

DOES OUR WORK
MEAN **MORE**
OPPORTUNITY
FOR YOUR
BUSINESS?

BUSINESS



PROGRAM



What's on the agenda?

- Introduction
- Business Opportunity Program
- Department Overviews
 - Watershed Programs
 - Human Resources
 - Organization & Employee Development
 - Communications & Community Relations
 - Engineering & Construction
- Managing Opportunities

BUSINESS



PROGRAM

OPPORTUNITYPIPELINE

 Northeast Ohio
Regional Sewer District

Business Opportunity Program

neorsd.org/opportunity

MBE/WBE/SBE

- Disparity study overview
- Program objectives
- Definition of MBE and WBE
- Eligibility standards
- Economically disadvantaged
- Communications
- Outreach
- Next Steps

Disparity Study

- Intensive disparity study
- Examine evidence of discrimination against minority and women firms
- Study found statistical and anecdotal evidence of discrimination in the District's market area

Program Objectives

- MBE/WBE and SBE Program June 01, 2011
- Minority Business Enterprise goals (MBE)
- Woman Business Enterprise goals (WBE)
- Small Business Enterprises goals (SBE)
- Project-by-project goals

What is a MBE and WBE?

- Local small business
- Which is at least 51% owned by one or more Minority/Woman individuals
- Which is managed and controlled by one or more Minority/Women individuals
- Performs a commercially useful function

What is a MBE and WBE ?

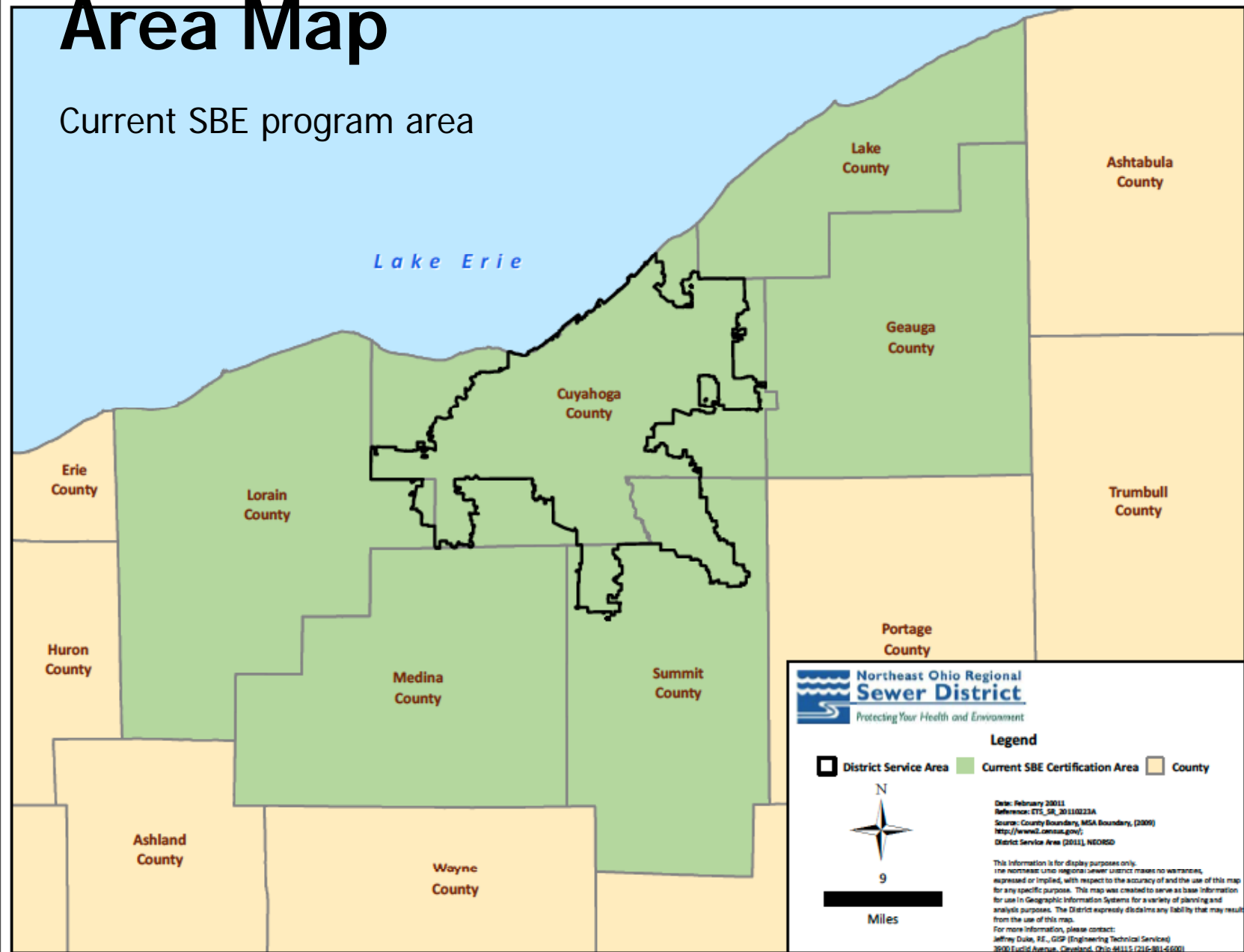
- Minority individual shall mean a person who is a member of one of the following groups:
 - African Americans
 - Hispanic Americans
 - Asian Americans
 - Native Americans
 - WBE
 - Shall mean a person of the female gender who is a business owner
 - Woman – as defined under Ohio law
- * Individual members of other groups found by the District to be socially disadvantaged.

Eligibility Standards

- Proposed Locations
 - **Metropolitan Statistical Areas**
 - Cleveland
 - Elyria
 - Mentor
 - Akron
 - Canton- Massillon
 - Youngstown – Warren
 - Ashtabula

Area Map

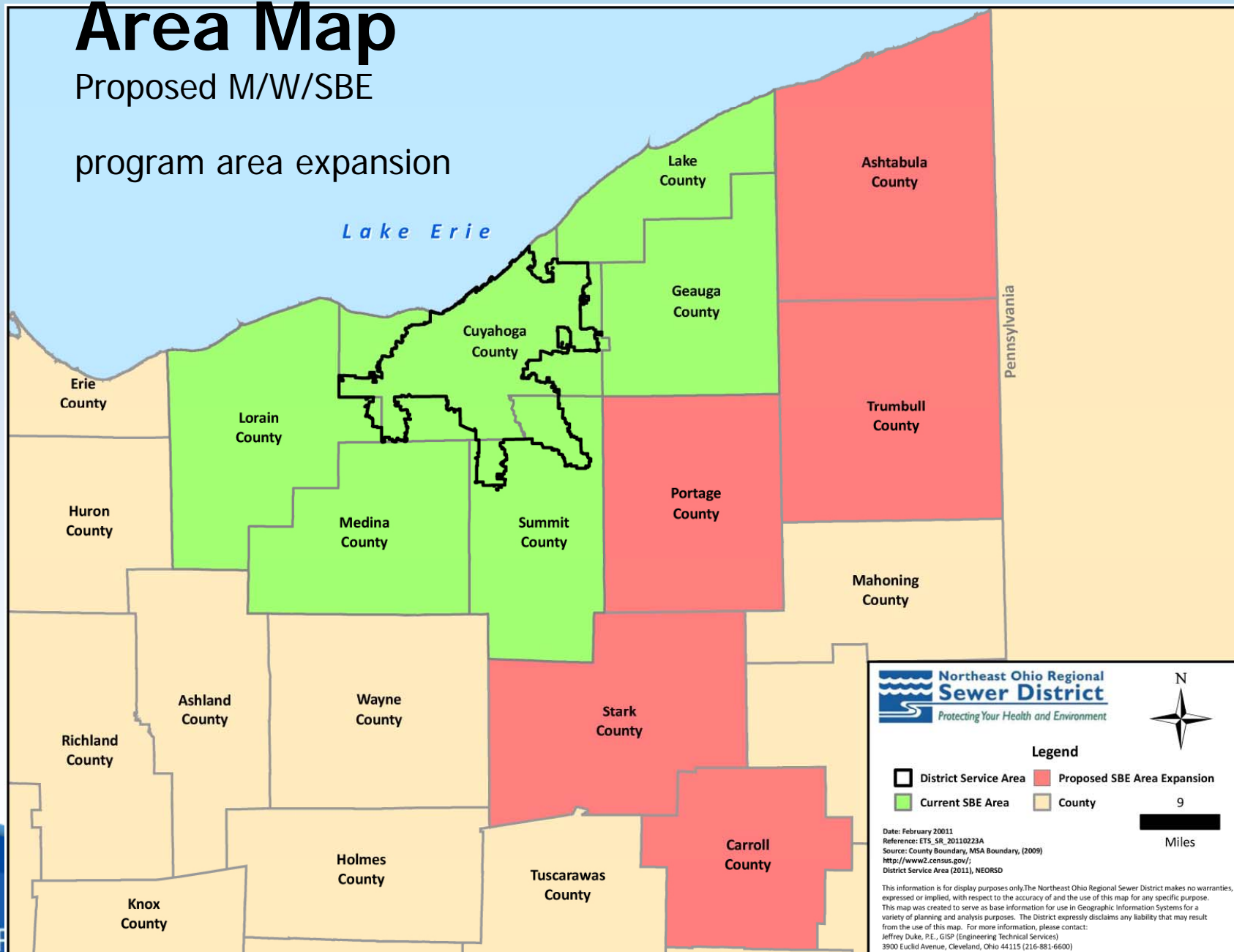
Current SBE program area



Area Map

Proposed M/W/SBE

program area expansion



Revenue Eligibility Standards

- District size standards (sample, in millions)
 - Construction \$33.5m
 - Plumbing \$33.5m
 - Electrical \$33.5m
 - Painting \$14m
 - Flooring \$14m
 - Engineering \$10m

