

AMENDMENT No. 2 to
INTERGOVERNMENTAL AGREEMENT (IGA) No. 30007251 between
City of Portland Office of Management and Finance,
Office of Equity and Human Rights, and Prosper Portland
FOR
PHASE 1 ADMINISTRATION OF THE
COMMUNITY OPPORTUNITIES & ENHANCEMENTS PROGRAM



This Amendment No. 2 amends Intergovernmental Agreement No. 30007251, dated the 29th day of February 2020, made and entered into by and among the City of Portland, through the Office of Management and Finance (“OMF”), Office of Equity and Human Rights (“OEHR”), and Prosper Portland (“Prosper”). The term “City”, as used in this Intergovernmental Agreement, collectively refers to OMF, OEHR, and the City Attorney’s Office.

The Effective Date of this Amendment is June 30, 2022. The purpose of this Amendment is to extend the term, update the allocation of FY 22/23 funding, update contact information, authorize the use of Portland Water Bureau (“Water”) and Bureau of Environmental Services (“BES”) Ratepayer Funds for fiscal year 22/23, update the sample invoice form, include the Ratepayer Rubric and Trades Most Commonly Utilized, and provide a COEP budget approved by OMF for fiscal year 22/23. For the purpose of this Amendment, language deleted from the IGA shall appear in ~~strike through~~ and new language shall appear in **bold and underline**.

Whereas, on February 29, 2020, the City and Prosper entered into an Intergovernmental Agreement (“IGA” or “Original IGA”) for the administration of COEP Funding; and

Whereas, on July 1, 2021, the Parties entered into Amendment No. 1 to the IGA to extend the term to June 30, 2022, to amend certain reporting and administrative compensation and cost reimbursements, and to authorize the use of additional funds; and

Whereas, the IGA contemplated that certain COEP funding might become available if the City was able to achieve a favorable determination holding that the Ratepayer Funds are eligible for uses that are the subject of the IGA; and

Whereas, on March 7, 2022, the Multnomah County Circuit Court, concluded Validation Proceedings in Case No. 20CV43973, and held that use of Ratepayer Funds, when spent in alignment with the Ratepayer Funds Eligible Activities Rubric (“Ratepayer Rubric”) (attached as Exhibit B to this Amendment), is presumed reasonably related to water and sewer services; and

Whereas, under Article 2, Section I.D.1 of the Original IGA, Prosper agreed to ensure that it had a proper accounting system for its use of all Ratepayer Funds to ensure that they are spent in compliance with the Ratepayer Rubric; and

Whereas, the City and Prosper desire to extend the IGA’s term, but recognize that:

- a. Requirements and administrative procedures regarding the use of Ratepayer Funds and Ratepayer Rubric-eligible activities need to be described in greater detail, and
- b. New solicitations may be necessary to ensure that Ratepayer Funds are spent in compliance with the Court’s ruling to ensure that all costs are tracked according to the Ratepayer Rubric; and

Whereas, the City contemplates that up to \$2,095,455 of funding, consisting of both Non-Ratepayer Funds, and BES and Water Ratepayer Funds, will be available during fiscal year 22/23 for distribution; and

Whereas, the City intends to release \$207,955 of Non-Ratepayer Funds and \$1,887,500 of Ratepayer Funds for services provided during fiscal year 22/23; and

Whereas, the City and Prosper desire to extend the term of the IGA, begin utilizing the Ratepayer Funds for services provided under the IGA where immediately possible, and update the budget for fiscal year 22/23.

Now therefore, the Parties agree to amend the IGA as follows:

