

Dept. of Procurement & Material Management (DPMM)

CY 2023 Equity Impact Plan



Leadership Sponsor(s): Lee Ann Pender, DPMM Director, Ron Shoram, Deputy Director



Equity Lead(s): Chris McGough, Sustainable Procurement Coordinator

Departmental Equity Guiding Statement: Guided by the County's One Fairfax Policy on racial and social equity, the Dept. of Procurement and Material Management aims to identify and address the potential for or instances of institutionalized discrimination in its contracting, procurement and material management functions. The Virginia Public Procurement Act (VPPA) enunciates a policy that all qualified vendors have access to public business and that no offeror be arbitrarily or capriciously excluded. DPMM has long strived to maximize competition and ensure that all purchasing actions are conducted fairly and impartially. DPMM reiterates its commitment to equity by maintaining this Equity Impact Plan and pursuing actions that create racially and socially equitable outcomes.

Context: DPMM oversees the contracting and procurement processes for all Fairfax County departments within the guidelines established by the VPPA and the Fairfax County Purchasing Resolution. While the process is overseen by DPMM, departments determine requirements, initiate purchases and play a significant role in determining outcomes. When viewed from an equity lens, contracting and procurement can be leveraged to create opportunities for equitable outcomes. However, the complexity of the procurement process, its many requirements, its application by diverse stakeholders, etc., creates unique challenges which may lead to inequitable outcomes, affecting some businesses more than others. Examples include department-led procurement strategies such as bundling contracts which can limit opportunities of small businesses or overly tightening requirements or specifications which give incumbent businesses an advantage. [Data](#) has long shown that over 30% Fairfax County's annual spending has been with small, women-owned and minority-owned (SWaM) vendors. However, when the data is [disaggregated](#), the spend with women-owned and minority-owned vendors is much lower.

With such a complicated process, identifying the opportunities to enhance equitable outcomes is challenging. DPMM's equity plan includes elements from all department focus areas; external facing programs such as its Supplier Diversity and Supplier Outreach Programs, policies and procedures which guide the County's contracting process, our interaction with and oversight of department-led purchasing, the design and operation of our systems which facilitate the \$900+ million in annual purchasing, logistics and warehousing services, as well as our own recruiting and staff development programs. DPMM remains committed to a fair and impartial process – for all.

Long-term Outcome(s):

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|---|---|
| <input type="checkbox"/> Cultural and Recreational Opportunities | <input checked="" type="checkbox"/> Health |
| <input checked="" type="checkbox"/> Economic Opportunity | <input type="checkbox"/> Housing and Neighborhood Livability |
| <input checked="" type="checkbox"/> Efficient and Effective Government | <input checked="" type="checkbox"/> Lifelong Education and Learning |
| <input type="checkbox"/> Empowerment and Support for Residents Facing Vulnerability | <input type="checkbox"/> Mobility and Transportation |
| <input checked="" type="checkbox"/> Environment | <input type="checkbox"/> Safety and Security |

System-Level Infrastructure:

- Of the \$900+ million the County spends annually, much is determined and executed at the department level. The decisions made by department purchasing staff can have major impacts on the equity of the County's contracting and procurement process. DPMM has a unique role to facilitate these purchases – prescribing policy/procedure and conducting oversight while also providing customer service and value-added consulting. DPMM will continue to deliver impactful changes, as indicated in the following section, but is also interested in helping departments develop their own goals related to equity in the procurement process.
- DPMM recognizes that the root causes to inequities which manifest in the procurement process may originate in issues of business development, access to capital for entrepreneurs, etc. Addressing such issues requires partnerships with other County efforts in this space – the Dept. of Economic Initiatives, the Economic Development Authority, the Economic Advisory Commission, etc. DPMM is interested in establishing such partnerships to design programs that enhance equity within the procurement process as well as improve economic inclusivity for all.
- DPMM also requires assistance from the County Executive's Office as it identifies legal barriers and pursues legislative initiatives.