***Based on a 5 year average**

Economically Disadvantaged

- **Personal net worth statement for SBEs, MBEs and WBEs**
- Individual personal net worth less than \$1.3m
- Owner must possess the power to direct the management and policy decisions

SBE/MBE/WBE Project Goal Estimating Procedure – Capital Projects

- Project cost estimated by construction category
- Abilities of certified SBE/MBE/WBE correlated with category cost estimates
- Capacity and number of SBE/MBE/WBE firms taken into consideration
- Range of potential SBE/MBE/WBE participation opportunities calculated
- Goal calculation documented on SBE/MBE/WBE goal calculation spreadsheet

SBE/MBE/WBE Project Goal Estimating Procedure – Capital Projects



SBE Calculation Sheet

BID FORM

Project Title:	
Project Acronym:	
Project Number:	

ITEM NO.	ITEM DESCRIPTION (Reference/Specification Section)	UNIT	ESTIMATED QUANTITY	UNIT BID PRICE		TOTAL BID AMOUNT		SBE low range		SBE high range		TYPICAL SBE CONTRACTORS	
				DOLLARS	CENTS	DOLLARS	CENTS	DOLLARS	CENTS	DOLLARS	CENTS		
GENERAL ITEMS													
1	Construction Photography, Inspection, and Reports												
2	Site Work												
BID ITEMS													
3													
4													
5													
6													
7													
8													
BID ITEMS													
9													

OPPORTUNITY PIPELINE



Communications

- MBE/WBE/ SBE Community
- Prime Contractors
- Business Opportunity Exchange
- Community Leaders Meeting

Outreach

- Certification Workshops
- Partner with other organizations for construction workshops
 - City of Cleveland W.O. Walker
 - Gilbane Construction Management
 - Synergy Hopkins Airport
- Greater Cleveland Partnership
- Women Business Council
- National Association of Women Business Owners
- Hispanic Business Association

Program Summary

- Program based upon Disparity Study results
- MBE and WBE goals will be placed on projects
- Metropolitan Statistical Areas (MSAs)
- Revenue eligibility based on a 5 year average
- Personal net worth statement
- Advisory committee
- Outreach

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Project Tracking

SBE/MBE/WBE TRACKING

Project Name: Example Project

Contractor: Jones Construction

Project Acronym: EXPRJ

Oracle Project #: EXPRJ

Contract Value \$5,117,500

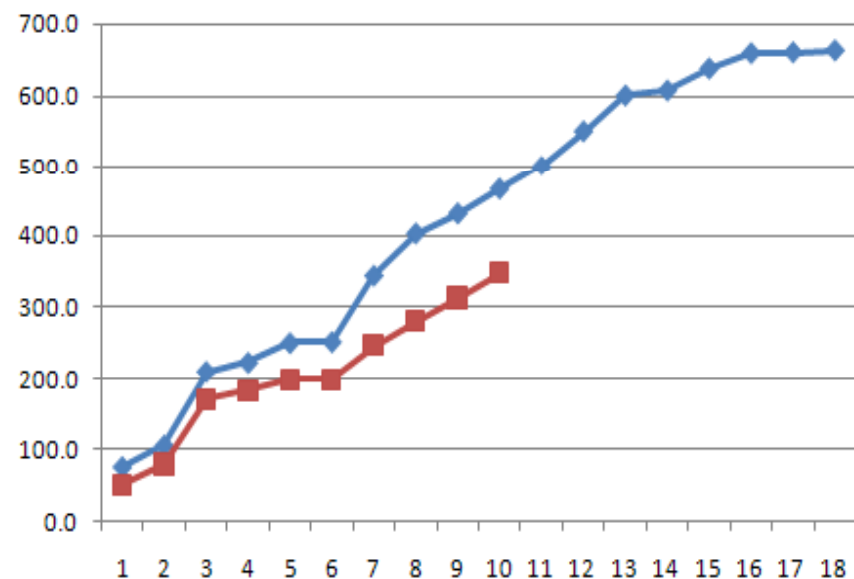
Contract #: 2000.00

Estimate Date: Tuesday, February 23, 2010

Period Start: Wednesday, February 24, 2010

Period End: Thursday, February 25, 2010

Pay Request No.: 10.00



Subcontractor	MBE/WBE/ SBE	Goal %	Goal \$			Aug-11	Sep-11	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12
ATB Enterprises	MBE	8.84%	\$452,600.00	PLANNED	431,927			87,550	1	12,356	500	58,314
				ACTUAL	153,338			77,000	1			38,514
Paving & Construction Co.	MBE	3.22%	\$165,000.00	PLANNED	78,726							25,000
				ACTUAL	0							
ABC Corp	SBE	2.34%	\$120,000.00	PLANNED	104,341	1,540		3,000	1	12,750		3,000
				ACTUAL	125,112	1,536		3,000	1	12,551		3,485
123 Trucking	MBE	60.00%	\$30,000.00	PLANNED	29,501				4,500	1	1,020	1,250
				ACTUAL	16,189				4,427	1	1,018	1,215
				PLANNED	255,903	75,000	30,000	12,750	8,000	2,500	1	4,278