1. Extend the term of this IGA from June 30, 2022, to June 30, 2023.
2. Prior to September 30, 2022, the Parties shall:
 - a. Implement Prosper's documented procedures detailing how Prosper will track the expenditure of both Bureau of Environmental Services and Portland Water Bureau Ratepayer Funds, including how Prosper will provide the City with the means to confirm that the expenditure of BES and Water Ratepayer Funds, authorized in the FY 22/23 budget for the COEP, are eligible uses as permitted by the March 2022 ruling of the Validation Proceedings; and Business Technical Assistance services and Workforce Development Assistance services provided using Ratepayer Funds are eligible expenditures in accordance with the Ratepayer Rubric.
 - b. Collaborate with the CEIC and Procurement Services to identify performance goals and develop a plan to track and measure goals with such available funds in a manner consistent with the requirements of the IGA.
 - c. Develop a reporting timeline.
 - d. Develop requirements for subgrantees regarding the continued use of Ratepayer Funds and Ratepayer Rubric-eligible activities, specifically for Business Technical Assistance programming.
3. Prior to January 1, 2023, the Parties shall enter into discussions to review and clarify fiscal year 23/24 budget estimates for COEP program.
4. The Parties shall pilot a revision in the allocation of fiscal year 22/23 funding as follows:
 - a. **BES and Water Bureau Ratepayer Funds.** Develop the budget to ensure that funds distributed from BES Ratepayer Funds and Water Bureau Ratepayer Funds are equal throughout FY 22/23 for the provision of Business Technical Assistance services and Workforce Development services.
 - b. **Business Technical Assistance and Workforce Development Assistance.** After administrative and other permitted operating costs, the pilot will temporarily adjust the Service Category allocations for FY 22/23 to further assist D/M/W/ESB/SDVBE firms in the service areas as follows:

SERVICE CATEGORY	FY 21/22	FY 22/23
Business Technical Assistance	25%	35%
Workforce Development Assistance	75%	65%

5. Update the Parties information found on Page 1 of the IGA as follows:

“Parties:

For City of Portland:

OMF Office of Management and Finance

1120 SW 5th Ave., **Suite 1040**, Portland, OR 97204

Main Contact: ~~The Chief Procurement Officer~~ **Theresa Green,**
Theresa.Green@portlandoregon.gov

Prosper **Portland**, 220 NW 2nd Ave., Suite 200, Portland, OR 97209

Main Contact: Morgan Masterman **mastermanm@prosperportland.us**

~~OEHR~~ **Office of Equity and Human Rights**, 421SW 6th Ave. Portland, OR 97204

Main Contact: Judith Mowry **judith.mowry@portlandoregon.gov**”

6. Article 2, Section III.A Worksystems, Inc.; Subcontracting is amended to include the following:

“For FY 22/23, Prosper may allow the Workforce Development Subcontractor, Worksystems, Inc. to bill up to \$150,000 for administration costs.”

7. The City and Prosper agree to pilot the use of both BES and Water Ratepayer Funds throughout FY 22/23 for the provision of services. OMF’s authorization of the use of BES and Water Ratepayer Funds is contingent upon Prosper ensuring that Business Technical Assistance and Workforce Development Assistance subgrantees have the ability to report on the provision of eligible services within trades most commonly utilized by BES and Water as identified in Exhibit B, COEP Ratepayer Funds Eligible Activities Rubric (“the Ratepayer Rubric”), and Exhibit C, COEP Ratepayer Rubric, Trades Most Commonly Utilized attached hereto.

Under the pilot, the City authorizes Prosper to:

- a. Invoice the City up to \$200,000, if necessary, for its allowable administrative expenses; and, to allocate and disburse up to \$150,000 to Workforce Development Subcontractor, Worksystems, Inc. (“WSI”) to invoice Prosper for its administrative expenses. In accordance with the foregoing, a total amount of \$350,000 is approved for administrative expenses.

These funds are included in the FY 22/23 budget allocated for administrative expenses, and amounts will be paid as invoiced during the fiscal year, and any subsequent extensions of this Agreement. To the extent the parties mutually agree to extend this Agreement, the parties will discuss in good faith whether this amount should be revised, and will evaluate the actual administrative staff time and costs of Prosper Portland in connection with Phase 1 (including time and costs prior to the Effective Date of this Agreement) in engaging in this discussion.

7. Revise Article 2 Section V.C as follows:

“V.C Funds for Prosper’s administrative expenses (described in paragraph V.A above) will come from the base amount of initial Pilot Project Funds, **additional funds made available through Amendment No. 1 to this IGA, and the FY 22/23 COEP annual budget provided by OMF.** Prosper will provide an invoice for these amounts quarterly. OMF will process and pay Prosper’s invoice within 15 business days of approval.”

