Southern Oregon University

Annual Report, Contracting and Purchasing with Historically Underrepresented Businesses
January 4, 2012

Chancellor George Pernsteiner  
Oregon University System  
P.O. Box 751  
Portland, OR  97207-0751  

Re: Annual MWESB Purchasing and Contracting Report  

Dear Chancellor Pernsteiner:  

Enclosed is Southern Oregon University’s Annual Minority, Women, and Emerging Small Business Purchasing and Contracting Report for the July 1, 2010 to June 30, 2011 reporting period.  

SOU actively works to expand contracting opportunities for MWESB firms as well as veteran and locally owned firms. SOU plays a vital role in the community to ensure that limited resources are expended in a manner that both achieves price efficiencies but also reinvests in our local businesses.  

Inquiries about the Annual MWESB Purchasing and Contracting Report can be addressed to Steve Larvick, Director of Business Services, 541-552-6594 or larvick@sou.edu.  

Sincerely,  

Mary Cullinan  
President
2011

Minority, Women, and Emerging Small Business Purchasing and Contracting Report
Section 1: Commitment to Promoting Economic Opportunities

Southern Oregon University (SOU) is committed to providing fair and equitable access to any company seeking to conduct business with the SOU. Ensuring open and equitable procurement and contracting policies and encouraging opportunities for Minority Business Enterprises, Women Business Enterprises, Emerging Small Businesses and Veteran Business Enterprises can provide not only opportunities for these companies, but also a competitive bidding and purchasing environment for the University; thus, ensuring best value.

The administration of SOU realizes the value and strength a diverse workforce brings to our culture and community. It is the role of higher education to promote communication, mutual understanding, respect, creativity, and tolerance for individuals, cultures, and the uniqueness of each person. A diverse workforce is necessary to promote such communication and awareness.

It is the policy of SOU that all persons be treated equally and fairly. The University expressly prohibits discrimination based on race, color, gender, marital status, national origin, age, disability, religion, pregnancy, sexual orientation, gender identity or expression, or any other consideration not directly and substantively related to effective performance; and to be in compliance with all relevant federal, state, and local laws and regulations. This policy is applicable to all University activities including purchasing and contracting.

Section 2: Outreach Plan

SOU has established the following procedures and initiatives to reach out to the MWESB, veteran, and small local businesses.

Procurement Requirements

SOU will not knowingly do business with any entity that discriminates on the basis of race, color, gender, marital status, national origin, age, disability, religion, pregnancy, sexual orientation, or gender identity or expression.

SOU has implemented procedures that typically require competition for contracts for goods and services starting at $5,000.00. The purpose of this policy is to ensure competitive pricing to provide the best value for goods and services. The lower limit also allows smaller businesses the opportunity to participate. Construction services are typically put out for bid for all projects regardless of the price (even those below $5,000.00). Many MWESB firms find these small projects attractive and can bid competitively due to lower overhead costs.
MWESB Retainer Recruitment

Prior to the reopening of the OUS retainer program in February 2010, the University created a list of all businesses in the state of Oregon registered as MWESB within Jackson, Josephine, and Klamath Counties. This group was emailed an invitation and instructions on how to register for the OUS retainer program. A week prior to the closing a follow up email was sent encouraging firms to register.

The first SOU Marketplace took place on December 2, 2011. This event was created to coordinate and encourage MWESB enterprises to meet with SOU procurement agents and decision makers on campus. It is the goal of SOU to connect not only registered MWESB firms but any small businesses with individuals that make purchasing decisions for university departments.

Vendor Fairs and Other Outreach Opportunities (2010-11):

- 2011 SOU MWESB Marketplace
- 2011 Oregon Association of Minority Entrepreneurs
- 2010 Governor’s Marketplace
- 2010 OPPA Reverse Vendor Trade Show
- 2010 MWESB Meet and Greet at Medford Higher Education Center
- 2010 MWESB Workshop at Lane Community College
- 2009 Governor’s Marketplace

Future Initiatives

- **SOU Marketplace:** SOU will continue to offer a vendor’s marketplace to promote MWESB and other local businesses. The next event is schedule for summer 2012 (tentatively scheduled for late June).

- **Data Collection:** SOU will require all contractors to submit data on the number of contracts and contract values of MWESB subcontractors

- **Recruitment:** SOU will continue to directly market to registered MWESB in Jackson, Josephine, Douglas, Klamath, Curry, and Coos Counties to attend SOU Marketplace events and register with OUS for inclusion in the retainer program.

- **Capital Construction:** SOU will require all contractors who bid on projects over $500,000.00 to provide a plan on how they will encourage and solicit bids from MWESB subcontractors.

- **Workshops and Fairs:** SOU will continue to participate in workshops, fairs, and other outreach programs.
### Section 3: Data

#### 1. Dollar Value

<table>
<thead>
<tr>
<th></th>
<th>Capital Const.</th>
<th>Goods &amp; Services</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Certified Minority Business</td>
<td>$9,123.05</td>
<td>$49,996.98</td>
<td>$59,120.03</td>
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<tr>
<td>Certified Women Business Enterprise</td>
<td>$86,582.00</td>
<td>$49,779.31</td>
<td>$136,361.31</td>
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<tr>
<td>Certified ESB</td>
<td>$23,742.00</td>
<td>$27,803.44</td>
<td>$51,545.44</td>
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<td>Self-identified MWESB</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Total of 1-4</strong></td>
<td><strong>$110,324.00</strong></td>
<td><strong>$127,579.73</strong></td>
<td><strong>$247,026.78</strong></td>
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</tbody>
</table>

#### 2. Percentage of Total SOU Expenditures

<table>
<thead>
<tr>
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<th>Capital Const.</th>
<th>Goods &amp; Services</th>
<th>Total</th>
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</thead>
<tbody>
<tr>
<td>Certified Minority Business</td>
<td>0.07%</td>
<td>0.38%</td>
<td>0.44%</td>
</tr>
<tr>
<td>Certified Women Business Enterprise</td>
<td>0.65%</td>
<td>0.04%</td>
<td>1.02%</td>
</tr>
<tr>
<td>Certified ESB</td>
<td>0.16%</td>
<td>0.07%</td>
<td>0.39%</td>
</tr>
<tr>
<td>Self-identified MWESB</td>
<td>0.00%</td>
<td>0.00%</td>
<td>0.00%</td>
</tr>
<tr>
<td><strong>Total of 1-4</strong></td>
<td><strong>0.81%</strong></td>
<td><strong>0.48%</strong></td>
<td><strong>1.85%</strong></td>
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#### 3. Number of Historically Underrepresented Business doing business with SOU

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<th></th>
<th>1</th>
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<th>2</th>
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<tr>
<td>Certified Minority Business</td>
<td>3</td>
<td>4</td>
<td>7</td>
</tr>
<tr>
<td>Certified Women Business Enterprise</td>
<td>0</td>
<td>6</td>
<td>13</td>
</tr>
<tr>
<td><strong>Total of 1-4</strong></td>
<td>7</td>
<td>6</td>
<td>13</td>
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