DEPARTMENT OF PROCUREMENT AND MATERIAL MANAGEMENT CALENDAR YEAR 2023 EQUITY IMPACT PLAN

| Goals | Area of Focus | Actions | Stakeholders | Timeline | Resources and Supports | Responsible Parties | Performance Measures |
|--|-----------------|---|--|----------------|---|--|---|
| 1. Maintain departmental equity team and conduct staff engagement/training. The DPMM Equity Team has and will continue to serve as key infrastructure to build momentum, ensure participation from all business areas and help implement the plan. Additionally, the DPMM Equity Team will take a lead role in advancing internally focused equity initiatives. | 1, 3, 5, 16, 17 | 1a. Evolve departmental equity team to meet current needs. Develop a core team to help advance all aspects of the EIP. Maintain Equity Planning Committees (training) and establish new ones (SWaM data). Establish clear roles and responsibilities. | Equity Lead, Sustainable Procurement Team, DPMM Staff and Leadership | 1/2023-12/2023 | Time, staff and resources from One Fairfax and other sources. | DPMM's Equity Lead will be the primary contacts for the reporting of all action items. | # Equity Team meetings # participants on Equity Team % business areas participating # of trainings conducted |
| | | 1b. Establish an equity steering committee made up of dept leadership or provide quarterly updates to the Senior Management Team. | See above. | 1/2023-12/2023 | Time, staff, leadership support | See above. | # of participants in trainings #/% of Equity Plan actions that have been initiated/completed |
| | | 1c. Equity Team and Training Planning Committee to recommend and help deliver new training such as new employee equity trainings and other training related to procurement. | DPMM Equity Team, Administration Division, Senior Management | 1/2023-12/2023 | Time and staff. Resources from One Fairfax. Funding for training. | See above. | Feedback/survey results: staff perception of equity initiatives, staff perception of Supplier Diversity Program |
| | | 1d. Reboot staff engagement: develop a 2023 meeting and training calendar for departmentwide participation, enhance internal communication. | DPMM Equity Team, DPMM Staff, Senior Management | 1/2023-12/2023 | Time and staff | See above. | |

| of Focus | | Stakeholders | Timeline | Resources and Supports | Responsible Parties | Performance Measures | |
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| <p>2. Collect disaggregated data including stakeholder feedback and conduct root cause assessments to identify equity issues within the procurement process. With a large number of potential barriers in the process – from the length of time solicitations are advertised to minimum requirements – understanding the magnitude of each is key to developing impactful solutions.</p> | 1, 17 | 2a. Continue collecting disaggregated data and publishing a report of annual spending, shifting from SWaM to a WaM and beyond grouping. Consider publishing additional equity data such as WaM participation vs win rates, small vs large purchases, capital construction, etc. | Sustainable Procurement Team, Bus. & Technical Solutions Div., FBSG, DOF, DPWES Cap Facilities, etc. | 1/2023-12/2023 | Time and staff and funding for projects to expand data collection such as Tealbook, etc. | See above. | <p>% of spend to WaM companies</p> <p># of WaM suppliers</p> <p>% of WaM companies attending edu/ outreach events and winning contracts or business</p> |
| | | 2b. Identify equity data gaps. Prioritize the most needed data. Create list of equity reports to measure EIP progress. Consider integrating 'equity metrics' in existing performance mgmt. process. | Stakeholders noted above. | 1/2023-12/2023 | Time and staff | See above. | Feedback/survey results: WaM suppliers, internal stakeholders regarding perception of Supplier Diversity Program |
| | | 2c. Conduct root cause assessments and other studies to identify issues/areas of opportunity. Compile findings by developing a list of priorities for further review and high impact interventions. | Stakeholders noted above, DPMM Equity Team, Contracts Division and other related stakeholders. | 1/2023-12/2023 | Time and staff | See above. | Equity performance metrics developed |
| | | 2d. Continue conducting stakeholder outreach. Develop outreach plan. Collect feedback via survey, focus groups, interviews, etc. Present EIP to and engage with stakeholders. Integrate feedback. Work towards an Equity Impact Plan that includes shared goals. | All stakeholders noted in this section and external stakeholders such as vendors, EAC, SBC, local chambers etc. | 1/2023-12/2023 | Time, staff and resources from One Fairfax and other sources. | See above. | |
| | | 2e. Explore conducting a formal disparity study that assesses issues rooted in the procurement process <i>and</i> issues of supplier/business development. Explore funding mechanisms and other resource requirements. | All stakeholders noted in this section. Also Dept. of Economic Initiatives, One Fairfax, etc. | 1/2023-12/2023 | Funding, time and staff, collaboration from diverse stakeholders | See above. | |
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| 3. Enhance supplier outreach and programming. As stakeholder feedback and new data is collected, begin to integrate it into the design of outreach, engagement and programming. | 1, 3, 5, 17 | 3a. Enhance existing supplier outreach: Continue improving Selling to Fairfax Workshop content for WaM vendors including how-to videos and other on-demand resources. Maintain partnerships with groups such as the Nova Black Chamber to deliver custom workshops. Improve website design for prospective WaM vendors, develop resources to help onboard successful WaM vendors, enhance DPMM's customer service to prospective vendors and expand access to staff assistance | Sustainable Procurement Team, Contracts Division, DPMM Equity Team, EAC, SBC and other commissions. Local chambers and business representatives. Key department partners. | 1/2023-12/2023 | Time and staff | See above. | # of presentations/meetings/listening tour events # of survey respondents from WaM business community # of WaM companies participating in edu/outreach program. % formal proposals or bids submitted by WaM companies Feedback/survey results: WaM suppliers, internal stakeholders regarding perception of Supplier Diversity Program |
| | | 3b. Plan new outreach such as commodity-focused meet and greets, an 'unbundled' vendor forum, etc. Partner with Dept. contacts to deliver new outreach. | All internal stakeholders noted above. | 1/2023-12/2023 | Time and staff | See above. | |
| | | 3c. Explore alternative programming related to supplier development such as mentor/protégé, pre-vendor workshops, certification assistance, community wealth building, etc. | All stakeholders above. Partnerships with Dept. of Econ. Initiatives and other business development groups will be key. | 1/2023-12/2023 | Time, staff and resources from One Fairfax and other sources. | See above. | |