8. Revise Article 3, Section VI. Notices to update the contact information for OMF as follows:

“If to OMF: 1120 SW 5th Ave. **Suite 1040**, Portland, OR 97204, Attn: ~~Cathy Sherick~~ **Theresa Green, Inclusive Contracting Manager**”

9. Replace Exhibit A, Prosper Invoice Format: Sample Invoice Form with Exhibit A, Revised Prosper Portland Invoice Format: Sample Invoice Form (Effective June 2022) attached hereto, to be used for future invoicing. Prosper shall include subcontractor support documentation with the invoice submitted to the City.

10. The COEP budget approved by OMF for fiscal year 22/23 is provided in Table A below, with a breakdown of Total Service Delivery provided in Table B:

Table A

Description	BUDGET FOR FY 22/23	
	Breakdown for Subtotals	Subtotals
Non-Ratepayer Funded Business Technical Assistance	\$50,000 (Prosper Admin)	\$207,955
	\$157,955 (Bus. Tech Service Providers)	
Non-Ratepayer Funded Workforce Development	-	-
Ratepayer Funded Bureau of Environmental Services (includes Admin expenses)	\$75,000 (Prosper Admin)	\$300,000
	\$225,000 (Bus. Tech Service Providers)	
	\$56,250 (WSI Admin)	\$500,000
	\$443,750 (Workforce Dev. Service Providers)	
Ratepayer Funded Portland Water Bureau (includes Admin expenses)	\$75,000 (Prosper Admin)	\$300,000
	\$225,000 (Bus. Tech Service Providers)	
	\$93,750 (WSI Admin)	\$787,500
	\$693,750 (Workforce Dev. Service Providers)	
Total amount budgeted and authorized by OMF for COEP_FY 22/23		\$2,095,455

Table B

	Unrestricted Funds	Ratepayer Funds		Total
		Water Bureau	Bureau of Env Services	
Administration				
Prosper Portland	\$50,000	\$75,000	\$75,000	\$200,000
Worksystems		\$93,750	\$56,250	\$150,000
Total Admin	\$50,000	\$168,750	\$131,250	\$350,000
Service Delivery				
Biz TA	\$157,955	\$225,000	\$225,000	\$607,955
Workforce		\$693,750	\$443,750	\$1,137,500
Total Service Delivery	\$157,955	\$918,750	\$668,750	\$1,745,455
Total	\$207,955	\$1,087,500	\$800,000	\$2,095,455

All other terms and conditions of the IGA remain unchanged by this Amendment and in full force and effect.

Attachments:

- Exhibit A, Revised Prosper Portland Invoice Format: Sample Invoice Form (Effective June 2022)
- Exhibit B, COEP Ratepayer Funds Eligible Activities Rubric ("Ratepayer Rubric")
- Exhibit C, COEP Ratepayer Rubric, Trades Most Commonly Utilized

Executed by the authorized signatories below, to be effective as of the Effective Date.

CITY OF PORTLAND

Office of Management & Finance

By *Biko Taylor*

Biko Taylor, Chief Procurement Officer

Date: August 31, 2022

PROSPER PORTLAND

By *Kimberly Branam*
Kimberly Branam (Aug 26, 2022 09:48 PDT)

Kimberly Branam, Executive Director

Date: Aug 26, 2022, 2022

Office of Equity and Human Rights

By *Lisa Watson*

Lisa Watson, Director

Date: 08/30/2022, 2022

Approved as to Form

Karen L. Moynihan

City Attorney
08/31/2022

Approved as to Form

Haley

Prosper Portland Legal Counsel

Due Upon Receipt

To: City of Portland/OMF
 Attn: Theresa Green
 1120 SW 5th Ave, #1250
 Portland, OR 97204

Invoice No: _____
 Remit to:
 Prosper Portland
 220 NW 2nd Ave, Ste 200
 Portland OR 97209

Contract #: IGA - Community Opportunities and Enhancements

Billing Period:

