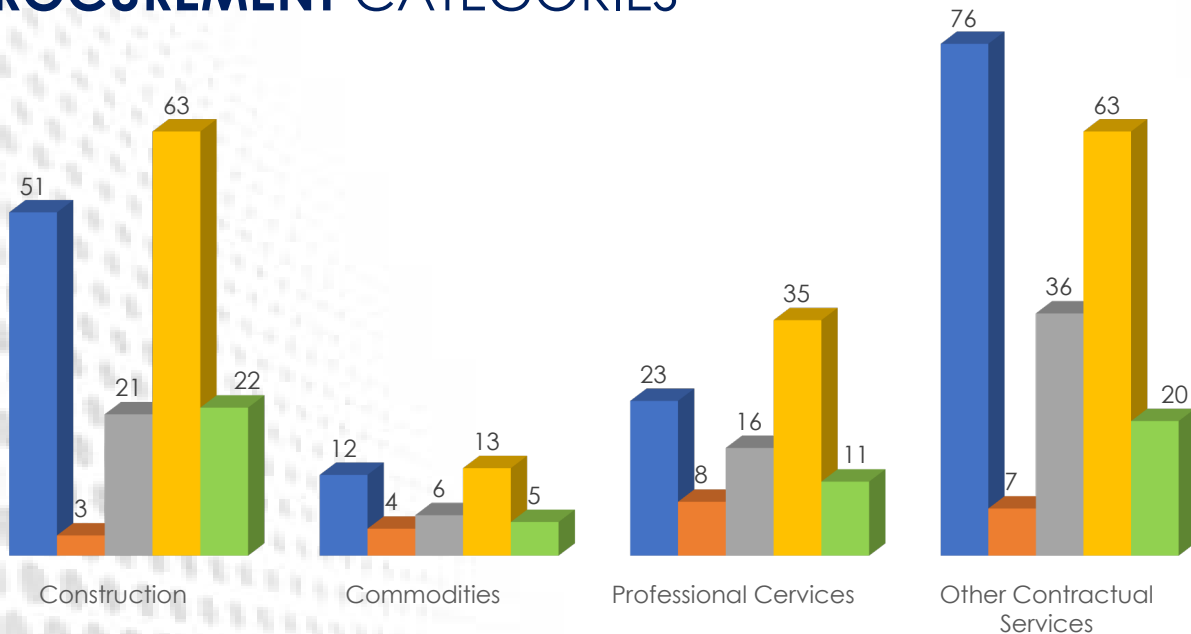


Diagram 2: E/S/M/WBE Firms by Procurement Categories<sup>2</sup>

<sup>2</sup>Some firms provide multiple services and are categorized under more than one procurement category.