Watershed Programs

Frank Greenland

Director of Watershed Programs

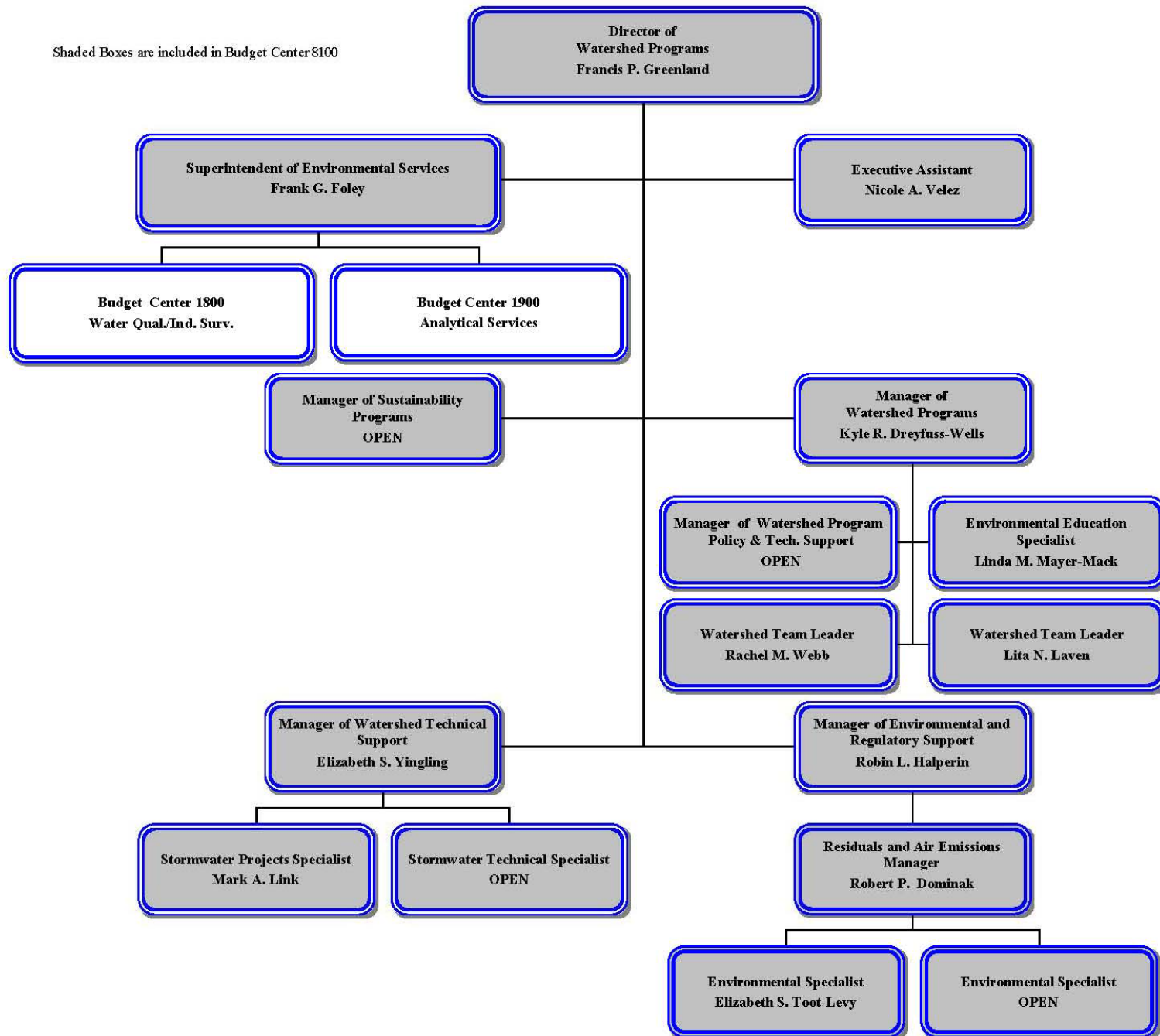
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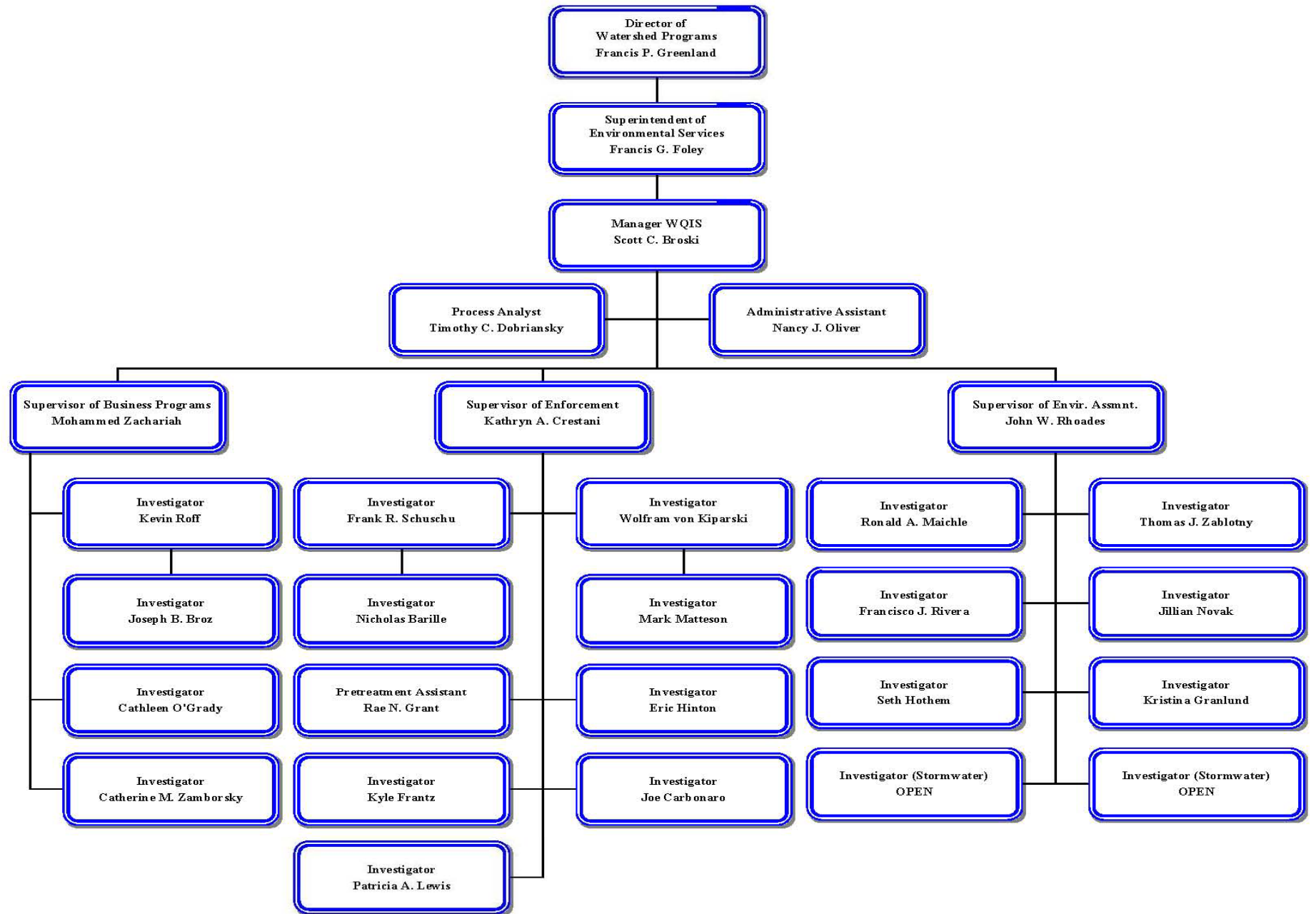
Business Opportunity Program

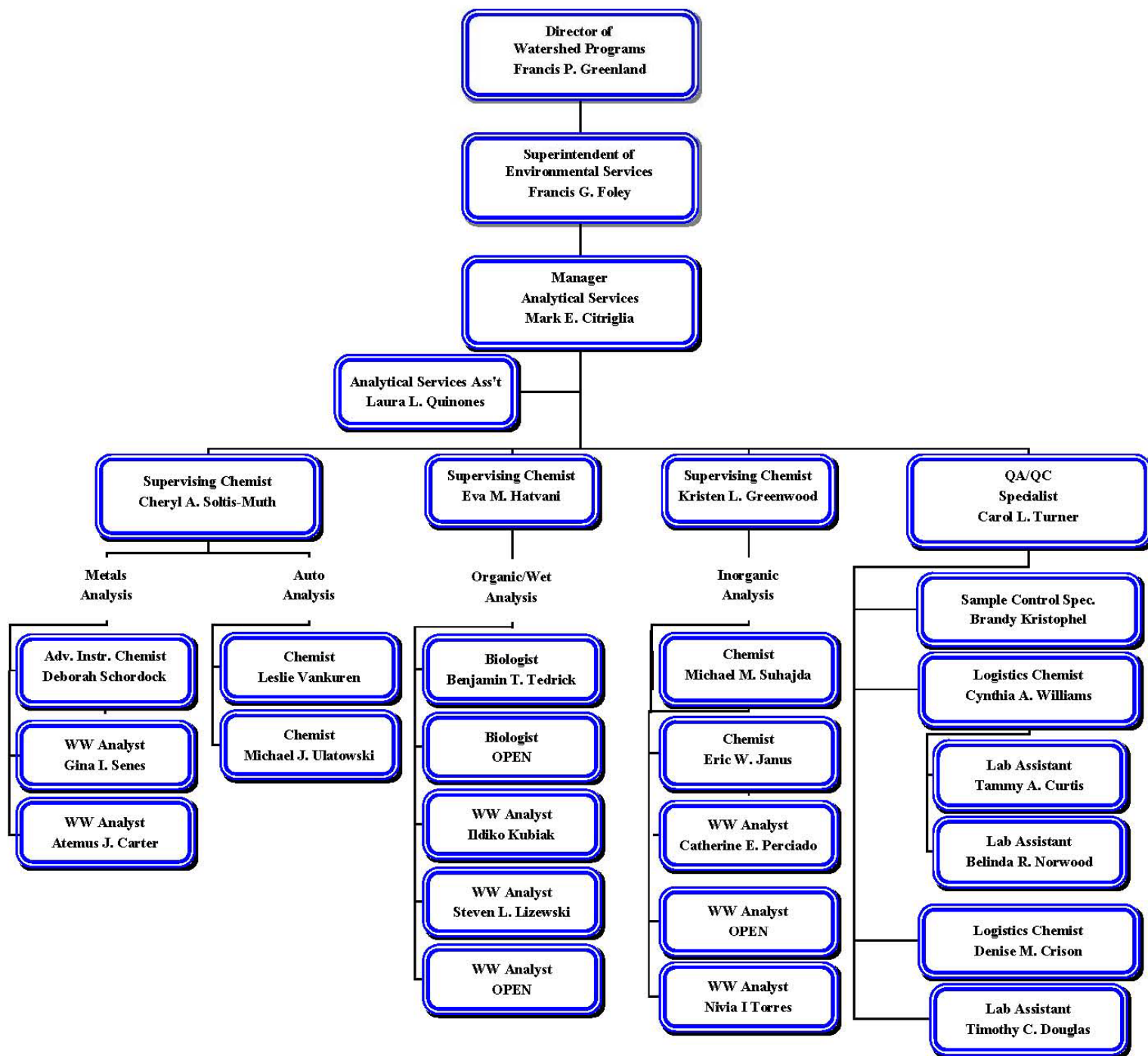


Northeast Ohio
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Shaded Boxes are included in Budget Center 8100