Community Opportunities & Enhancements Program

Budget Category	Contracted Budget	Invoice	Amount Billed to Date	Balance
General Fund				
Business Development	\$ -	\$ -	\$ -	\$ -
Workforce Development	\$ -	\$ -	\$ -	\$ -
Prosper Portland Administration	\$ -	\$ -	\$ -	\$ -
Worksystems Administration	\$ -	\$ -	\$ -	\$ -
Total General Funds	\$ -	\$ -	\$ -	\$ -
Water Funds				
Business Development	\$ -	\$ -	\$ -	\$ -
Workforce Development	\$ -	\$ -	\$ -	\$ -
Prosper Portland Administration	\$ -	\$ -	\$ -	\$ -
Worksystems Administration	\$ -	\$ -	\$ -	\$ -
Total Water Funds	\$ -	\$ -	\$ -	\$ -
BES Funds				
Business Development	\$ -	\$ -	\$ -	\$ -
Workforce Development	\$ -	\$ -	\$ -	\$ -
Prosper Portland Administration	\$ -	\$ -	\$ -	\$ -
Worksystems Administration	\$ -	\$ -	\$ -	\$ -
Total BES Funds	\$ -	\$ -	\$ -	\$ -
Total COEP	\$ -	\$ -	\$ -	\$ -

Prepared by: _____
 Courtney Cohn, Budget Analyst
 Phone Number: 503.823.0137 email: cohnc@prosperportland.us

Approved by: _____
 Tony Barnes, Finance Manager

By signing this report, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and objectives set forth in the terms and conditions of the Federal award. I am aware that any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false statements, false claims or otherwise. (U.S. Code Title 18, Section 1001 and Title 31, Sections 3729-3730 and 3801-3812).

Worksystems, Inc. (WSI) Coversheet (Effective June 30, 2022)

Worksystems, Inc. prepares this coversheet based on partner invoices.

Worksystems, Inc. Admin will be billed in equal amounts across the year and will be proportional to the % billed under each activity.

	2. (Water Outreach) Expenditure of funds for <u>outreach and recruitment</u> of diverse workers	2. (BES Outreach) Expenditure of funds for <u>outreach and recruitment</u> of diverse workers	3. (Water Training) Expenditure of funds for <u>workforce training</u> , (including pre-apprenticeship training)	3. (BES Training) Expenditure of funds for workforce training, (including pre-apprenticeship training)	4. (Water Retention) Expenditure of funds for retention of diverse workers (apprentices and journey workers)	4. (BES Retention) Expenditure of funds for retention of diverse workers (apprentices and journey workers)	TOTAL
	B. Activity increases diverse workforce supply and/or M/W/DBE subcontractor pool for PWB project or services	D. Activity increases diverse workforce supply and/or M/W/DBE subcontractor pool for BES project or services	B. Activity increases diverse workforce supply and/or M/W/DBE subcontractor pool for PWB project or services	D. Activity increases diverse workforce supply and/or M/W/DBE subcontractor pool for BES project or services	B. Activity increases diverse workforce supply and/or M/W/DBE subcontractor pool for PWB project or services	D. Activity increases diverse workforce supply and/or M/W/DBE subcontractor pool for BES project or services	
Workforce Development Service Providers							
CCC	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
ULPDX	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
OTW	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
OTW/POIC	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
OTW/CH	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
OTW/PYB	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
OTW/LCSA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Direct Service total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<i>Percent by fund/activity</i>							
Worksystems Admin	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total PWB Ratepayer Fund	\$ -						
Total BES Ratepayer Fund	\$ -						

Approved by _____
Date _____

COEP_Workforce Service Provider Invoice Template (Effective June 30, 2022)

To be completed by Workforce Development Assistance service providers and submitted to Worksystems, Inc. (WSI)

Organization Name:

	Ratepayer Rubric Activity						TOTAL
	2. (Water Outreach) Expenditure of funds for outreach and recruitment of diverse workers	2. (BES Outreach) Expenditure of funds for outreach and recruitment of diverse workers	3. (Water Training) Expenditure of funds for workforce training, (including pre-apprenticeship training)	3. (BES Training) Expenditure of funds for workforce training, (including pre-apprenticeship training)	4. (Water Retention) Expenditure of funds for retention of diverse workers (apprentices and journey workers)	4. (BES Retention) Expenditure of funds for retention of diverse workers (apprentices and journey workers)	
	B. Activity increases diverse workforce supply and/or M/W/DBE subcontractor pool for PWB project or services	D. Activity increases diverse workforce supply and/or M/W/DBE subcontractor pool for BES project or services	B. Activity increases diverse workforce supply and/or M/W/DBE subcontractor pool for PWB project or services	D. Activity increases diverse workforce supply and/or M/W/DBE subcontractor pool for BES project or services	B. Activity increases diverse workforce supply and/or M/W/DBE subcontractor pool for PWB project or services	D. Activity increases diverse workforce supply and/or M/W/DBE subcontractor pool for BES project or services	
Must include a description of the eligible expense to demonstrate how it aligns with the Ratepayer Rubric Activity. Thank you.							
Personnel							
<i>Service description line item</i>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<i>Service description line item</i>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Operating							
<i>Service description line item</i>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Support Services							
<i>Service description line item</i>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Indirect							
<i>Service description line item</i>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Contracted Budget							
Invoice							
Amount Billed to Date							
Balance							