## E/S/M/WBEs by REVENUE

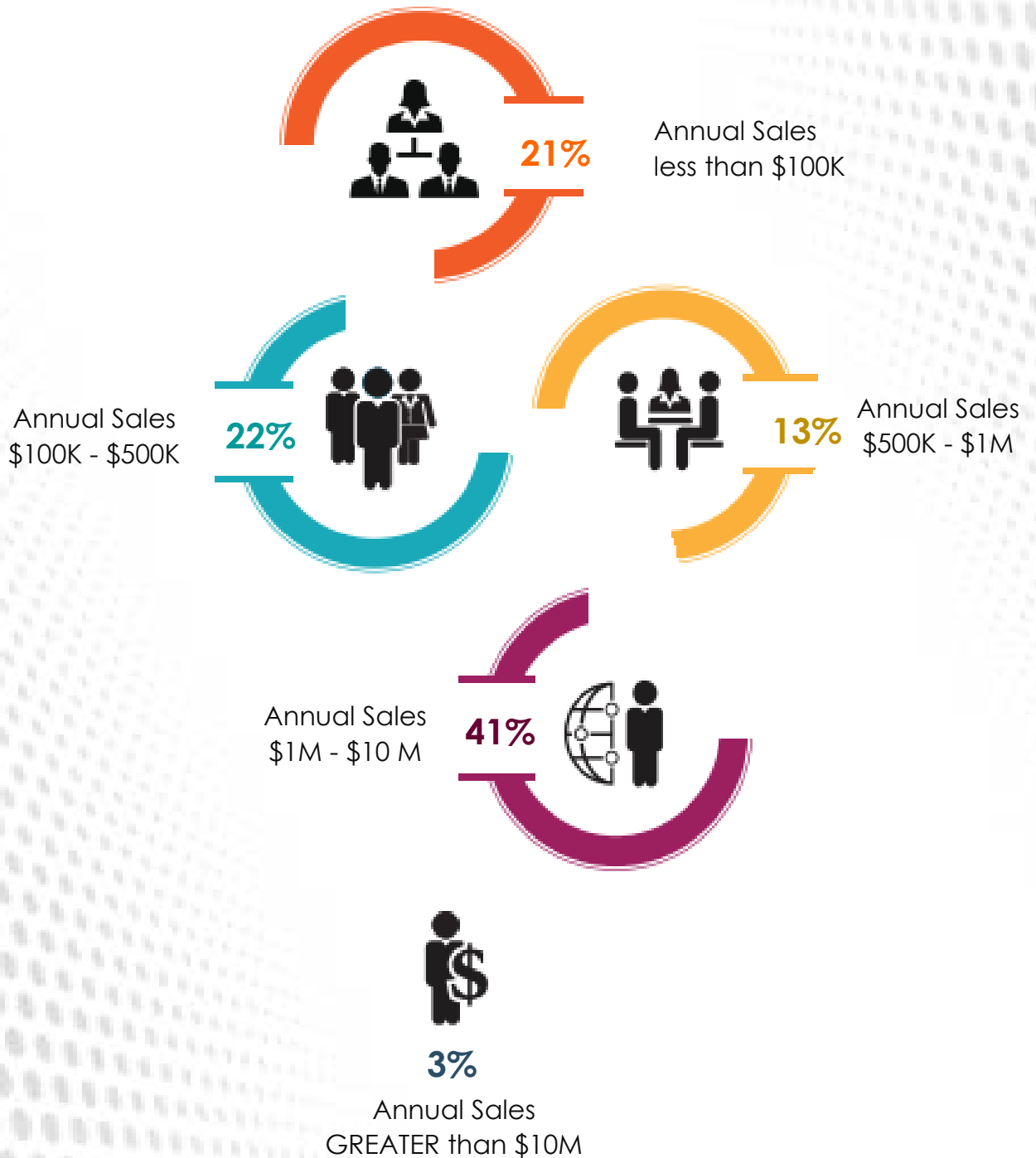


Diagram 3: E/S/M/WBE Firms by Average Gross Receipts

# ECONOMIC IMPACT

JULY 2017 – JUNE 2022



# 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 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.

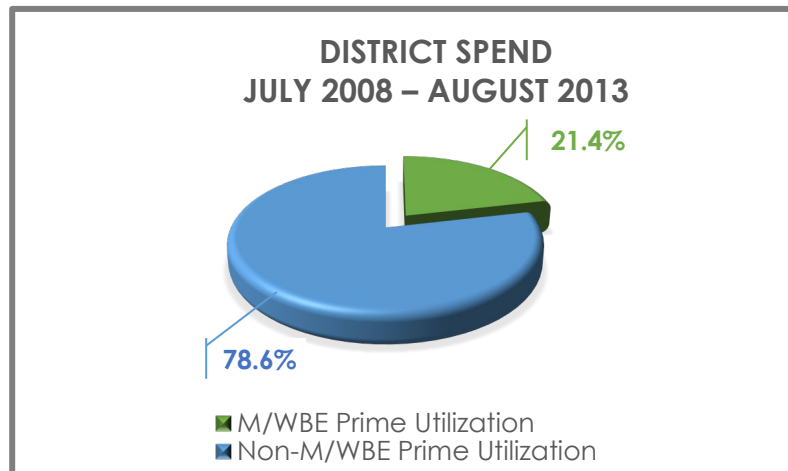


Diagram 4-1: M/WBE Spend vs. Non-M/WBE Spend

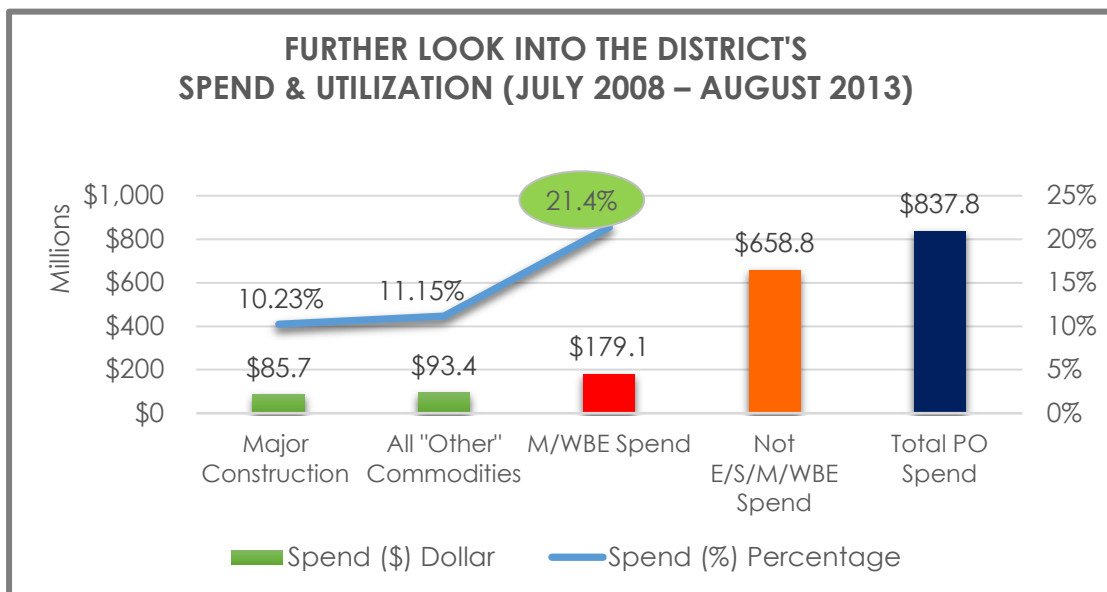


Diagram 4-2: Overview of District Spend & Utilization

# POLICY 3330 IMPLEMENTATION

The following diagrams provide an overview of the District's progress post Policy 3330 implementation. The overview incorporates five years.

