

**Oregon Metro**  
**Construction Career Pathways Project (C2P2)**  
**Public Owner Workgroup**

**Phase I Summary**

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## **I. INTRODUCTION TO C2P2**

People of color and women face multiple barriers to accessing and sustaining construction careers in the Greater Portland region. The inconsistent nature of work, lack of meaningful advancement opportunities, and insufficient funds for education, job training, and other supportive services (e.g. transportation, childcare) are all factors that limit diverse participation in the construction trades.

Oregon Metro (Metro) anticipates that approximately 81 regional projects, worth approximately \$7 billion, will be built in the Greater Portland region over the next five years. Such a robust pipeline of projects will require a formidable construction workforce, that, if thoughtfully planned and coordinated, can create meaningful economic opportunities for women and communities of color that go well beyond the construction of these projects.

### **A. Purpose and Goals of C2P2 Public Owner Workgroup**

To address these challenges, Metro created the Construction Career Pathways Project (C2P2). C2P2 convenes stakeholders at the regional level to learn more about the lack of diversity in the construction workforce and identify strategies to provide reliable career pathways for people of color and women. Specifically, C2P2 will do the following:

- 1) Support and grow a diverse construction workforce;
- 2) Deliver effective investments in the construction workforce system, and;
- 3) Promote equitable growth in the region's economy.

C2P2 is grounded in Metro's *Strategic Plan to Advance Racial Equity, Diversity and Inclusion*. Research shows that places that attain more economic growth are those with greater racial inclusion and smaller racial income gaps. As such, Metro seeks to work with its private and public partners to help develop and maintain sustainable economic growth for communities of color and women through the construction industry in the Portland metro region.

The Public Owner Workgroup (Workgroup) is a key component of C2P2. The goal of the Workgroup is to create a framework and set of investment strategies to advance workforce equity and support people of color and women to fully realize the benefits of a career in construction. The Workgroup is comprised of 1-2 representatives from sixteen public agencies in the Portland region. All have major construction projects underway in the next 5-10 years. Agency representatives are experts in procurement and contracting practices of their agency. Workgroup members agreed to meet monthly into 2019 to discuss and develop strategies to address these issues.

## B. Composition of C2P2 Public Owner Workgroup

Figure 1. List of Workgroup Members, Agency, and Title

AGENCY	WORKGROUP MEMBER	TITLE
1. Prosper Portland	John Cardenas	Senior Manager of Contracting and Workforce Equity
	Mayra Arreola	Director of Social Equity, Policy and Communications
2. Oregon Health Sciences University (OHSU)	Rebecca Finch	Business Office Manager, Design and Construction
	Bill Bowen	Manager, Capital Projects
3. Port of Portland	Bobbi Matthews	Director of Administrative Services
	Emerald Walker	Regional Affairs Manager
4. Multnomah County	Jamie Waltz	Deputy Director, Department of Community Services
	Liz Smith Currie	Senior Policy Advisor to Chair Deborah Kafoury
	Lee Fleming	Supplier and Diversity Officer
5. City of Portland	Cathleen Massier	Program Manager, Procurement Services
	Molly Washington	Deputy City Attorney
6. TriMet	Steve Witter	Executive Director of Capital Projects and Construction
	John Gardner	Director of Diversity and Transit Equity
7. Portland Public School District	Stephanie Soden	Chief of Staff to Superintendent Guadalupe Guerrero
	Aidan Gronauer	Manager, Equity in Public Purchasing and Contracting
8. Portland State University	Ron Blaj	Director of Capital Projects and Construction
	Karen Thomson (alternate)	Director, Contracting and Procurement Services
	Chris Tinnin	Project Manager, Capital Projects and Construction
9. Portland Community College	Bethany DeMello (alternate)	Contracts Officer, Contracting and Procurement Services
	Linda Degman	Director, Planning and Capital Construction
10. Home Forward	Kurt Simonds	Dean of Instruction, Cascade Campus
	Berit Stevenson	Procurement Director
11. City of Beaverton	Peter Garcia	Senior Procurement Coordinator
	Cadence Petros	Development Division Manager
12. Metro	Grace Wong	Assistant City Attorney
	Raahi Reddy	Program Director, Diversity, Equity and Inclusion
13. ODOT	Heidi Rahn	Director, Assets Management Capital Planning Program
	Angela Crain	Civil Rights Manager
14. BOLI	Max Bernstein (alternate)	Region 1 Field Coordinator, Office of Civil Rights
	Steve Simms	Director, Apprenticeship and Training Division
15. Beaverton School District	Paul Odenthal	Executive Administrator for Facilities
16. North Clackamas School District	David Hobbs	Director of Capital Projects

## C. Scope of Work

Los Angeles based firm Estolano LeSar Advisors (ELA) was selected through a competitive procurement process to facilitate the C2P2 Workgroup. ELA specializes in working with multi-stakeholder groups to address complex public policy and social equity issues.

The Workgroup’s scope was divided into three Phases. This report focuses on the activities completed during Phase I.

**Phase I (Building a Foundation):** The first Phase focused on building working relationships between Workgroup members that will last beyond the length of the engagement. Phase I consisted of an assessment of Portland regions construction careers ecosystem, a review of Best Practices from other regions, and the establishment of sub groups (Goals and Accountability, Driving Demand, and Creating Supply) to address deficiencies and gaps and make recommendations for a potential regional framework. Oregon Metro concurrently held an external stakeholder engagement process (labor, minority contractors, pre-apprenticeship programs, community-based organizations, general contractors, sub-contractors, etc.), and Workgroup members were able to hear from stakeholder representatives to better inform their recommendations for a regional framework.

This Phase ran from July through October 2018.

**Phase II (Identify and Develop Opportunities):** The second Phase will focus on the development of a draft regional framework. The Workgroup will continuously engage with external stakeholders and include executive-level agency staff on issues such as funding, monitoring, and implementation. The Workgroup will consider the following questions.

- What strategies can we deploy to achieve our goals? (financial, programmatic, policy)
- How do we measure the success of our efforts?
- What resources or leverage do we have?
- Who are our partners? How will we work together?
- What is our timeline to get things done?
- What are the barriers to implement our strategies? How can they be addressed?

Phase II will run from November 2018 through April 2019.

**Phase III (Implementation):** The Workgroup will begin the process of implementing the structure and processes outlined in the regional framework. Close coordination is needed to ensure that efforts and investments are being implemented properly, and that a structure is in place to address/troubleshoot emerging issues in real time.

Phase III will run from June through July 2019.

## D. Summary of Workgroup Meetings #1-4

Phase I Meetings #1-4 are summarized below. See the Appendix for detailed Meeting Notes.

**Meeting #1 (Friday, July 13, 2018)** – *Introduction to Workgroup, Elements of a Successful Construction Careers Policy*

During Meeting #1, Workgroup members were introduced to the C2P2 Public Owner Workgroup. Raahi Reddy, Diversity and Inclusion Manager, Oregon Metro, introduced the facilitation team (ELA), and provided an overview of C2P2 and Metro's Racial Equity Plan. ELA introduced Memorandum of Understanding (MOU) and Ground Rules, which set the parameters for how the Workgroup will work together. The Workgroup discussed the elements necessary for a successful construction careers policy, borrowing from best practices from the UCLA Labor Center's "Exploring Targeted Hire" study.

Throughout the presentation, Workgroup members were asked to share how best practices are modeled in their own agencies.

**Outcomes:** Workgroup members learned what makes a successful construction careers policy, Workgroup members shared latest efforts on promoting construction careers.

### **Meeting #2 (Wednesday, August 15, 2018) – SWOT Analysis Presentations**

Leading up to Meeting #2, Workgroup members were asked to perform a Strengths Weaknesses Opportunities and Threats (SWOT) Analysis of their own agency. During Meeting #2, Workgroup members broke up into groups, shared their SWOTs, and discussed the following:

- What are the biggest gaps or challenges our agency needs to address?
- What are the most promising opportunities our agency needs to capitalize or leverage?

Following the discussion, Workgroup members reviewed and completed the “Seven Elements of a Successful Construction Careers Policy” worksheet (based on the Meeting #1 presentation) and dot exercise that examined and compared agencies’ performance for a set of measurable practices for each of the seven elements. While completing the exercise, Workgroup members discussed the following:

- What are we doing well in? What are the gaps?
- How can gaps be addressed?
- How can we leverage our efforts?

Following the exercise, Workgroup members discussed areas where they sensed gaps or deficiencies. Common themes emerged which formed the basis of working groups that will collectively develop strategies to inform the regional framework.

**Outcomes:** Workgroup members presented SWOTs for their respective agencies, Workgroup members gained an understanding of the strengths, weaknesses, opportunities, and threats in the Portland region’s construction careers ecosystem.

### **Meeting #3 (Wednesday, September 5, 2018) - Draft Ecosystem Assessment, Best Practices in Construction Careers**

ELA compiled the dot exercise from Meeting #2 into an ecosystem assessment: a series of pie charts that illustrate how agencies are performing in relation to the “Elements of a Successful Construction Careers.” In a successful ecosystem, agencies will work together to leverage resources and fill gaps. Workgroup members were joined (via webinar) by President Laurence B. Frank, President, Los Angeles Trade Technical College, for a presentation on how Public Owners can use pre-apprenticeships, apprenticeships, superseding agreements, and prevailing wage requirements as workforce development tools. The presentation was followed by a Q&A portion.

Following the presentation, the Workgroup was split into three sub groups: 1) Goals & Accountability, 2) Driving Demand, and 3) Creating Supply. The themes were created based on the common themes identified during Meeting #2. The goal of the sub groups is to work between Workgroup meetings to develop tangible recommendations that will be a part of the C2P2 framework. Sub groups were asked

to review a purpose statement (drafted by ELA), and asked to create workplan for the next few months.

**Outcomes:** Workgroup members presented SWOTs for their respective agencies. ELA presented a draft ecosystem assessment. Workgroup broke into three sub groups to develop recommendations to the Regional Framework.

### **Meeting #4 (Wednesday, October 3, 2018) – Discuss Gaps, Opportunities, and Challenges**

For Meeting #4, Oregon Metro invited external stakeholders to provide their assessment of the gaps, opportunities, and challenges to the Portland regions construction careers ecosystem. These external stakeholders have convened concurrently with the C2P2 Workgroup and include: labor, minority contractors, pre-apprenticeship training programs, community-based organizations, general contractors, and subcontractors. Workgroup Members then engaged in Q&A with the external stakeholders. Sub groups then presented their workplans to the entire group.

The Workgroup then split into their three sub groups to discuss next steps. External stakeholders were welcome to join the sub group that best reflected their interests.

**Outcomes:** Workgroup learned external stakeholders on gaps, opportunities, and challenges; Workgroups continued to meet in sub groups to develop recommendations for the Regional Framework.