Approved By:

Signature	<input type="text"/>
Name and Title:	<input type="text"/>

Support Services Detail:

Transaction Date	Client Name	Service Provider	Description of Service	Amount Charged
			see above	\$ -
			see above	\$ -
			see above	\$ -
			see above	\$ -
TOTAL				\$ -

Prosper Portland Coversheet

Prosper prepares this coversheet based on partner invoices.

Admin billed in equal amounts across the year and proportional to % billed under each activity.

Business Technical Subgrantees	General Fund	1.b. Water Biz TA	1.d. BES Biz TA	TOTAL
Livelihood NW	\$ -	\$ -	\$ -	\$ -
LatinoBuilt	\$ -	\$ -	\$ -	\$ -
NAMC	\$ -	\$ -	\$ -	\$ -
PBDG	\$ -	\$ -	\$ -	\$ -
Urban League	\$ -	\$ -	\$ -	\$ -
Direct Service total	\$ -	\$ -	\$ -	\$ -
<i>Percent by fund/activity</i>				
Prosper Admin	\$ -	\$ -	\$ -	\$ -
TOTAL	\$ -	\$ -	\$ -	\$ -

Approved by _____

Date _____

Invoice template for Business Technical Assistance service providers

To be completed by Business Technical Assistance service providers and submitted to Prosper Portland

Organization Name _____

Ratepayer Rubric Activity		General Fund	1.b. Water Biz TA	1.d. BES Biz TA	TOTAL	
Personnel						
line item	\$	-	\$	-	\$	-
line item	\$	-	\$	-	\$	-
Operating						
line item	\$	-	\$	-	\$	-
Support Services		\$	-	\$	-	\$
Indirect		\$	-	\$	-	\$
TOTAL		\$	-	\$	-	\$
Contracted Budget		\$	-	\$	-	\$
Invoice		\$	-	\$	-	\$
Amount Billed to Date		\$	-	\$	-	\$
Balance		\$	-	\$	-	\$

Approved by _____
 Date _____

Support Services Detail

Transaction Date	Client Name	Service by	Description of Service	Amount
				\$ -
				\$ -
				\$ -
				\$ -
TOTAL				\$ -

Exhibit B, COEP Ratepayer Funds Eligible Activities Rubric (“Ratepayer Rubric”)

Project Review Tool: **Services must be reasonably related to the provision of water or sewer services.**