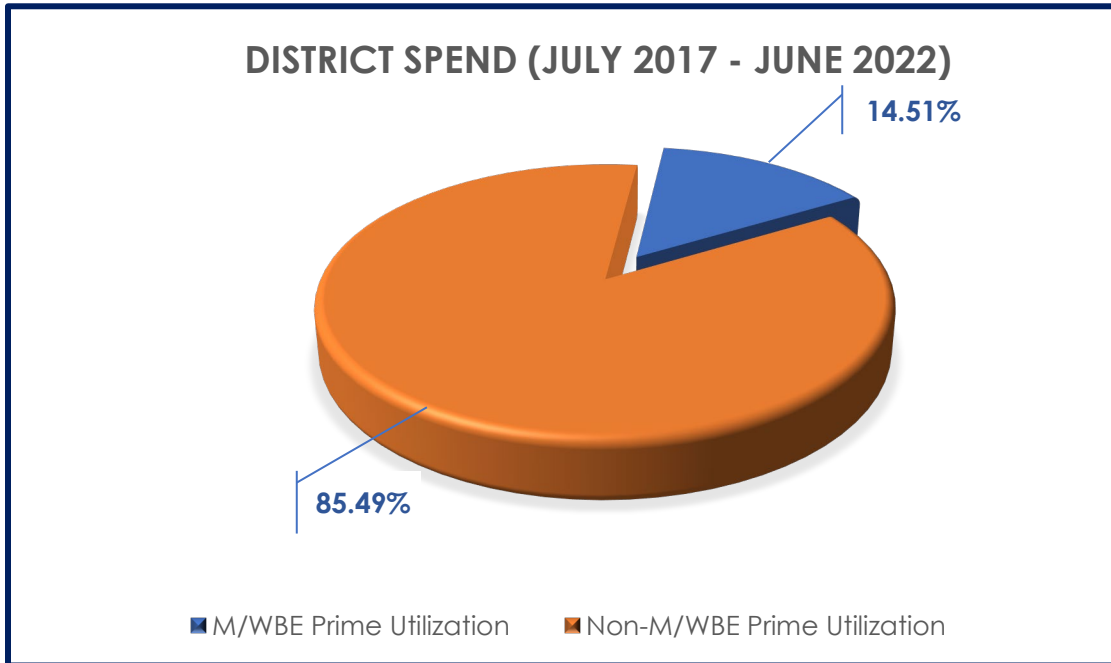


Diagram 5-1: M/WBE Spend vs. Non-M/WBE Spend | July 2017 – June 2022

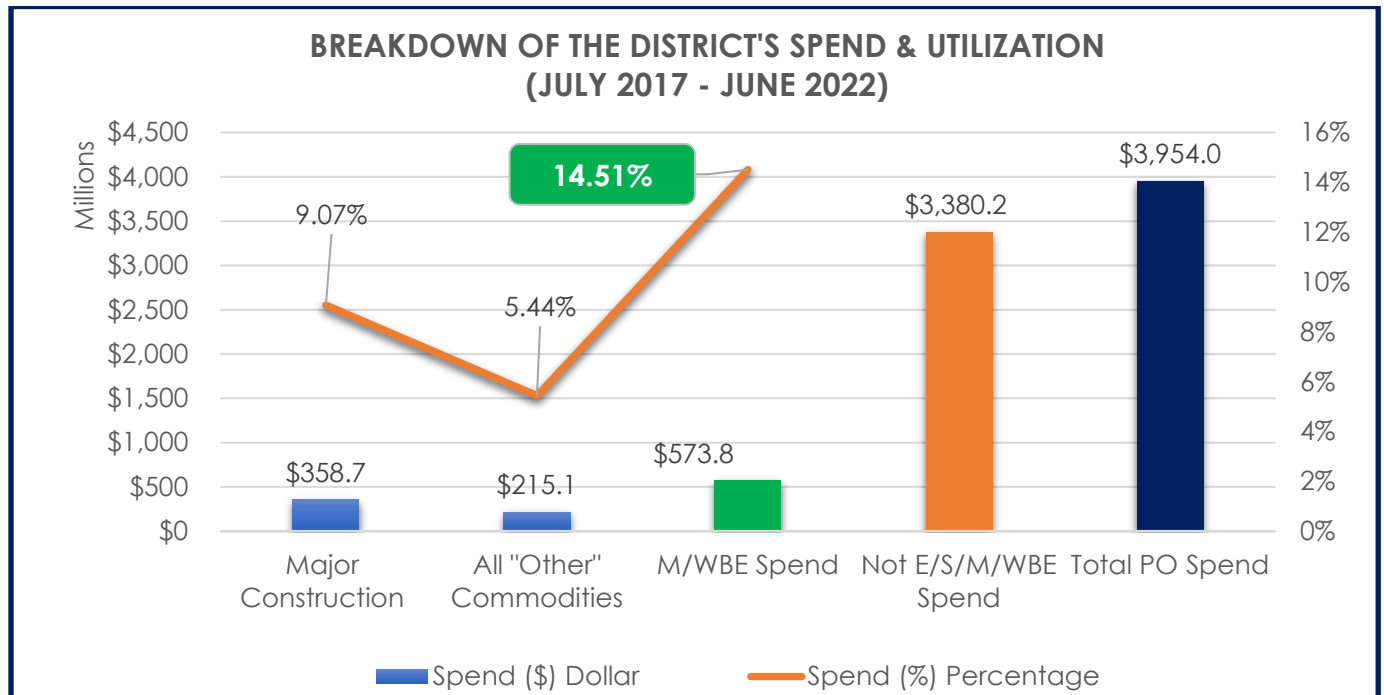


Diagram 5-2: Overview of Spend & Utilization | July 2017 – June 2022