## **II. WHAT WE LEARNED**

### **A. Key Elements of Construction Careers Policies**

During Meeting #1, the facilitation team provided an overview of *Key Elements of a Successful Construction Careers Policy*, adapted from the recommendations outlined in the UCLA Labor Center's *Exploring Targeted Hire* report, to help Workgroup members gain deeper insight into existing practices. These seven key elements include:

#### **1. Realistic Targeted Hire Goals**

- Rooted in target communities and industry conditions
- Clearly define targeted workers

#### **2. Early Stakeholder Engagement**

- Solicit participation early from external stakeholder groups (e.g. labor, CBOs, contractors, pre-apprenticeship training partners, etc.) that will be affected and/or be a party to the policy
- Facilitate collaboration and partnerships with external stakeholder groups

#### **3. Ongoing Stakeholder Engagement**

- Create educational opportunities for external stakeholders to learn about the policy
- Share goals within own agency
- Dedicate ongoing resources to promote policy

#### 4. Contractor Engagement

- Provide educational opportunities for participating contractors
- Create mentorship opportunities between small and large contractors

#### 5. Recruitment of Targeted Workers

- Connect outreach and recruitment partners with contractors
- Connect targeted workers with necessary support services
- Provide funding and resources for outreach and engagement

#### 6. Invest in Pre-Apprentice and Apprenticeship Programs

- Connect pre-apprenticeship programs with key stakeholders
- Identify funding and resources for pre-apprenticeship programs
- Establish pathways for pre-apprenticeship graduates to enter formal apprenticeships
- Set specific apprentice utilization goals
- Incentivize retention of apprentices over the long term

#### 7. Enact Clear Reporting and Compliance

- Assign responsibility for monitoring and enforcement
- Appoint multiple stakeholders to oversee compliance
- Adopt reporting technologies

## B. Developed a Baseline Understanding of Our Ecosystem

Workgroup members were asked to look within their own agencies to examine goals, policies, and procedures that facilitate construction career pathways while also assessing existing barriers to success for people of color and women in the construction trades. This preliminary assessment helped establish a baseline understanding of the Portland region's construction careers ecosystem. Agency representatives were asked to complete a survey (preceding the first Workgroup meeting) and a Strength, Weaknesses, Opportunities, Threats (SWOT) Analysis matrix (preceding the second Workgroup meeting) to help inform the overall ecosystem assessment.

### Workgroup Survey

Workgroup members were asked to complete a short survey (included in the Appendix) for the facilitation team to better understand 1) the Workgroup's priorities and goals, 2) the landscape of agencies' existing construction workforce diversity policies, and 3) any accomplishments to date. The initial survey results showed that while all agencies may have a set of workforce goals (e.g. low-income, women, people of color, MWBE), they do not all have clear or consistent policies to require implementing those goals agency-wide. Agencies also differed in how they collect and report data and measure overall progress towards achieving workforce goals. Furthermore, agencies differ in how they leverage partnerships and engage with community-based organizations, pre-apprenticeship programs, labor unions, and contractors.

Figure 2. Summary of Initial Survey Results

Agency	Clear Goals	Clear Policies	Partnerships	Measures Progress
Beaverton School District	Yes	Yes	Yes	Yes
City of Beaverton	Yes	Yes	No	No
City of Portland	Yes	Yes	Yes	No
Home Forward	Yes	Yes	Yes	No
Metro	Yes	Yes	No	Yes
Multnomah County	Yes	Yes	Yes	Yes
Oregon Health & Science University	Yes	No	Yes	Yes
Port of Portland	Yes	No	Yes	Yes
Portland Community College	Yes	No	No	No
Portland Public Schools	Yes	Yes	Yes	Yes
Portland State University	Yes	No	No	No
Prosper Portland	Yes	Yes	Yes	Yes
TriMet	Yes	No	Yes	Yes

### SWOT Analysis

Workgroup members were also asked to complete a SWOT Analysis on behalf of their agency, specifically related to construction workforce diversity. In the analysis matrix, Strengths and Weaknesses describe what an agency does particularly well, or may be lacking, internally. Opportunities refer to external factors that can provide an agency competitive advantage. Threats refer to factors that may hinder an organization. Agencies were asked to report some of the higher priority gaps or challenges to be addressed and identify strategies to collectively leverage Strengths and Opportunities to address common Weaknesses and Threats. Agencies used the results from the SWOTs to inform the overall ecosystem assessment.

### Ecosystem Assessment

During the second meeting, the Workgroup broke into groups (four agencies per group) and completed the “Seven Elements of a Successful Construction Careers Policy” worksheet and dot exercise. The facilitation team defined each element through a series of 4-6 measurable items or practices (see Figure 3 and 4 below). Workgroup members posted a colored dot if their agency is currently practicing or implementing that item or practice. When completed, the Workgroup could visualize where agencies are performing well along with gaps or challenges.

Figure 3. Key Elements and Practices of a Successful Construction Careers Policy

Element	Practices
1. Realistic Targeted Hire Goals	<ul style="list-style-type: none"> <li>• A numeric commitment to hiring from a target population</li> <li>• A defined target population(s)</li> <li>• Goals that are well researched and grounded in data</li> <li>• Staff (or designated third-party) dedicated to monitoring and tracking progress on the goals</li> <li>• Public reporting of progress on goals</li> </ul>
2. Early Stakeholder Engagement	<ul style="list-style-type: none"> <li>• Goals were informed by stakeholder feedback gathered at all stages of development</li> <li>• Goals were informed by a diverse cross-section of stakeholders (e.g. labor, CBOs, contractors, pre-apprenticeship programs)</li> <li>• Goals were informed by the potential to leverage existing partnerships with public, private, and non-profit partners</li> </ul>
3. Ongoing Stakeholder Engagement	<ul style="list-style-type: none"> <li>• Agency provides opportunities for external stakeholders to understand policy and how to achieve its goals</li> <li>• Agency staff at all levels demonstrate an understanding of and commitment to achieving goals</li> <li>• Agency staff reports to a stakeholder committee, advisory group, or similar group, to report on progress in achieving goals</li> <li>• Agency provides dedicated staff (or designated third party) to manage ongoing engagement around goals</li> </ul>
4. Contractor Engagement	<ul style="list-style-type: none"> <li>• Agency directs ongoing outreach to small, women-owned, minority-owned, veteran-owned firms to market potential bidding opportunities</li> <li>• Agency provides training opportunities to educate small, women-owned, minority-owned, veteran-owned firms on how to successfully compete for contracts</li> <li>• Agency promotes ongoing networking/mentorship opportunities connecting large and small contractors</li> <li>• Agency provides as-needed technical assistance for prime contractors having trouble meeting target hire goals</li> </ul>
5. Recruitment of Targeted Workers	<ul style="list-style-type: none"> <li>• Agency has direct working relationships with CBO, labor, workforce partners, and contractors to provide support services to targeted workers</li> <li>• Agency has direct working relationships with CBO, labor, workforce partners, and contractors to provide targeted hire workers with access to additional training</li> <li>• Agency has working relationships with CBO, labor, workforce partners, and contractors to directly engage communities about employment opportunities</li> <li>• Agency has direct working relationships with CBO, labor and workforce partners to create a referral system to place apprentice and journey-level workers on jobsites</li> </ul>
6. Invest in Pre-Apprenticeship and Apprenticeship Programs	<ul style="list-style-type: none"> <li>• Agency has an apprentice utilization goal</li> <li>• Agency contractors have relationships with pre-apprenticeship programs</li> <li>• Apprenticeship programs have direct-entry agreements with pre-apprenticeship programs to reserve a percentage or number of available apprenticeship slots for qualified workers that also fit into an agency's targeted hire category</li> <li>• Agency has identified funds to support pre-apprenticeship programs over the long-term</li> </ul>
7. Enact Clear Reporting and Compliance	<ul style="list-style-type: none"> <li>• Agency has established an advisory board for monitoring and enforcement of policy</li> <li>• Agency has dedicated funding and resources for monitoring, evaluation, and compliance</li> <li>• Agency staff (or designated third-party) works directly with contractors to identify challenges and develop solutions to meet policy goals</li> <li>• Agency has set clear standards for "good faith" efforts</li> <li>• Agency has set clear penalties for non-compliance</li> <li>• Reporting and compliance information is publicly available</li> </ul>

Figure 4. Sample Outcome from Completed Evaluation Activity



### 7 Elements of a Successful Construction Careers Policy

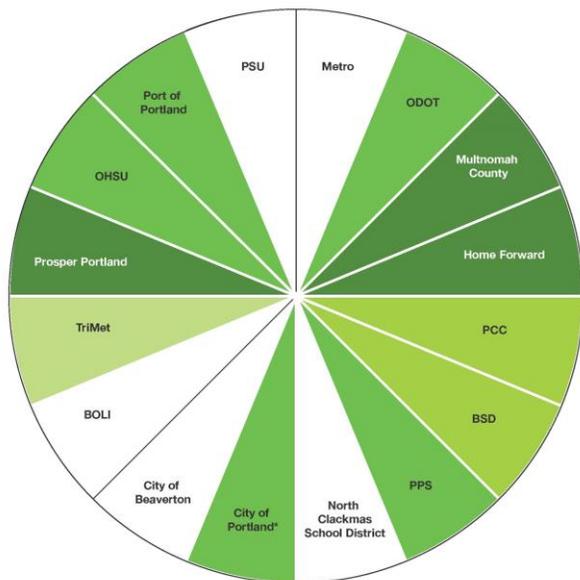
Element	Agency	Items
 <b>Realistic Targeted Hiring Goals</b>		A numeric commitment to hiring from a target population
		A defined target population(s) (e.g. low-income, women, minorities, etc.)
		Goals that are well-researched and grounded in data
		Staff (or designated third-party) dedicated to monitoring and tracking progress on the goals
		Public reporting of progress on goals (e.g. in print, website, publicly reported to Board)
 <b>Early Stakeholder Engagement</b>		Goals were informed by stakeholder feedback gathered at all stages of development
		Goals were informed by a diverse cross-section of stakeholders (e.g. other public agencies, elected officials, contractors, labor unions, local leaders, community-based organizations, local businesses, workforce development organizations, and potential employers)
		Goals were informed by the potential to leverage existing partnerships with public, private, non-profit partners
 <b>Ongoing Stakeholder Engagement</b>		Agency provides opportunities for stakeholders to understand policy and how to achieve its goals
		Agency staff at all levels demonstrate an understanding of and commitment to achieving goals
		Agency staff reports to a stakeholder committee, advisory group, or similar group, to report on progress in achieving goals
		Agency provides dedicated staff (or designated third party) to manage ongoing engagement around goals
 <b>Contractor Engagement</b>		Agency directs ongoing outreach to small, women-owned, minority-owned, veteran-owned firms to market potential bidding opportunities
		Agency provides training opportunities to educate small, women-owned, minority-owned, veteran-owned firms on how to successfully compete for contracts (e.g. certification, pre-qualification, labor compliance, fiscal training)
		Agency promotes ongoing networking / mentorship opportunities connecting large and small contractors
		Agency provides as-needed technical assistance for prime contractors having trouble meeting target hire goals
 <b>Recruitment of Targeted Workers</b>		Agency has direct working relationships with CBO, labor, workforce partners, and contractors to provide support services to targeted workers (e.g. childcare, transportation subsidies, application fee waivers)
		Agency has direct working relationships with CBO, labor, workforce partners, and contractors to provide targeted hire workers with access to additional training (e.g. skills assessments, career planning, job preparation)
		Agency has working relationships with CBO, labor, workforce partners, and contractors to directly engage communities about employment opportunities
		Agency has direct working relationships with CBO, labor, workforce partners, and contractors to create a referral system to place apprentice and journey-level workers on jobsites
		Agency has an apprentice utilization goal
 <b>Invest in Pre-Apprenticeship and Apprenticeship Programs</b>		Agency contractors have relationships with pre-apprenticeship programs
		Apprenticeship programs have direct-entry agreements with pre-apprenticeship programs to reserve a percentage or number of available apprenticeship slots for qualified workers that also fit into an agency's targeted hire category
		Agency has identified funds (from a variety of sources) to support pre-apprenticeship programs over the long term
		Agency has established an advisory board for monitoring and enforcement of policy
 <b>Enact Clear Reporting and Compliance</b>		Agency has dedicated funding and resources for monitoring, evaluation, and compliance
		Agency staff (or designated third-party) works directly with contractors to identify challenges and develop solutions to meet policy goals
		Agency has set clear standards for "good faith" efforts
		Agency has set clear penalties for non-compliance
		Reporting and compliance information is publicly available (e.g. print, website, publicly reported to the Agency's governing board)
		

**Legend**     Agency 1     Agency 2     Agency 3     Agency 4

Using this dot exercise, the facilitation team tallied up the results and created a series of pie charts that illustrate how agencies are performing in relation to the seven elements. For each element, the pie charts reflect the number of items or practices an agency currently has in place and ranks an agency's performance as a gradient from Low (light color) to High (dark color). Dark slices/pies indicate that an element is particularly common to the region. Lighter slices/pies indicate regional gaps or areas that may need more support. Figure 5 below shows actual agency outcomes for two of the elements: 1) Realistic Targeted Hiring Goals and 2) Recruitment of Targeted Workers (the full collection of pie charts is included in the Appendix).