Watershed Programs Contracting Opportunities

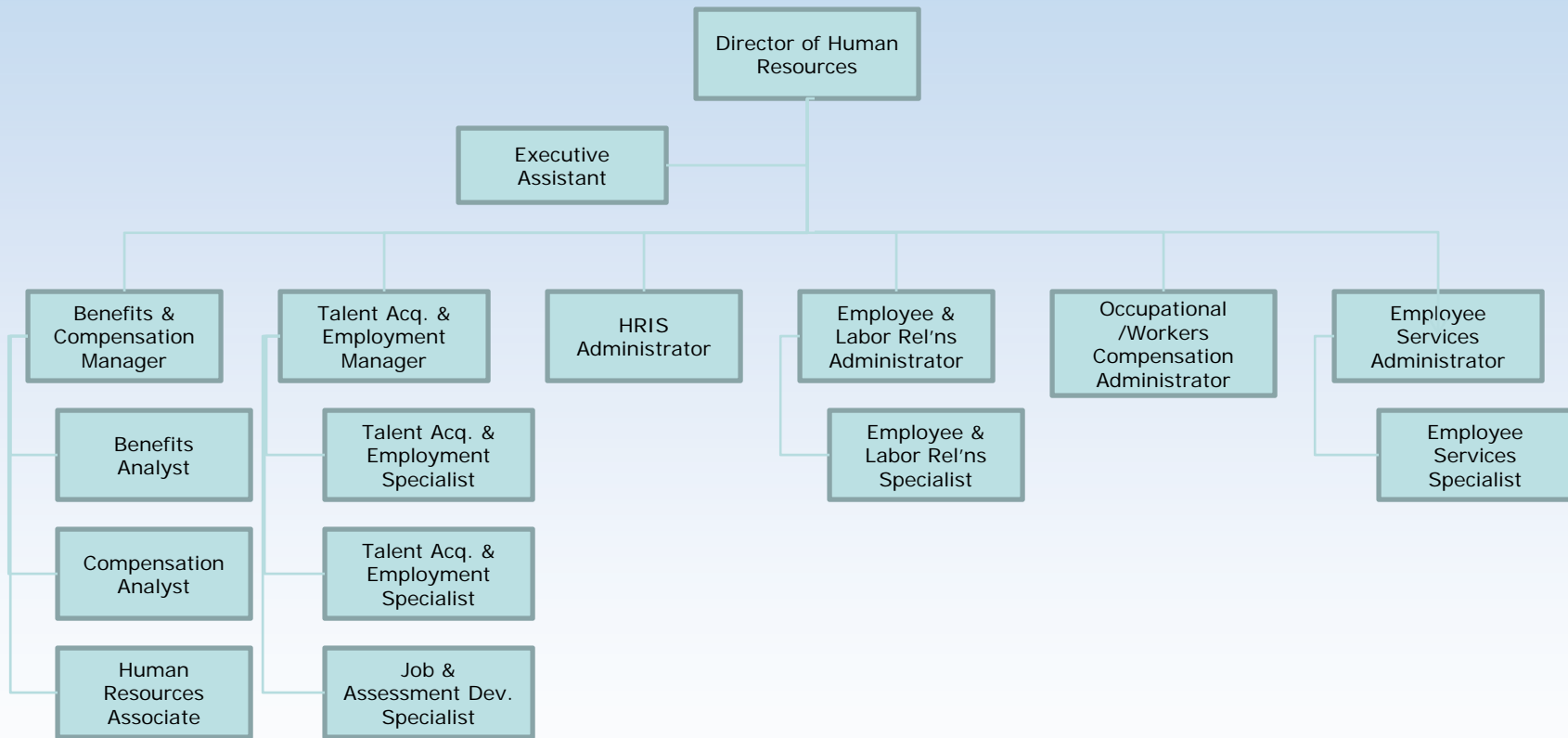
- Laboratory chemicals, supplies
- Outside laboratory services (for analyses we don't perform in-house)
- Macroinvertebrate identification, enumeration
- Emergency spill clean-up
- Stormwater Program Assistance
- Regulatory Compliance Assistance
- Watershed Programs Assistance

Human Resources

Tana Powell

Executive Assistant to Director of
Human Resources

Human Resources



Human Resources

- Core HR Areas of Responsibility
- Number of Organizational Employees
- Percentage of Operating Budget
- Organizational Trends
- Other Organizational Impact

Contractor Opportunities

- Training
- Talent Acquisition
- Union Negotiation
- Occupational Health
- Human Resource Information Systems HRIS
- Annual Service Awards
- New Employee & Promotional Assessments
- Printing

Evaluation Process

- Request For Qualifications
- Request For Proposals
- Cross-departmental Evaluation Team

Organization & Employee Development

Mary Ann Hogan

Organization & Employee
Development Consultant

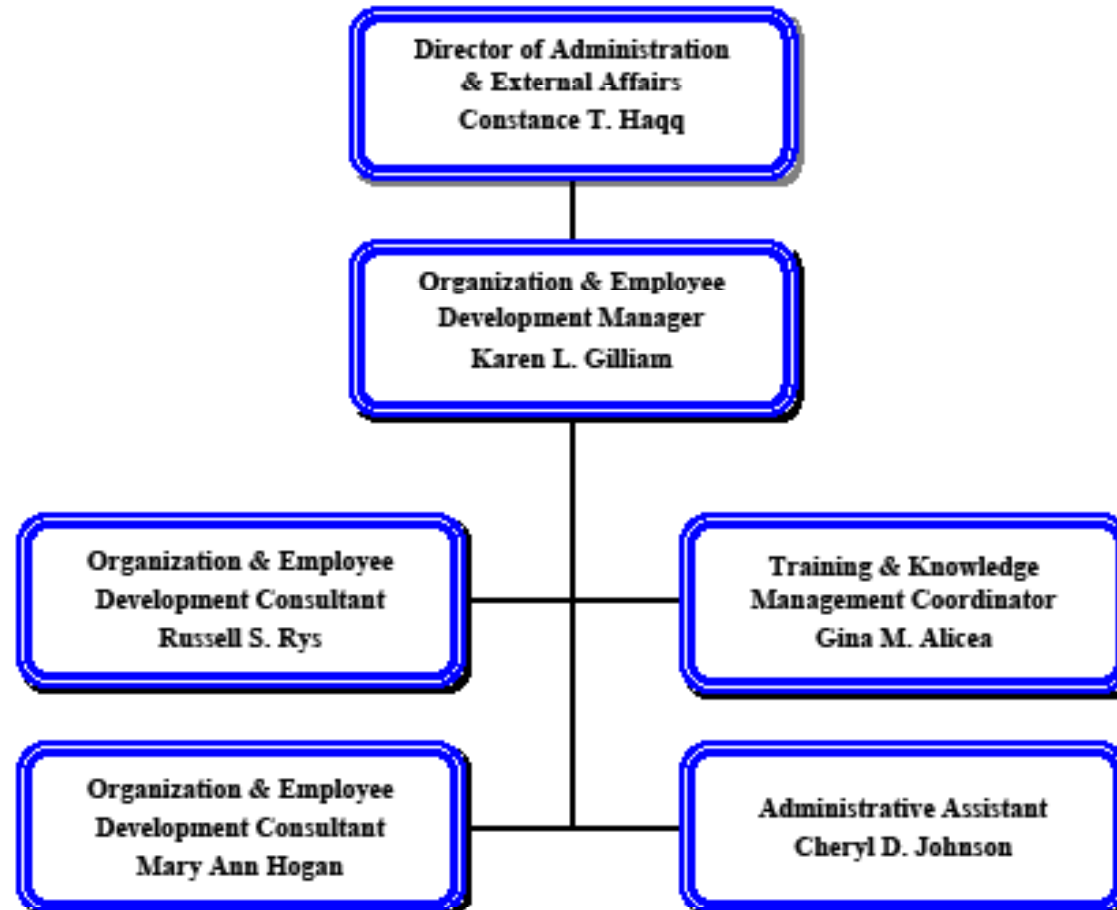
We believe in a culture of inclusion that encourages the ongoing growth and development of a competent, diverse and engaged workforce.

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 Northeast Ohio
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Business Opportunity Program

Northeast Ohio Regional Sewer District
Organization & Employee Development
Budget Center - 5100



OED Overview

- Ensure organizational readiness so that the District can effectively **manage change** in a complex, ever changing and demanding environment.
- Serve our clients by providing internal management **consulting and coaching** in specific areas of talent development, performance management, organizational learning and change management.
- Provide **professional development** programs that enhance requisite knowledge and skills.