## ANALYSIS: E/S/M/WBE Utilization

### E/S/M/WBEs Vs. Non-E/S/M/WBEs

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

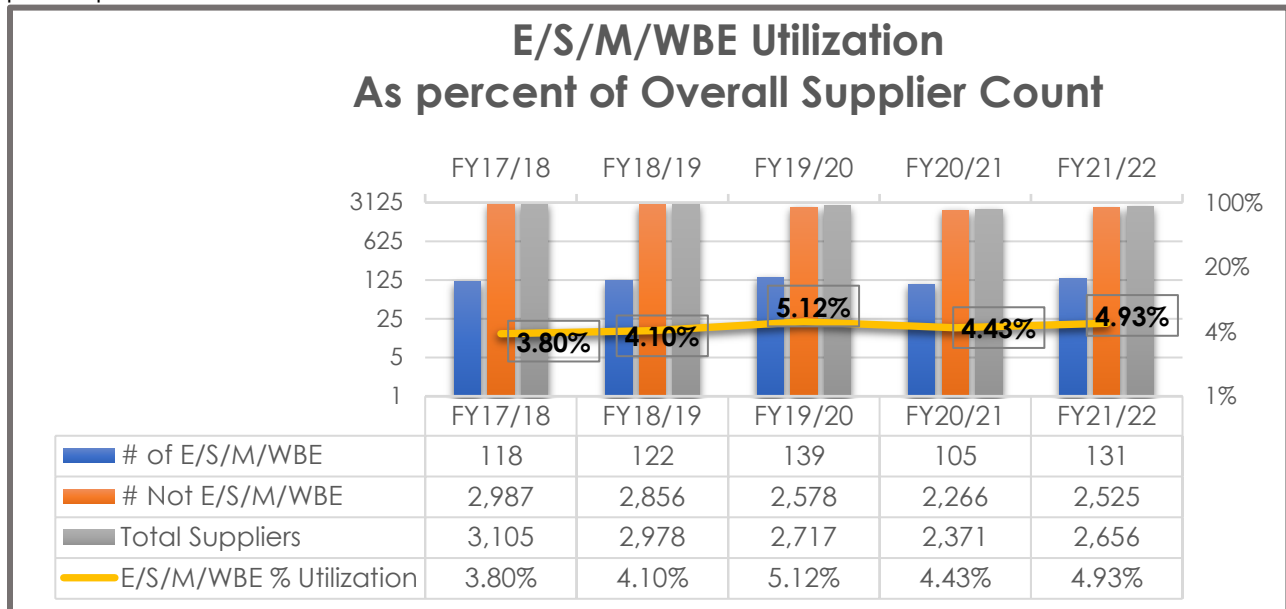


Diagram 6: E/S/M/WBE Utilization vs. Non-E/S/M/WBE Utilization | July 2017 – June 2022