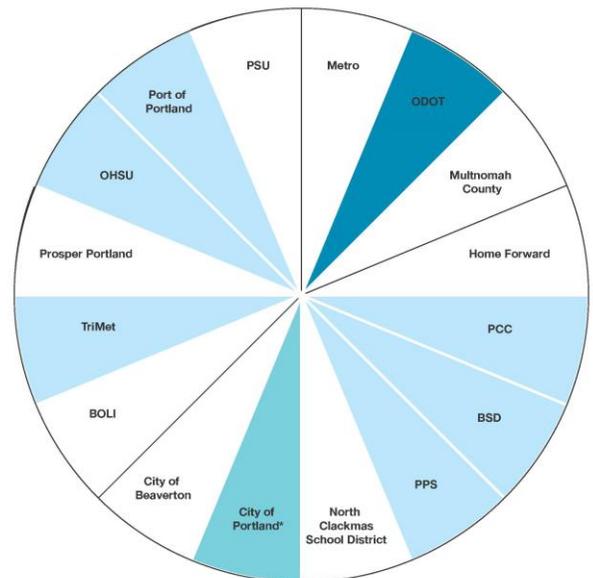
Figure 5. Agency Self-Evaluation of Performance on Hiring Goals and Recruitment of Targeted Workers

## Realistic Targeted Hiring Goals



\*For agencies that used half points, score is rounded down.

## Recruitment of Targeted Workers



\*For agencies that used half points, score is rounded down.

Once the exercise was complete, agency representatives discussed visible gaps and opportunities for leveraging shared efforts to address these gaps. Some common gaps that emerged from the pie chart visualizations include:

- **Targeted Hire Goals:** Out of 16 agencies, there are 10 agencies who have set agency-wide goals. Some agencies are subject to federal funding restrictions and can only set aspirational

goals, while other agencies have set goals on a project-by-project basis. There is also variation in the types of goals that agencies set (e.g. construction workforce diversity versus subcontractor diversity). Overall, this indicates a need for regionwide alignment on goals across agencies.

- **Comparing Large vs. Small-Scale Projects:** There is a wide range of project sizes and costs. Some agencies raised concerns about how contractors can still meet regional goals on smaller projects and how to apply goals and project thresholds across different project scales. Agencies will need to determine an appropriate project threshold that can trigger a workforce diversity policy.
- **Recruitment of Targeted Workers:** There is an ongoing challenge to recruit women and people of color in the construction trades, so there is a need to establish and sustain ongoing relationships with external stakeholders, such as CBOs, labor unions, and schools to create a pool of diverse workers.
- **Retention of Workers:** Some targeted workers face challenges and need additional supportive services to stay on the job (e.g. childcare, transportation, food and housing insecurity). The inconsistent nature of construction jobs also makes it difficult for workers to stay employed long-term.
- **Scaling Pre-Apprenticeship Programs:** Pre-apprenticeship training programs have limited capacity and there is no dedicated or consistent funding stream to scale their services and programs. Pre-apprenticeship programs can serve as a bridge to the construction trades particularly for women and people of color.
- **Early Education and Marketing Construction Careers:** Exposure to the construction trades is lacking in K-12. Construction trades need to be marketed as viable career paths on par with a 4-year college degree. CTE Programs (at both K-12 and community college level) should be evaluated to ensure that existing curriculum teaches skills students need to enter trades and be successful.
- **Union vs. Non-Union Participation:** How to ensure that all contractors can equally compete on projects. Public Owners acknowledged that contractors of all sizes should also provide feedback and buy-in to construction careers policy.
- **Finance Strategies:** Need to establish a funding set-aside for different aspects of construction ecosystem (e.g. technical assistance, PATP support, supportive services, etc.). Public owners acknowledge this may take legislation to fund and were interested in exploring other funding strategies at a regional level.

These gaps served as the basis for sub groups (see Section C). ELA then worked to condense the gaps above into common themes for three subgroups, so that each subgroup will directly address specific gaps and work to identify potential solutions that will eventually inform the draft regional framework during Phase II and III.

## C. Began to Identify Solutions to Ecosystem Gaps

Based on the ecosystem assessment described above, Workgroup members joined the following three sub groups that would directly address the gaps or deficiencies observed:

- 1) **Goals and Accountability** – Addresses goals, large vs. small projects, union vs. non-union participation
- 2) **Driving Demand** – Addresses finance strategies, union vs. non-union participation, and demand-side recruitment and retention strategies
- 3) **Creating Supply** – Addresses finance strategies, early education and marketing, supporting pre-apprenticeship programs, and supply-side recruitment and retention strategies

Each sub group was tasked with determining their workplan and deliverables through January 2019 to help inform recommendations for the overall Workgroup’s draft regional framework. Sub groups meet in person during Workgroup meetings and convene at least once (via conference call) between Workgroup meetings. The table below summarizes the purpose of each Workgroup.

Figure 6. Summary of Sub Groups, Purpose, and Final Deliverables

Sub Group	Purpose and Final Deliverable
Goals and Accountability	<p>Recommend a regionwide goal(s) for workforce diversity; accountability and enforcement mechanisms to ensure goal(s) are met</p> <p><b>Deliverable:</b> Outline with a proposed workforce diversity goal(s); recommendations for tweaking goals based on funding sources, size of contracts, etc.; and recommendations for ongoing accountability and oversight that will inform the regional framework.</p>
Driving Demand	<p>Discuss strategies that create a demand for a diverse construction workforce on public projects. This group will recommend procurement structures that create incentives and supports for small/large, union/non-union contractors to achieve construction diversity goals.</p> <p><b>Deliverable:</b> Outline with recommendations for procurement, such as standardized provisions and best practices that will inform the regional framework and drive demand for a diverse workforce.</p>
Creating Supply	<p>Discuss how to scale the recruitment of targeted workers to match the needs of the region; how to connect workers to pre-apprenticeship programs that ensure job readiness, and; Strategies to retain workers over the long term to meet regional construction demands. The group will also discuss marketing and messaging strategies to engage young people in the trades.</p>

	<b>Deliverable:</b> Outline of strategies to address supply gaps and challenges
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ELA developed workplans for each sub group to ensure groups remain organized and produce a work product within the time allotted. Individual sub group Workplans are included in the Appendix.

## D. Engaged Stakeholders to Understand their Priorities and Needs

Oregon Metro facilitated an external engagement process concurrent to the C2P2 Workgroup. The stakeholders included representatives from: Labor, NAMC-Oregon, Pre-Apprenticeship Training Programs, Community Based Organizations, General Contractors, and Subcontractors. Representatives from these groups were invited to Meeting #4 (October 2018) to meet the Workgroup and speak about the following:

- What are some gaps your stakeholder group sees in Greater Portland’s construction workforce ecosystem?
- What are barriers your stakeholder group perceives in achieving a diverse, inclusive construction ecosystem?
- What are some potential solutions for addressing the gaps and/or barriers you describe?
- What insights or resources can you provide the Workgroup as they develop recommendations for creating an inclusive construction ecosystem?

Common themes emerged from the presentations, as summarized below (not an exhaustive list, and not in order of priority):

- **Ongoing need for Career Technical Education (CTE)** at K-12 and Community Colleges.
- **A lack of affordable childcare and other supportive services** (“soft skills”) pose a barrier to job seekers looking to enter the construction trades.
- **Interactive “unconscious bias” trainings** should be developed and enforced at all worksites, so all workers can feel comfortable on the job.
- **Strong preference for “alternative” rather than “low bid” contracts**, which can allow small firms to compete for projects.
- Strong support for Public Owners to **develop a predictable pipeline of work** so GCs/small contractors can scale up in accordance with demand.

- There is a lack of consistent **funding for pre-apprenticeship training programs**.
- Stakeholders all agreed on **the need to diversify the workforce to meet the demand**. Stakeholders acknowledged the need to form new partnerships to recruit workers and focus on retention.

### III. NEXT STEPS

As we enter Phase II of this project, we anticipate the following “critical path” items.

1. **Continue to support Public Owner Sub Groups in the development of recommendations for the Regional Framework.** We will rely on the expertise and resources of Workgroup members and external stakeholders to ensure recommendations leverage existing knowledge and available resources.
2. **Facilitate a training on Project Labor Agreements.** Julian Gross, an attorney with two decades of experience in community benefits agreements and other community development initiatives, will present an overview of PLAs, highlight key definitions, and outline the PLA negotiation process to the Workgroup. He will also meet one on one with Workgroup agencies.
3. **Vet the Draft Framework.** Once produced, the Workgroup will vet the Draft Framework with agency-level executives and external stakeholders. ELA will update the Framework based on comments and feedback received.
4. **Other Considerations.** We will engage agency level executives to discuss critical path issues, including by not limited to: 1) identifying funding sources to support regional collaboration; 2) developing common tracking systems to ensure progress towards set goals, and 3) ongoing organizational structure(s) to ensure regional efforts are coordinated.

## **Appendix**

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## I. Workgroup Meeting Notes

### Oregon Metro C2P2 Public Owners Workgroup

Workgroup Meeting #1

Friday, July 13, 2018

8:30 AM – 11:00 AM

Ecotrust

Frank Billy Jr. Conference Room

721 NW 9<sup>th</sup> Ave, #200

Portland, OR 97209

**Facilitation Team:** Cecilia Estolano, Andri Tai-Ward (Estolano LeSar Advisors (ELA))

**Participants:** Angela Crain (ODOT), Aidan Gronauer (PPSD), Andy Shaw (Metro), Berit Stevenson (Home Forward), Bill Bowen (OHSU), Bobbi Matthews (Port of Portland), Chris Tinnin (PSU), Emerald Walker (Port of Portland), Grace Wong (City of Beaverton), John Cardenas (Prosper Portland), John Gardner (TriMet), Liz Smith-Currie (Multnomah County), Linda Degman (PCC), Lee Fleming (Multnomah County), Mayra Arreola (Prosper Portland), Molly Washington (City of Portland), Paul Odenthal (Beaverton School District), Peter Garcia (Home Forward), Raahi Reddy (Metro), Rebecca Finch (OHSU), Steve Simms (BOLI) , Steve Witter (TriMet)

#### I. Welcome and Presentation from Oregon Metro on C2P2 Program and Racial Equity Plan

Raahi Reedy (Metro) welcomed the group and provided a brief overview of the C2P2 Program grounded in Metro's *Strategic Plan to Advance Racial Equity, Diversity, and Inclusion*.