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| 4. Review procurement policy, procedure and process through an equity lens – and recommend improvements. DPMM maintains diverse policies and procedures – from competitive thresholds to ordering procedures. Many are updated regularly in alignment with Virginia law and other maintenance needs. DPMM strives to review regular policy updates through an equity lens as well as recommend enhancements to existing policy. | 1, 17 | 4a. Maintain the newly launched Equity Policy Review Committee and continue to review all updated/new policies through an equity lens. Assess impacts of existing policies such as minimum SWaM quotes for purchases under \$200k. | Equity lead, DPMM Equity Team, Contracts Division and Leadership. | 1/2023-12/2023 | Time and staff | See above. | % of small purchases, uncontracted, to WaM companies |
| | | 4b. Conduct an assessment for internal policy changes – and prioritize opportunities: *Micro business preferences *Update procurement schedule to include early Dept-DPMM assessment of equity impacts *Diversity requirements for contract Selection Advisory Committees *Policy enabling more spot purchases *Policy or strategy to negotiate subcontractor plans *Given stakeholder interest, explore policy framework for SWaM set-asides or preferences. Include impacts such as resource and staffing needs. | DPMM Equity Team, Business and Technical Solutions Division, Contracts Division. | 1/2023-12/2023 | Time and staff | See above. | % of formal proposals or bids submitted by WaM companies % of contracts awarded to WaM companies # of WaM suppliers % of spend to WaM companies # of legislative barriers identified # of recommendations made to appropriate legislative committees |
| | | 4c. Continue to compile list of policy, procedure, process improvements such as unbundling select contracts, etc. | Equity lead, DPMM Equity Team | 1/2023-12/2023 | Time and staff | See above. | |
| | | 4d. Continue implementation of Supplier CSR Program. Refine equity KPIs. Publish cumulative results on supplier DE&I performance. Assess options to integrate into procurement process. | Sustainable Procurement Team, dept. stakeholders, One Fairfax, OEEC | 1/2023-12/2023 | Time, staff, funding for contractor supported CSR program | See above. | |
| | | 4e. Identify legal barriers to integrating equity considerations into the procurement process. Provide recommendations to the CEX, existing legislative committees, etc. as appropriate. | Equity lead, DPMM Equity Team, DPMM Leadership | 1/2023-12/2023 | Time and staff | See above. | |
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| <p>5. Collaborate with Departments to help them anchor equity in their purchasing decisions. DPMM strives to help our departmental partners by collecting feedback, collaborating on goals, building tools/resources, conducting staff training and providing regular feedback on their performance and compliance.</p> | 1, 5, 17 | <p>5a. Collaborate with Departments to develop dept-specific equity goals such as partnering on a minimum amount of supplier outreach, SWaM spend or subcontractor targets, unbundling contracts, hosting pre-solicitation info meetings, etc. Attend regular Business Planning Meetings to strengthen relationships and track progress. Collect feedback about challenges and opportunities and integrate into DPMM’s EIP.</p> | DPMM Leadership, DPMM Equity Team, Business and Technical Solutions Division, Contracts Division. | 1/2023-12/2023 | Time and staff | See above. | <p># Department meetings to collect feedback/establish goals</p> <p># Department goals</p> <p>#/% of small purchases, uncontracted, to WaM companies</p> <p>% formal proposals or bids submitted by WaM companies</p> <p># of WaM suppliers</p> <p>% of spend to WaM companies</p> |
| | | <p>5b. Develop tools and resources for departmental purchasers. Develop and provide training (new content such as procurement for equity, how to use resources such as eVA, WaM directories, etc.)</p> | DPMM Equity Team, Business and Technical Solutions Division, Contracts Division. | 1/2023-12/2023 | Time and staff | See above. | |
| | | <p>5c. Assess staff perceptions about WaM businesses. Develop strategies to change culture and behavior.</p> | Same as above. | 1/2023-12/2023 | Time and staff | See above. | |
| | | <p>5d. Provide feedback to departments on equity related performance and compliance.</p> | Same as above. | 1/2023-12/2023 | Time and staff | See above. | |

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Lee Ann Pender

Director’s Signature:

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