### Procurement Categories

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

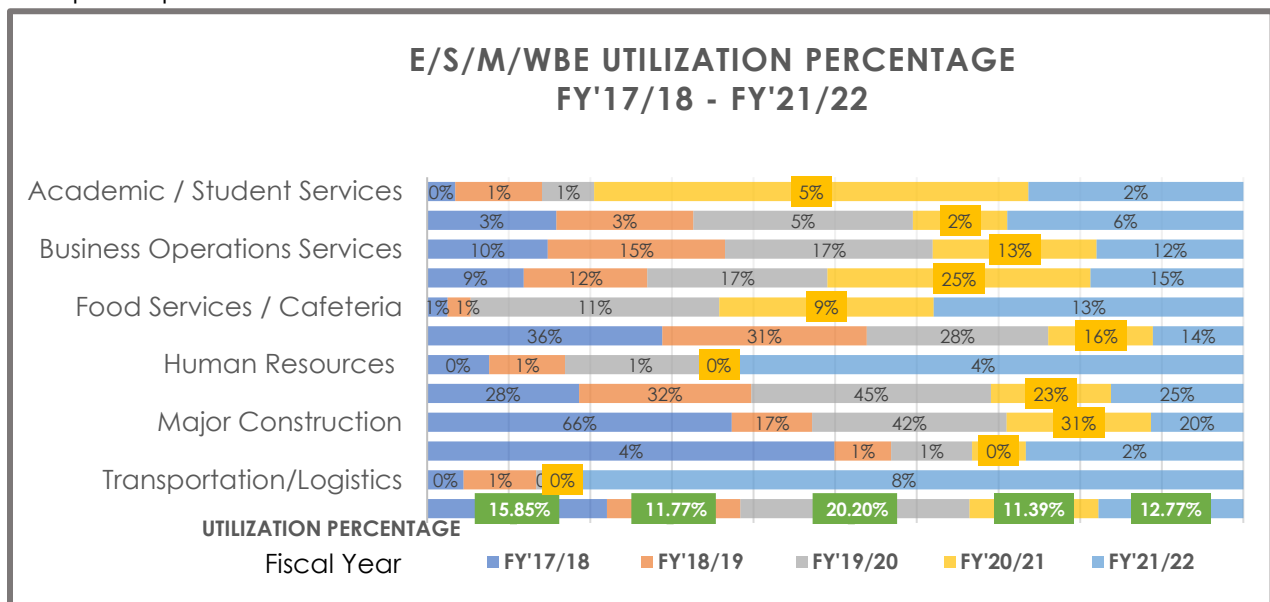


Diagram 7: E/S/M/WBE Utilization per Procurement Category | July 2017 – June 2022

# ANALYSIS: E/S/M/WBE Spend

## Major Construction Vs. All Other Commodities

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

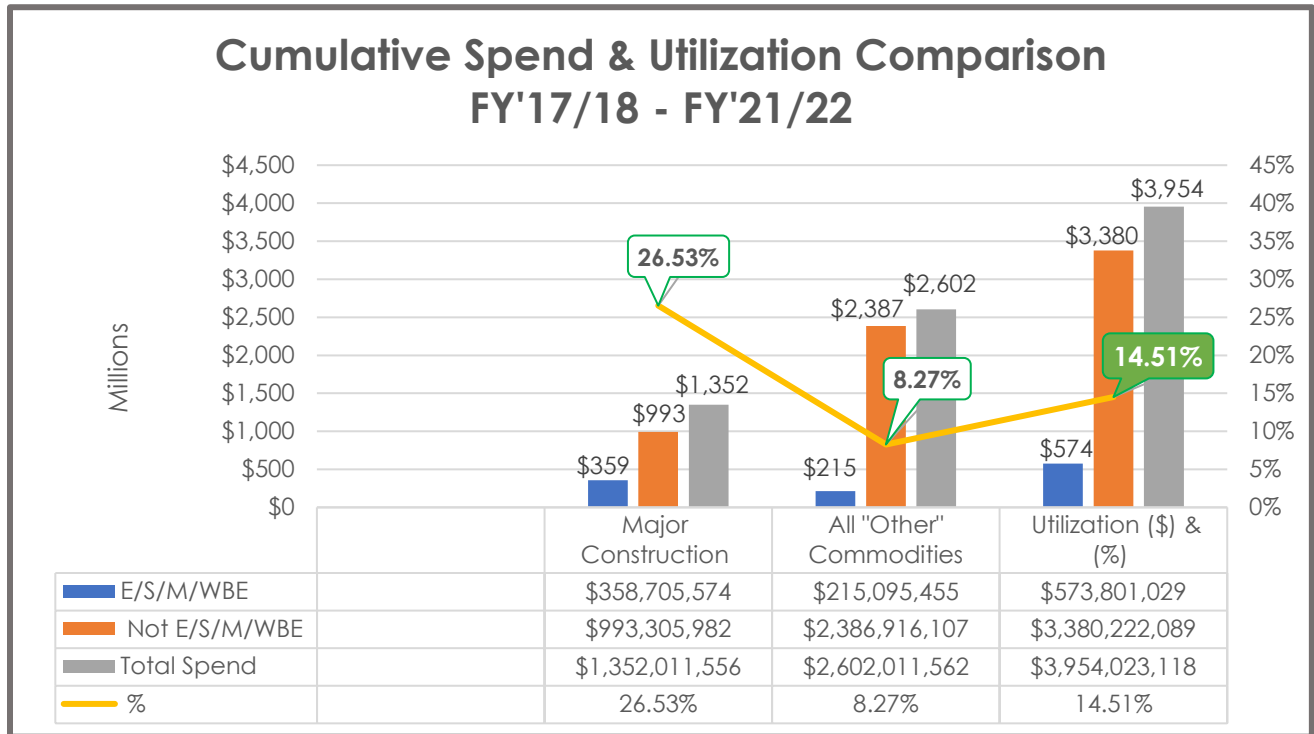


Diagram 8: Construction Spend vs. All Other Commodities Spend | July 2017 – June 2022