#### II. Group Introductions

Cecilia Estolano (ELA) led the group through a round of introductions. Workgroup members stated their name, title, organization, and an example of a time someone gave them a leg up, either personally or professionally.

#### III. Review Draft Memorandum of Understanding (MOU) and Ground Rules

Cecilia provided an overview of the draft MOU and proposed ground rules and instructed Workgroup members to review the documents within their respective agencies and provide red line comments to ELA by Monday, July 23.

#### IV. Workplan

Cecilia reviewed the draft workplan for the next nine Workgroup meetings and mapped out the proposed outcomes and deliverables for each meeting. The final deliverable will be a

draft Regional Framework. Cecilia also explained the parallel workplans of the stakeholder groups (labor, pre-apprenticeship partners, CBOs, developers, and contractors).

## V. Elements of a Successful Construction Careers Policy

Cecilia presented seven elements of a successful construction careers policy, adapted from the UCLA Labor Center report on creating a local and targeted hire policy for the construction industry. The following agencies shared updates based on their survey responses on their own programs and successes related to the following elements:

1. **Realistic Targeted Hired Goals** - Prosper Portland shared their targeted hire goals, actual performance, and public reporting practices.
2. **Early Stakeholder Engagement** - Oregon Metro shared their stakeholder engagement process in the context of their *Strategic Plan to Advance Racial Equity, Diversity, and Inclusion*.
3. **Ongoing Stakeholder Engagement** – City of Portland shared several of their ongoing efforts, including the Fair Contracting Forum, Community Recruitment Resources posted on their website, and Workforce Program process for hiring workers.
4. **Contractor Engagement**
  - **Educational Opportunities** – TriMet shared how they work directly with prime contractors based on forecasting and performance.
  - **Mentorship Opportunities** - Port of Portland shared the long-term success of their Mentor-Protégé program.
5. **Recruitment of Targeted Workers** – Home Forward shared how they implement HUD’s Section 3 requirements to hire workers from HF housing communities.
6. **Invest in Pre-Apprenticeship and Apprenticeship Programs** – Oregon Health & Science University shared their efforts working with contractors that hire from pre-apprenticeship and apprenticeship programs, specifically on the Southwest Waterfront Project Apprenticeship Agreement.
7. **Enact Clear Reporting and Compliance** – Multnomah County – *pushed to next meeting based on time constraint*

## VI. Next Steps

1. **MOU and Ground Rules Comments** – Workgroup members should circulate the draft MOU and Ground Rules to their respective agencies and provide comments back to ELA by Monday, July 23.
2. **SWOT Analysis** – Workgroup members should fill out the SWOT Analysis templates and return to ELA by Wednesday, August 8.

## Oregon Metro C2P2 Public Owners Workgroup Workgroup Meeting #2

Wednesday, August 15, 2018  
1:00 PM – 3:00 PM

Laborers Local 737 – Training Center  
17230 NE Sacramento Street  
Portland, OR 97230

### Meeting Participants:

- **Group 1:** Aidan Gronauer and Stephanie Soden (PPS), Kurt Simonds and Linda Degman (PCC), Paul Odenthal (Beaverton School District)
- **Group 2:** Heidi Rahn and Raahi Reddy (Metro), Jamie Waltz (Multnomah County), Angela Crain (ODOT), Berit Stevenson and Peter Garcia (Home Forward)
- **Group 3:** Cathleen Massier, Molly Washington, and Molly Gardiner (City of Portland), Cadence Petros (City of Beaverton), John Gardner and Steve Witter (TriMet)
- **Group 4:** Chris Tinnin and Ron Blaj (PSU), Bill Bowen and Rebecca Finch (OHSU), Bobbi Matthews and Emerald Bogue (Port of Portland)
- **Facilitation Team:** Cecilia Estolano, Cynthia Guzman, Andri Tai-Ward (Estolano LeSar Advisors)
- **Other Staff:** David Fortney (Oregon Metro), Noelle Dobson (Oregon Metro), Samantha Wu Rose (Oregon Metro)
- **Not in Attendance:** David Hobbs (NCSD), Steve Simms (BOLI), Lee Fleming and Liz Smith Currie (Multnomah County)

### I. **Tour of Laborers Training Facility**

Workgroup members had an opportunity for a guided tour of the Laborers Local 737 training facility.

### II. **Welcome and Agenda Review**

Aida Aranda (Apprentice Coordinator), Zack Culver (Business Manager) and Ben Guzman (Lead Organizer) welcomed workgroup members to the Laborers Local 737 space. They provided a brief history of the union and an overview of training center services.

Cecilia provided an overview of the meeting agenda and welcomed new workgroup members in attendance: Stephanie Soden (PPS), Kurt Simonds (PCC), Cathleen Massier and Molly Gardiner (City of Portland), Cadence Petros (City of Beaverton), Ron Blaj (PSU), Heidi Rahn (Metro), and Jamie Waltz (Multnomah County).

### III. **SWOT Analysis Breakout Groups**

Workgroup members met in their breakout groups (comprised of four agencies each) to present their SWOT analysis results. Agencies addressed the following questions in their reports and began to identify common strengths, weaknesses, and potential solutions:

- What are biggest gaps or challenges our agency needs to address?
- What are the most promising opportunities our agency needs to capitalize/leverage?

### IV. **Elements of a Successful Construction Careers Policy: Worksheet Exercise**

In breakout groups, workgroup members reviewed and completed the “*Seven Elements of a Successful Construction Careers Policy*” dot exercise. The exercise outlined a set of measurable practices for each of the seven elements. Agency representatives were directed to post a colored dot if they currently have those elements. The completed worksheet shows areas that the agency is doing particularly well in along with visible gaps and challenges. Agencies then discussed common themes and opportunities for leveraging shared efforts to address gaps.

### V. **Elements of a Successful Construction Careers Policy: Gallery Walk and Discussion**

Groups displayed their completed worksheets and one member from each group shared high-level observations from the exercise, including elements they were strong or weak in and highlighting examples from certain agencies that had strengths/weaknesses over other. Some common themes that emerged include:

- **Targeted Hire Goals**
- **Recruitment of Targeted Workers**
- **Retention of Workers**
- **Scaling Pre-Apprenticeship Programs**
- **Comparing Large vs. Small-Scale Projects**
- **Early Education and Marketing Construction Careers**
- **Union vs. Non-Union Participation**

- **Finance Strategies**

These topics may eventually become the basis of subgroups. Subgroups may meet between workgroup meetings to discuss strategies that address gaps and deficiencies in Greater Portland's construction careers ecosystem.

## **VI. Next Steps and Adjourn**

Cecilia discussed next steps for the third meeting on September 5, 2018, including finalizing the MOU and identifying speakers. She also provided brief updates on how the worksheet exercise will be used to create an overall ecosystem assessment.

## **C2P2 Public Owners Workgroup**

Workgroup Meeting #3

Wednesday, September 5, 2018

1:00 PM – 3:00 PM

Ecotrust

Frank Billy Jr. Conference Room

721 NW 9th Ave, #200

Portland, OR 97209

**Facilitation Team:** Cecilia Estolano, Cynthia Guzman (Estolano LeSar Advisors (ELA))

### **Participants:**

**Group 1: Goals and Accountability:** Berit Stevenson (Home Forward), Bill Bowen (OHSU), John Gardner (TriMet), Molly Washington (City of Portland), Heidi Rahn (Oregon Metro), Lee Fleming (Multnomah County)

**Group 2: Driving Demand:** David Hobbs (North Clackamas School District), Grace Wong (City of Beaverton), Linda Degman (PCC), Peter Garcia (Home Forward), Rebecca Finch (OHSU), Raahi Reddy (Metro), Kimberly Michell-Phillips (Port of Portland), Steve Witter (TriMet), Cathleen Massier (City of Portland)

**Group 3: Creating Supply:** Jamie Waltz (Multnomah County), Liz Smith Currie (Multnomah County), Bethany DeMello (Portland State University), Paul Odenthal (Beaverton School District, Max Bernstein (ODOT), Aidan Gronauer (PPS), Stephanie Soden (PPS), Kurt Simonds (PCC), John Cardenas (Prosper Portland)

**Other Staff:** David Fortney (Oregon Metro), Noelle Dobson (Oregon Metro)

### **I. Welcome, Agenda Review, and Discuss Ecosystem Assessment**

Cecilia provided an overview of the meeting agenda. Cecilia also provided brief remarks on the outcome of the “dot exercise” performed during Meeting #2. ELA compiled the dot exercise into a series of pie charts that illustrate how agencies are performing in relation to the Seven Elements of a Successful Construction Careers.

### **II. Best Practices Presentation: Laurence B. Frank, President, Los Angeles Trade Technical College**

Larry Frank, President, Los Angeles Trade Technical College, provided a webinar presentation on how public owners can use apprenticeships, superseding agreements, and prevailing wage requirements as workforce development tools.

### III. Breakout Groups

The Workgroup split into the following sub groups:

- Goals and Accountability
- Driving Demand
- Creating Supply

Sub groups will develop tangible recommendations (e.g. goals language, template procurement language, etc.) that could be used as part of the C2P2 framework. The sub groups are expected to meet periodically between now and January 2019.

The sub groups were tasked with the following:

- Review and discuss draft purpose language and make additions/edits as needed;
- Discuss outcomes for their sub group;
- Discuss resources needed to accomplish outcomes;
- Develop a Workplan (to be presented at Meeting #4);
- Set a check in between Meeting #3 and Meeting #4 to discuss workplan and progress towards outcomes.

### IV. Next Steps

A representative from each subgroup provided an overview of topics discussed during the breakout, edits to their purpose (if any), and potential next steps.

## C2P2 Public Owners Workgroup

Workgroup Meeting #4

Wednesday, October 3, 2018

1:00 PM – 3:00 PM

Prosper Portland  
222 NW 5th Ave  
Portland, OR 97209

**Participants:** Mayra Arreola (Prosper Portland), Ron Blaj (PSU), Emerald Bogue (Port of Portland), John Cardenas (Prosper Portland), Angela Crain (ODOT), Linda Degman (PCC), Lee Fleming (Multnomah County), Peter Garcia (Home Forward), John Gardner (TriMet), Aiden Gronauer (PPS), David Hobbs (North Clackamas School District), Bobbi Matthews (Port of Portland), Cathleen Massier (City of Portland), Heidi Rahn (Metro), Liz Smith Currie (Multnomah County), Berit Stevenson (Home Forward), Molly Washington (City of Portland), Jamie Waltz (Multnomah County), Steve Witter (TriMet), Grace Wong (City of Beaverton)

**Other Staff:** David Fortney (Oregon Metro), Nyla Moore (Metro),

**Other Stakeholders:** Andre Bealer (NAMC), Mike Clifford, Pat Daniels (Constructing Hope), Patrick Gihring (WSI), Kelly Haines (WSI), Kelly Kupcak (OTI), John Lindenthal (Metro), Nate McCoy (NAMC), Andrew McGough (WSI), John Mohlis, Gabriele Schuster (Metro), Nancy Strening (Metro), Chris Woo (Metro),

**Facilitation Team:** Cecilia Estolano, Cynthia Guzman (Estolano LeSar Advisors (ELA))

### I. Welcome and Agenda Review

Cecilia welcomed the group and provided an overview of the Agenda.