Ratepayer Rubric	A. Activity is specific to Portland Water Bureau (PWB) projects or services.	B. Activity increases diverse workforce supply and/or M/W/DBE subcontractor pool for PWB projects or services.	C. Activity is specific to Bureau of Environmental Services (BES) projects or services.
<p>1. Expenditure of funds for business technical assistance</p>	<p>Specific examples may include, but are not limited to:</p> <p>A Service Provider connects with a subcontractor actively working on a PWB project who needs support with their bookkeeping practices. The Service Provider offers one-on-one training to the subcontractor and refers them to an Inclusive Business Resource Network bookkeeping program for additional services.</p> <p>A Service Provider connects with a subcontractor on an active PWB project. That subcontractor is looking to purchase a piece of equipment that they have been renting. The Service Provider reviews cashflow with the business and supports the creation of a loan package.</p>	<p>Specific examples may include, but are not limited to:</p> <p>A Service Provider assists firms that employ workers within Trades Most Commonly Utilized on PWB projects to become COBID certified, increasing the likelihood that PWB projects meet or exceed their equity goals.</p> <p>A Service Provider assists firms that employ workers within Trades Most Commonly Utilized on PWB projects with industry-specific and business software.</p>	<p>Specific examples may include, but are not limited to:</p> <p>A Service Provider connects with a subcontractor actively working on a BES project who needs support with their bookkeeping practices. The Service Provider offers one-on-one training to the subcontractor and refers them to an Inclusive Business Resource Network bookkeeping program for additional services.</p> <p>A Service Provider connects with a subcontractor on an active BES project. That subcontractor is looking to purchase a piece of equipment that they have been renting. The Service Provider reviews cashflow with the business and supports the creation of a loan package.</p>
<p>2. Expenditure of funds for outreach and recruitment of diverse workers</p>	<p>Specific examples may include, but are not limited to:</p> <p>A Service Provider connects with project staff and contractors actively working on a PWB project to identify upcoming scopes and opportunities. The Service Provider tailors outreach to these opportunities, identifies pre-apprenticeship and apprenticeship candidates, and streamlines referrals.</p> <p>Service Providers support candidates to connect with active PWB project sites, including site visits, guest speakers and information about project employment opportunities.</p> <p>Service Providers support candidates to enter pre-apprenticeship programs, apprenticeship programs and jobs in the trades with current or upcoming scopes on active PWB project sites.</p>	<p>Specific examples may include, but are not limited to:</p> <p>A Service Provider develops a steady stream of qualified candidates for pre-apprenticeship, apprenticeship or jobs in Trades Most Commonly Utilized on PWB projects.</p> <p>A Service Provider meets with high school juniors and seniors to share information about Trades Most Commonly Utilized on PWB projects and upcoming opportunities.</p>	<p>Specific examples may include, but are not limited to:</p> <p>A Service Provider connects with project staff and contractors actively working on a BES project to identify upcoming scopes and opportunities. The Service Provider tailors outreach to these opportunities, identifies pre-apprenticeship and apprenticeship candidates, and streamlines referrals.</p> <p>Service Providers support candidates to connect with active BES project sites, including site visits, guest speakers and information about project employment opportunities.</p> <p>Service Providers support candidates to enter pre-apprenticeship programs, apprenticeship programs and jobs in the trades with current or upcoming scopes on active BES project sites.</p>
<p>3. Expenditure of funds for workforce training (including pre-apprenticeship training)</p>	<p>Specific examples may include, but are not limited to:</p> <p>A Service Provider connects with contractors and subcontractors actively working on a PWB project to identify upcoming scopes and opportunities to employ diverse apprentices. The Service Provider coordinates with project contractors and apprenticeship programs to streamline referrals of qualified apprenticeship candidates, track apprenticeship dispatch requests and responses, and provide technical assistance around workforce diversity.</p> <p>Service Providers support candidates to connect with active PWB project sites, including site visits, hands-on opportunities, guest speakers and information about project employment opportunities.</p> <p>Service Providers support graduates to obtain special training/certifications required for active PWB project sites.</p>	<p>Specific examples may include, but are not limited to:</p> <p>A Service Provider develops a steady stream of qualified candidates for apprenticeship in Trades Most Commonly Utilized on PWB projects. The Service Provider coordinates with PWB staff and apprenticeship programs to align pre-apprenticeship training graduates with planned PWB projects and incorporate City and PWB specific content.</p>	<p>Specific examples may include, but are not limited to:</p> <p>A Service Provider connects with contractors and subcontractors actively working on a BES project to identify upcoming scopes and opportunities to employ diverse apprentices. The Service Provider coordinates with project contractors and apprenticeship programs to streamline referrals of qualified apprenticeship candidates, track apprenticeship dispatch requests and responses, and provide technical assistance around workforce diversity.</p> <p>Service Providers support candidates to connect with active BES project sites, including site visits, hands-on opportunities, guest speakers and information about project employment opportunities.</p> <p>Service Providers support graduates to obtain special training/certifications required for active BES project sites.</p>
<p>4. Expenditure of funds for retention of diverse workers (apprentices and journey workers)</p>	<p>Specific examples may include, but are not limited to:</p> <p>A Service Provider connects with contractors and subcontractors actively working on a PWB project to identify workers in need of support. The Service Provider supports an early apprentice who recently began working on that project with transportation and childcare payments in order to keep them on the job.</p>	<p>Specific examples may include, but are not limited to:</p> <p>A Service Provider develops a mentorship program to retain Black, Indigenous, and other POC plumbing apprentices.</p> <p>A Service Provider offers support services such as childcare, transportation, and personal protective gear to facilitate retention of diverse workers in Trades Most Commonly Utilized on PWB projects.</p>	<p>Specific examples may include, but are not limited to:</p> <p>A Service Provider connects with contractors and subcontractors actively working on a BES project to identify workers in need of support. The Service Provider supports an early apprentice who recently began working on that project with transportation and childcare payments in order to keep them on the job.</p>

COEP Ratepayer Funds Eligible Activities Rubric (“Rubric”)

Project Review Tool: Services must be reasonably related to the provision of water or sewer services.