# YEAR IN REVIEW



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**BROWARD**  
County Public Schools

## ECONOMIC PERFORMANCE



# \$231.32M

FY2021-2022 SMALL/LOCAL SPEND  
WITH **157 CERTIFIED FIRMS**

\$108.1M

MAJOR  
CONSTRUCTION

\$28.8M

JANITORIAL/  
CUSTODIAL

\$22.1M

FOOD SERVICES/  
CAFETERIA

\$20.8M

BUSINESS  
OPERATIONS  
SERVICES

\$16.6M

GROUND/STRUCTURE/  
EXTERIOR (OUTSIDE)

\$11.5M

FACILITIES/  
MAINTENANCE/  
REPAIR (INSIDE)

\$8.5M

BUSINESS  
OPERATIONS  
PRODUCTS

\$6.0M

TRANSPORTATION/  
LOGISTICS

\$5.0M

TECHNOLOGY

\$2.8M

ACADEMIC/  
STUDENT SERVICES

\$1.2M

HUMAN  
RESOURCES



# CONTRACT COMPLIANCE



## 155

### SOLICITATIONS

Invitation to Bid (ITB) accounted for 84% (130) of all solicitations posted in FY21-22. There were 18(12%) Requests for Proposals and seven (4%) Requests for Quotes (RFQ).



## 435

### PROPOSALS EVALUATED

The Contract Compliance team evaluated 282 ITB (65%), 123 RFP (29%), and 30 RFQ (6%) proposals in the fiscal year.



## 150

### M/WBE<sup>3</sup> PRIME VENDORS

S/M/WBE primes accounted for 35% of all firms that responded to the District's solicitations; ITBs – 111, RFPs – 21, and RFQs – 18. However, non-certified prime vendors were largely more responsive; ITBs – 179, RFPs – 96, and RFQs – 13.



## 291

### M/WBE SUBCONTRACTORS/SUBCONSULTANTS

A total of 232 (80%) S/M/WBE subs primarily participated in ITBs. Eighteen S/M/WBEs (7%) participated in RFPs and 48 (13%) in RFQs.

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<sup>3</sup>S/M/WBE may have participated in multiple projects. The total number of M/WBEs does not reflect unique companies.


## S/M/WBE CERTIFICATION

344

CERTIFICATION APPLICATIONS PROCESSED



**226**  
APPROVED  
APPLICATIONS




**70**  
NEW  
CERTIFICATION



**103**  
RE-CERTIFICATION



**53**  
TRI-COUNTY  
RECIPROCAL



**62**  
DENIED  
APPLICATIONS



**57**  
NO SIGNIFICANT  
BUSINESS PRESENCE<sup>3</sup>



**5**  
EXCEEDED  
SIZE STANDARD<sup>4</sup>



**0**  
NON-PROFIT

**56**  
WITHDRAWALS<sup>5</sup>



**3**  
GRADUATED FIRMS<sup>6</sup>

<sup>3</sup> 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 region.

<sup>4</sup> Size Standard – An applicant firm’s average gross sales (or a number of employees if applicable) for the last two consecutive years must not exceed 50% of the U.S. Small Business Administration (SBA) small business size limits based on its industry categories.

<sup>5</sup> Fifty-six applicant firms were withdrawn from the certification process for failure to provide the required documents or following the request from the applicant.

<sup>6</sup> Graduate firms refer to certified suppliers whose gross sales have exceeded the 50% U.S. SBA size standard requirements. Policy 3330 update in April 2020 allows the firms to remain in the SDOP once the average gross sales (or a number of employees) remain within its industry limit.

## 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.

213

ACTIVE  
SOLICITATION  
CAMPAIGNS

79

TARGETED  
OUTREACH  
CAMPAIGNS

188

ONE-ON-ONE  
TECHNICAL  
ASSISTANCE

245

INTERNAL/EXTERNAL  
COMMUNITY  
MEETINGS

335

SMALL BUSINESS  
SPOTLIGHTS

1


ANNUAL SUPPLIER  
ENGAGEMENT  
SURVEY

4

BUSINESS CONNECT  
NEWSLETTERS



## 4<sup>th</sup> Annual Small Business ENGAGEMENT SURVEY



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The Small Business Engagement Survey measures the effect of changing business trends in the District. At the close of the Fiscal Year 2021-2022, EDDC administered the survey to gather crucial data in near real-time on the successes and challenges of our local, small, and certified suppliers. The past two years have tested small businesses like never before; in contrast, the impacts of COVID-19 are fading.