Cecilia reminded Public Owners that they're at the halfway point of the process, and suggested they present an update on C2P2 to their internal leadership. The Workgroup will view a draft framework in January that outlines strategies to advance construction workforce equity in the region.

The facilitation team can provide language that summarizes C2P2 to date for inclusion in staff reports or other updates.

### II. Stakeholder Presentations and Discussion

Oregon Metro facilitated an external engagement processes in parallel to the Public Owners workgroup. The stakeholders include: Labor, NAMC-Oregon, Pre-Apprenticeship

Training Programs, Community Based Organizations, General Contractors, and Subcontractors. Stakeholders were asked to provide an overview of the following:

- What are some **gaps** your stakeholder group sees in Greater Portland's construction workforce ecosystem?
- What are **barriers** your stakeholder group perceives in achieving a diverse, inclusive construction ecosystem?
- What are some potential **solutions** for addressing the gaps and/or barriers you describe?
- What **insights or resources** can you provide the Workgroup as they develop recommendations for creating an inclusive construction ecosystem?

### 1. Labor (John Mohlis)

#### Gaps/Barriers

- There is an ongoing need for Career Technical Education (CTE) at the K-12 level. High school students do not know what the Trades do, and Trades are often viewed as a less desirable alternative to college.
- Childcare is a recurring issue for working parents. Construction schedules do not line up with traditional childcare – workers often need to be on the site by 6 am or earlier.
- Reliable transportation is recurring issue as workers need to often travel long distances to get to the construction site.
- Workers need to be proficient in English to be successful on the job.

#### Solutions

- We need construction worker friendly reimbursable childcare.
- All workers on the job need to go through an interactive respectful worker training to ensure a welcoming and supportive environment for a diverse workforce.
- Some Trades only accept applications every few years. A “direct application” process would allow for job seekers to apply at any time to get in the queue, rather than wait for the next opening.

- Oregon Tradeswomen trains “career ambassadors,” who introduce and encourage women to join the construction industry. This is an effective approach that should be scaled up.
- If we are serious about creating a diverse construction workforce, the tone needs to come from the top. Trades leadership needs to be bought in and enforce values at all levels of the organization.

## 2. NAMC-Oregon (Andre Bealer, Nate McCoy)

### Gaps

- Minority Business Enterprises (MBEs) are generally understaffed and rely on their own resources to recruit workers.
- MBEs struggle with maintaining a steady pipeline of work – if an MBE cannot keep a worker employed, they will go elsewhere.
- MBEs have trouble in transferring knowledge of how to run a small business to future generations – which may create a lack of diverse business owners in the future.
- Because of their small size, it is difficult to keep wages and benefits competitive with larger firms.

### Barriers

- MBEs lack the resources to run workforce development programs.
- There is a lack of consistency between public agencies. Once an MBE figures out how to work with one agency, they tend to stick with that agency.
- Labor signatory costs are quite burdensome for MBEs, which puts them at a disadvantage when competing against union firms.
- There is a lack of comprehensive CTE programs in high schools.
- There is a lack of “soft skills” training: communicating properly, showing up on time, critical thinking, etc.

## Opportunities

- MBEs would like to be more involved with community-based organizations to let them know when job opportunities are available.
- There is a lack of outreach and recruitment information for minorities in construction.

## Strategies

- NAMC supports “alternative” rather than low bid contracting. MBEs have a hard time competing against larger firms in the low bid market.
- Bonding projects is an ongoing issue for MBEs.
- NAMC is interest in set-aside opportunities: where contracts can compete for projects with contractors of similar size.
- NAMC supports Public Owners’ efforts to create a predictable pipeline of work. Creating a sustainable pipeline is important in developing the next generation of MBE workers and owners.
- NAMC sees a lack of incentives to use training and hiring programs. MBEs are often responsible for the cost of workforce training.
- NAMC members report issues with training in apprenticeship programs (union and non-union). Graduates are not always equipped with the skills MBEs need.

### **3. Pre-Apprenticeship Training Programs (PATP) (Kelly Kupcack)**

- PATPs are critical to the success of the construction industry. Oregon Tradeswomen provides an 8-week training course: training covers housing, resume building, and skill building.
- OTI provides support throughout a worker’s job placement. OTI provides case management and other supportive services once workers are placed.
- OTI gets its funding from a mix of grants and other sources – it’s not largely industry funded.

## Challenges

- There is no consistent funding for PATPs. OTI would support a public set-aside to sustain PATPs over the long term.
- OTI places 87% of trainees into jobs. They have a 70% retention rate.

### **3. Community Based Organizations (CBOs)** (Noelle Dobson)

- Oregon Metro hosted a roundtable lunch with CBOs to introduce them to the C2P2 program. Participants were also provided with stipends for their time.
- The invited CBOs are active in workforce development and other related fields. Participating CBOs shared the experiences of their community members and clients.

#### Challenges

- Community members and clients in need are looking for a job right away – an 8-week training program is a barrier for most.
- Some members have an incarceration history, lack legal immigration status, or cannot speak English – all can pose barriers to employment.
- Participating CBOs emphasized a need to Public Owners to hear directly from community members to learn about their lived experience, not just through CBOs.
- CBOs acknowledged they can do more to encourage members to consider the construction fields – some admit they have been too focused on college-track careers.
- CBOs cited a lack of funding, particularly for groups doing K-12 STEM education.

### **4. General Contractors (GC)** (Mike Clifford)

- Mike brought several GC representatives – often competitors - to discuss how to strengthen the construction industry.
- GCs are concerned that they do not have the workforce needed for the projects Public Owners hope to build in the coming years.
- GCs understand the need to drive diversity – GCs need to look for people in new places and work on strategies to retain workers.

## Gaps

- GCs see a retention gap at the apprentice to journeyman period. Apprenticeship programs have focused on “weeding” people out, they must change their focus to be more supportive.
- GCs acknowledge a lack of people of color and women in the Trades.
- GCs question is goal setting is the right approach to drive change in the industry.
- New workforce is lacking in basic math skills.
- There is a need for “inclusiveness” training at job sites. Construction personnel is transitory – they are constantly moving from site to site. The workplace culture may change depending on the site. It is difficult to enforce good practices.
- The historical distrust between African Americans and the Trade Unions needs to be addressed.
- GCs do not simply want to bring on apprentices to meet quotas. They want apprentices to be committed for the long term. GCs want to ensure a set number of journeymen and foremen to ensure quality work.
- Lack of childcare is an ongoing issue.
- GCs report a lack of consistency between public agencies, particularly on reporting mechanisms.

## Solutions

- A regional program has the potential to create efficiencies for contractors, as well as address training, hiring, and retention issues.
- Unconscious bias and diversity inclusion training will go a long way to ensuring everyone feels welcome on the job.

### **5. Sub-Contractors** (Chris Woo)

- Oregon Metro convened a table of sub-contractors. Much of their feedback coincides with that of other stakeholders.

- Subs support emphasizing trades as a viable career, and not a less ideal alternative to college.
- Subs lack the back office/administrative staff needed to tackle Public Owner reporting requirements.
- Alternative procurements are ideal, it's hard for small businesses to compete based on low cost alone.
- Low bid contracting is disincentivizing a diverse workforce.

### 6. Questions (All)

- How should we address a market downturn, when the need for workers will decrease?
  - We need to be clear about market projects and not over train;
  - Aging workforce should not be ignored – they will be a need to hire;
  - If the market cools, the role of government should be to step in and provide gap support services to make sure opportunities still exist for the most vulnerable (low income, POC, women, etc.).
- What are we doing (legislation, policy, programs) to build interest in the Trades?
  - We need to do more to meet young people where they are. More programming and outreach is needed. We need to provide young people with summer youth programs and internships (e.g. Summer Works) that provides paid internships that can lead to jobs.

### III. Presentation from Worksystems, Inc. (WSI)

Worksystems, Inc. (Kelly Haines, Andrew McGough, and Patrick Gihring) provided an overview of their organization, programs, and clients they serve.

Worksystems, Inc. is a 501(c)3 non-profit organization that pursues and invests resources to improve the quality of the workforce in the City of Portland, Multnomah and Washington Counties. WSI develop policies and design workforce development programs and services delivered through a network of local partners to help people get the skills, training and education they need to go to work or to advance in their careers. Their partners include employers, labor groups, government, community colleges, high schools, community-based and economic development organizations.

WSI serves as a funder, convener, connector, and evaluator, but does not compete with direct workforce development services. They also have a housing and childcare assistance programs – which could help address the concerns expressed by stakeholders.

Kelly Haines serves as the Construction Sector Lead.

#### **IV. C2P2 Sub Group Presentations and Discussion**

Representatives from the C2P2 Sub Groups provided updates on their work to date.

1. Goals and Accountability
2. Driving Demand
3. Creating Supply

#### **V. C2P2 Sub Group Check Ins**

The Workgroup broke up into respective Sub Groups to discuss next steps. External stakeholders were welcome to join the Sub Groups of their choice to provide additional feedback and insights.

## II. Workgroup Survey

### Oregon Metro Public Owners Workgroup Survey

Oregon Metro's Construction Career Pathways Project (C2P2) seeks to address systemic barriers to employment and create a regional roadmap for government that will support and grow a diverse construction workforce; deliver effective investments in the construction workforce system; and promote equitable growth in the region's economy. This survey is intended to better understand 1) the Workgroup's priorities and goals and 2) the landscape of agencies' own construction workforce diversity policies (if any) and accomplishments.

#### I. Agency Information

1. Agency Name:
2. Agency Representative:
3. Agency Website:
4. City/County:

#### II. Clear Goals

5. Does your agency have construction workforce diversity goal (or goals)? *Check yes or no.*
  - a. Yes
  - b. No

If yes, list your agency's definition and numeric goal.

- a. Low Income Workers:
- b. Women:
- c. MWBE:
- d. Other Groups (please specify):

*Please attach data if available.*

6. What year were these goals established?
7. What resources, if any, are your agency dedicating to achieving its construction workforce diversity goals?

#### III. Measuring Progress

8. Does your agency collect data on its construction workforce diversity?

- a. Yes
- b. No

*If yes, describe. If no, skip to next section.*

9. How is your agency performing on its construction workforce diversity participation goals? *For each group, note the latest recorded date.*

- a. Low Income Workers:
- b. Women:
- c. MWBE:
- d. Others (please specify):

*Please attach data if available.*

10. How often is this data collected? *Describe.*

11. Is this data available to the public? *Describe.*

12. Do you have a regular feedback mechanism to adjust practices based on performance?

#### **IV. Partnerships**

13. Does your agency have partnerships with **community based organizations** that provide recruitment and training for targeted workers? *If yes, describe.*

14. Does your agency have partnerships with organizations that provide **pre-apprenticeship training** programs (e.g. soft skills, math, etc.) for targeted workers? *If yes, describe.*

15. Does your agency have partnerships with **labor unions** that accept graduates from pre-apprenticeship programs to work on your agency's construction projects? *If yes, describe.*

16. Does your agency have partnerships with **contractors** that source employees from apprenticeship or other training programs? *If yes, describe.*

17. Does your agency have partnerships with **contractors** to promote the hiring of women and minority owned businesses? If yes, describe.