RFP Criteria

- Methodology (method of accomplishing scope of work)
- Team Quality & Experience
- Knowledge of Software Application
- Task/Cost (hourly rate summary)
- Timeline/Commitment of key project personnel
- Presentation or Training Delivery Approach

Future Projects

- OED & Information Technology (IT)
 - Classroom training services, *Lunch & Learn* sessions for Microsoft Office Suite
 - Enterprise Applications training services, i.e., Microsoft Visio, Adobe Professional and Photoshop

Communications & Community Relations

Kim Jones
Manager of CCR

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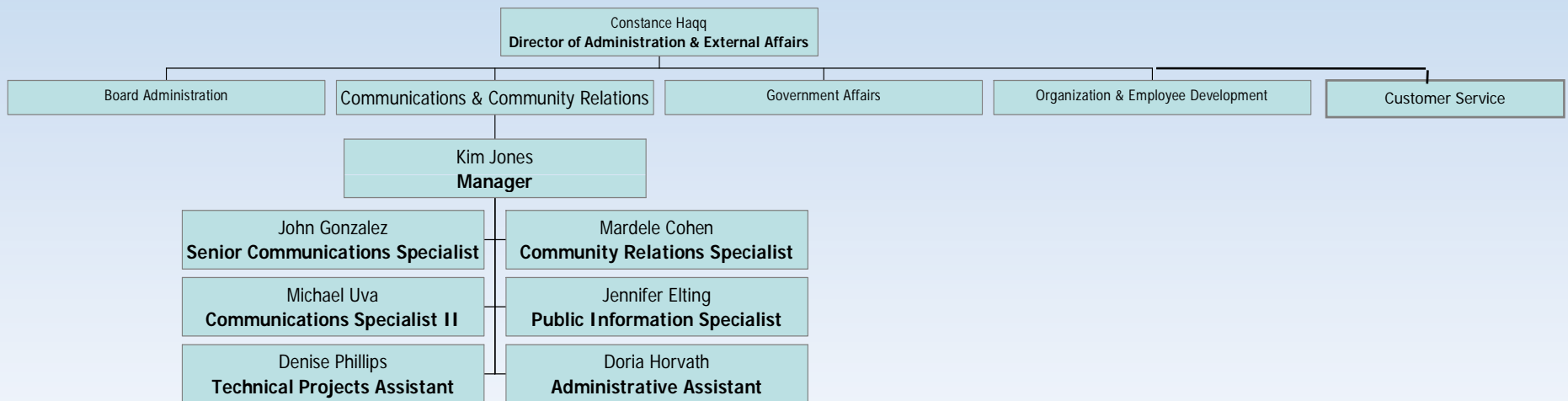
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Our purpose

- Educate the community and our customers about our clean water work and its value to the region.

COMMUNICATIONS & COMMUNITY RELATIONS Organization



COMMUNICATIONS & COMMUNITY RELATIONS

Internal & external communication

- Media production *Print, video, web, electronic*
- Media relations
- Web content management
- Outreach and education
 - Includes event planning
- Student outreach and education
- Customer awareness research

COMMUNICATIONS & COMMUNITY RELATIONS

Opportunities

- **Printing, graphic design:** Assorted print publications
THROUGHOUT THE YEAR
- **Promotional materials:** T-shirts, notepads, pencils, etc. THROUGHOUT THE YEAR
- **Equipment Rental:** tents, tables/chairs, A/V AS NEEDED
- **Graphic Displays production:** Banners, signs, portable displays THROUGHOUT THE YEAR
- **Video production** AS NEEDED
- **Customer awareness research** ANNUALLY
- **Crisis media consultation** AS NEEDED

Process

- Issue Request For Proposal
- Solicit three quotes beginning with companies in our MBE/WBE/SBE database
- Select the best work for the best price

Engineering & Construction

Jim Bunsey

Deputy Director of Engineering &
Construction

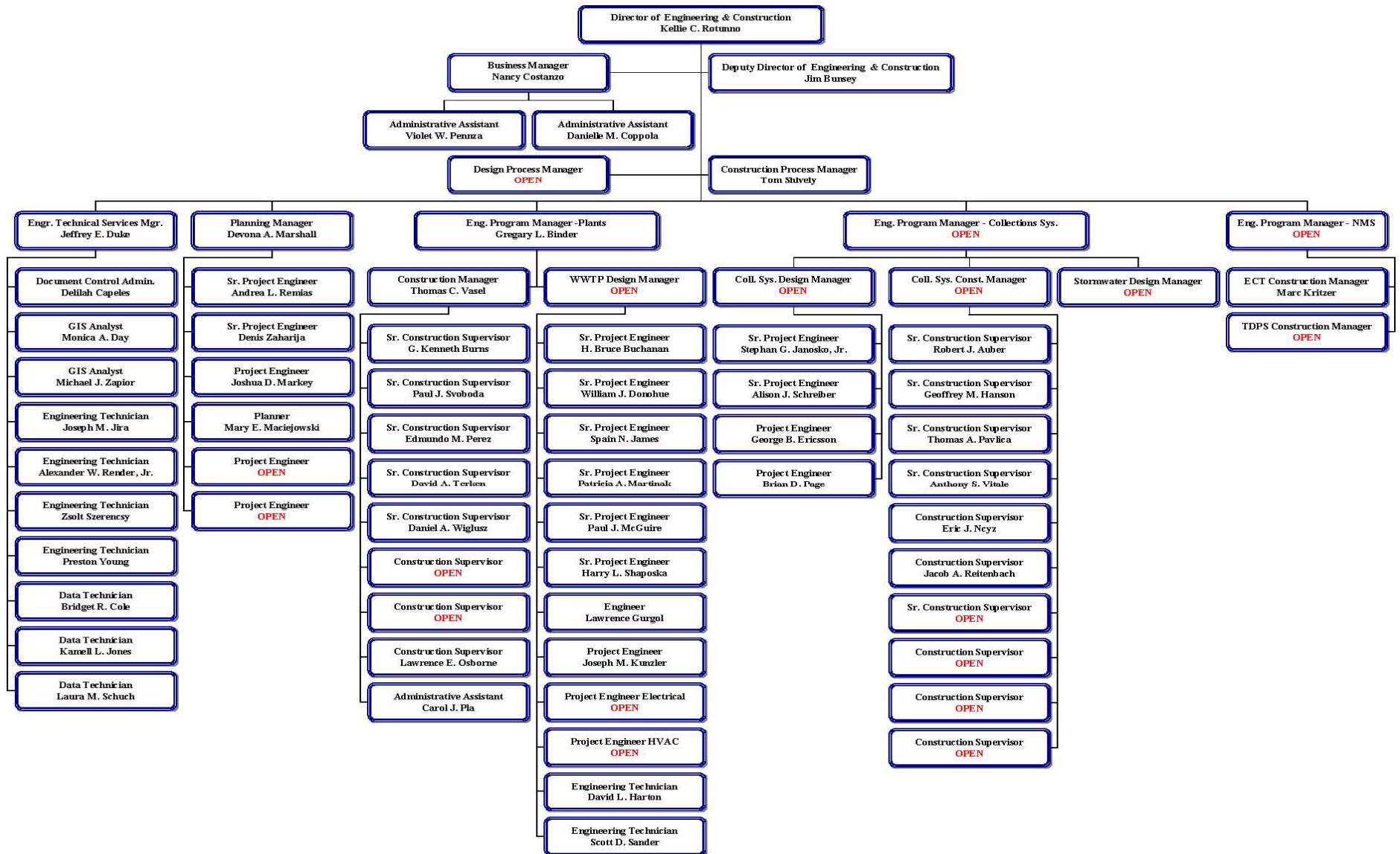
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Northeast Ohio Regional Sewer District
Engineering & Construction
Budget Center - 9000



E&C Overview

- Plan activities needed to define the District's Capital Improvements Program
- Implement the design and construction of the District's Capital Plan Projects
- Provide project leadership and proper engineering resources for planning, design & construction of efficient wastewater and wet weather conveyance, overflow control and treatment systems while meeting environmental needs of the community

RFP Criteria

- Project Team/Project Manager Quality
- Experience on Similar Projects
- Clarity and Organization of Proposal
- Local/MBE/WBE/SBE Participation
- Project Understanding
- Proposed Methods to Accomplish:
 - Scope of Work
 - Alternative Approaches
 - Risk Management
- Ability to Meet Proposed Schedule

RFP Criteria

- Proposals shall include a statement indicating:
- Portions of the project to be assigned to MBE/WBE/SBE businesses in a responsible role;
- Other portions of the project that will involve contribution by MBE/WBE/SBE firms;
- Statement of the overall percentage of MBE/WBE/SBE involvement; and
- Principal contact information for each MBE/WBE/SBE firm