The survey results revealed that forty-two (42) percent of certified firms are currently doing business with the District in the capacity of a prime vendor or a subcontractor/ subconsultant; twenty-four (24) percent of the firms that submitted bids were not awarded contracts, and twenty-five (25) percent of the certified companies did not respond to BCPS solicitations. The consensus among the latter firms is that the District's opportunities did not align with the products and services they provided, and for those that did, the contracts were too large to fulfill.

Overall, firms recommended that the District considers separate projects for small, certified businesses and additional workshops on how to complete bids. Respondents also suggested that small businesses get certified, participate, network, read and ask questions when seeking to do business with Broward County Public Schools. They shared that "Certifications such as E/S/M/WBE are quite helpful" and "I believe that the School Board makes a very good effort to get small business participation."

Finally, the survey results showed that most certified firms attempted to secure an opportunity with the District in FY21-22 compared to previous years. Respondents were equally represented by firms across all procurement categories; construction, commodities, professional services, and other contractual services.





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County Public Schools

#BCPS  
EDDC

# MARKETING & COMMUNICATIONS

## 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.



# 18,000

PAGE VIEWS

### EDDC SOCIAL MEDIA ENGAGEMENT:

**4**<sup>+2</sup>  
 SOCIAL MEDIA  
 ACCOUNT

**> 1500**<sup>+150%</sup>  
 COMBINED POSTS

**> 500**<sup>+150%</sup>  
 COMBINED FOLLOWERS

  
**> 200,000**  
 IMPRESSIONS

  
**> 30,000**  
 ENGAGEMENT



# STAY INFORMED | STAY CONNECTED



## PROGRAMS & INITIATIVES

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### **SOCIAL MEDIA ENHANCEMENTS & SUPPLIER HIGHLIGHTS**

EDDC developed and launched a new marketing initiative representing a low-cost, high-value strategy. The Awareness Celebration Calendar increases brand awareness by spotlighting certified firms during each national and ethnic heritage month, including Black History Month, Women's History Month, Asian Pacific Heritage Month, and Hispanic Heritage Month. Firms are featured on EDDC's social media platforms and can use the highlights to enhance their marketing and web traffic to generate leads.

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### **PRE-BID MEETINGS**

The SMART inclusion team actively engaged local certified S/M/WBEs in the District's pre-bid meetings for all SMART projects. These multipurpose meetings serve as a vehicle to discuss S/M/WBE goals and reporting, allow for prime/sub-contractor engagement and encourage S/W/MBE primes to participate in bidding.

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### **SMALL BUSINESS ADVISORY COMMITTEE**

The SBAC demonstrated strong engagement in FY20-21. Eighty (80) percent met or exceeded the quorum requirements of the ten scheduled meetings. EDDC is leveraging the committee's expertise to expand its reach in the community through partnerships with various professional organizations.

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### **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 on a contract-by-contract basis. Staff continues to work with department leadership to set goals for all commodity areas and to allocate the best remedial APIs where appropriate.

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### **SDOP MANAGEMENT SYSTEMS (SMS)**

Implementing the SMS powered by the B2Gnow system is at ninety percent completion. 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.

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## REPORTING

EDDC launched a web-based central repository of all reports:

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

Direct weblink: <https://www.browardschools.com/Page/69024>

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## TECHNICAL ASSISTANCE

The EDDC team provides one-on-one Technical Assistance to new and current suppliers in certification, contact compliance, and business development. The working sessions are conducted via Microsoft teams as requested by the small and local businesses.

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## 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, District's department heads, and community leaders who have provided mentorship and trust in our work.



# FY 2022-2023

# STRATEGIC

# PRIORITIES



**01****DISPARITY STUDY**

Initiate and conduct an eight-milestone comprehensive, legally defensible disparity study, for SBBC procurement practices, through statistical analysis, of all contracting expenditures and evaluation of economic and sociological studies of the marketplace to determine whether a disparity exists in the award of procurement contracts to minority and women-owned business enterprises. The goal is to complete the first four milestones this fiscal year.

**02****SOUTH FLORIDA ANCHOR ALLIANCE MARKETPLACE PILOT- Grant Recipient**

This alliance consists of governmental procurement organizations in Broward and Miami Dade, working under a grant from the Health Foundation to simplify procurements, local supplier outreach, and bid notifications onto one common platform.

**03****3-QUOTES INITIATIVE**

The 3-Quotes Initiatives is an alternative effort to position certified suppliers to do business with the District. It is an avenue for success, considering the 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.