**V. Clear Policies**

18. Does your agency have a policy or program in place that directs the agency to implement your construction workforce diversity goal(s)? *If yes, copy/paste the policy or describe.*

19. Does your agency have a policy in place that directs the agency to engage in partnerships with CBOs, pre-apprenticeship programs, contractors and/or labor unions? *If yes, copy/paste the policy or describe.*

**VI. Project Labor Agreement**

*Project Labor Agreements (PLA) are contracts negotiated between the owner of a construction project and applicable labor unions that establish an agreement for a union workforce at least through the duration of a project. PLAs include rules of worksite conditions, project execution, and a protocol to resolve labor disputes without resorting to strikes and lockouts<sup>1</sup>.*

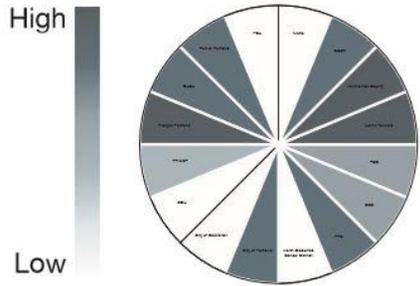
20. Describe your agency's experience working with Project Labor Agreements (PLA)?

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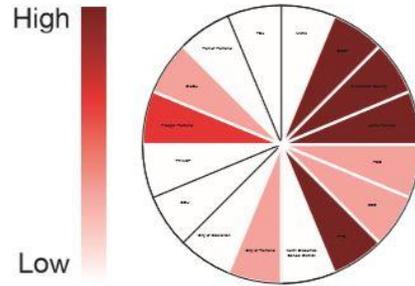
<sup>1</sup> UCA Labor Center, "Exploring Targeted Hire: An Assessment of Best Practices in the Construction Industry," March 2014, p. 105

## III. Ecosystem Assessment – Pie Charts

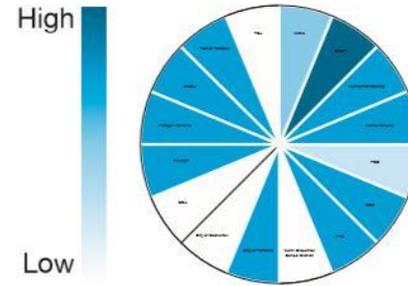
Realistic Targeted Hiring Goals



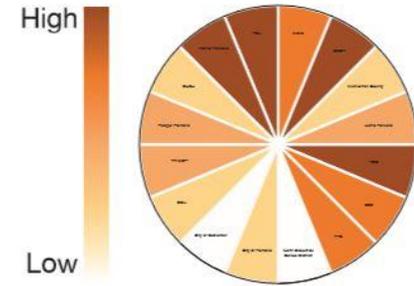
Early Stakeholder Engagement



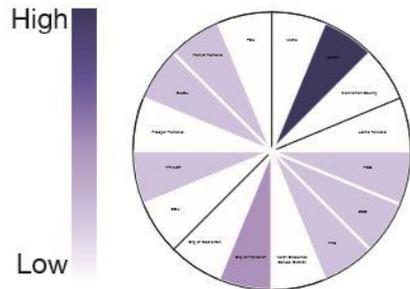
Ongoing Stakeholder Engagement



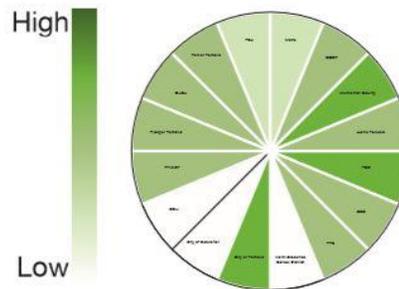
Contractor Engagement



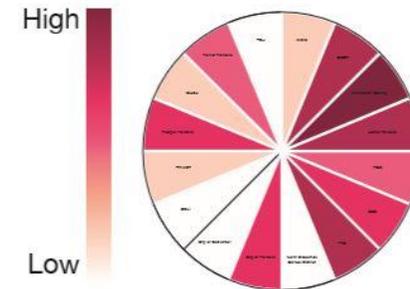
Recruitment of Targeted Workers



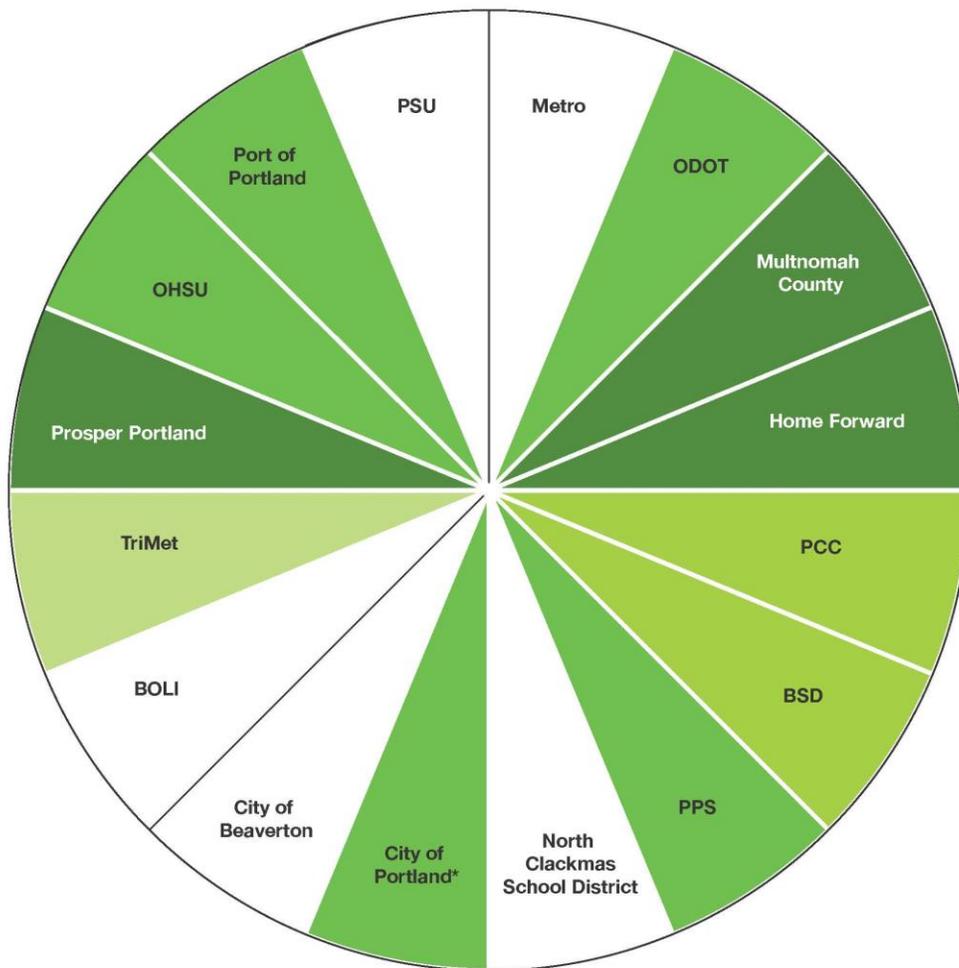
Invest in Pre-Apprenticeship and Apprenticeship Programs