Evaluation and Selection Process

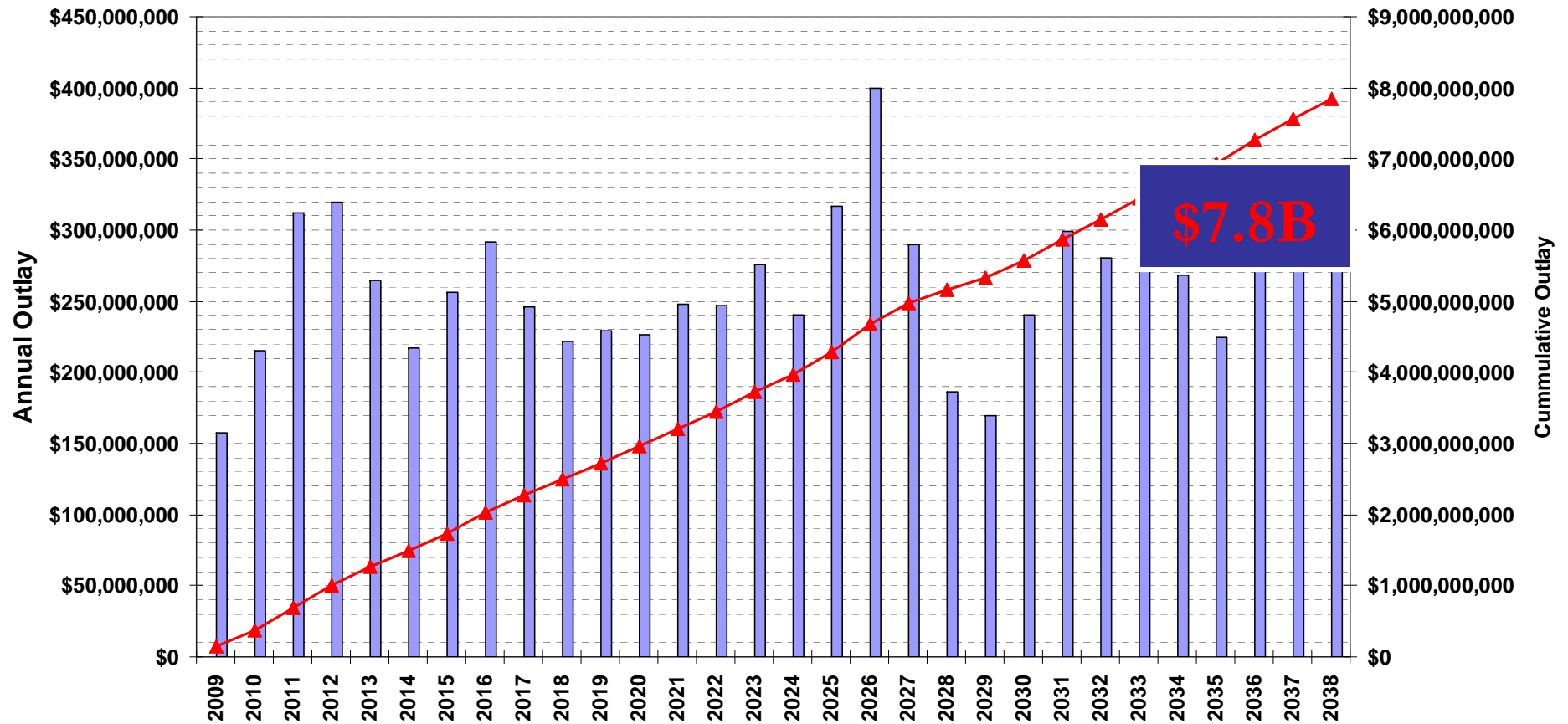
- Written Qualifications (35%) and Written Technical Approach (35%) – evaluated and scored by District Selection Committee
- Presentation and Interview (30%)
- Scores will be combined
- Negotiations will take place with the highest rank firm
- Upon agreement, recommendations will be made to the District's Consultant Review Committee for approval

Evaluation and Selection Process

- Upon approval by Consultant Review Committee, District Staff will report to the Board of Trustees and make a recommendation to enter into a contract based on the outcome of the negotiations.

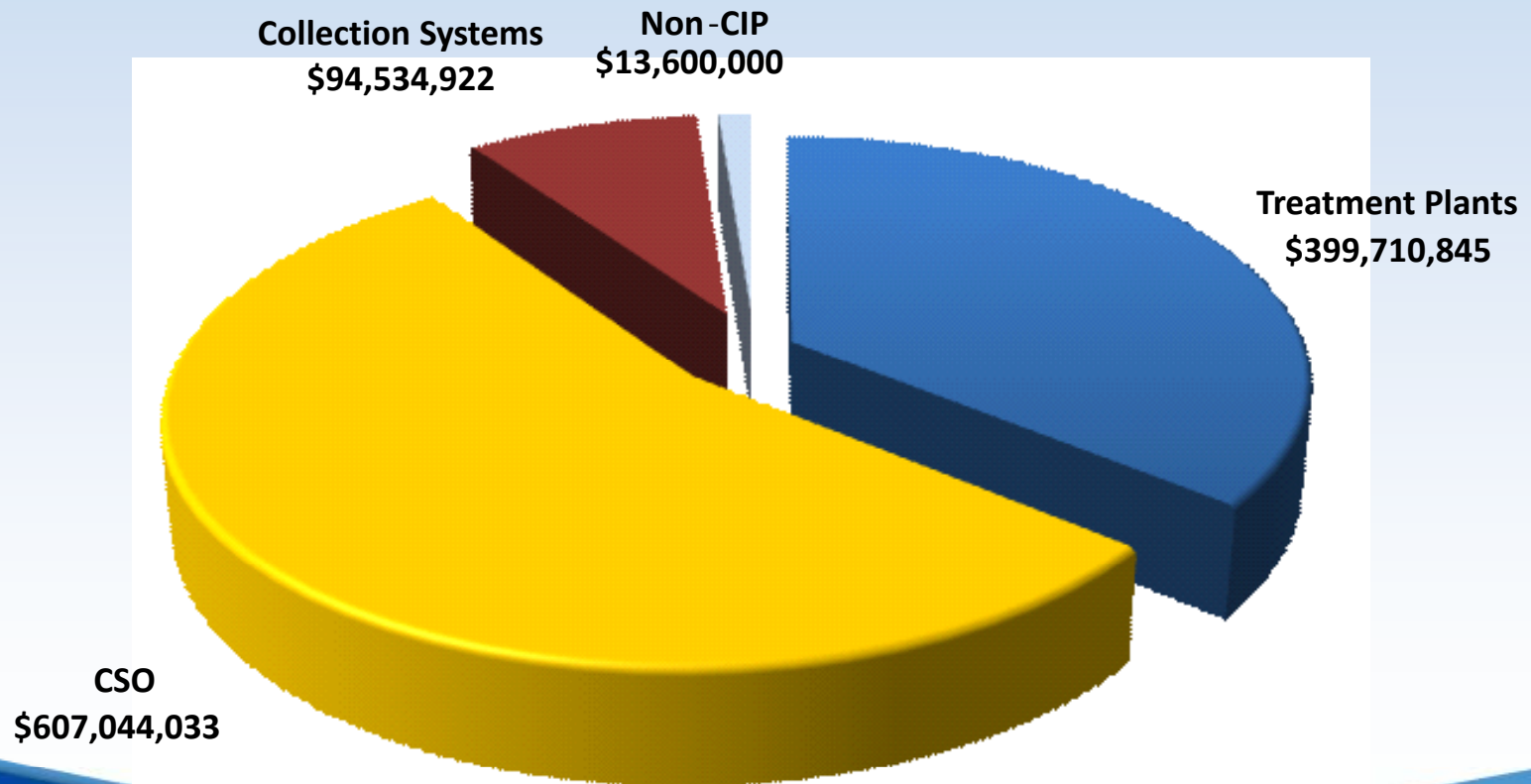
30-Year Capital Improvement Program (escalated costs)