**04****ENGAGE INTERNAL DEPARTMENTS IN THE API PROCESS FOR COMMODITIES SOLICITATIONS**

Per Policy 3330, the SDOP unfolds the industry-specific Remedial APIs throughout construction and commodities contract opportunities. EDDC's strategy aims to advance the inclusion and involvement of departments coordinating commodities contracts, including Information & Technology, Academics, Transportation, and more.

**05****SYSTEM ENHANCEMENTS**

B2Gnow enhancement: Enable reciprocal certification functionality with the system to streamline the reciprocal certification process and eliminate paper processing. SAP Ariba enhancement: Staff is working with the Procurement & Warehousing Services, Operations & Compliance team to improve and enhance the user experience continually.

**06****COMMUNITY PARTNERSHIPS**

EDDC team will continue to formalize regional partnerships with supplier inclusion organizations. We aim to leverage and build relationships to increase access to central resources supporting small business growth and development.

**07****EVENTS**

Participate, partner, and host events to facilitate supplier education, network building, and matchmaking opportunities.

**ECONOMIC  
DEVELOPMENT  
&  
DIVERSITY  
COMPLIANCE**



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**BROWARD**  
County Public Schools

# Meet the EDDC Team



**ROBERT M. BALLOU**  
Officer

## BUSINESS INTELLIGENCE & PROCESS MANAGEMENT



**JASMINE M. JONES**  
Manager



**LAVINIA FREEMAN**  
MWBE Specialist

## CONTRACT COMPLIANCE



**ANNE MARIE RICHARDS**  
Coordinator



**DR. ERNESTO DE LA HOZ**  
MWBE Specialist

## CERTIFICATION, OUTREACH & MARKETING



**CHELSEA JONES FINLEY**  
Coordinator



**WINIFRED CUMMINGS**  
MWBE Specialist

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

# SMALL BUSINESS ADVISORY COMMITTEE



**Carolyn D. Jones, M.Ed., CMCS.**  
*Chair*  
District 4 Representative



**Shaheewa Jarrett Gelin, Esq.**  
*Vice-Chair*  
Appointed by  
SBAC Committee



**Carlton Crawl**  
*Past Chair*  
District 2 Representative



**Hebertny Perez**  
Appointed by Board Member  
District 3 Representative



**Wellington De Darla.**  
Appointed by Board Member  
District 5 Representative



**Dr. Reggie R. Lewis, Ed.D.**  
Appointed by Board Member  
District 6 Representative



**Brian Farrell**  
Appointed by  
SBAC Committee

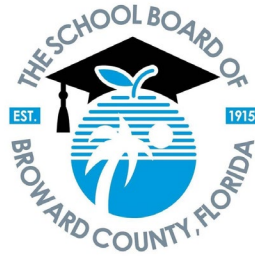


**Dodie Keith-Lazowick, PLS**  
Appointed by Board Chair  
Countywide At-Large, Seat 8  
Representative



**Jimmy Witherspoon**  
Appointed by Board Member  
Countywide At-Large, Seat 9  
Representative





Torey Alston, Chair  
Lori Alhadeff, Vice Chair

Daniel P. Foganholi  
Debra Hixon  
Sarah Leonardi  
Ryan Reiter  
Nora Rupert  
Manuel A. Serrano  
Kevin Tynan

Dr. Vickie L. Cartwright  
Superintendent of Schools

The School Board of Broward County, Florida, prohibits any policy or procedure which results in discrimination based on age, color, disability, gender identity, gender expression, genetic information, marital status, national origin, race, religion, sex or sexual orientation. The School Board also provides equal access to the Boy Scouts and other designated youth groups. Individuals who wish to file a discrimination and harassment complaint may call the Director, Equal Educational Opportunities/ADA Compliance Department & District's Equity Coordinator/Title IX Coordinator at 754-321-2150 or Teletype Machine (TTY) 754-321-2158.

Individuals with disabilities requesting accommodations under the Americans with Disabilities Act Amendments Act of 2008 (ADAAA) may call Equal Educational Opportunities/ADA Compliance Department at 754-321-2150 or Teletype Machine (TTY) 754-321-2158.

**[browardschools.com](http://browardschools.com)**

# JOIN FORCES. SUCCEED TOGETHER.

## ECONOMIC DEVELOPMENT & DIVERSITY COMPLIANCE

7720 W. Oakland Park Blvd., Suite 323  
Sunrise, FL 33351

754 -321-1517 | [browardschools.com/EDDC](https://browardschools.com/EDDC)

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## CONTACT US

### Business Intelligence & Process Management

[EddcBiTeam@browardschools.com](mailto:EddcBiTeam@browardschools.com)

### Contract Compliance

[sdopcompliance@browardschools.com](mailto:sdopcompliance@browardschools.com)

### S/M/WBE Certification

[sdopcercertification@browardschools.com](mailto:sdopcercertification@browardschools.com)

### Outreach

[sdopoutreach@browardschools.com](mailto:sdopoutreach@browardschools.com)

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