Enact Clear Reporting and Compliance

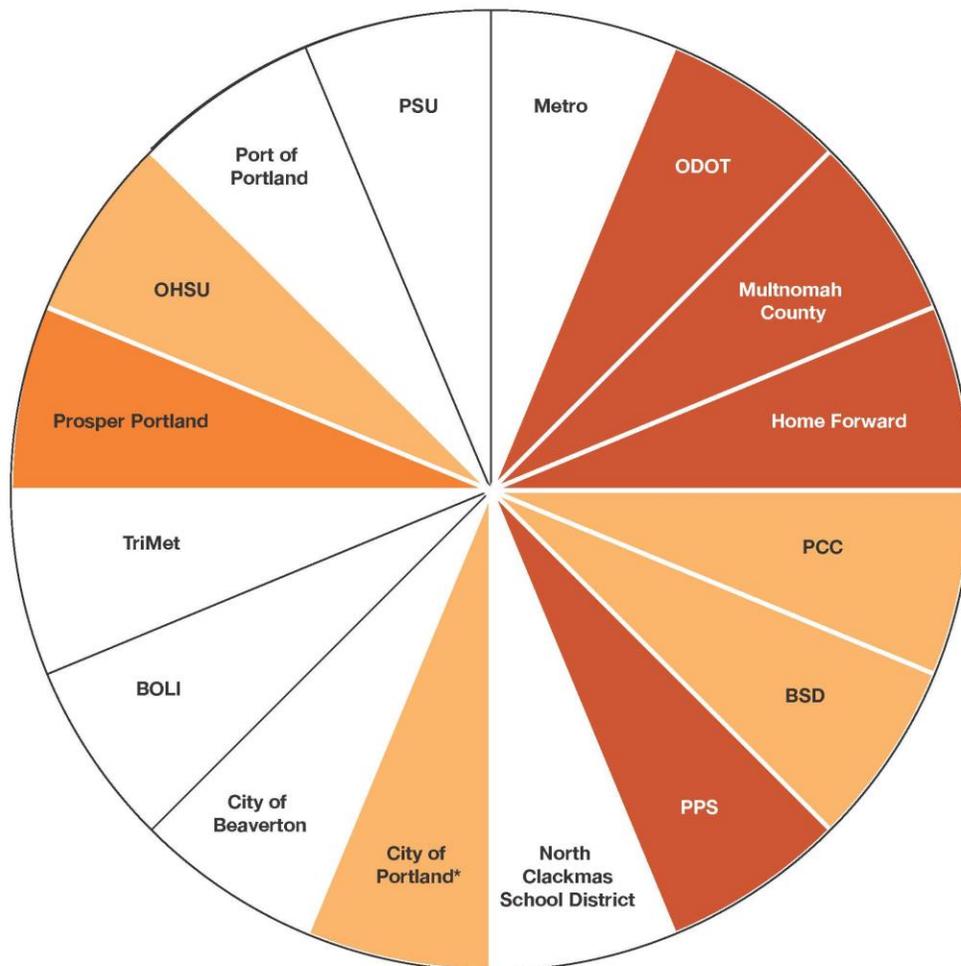


# Realistic Targeted Hiring Goals



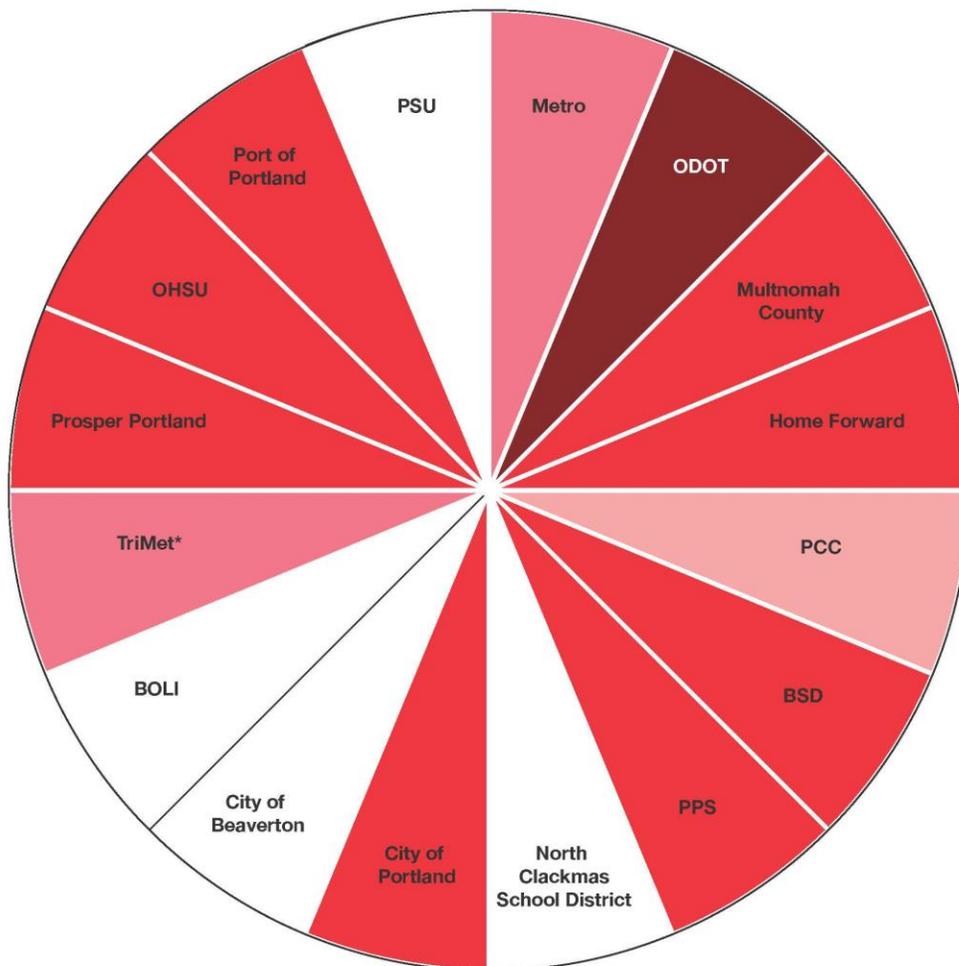
\*For agencies that used half points, score is rounded down.

# Early Stakeholder Engagement



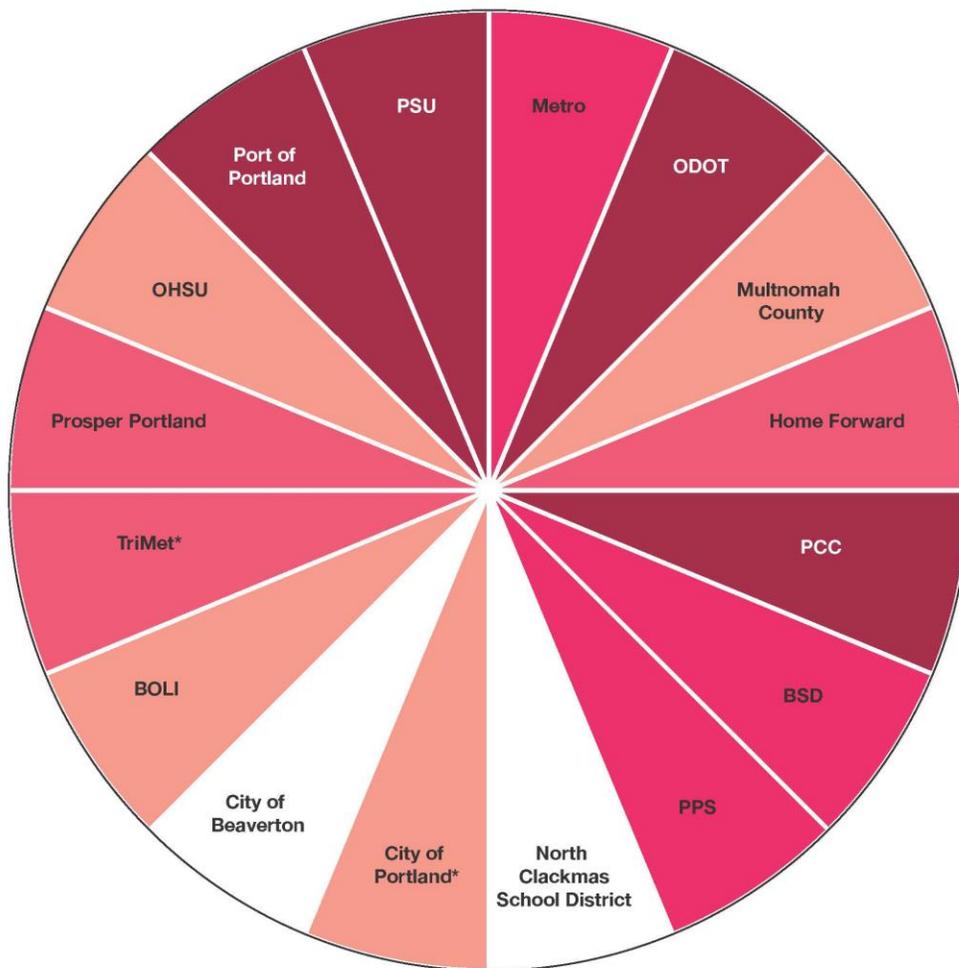
\*For agencies that used half points, score is rounded down.

# Ongoing Stakeholder Engagement



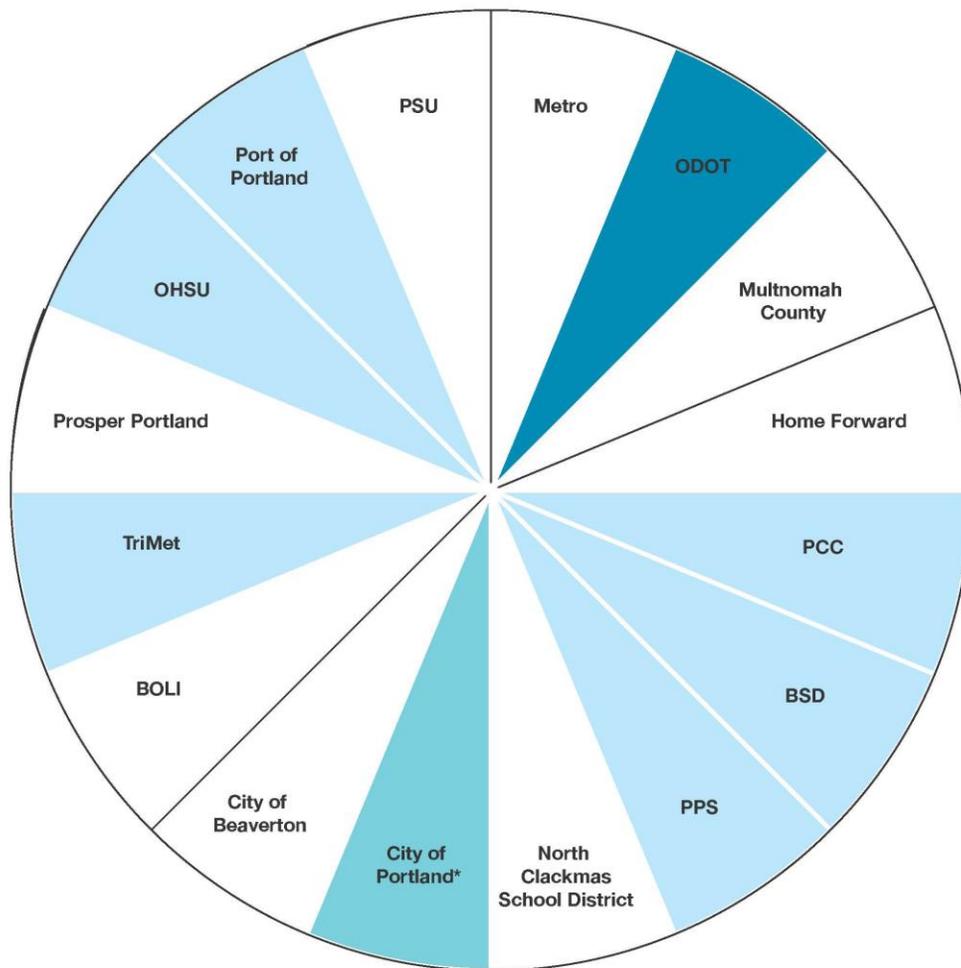
\*For agencies that used half points, score is rounded down.

# Contractor Engagement



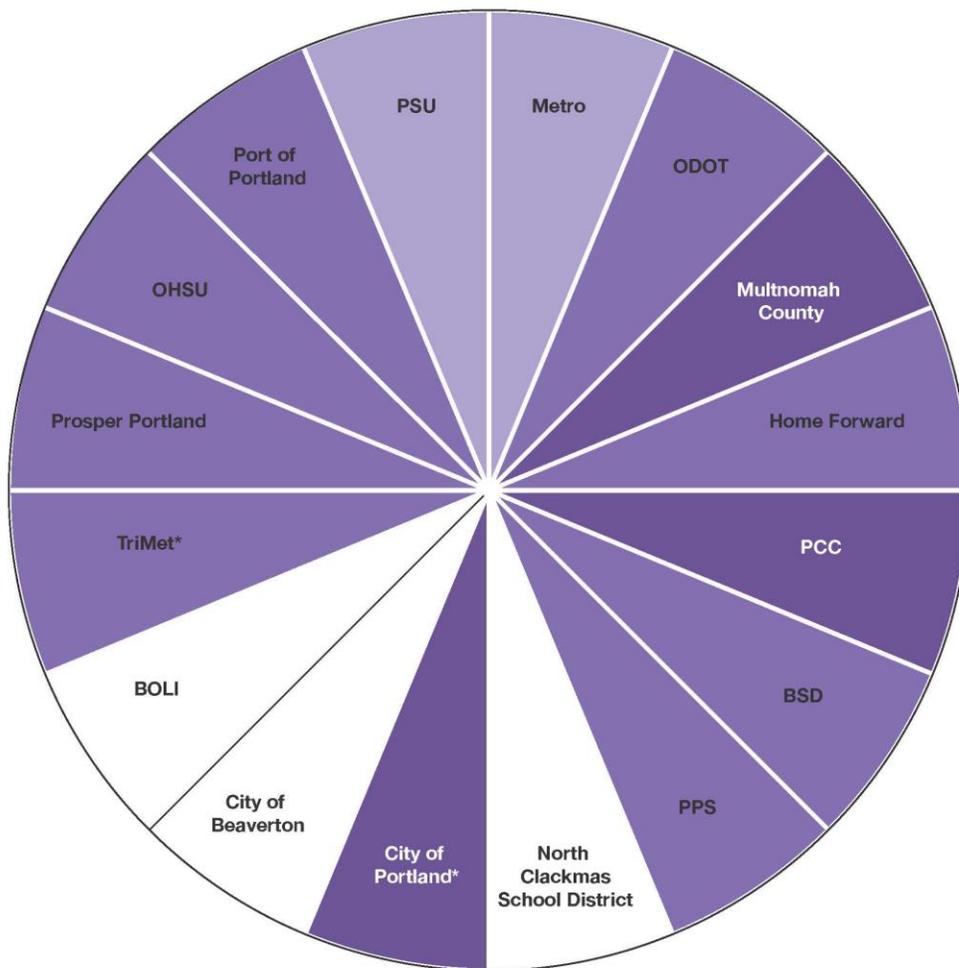
\*For agencies that used half points, score is rounded down.