Current CIP 2009-2038



5-Year CIP 2011-2015

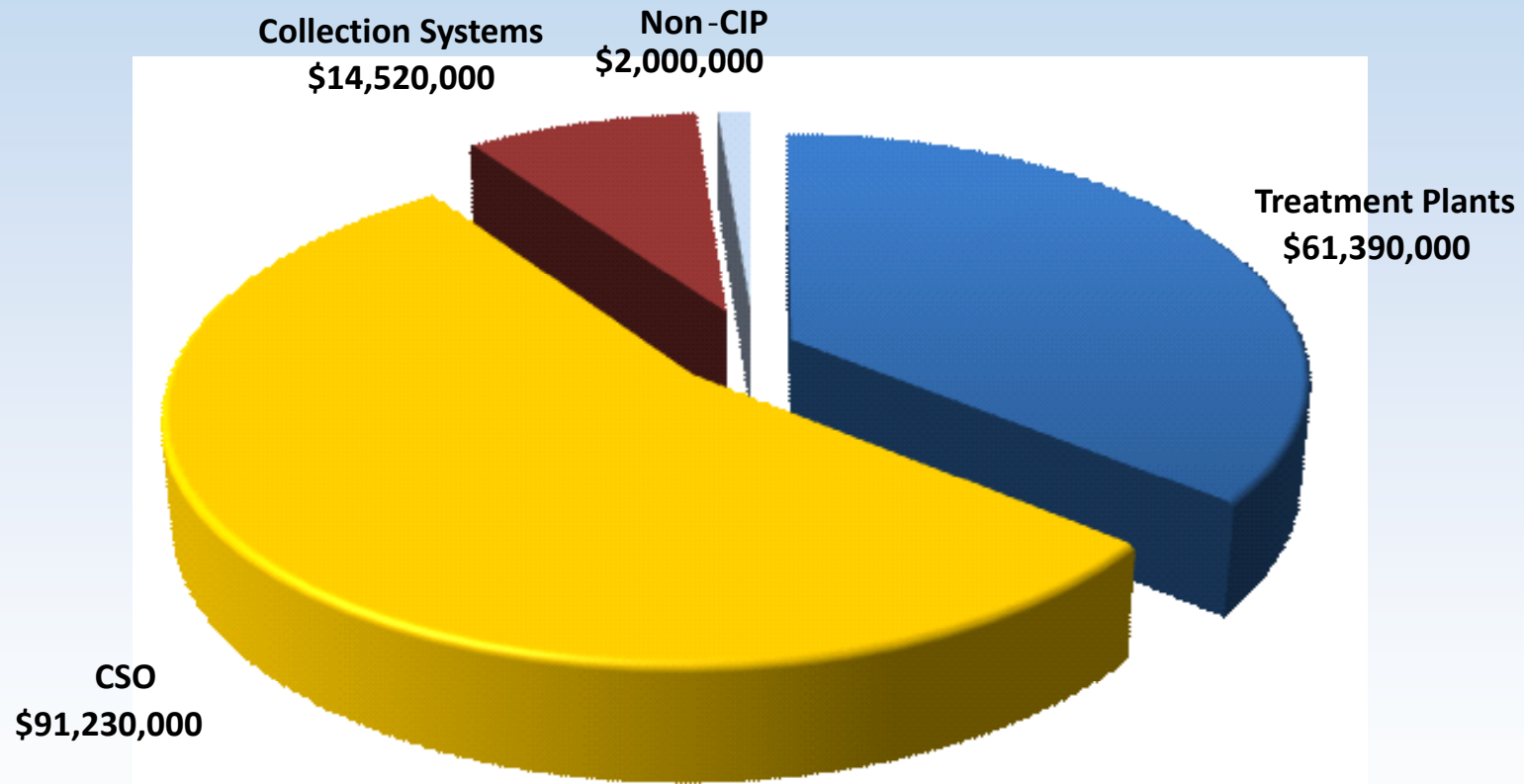
Total \$1,101,289,798



5-Year CIP 2011-2015

Professional Services Total

\$169,140,000



5-Year CIP 2011-2015

Construction Services Total

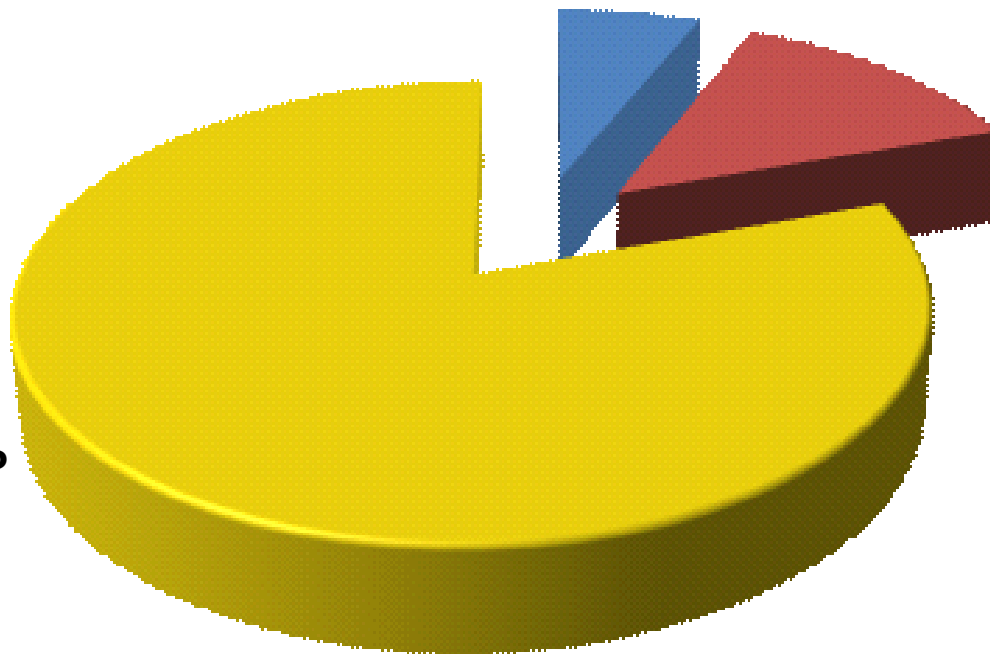
\$932,152,360

Treatment Plants \$41,619,259

Collection Systems

\$46,380,795

CSO
\$844,152,306



5-Year CIP Available On-Line

Northeast Ohio Regional Sewer District :: Protecting your health and environment - Microsoft Internet Explorer provided by NEOR

http://www.neorsd.org/

File Edit View Favorites Tools Help Links » Convert Select

NEORS D Intranet - Sit... Submittal Reviews Northeast Ohio Reg...

S | PARENTS | TEACHERS

[Euclid Creek Tunnel](#)
[Walworth Run Interceptor Realignment](#)

[Code of Regulations](#)
[SSCBOUTS: Sewer Service Charge Based on Usage of the System](#)
[Consent decre](#)

On the blog | n


RESOURCES

FOR VENDORS

- ▶ [Small Business Enterprises](#)
- ▶ [Vendor registration](#)
- ▶ [Bids + Proposals](#)
- ▶ [Purchasing department](#)
- ▶ [govdeals.com](#)

FOR EDUCATORS

- ▶ [Videos](#)
- ▶ [Request materials](#)



FROM OUR BOARD

[Board of Trustees: Profiles](#)
[Board of Trustees Access](#)

[2010 Public meeting schedule](#)
Updated 5/21/2010


CURRENT

- ▶ 12/02/2010: [Agenda](#) | [Action](#)
- ▶ 11/18/2010: [Agenda](#) | [Action](#)

Archives: [Minutes](#) + [Agendas](#)
[Committee meeting minutes](#)
[more...](#)

LINKS + RESOURCES

PUBLICATIONS

- ▶ [environotes](#) 
- ▶ [Capital Improvement Plan](#)
- ▶ [Healthy Home Handbook](#)
- ▶ [Annual Financial Reports](#)

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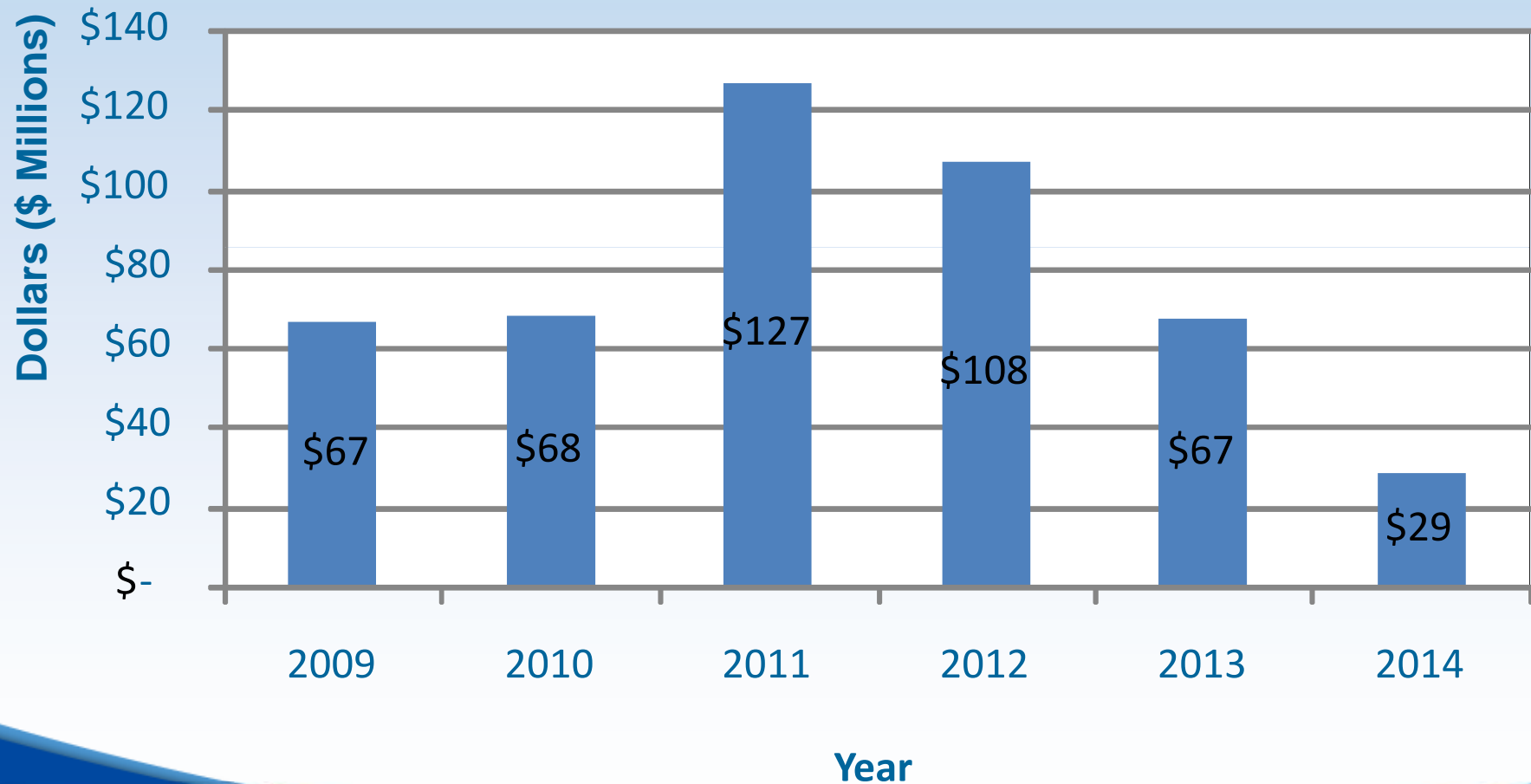
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2011 CIP Look Ahead