Ratepayer Rubric	D. Activity increases diverse workforce supply and/or M/W/DBE subcontractor pool for BES projects or services.	E. Activity supports BES environmental obligations.
<p>1. Expenditure of funds for business technical assistance</p>	<p>Specific examples may include, but are not limited to:</p> <p>A Service Provider assists firms that employ workers within Trades Most Commonly Utilized on BES projects to become COBID certified, increasing the likelihood that BES projects meet or exceed their equity goals.</p> <p>A Service Provider assists firms that employ workers within Trades Most Commonly Utilized on BES projects with industry-specific and business software.</p>	<p>Specific examples may include, but are not limited to:</p> <p>A Service Provider supports a landscaping business who wants to expand into stormwater management by maintaining bioswales throughout the city. The Service Provider helps the business assess cashflow and personnel policies in order to hire additional staff for this work.</p> <p>Service providers educate firms they serve on BES and City environmental obligations.</p>
<p>2. Expenditure of funds for outreach and recruitment of diverse workers</p>	<p>Specific examples may include, but are not limited to:</p> <p>A Service Provider develops a steady stream of qualified candidates for pre-apprenticeship, apprenticeship or jobs in Trades Most Commonly Utilized on BES projects.</p> <p>A Service Provider meets with high school juniors and seniors to share information about Trades Most Commonly Utilized on BES projects and upcoming opportunities.</p>	<p>Specific examples may include, but are not limited to:</p> <p>Service Providers educate candidates about the BES and City environmental obligations as part of outreach efforts.</p>
<p>3. Expenditure of funds for workforce training (including pre-apprenticeship training)</p>	<p>Specific examples may include, but are not limited to:</p> <p>A Service Provider develops a steady stream of qualified candidates for apprenticeship in Trades Most Commonly Utilized on BES projects. The Service Provider coordinates with BES staff and apprenticeship programs to align pre-apprenticeship training graduates with planned BES projects and incorporate City and BES specific content.</p>	<p>Specific examples may include, but are not limited to:</p> <p>Service Providers include curriculum in their pre-apprenticeship training programs that educate participants on BES and City environmental obligations.</p>
<p>4. Expenditure of funds for retention of diverse workers (apprentices and journey workers)</p>	<p>Specific examples may include, but are not limited to:</p> <p>A Service Provider develops a mentorship program to retain Black, Indigenous, and other POC roofing and waterproofing apprentices.</p> <p>A Service Provider offers support services such as childcare, transportation, and personal protective gear to facilitate retention of diverse workers in Trades Most Commonly Utilized on BES projects.</p>	<p>Specific examples may include, but are not limited to:</p> <p>Service Providers educate the apprentices and journey workers they serve on BES and City environmental obligations.</p>

Exhibit C, COEP Ratepayer Rubric, Trades Most Commonly Utilized

The following trades have been identified as most commonly utilized on Portland Water Bureau (Water) and Bureau of Environmental Services (BES) public improvement projects.

Bureau of Environmental Services (in order of highest utilization)

- Laborer
- Power Equipment Operator
- Truck Driver
- Carpenter
- Flagger
- Supervisor
- Cement Mason
- Electrician
- Plumber

Portland Water Bureau (in order of highest utilization)

- Laborer
- Power Equipment Operator
- Electrician
- Truck Driver
- Carpenter
- Flagger
- Supervisor
- Cement Mason
- Plumber
- Ironworker
- Roofer
- Bricklayer
- Tile Terrazzo Finisher

Methodology:

Workforce data submitted through LCP Tracker on 18 PWB and 56 BES public improvement projects active between 7/1/17 and 10/1/20 was analyzed. The trades above were used on 10% or more of all projects during this time frame.