# Recruitment of Targeted Workers



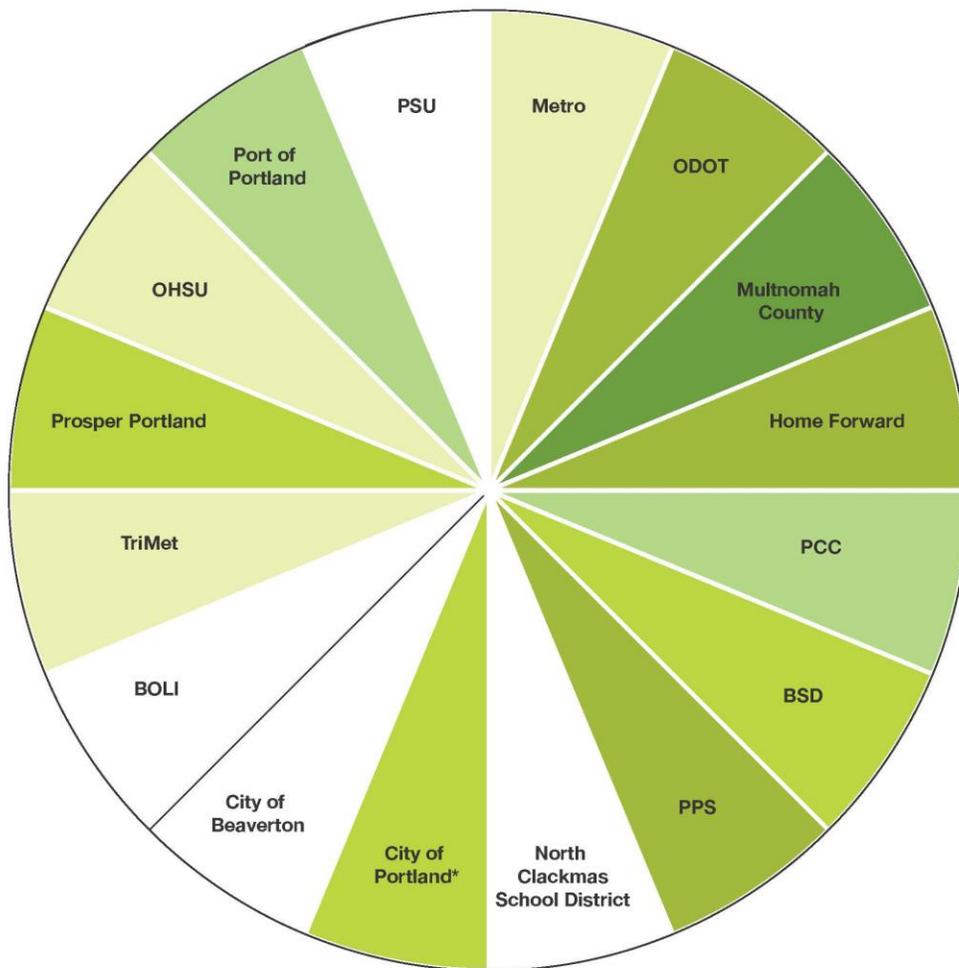
\*For agencies that used half points, score is rounded down.

# Invest in Pre-Apprenticeship and Apprenticeship Programs



\*For agencies that used half points, score is rounded down.

# Enact Clear Reporting and Compliance



\*For agencies that used half points, score is rounded down.

#### **IV. Sub Group Workplans**

##### **GOALS AND ACCOUNTABILITY**

###### **SUMMARY**

The Goals and Accountability Sub Group will recommend a region wide goal(s) for workforce diversity, as well as accountability and enforcement mechanisms to ensure goal(s) are met.

###### **I. Set a Draft Region Wide Goal**

The sub group has identified draft workforce diversity goals (*20% apprenticeships; 14% women; 25% minorities*). The sub group has shared the proposed workforce diversity goals with C2P2 members to understand any legal constraints in achieving these targets. Based on the data collected, the sub group will make recommendations to tailor these goals based on types of funding and legal restrictions.

###### **II. Ensure Draft Region Wide Goal is Realistic and Achievable**

The region wide goal is meant to be achievable but still encourage innovative approaches.

This sub group will also consider the following questions:

1. How to set goals for small and large construction contracts?
2. How to set goals for Trades that may have difficulty meeting diversity goals (e.g. smaller Trades, or Trades that have historically low numbers of women)?
3. How to apply diversity goals to subcontractors?

###### **III. Recommend Accountability and Oversight Measures**

The sub group will consider the following accountability and enforcement questions and provide recommendations:

1. How does a Public Owner track progress on goals? The sub group will discuss software currently used by other Public Owners (e.g. LCPtracker, Elations)
2. How does a Public Owner publicly report progress on goals? The sub group will discuss public reporting practices, such as reporting to a Board of Committee, posting updates online, etc.
3. How does a Public Owner hold a contractor accountable? The sub group will discuss various accountability structures, such as establishing a Governance Committee, Joint

Labor Management Committees, or similar.

4. How does a Public Owner penalize non-compliance? The sub group will discuss strategies such as liquidated damages, and others.

The subgroup will meet with Julian Gross in November to troubleshoot any issues.

#### **IV. Create a Final Product**

The final product will be an outline with a proposed workforce diversity goal(s); recommendations for tweaking goals based on funding sources, size of contracts, etc.; and recommendations for ongoing accountability and oversight that will inform the regional framework.

#### **TIMELINE**

**September 2018:** Review existing Public Owner goals and develop draft regional goal, based on existing research and what has been accomplished locally.

**October 2018:** Share draft regional goal with Public Owners; gather feedback and develop recommendations types of funding; size of contracts; and types of Trades.

**November 2018:** Discuss accountability and enforcement, develop recommendations; Meeting with Julian Gross (separate from C2P2 presentation) to troubleshoot issues.

**December 2018:** Finalize outline.

**January 2019:** Present to Workgroup.

#### **DRIVING DEMAND**

##### **SUMMARY**

The Driving Demand Sub Group will look at the ways in which public agencies can drive demand for a diverse construction workforce through their procurement and contracting language and practices.

##### **I. Review Existing Contracts and Determine Best Practices**

The sub group will also look at a suite of Public Owner bid documents to identify standardized provisions that best provide the following:

1. Incentives for contractors in bidding process for past diversity performance and compliance;

2. Accountability and clear recourse for contractors that are unable to perform on their contracts;
3. Requirements for a Construction Coordinator;
4. Monthly or quarterly reporting requirements;
5. Joint Labor Management Committee (or similar), to troubleshoot issues in meeting workforce diversity goals.

## **II. Review PLAs/CWAs and Determine Best Practices**

The sub group will review Project Labor Agreements (PLAs) and Community Workforce Agreements (CWAs) (from Multnomah County, City of Portland, Seattle Community Workforce Agreement) to identify the following:

1. Specific contracting provisions that have worked well;
2. Specific contracting provisions that may not have worked as well, and recommend edits/tweaks to encourage improved contractors performance;

The goal of this task is to identify key provisions that can go into a regional PLA/CWA or other superseding agreement. As part of this task, the sub group will meet with Julian Gross to troubleshoot specific issues.

## **III. Determine Strategies to Drive Goals in Bidding Process**

The sub group will also develop recommendations on how Public Owners can drive their goals in the bidding process:

1. Bidder's Conferences;
2. Mandatory construction site training;
3. Other marketing opportunities, as identified.

## **IV. Test with Stakeholders**

The sub group will convene a group of General Contractors and Sub Contractors (together or separately depending on timing and availability) to test concepts and gather feedback.

## **V. Create a Final Product**

The final product will be an outline with recommendations, standardized provisions and best practices that will inform the regional framework.

## **TIMELINE**

**October 2018:** Go through PLAs, bid documents, and identify best practices and key provisions.

**November 2018:** Review PLA provisions, bid documents, best practices, and decide what will go in the outline. Meeting with Julian Gross (separate from C2P2 presentation) to troubleshoot issues.

**December 2018:** Test with stakeholders (GCs and small contractors). Finalize recommendations.

**January 2019:** Present to Workgroup.

## CREATING SUPPLY

### SUMMARY

The Creating Supply Sub group will recommend strategies to scale the recruitment of targeted workers to match the construction needs of the region. The sub group will define and troubleshoot barriers to recruiting, training, hiring, and retaining targeted workers, with a focus on women and people of color. The sub group will also explore potential financing strategies to fund ongoing workforce development activities and help meet regional demand. The group may also discuss marketing and messaging strategies to engage diverse populations new to the construction industry.

#### I. Develop a System Map to Address Barriers and Gaps

The sub group will develop a description of the various organizations involved in workforce development training in the greater Portland area and how they work together. The point of this exercise is to develop an understanding of the various actors involved and identify any gaps in services.

#### II. Survey Workforce Development Providers

The sub group has developed a questionnaire that will be shared with CBOs and PATPs to understand the challenges, gaps, and potential solutions to create a robust workforce development pipeline. The sub group will schedule a call or meeting with relevant stakeholders to discuss the questionnaire and solicit feedback.

The questions include the following:

##### 1. Barriers to Recruitment and Retention

- a. How do pre-apprenticeship training (PAT) programs recruit participants? Who are your partners in recruitment?
- b. What specific strategies does your organization take to recruit women and people of color?

- c. What are the most common barriers to retention in pre-apprenticeship training? Do these barriers differ according to population group (e.g. women, minorities, veterans, others)?
- d. Do PAT programs experience difficulties in placing graduates into apprenticeship programs? What are some ways these can be improved?
- e. What strategies have you found most effective in retaining pre-apprentices during training?
- f. How do PATs work with unions to help them identify and grow their minority and women memberships? What is the relationships between PATs and non-union contractors?
- g. What are exemplary PAT programs in the Greater Portland region or elsewhere? What about them should be modeled or replicated?

## **2. Resources Needed**

- a. How could public owners better support PAT programs to help grow a more diverse construction workforce?
- b. What are the primary funding sources for PAT programs?
- c. What are some ways public agencies can help address funding challenges?
- d. What types of training activities are hardest to fund (e.g. stipends, childcare, transportation, training, case management, etc.)?
- e. What are some successful PAT curriculum? What about them makes them effective? Is there a need for new curriculum to address needs of diverse groups or growing construction occupations?
- f. Are there existing relationships with K-12 schools and/or community colleges to PATs? How can we build on and strengthen these relationships?

## **III. Identify Potential Funding Sources and Partnerships**

The sub group will make recommendations for developing sources of funding and partnerships that can help fund/provide needed ongoing activities, such as case management, on the job training, childcare, transportation, etc.

## **IV. Create a Final Product**

The final product will be an outline with strategies to address supply gaps and challenges.

**TIMELINE**

**October 2018:** Develop Systems Map and List of Survey Questions. Survey Workforce Development Providers

**November 2018:** Develop Strategies to Address Supply Issues. Identify Potential Funding Sources.

**December 2018:** Finalize recommendations.

**January 2019:** Present to Workgroup.