- Target award of \$201M
- Target award of 34 new projects
- Target close-out of 17 construction projects
- Target average bid price within 10% of Engineers Opinion of Probable Construction Costs
- Integrate and Implement new processes/procedures that have been established for improving consistency in management of design, bid and construction projects

2009-2014 Cash Flow for Treatment Plants Projects



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2009-2014 Cash Flow for Collection System Program



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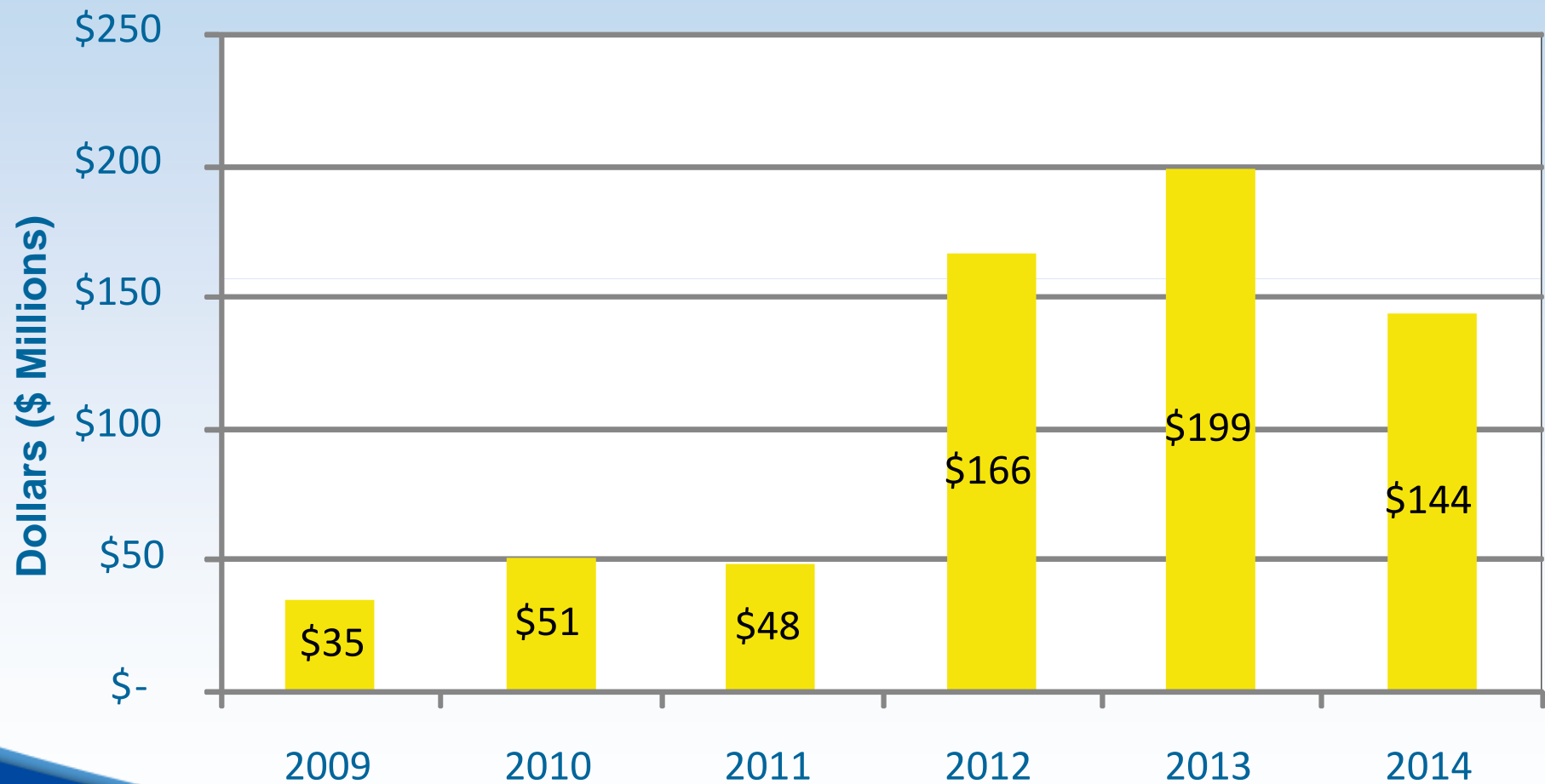
Business Opportunity Program



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2009-2014 Cash Flow for CSO Program Projects



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Business Opportunity Program

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Program Info.		Program Name	Year
TP	Westerly	Westerly Primary Clarifier Rehabilitation Project	2011
CSO	Easterly	400 MGD Sustained Secondary Capacity Improvements	2011
CSO	Easterly	Euclid Creek Pump Station	2011
CL	Southerly	Cuyahoga Valley Interceptor (CVI)	2011
TP	Westerly	Biosolids Handling System Improvements	2012
TP	Southerly	Waste Pickle Liquor Building Improvements	2012
TP	Southerly	Stormwater Pump Station Improvements	2012
CSO	Easterly	Dugway West Interceptor Relief System	2012
CSO	Easterly	Lakeshore/Nottingham Reg/Relief	2012
CSO	Southerly	CSO-063 Relief/Consolidation Sewer	2012
TP	Southerly	First Stage Aeration Tank Improvements	2013
TP	Southerly	First Stage Return Sludge Pump Station Improvements	2013
TP	Southerly	Effluent Disinfection Improvements	2013
TP	Southerly	Equipment Storage Building Rehabilitation	2013
TP	Southerly	Maintenance Building Rehabilitation	2013
TP	Southerly	Security Building Rehabilitation	2013
TP	Southerly	Second Stage FST System Improvements	2013
TP	Southerly	Second Stage Aeration Improvements II	2013
TP	Southerly	Second Stage Return Sludge Pump Station Improvements	2013
TP	Southerly	First Stage FST Improvements	2013
TP	Southerly	Second Stage Lift Station Improvements II	2013
TP	Southerly	Waste Liquor Handling Improvements	2013
CSO	Easterly	Lakeshore Boulevard Relief Sewer	2013
CSO	Easterly	Dugway Storage Tunnel	2013
CSO	Easterly	Easterly CSO-001 400 MGD Chemically Enhanced High Rate Treatment (CEHRT) Facility	2013
CSO	Easterly	London Road Relief Sewer	2013
CSO	Westerly	Westerly CSO-002 CSOTF Expansion to 411 MGD Chemically Enhanced High Rate Treatment (CEHRT) Facility	2013
CSO	Westerly	Mary Street Pump Station Upgrade	2013
CSO	Southerly	Optimized Parallel Operation with Chemicals and Disinfection(OPT-1)	2013
CSO	Easterly	140th Consolidation and Relief Sewer	2014
CSO	Easterly	Superior Avenue Pump Station Upgrade	2014
CSO	Easterly	Stones Levee Pump Station Upgrade	2014
CSO	Southerly	Columbus Road Storage Tank	2014
CSO	Easterly	Doan Valley Storage Tunnel	2015
35 Projects			2015-2030

Future Projects

How District opportunities are managed

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Business Opportunity Program

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Law Governing Opportunities

- Governed by Ohio Revised Code 6119.10
 - Construction Requirements
 - Competitive Bidding
- Ohio Revised Code Chapter 153
 - Public Improvements
 - Professional Design Service Requirements

Notification of Opportunities

- <http://neorsd.org>
- Plain Dealer/Call & Post
- Direct email/fax

After Opportunity Award

- Successful bidder
 - Contract submitted for signature
- Unsuccessful bidder
 - Follow-up to review winning bidder/proposers submission

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