



It is the mission of the Urbana Park District to:

- Improve the quality of life of its citizens through a responsive, efficient, and creative park and recreation system,
- Pursue excellence in a variety of programs, parks, and special facilities that contribute to the attractiveness of neighborhoods, conservation of the environment, and the overall health of the community.

NOTICE AND AGENDA OF MEETING
URBANA PARK DISTRICT BOARD OF COMMISSIONERS
BOARD STUDY SESSION
TUESDAY, NOVEMBER 2, 2021
6:30 PM
PLANNING & OPERATIONS FACILITY
1011 E. KERR AVENUE
URBANA, IL 61802

Board Study Sessions are designed for the Board to study, review and discuss specific topics. Actions are not typically taken during a Study Session, unless specifically noted on the agenda.

I. Call to Order

A. Remote Attendance

The Board may authorize, by a voice vote of the physically present board members, any Commissioner wishing to attend remotely, pursuant to the UPD Remote Attendance Policy (Ord 2017-03).

II. Accept Agenda

III. Public Comment

Any member of the public may make a brief statement at this time within the public participation rules of the Board.

IV. Discussion

A. Minority and Women Owned Business Enterprise (MWBE) Addition to Prequalified Provider Program

B. Other Diversity, Equity, and Inclusion Updates

V. Comments from Commissioners

VI. Adjourn

Note: This Meeting Agenda and its supporting materials are on the UPD website at <http://www.urbanaparks.org/documents/index.html>, choose the "Public Meetings" category and search for the meeting information you wish to download.

Memo

To: Urbana Park District Board of Commissioners

From: Derek Liebert, Superintendent of Planning and Operations

Copy: Tim Bartlett, Executive Director

Corky Emberson, Superintendent of Recreation

Caty Roland, Superintendent of Business Services

Andy Rousseau, Project Manager

Date: November 2, 2021

Re: Minority and Women Owned Business Enterprise Addition to Prequalified Provider Program

I. Statement of Situation

The Urbana Park District has identified a goal of developing a program to increase procurement opportunities for minority and women owned businesses. The State of Illinois and the City of Champaign have existing programs that certify minority and women business enterprises (MWBEs). Coleman and Associates, Inc (CAI) has been contracted to assist the Urbana Park District with the addition of a procedure to increase MWBE procurement opportunities within the UPD's Prequalified Provider Program (PPP).

II. Statement of work

The existing Prequalified Provider Program was reviewed from the perspective of MWBE contractors. The program application was updated to improve access and lower barriers for applying contractors. Sections of the application that did not significantly affect the UPD's evaluation of contractors were improved or removed. The updated PPP application will be used universally for MWBE and non-MWBE contractors. MWBE contractors certified through the City of Champaign or the State of Illinois will identify their current certification and be given priority in the distribution of work opportunities. All PPP contractors will be distributed in to Tier 1 and Tier 2 status based on their work history with the UPD. All new contractors without prior park district work history, both MWBE and non-MWBE, will begin in Tier 1 status and achieve Tier 2 status through the satisfactory completion of awarded projects. A satisfactory work history will be evaluated with a post-project contractor assessment tool CAI assisted the UPD in developing.

Projects will similarly be assigned Tier 1 and Tier 2 projects through the metric CAI developed to assign projects based upon risk, complexity, and urgency. Tier 2 projects carry more risk and complexity and may have an element of time urgency. Tier 2 projects would be reserved for Tier 2 contractors with which UPD has established a known work history of satisfactory work.

When awarding work, staff will prioritize requesting quotes from MWBE contractors. In instances where no MWBE contractors are certified within the category of sought work, or the proposals received from MWBE contractors are evaluated to be excessively high, staff may seek proposals from non-MWBE contractors.

On an annual basis, staff will review MWBE participation levels in the PPP. In year one, the UPD has assigned a preliminary goal of awarding 15% of all PPP contracts to MWBE vendors. Similar percentages are used in

other agencies MWBE programs on an annual basis of percentage of funds spent. Because of the uncertainty of the availability of interested MWBE contractors in our new program, the district will evaluate annually and seek to increase participation goals and awarded work in subsequent years.



Update 9/23/21

Background and Procedure to Utilize a Metric

To Select MWBE Vendors in Urbana Park District (UPD) Prequalified Provider Program (PPP) for Projects

Purpose

Provide a tool to select MWBE vendors new to the PPP program who are to be assigned to small capital and facility maintenance work and/or projects between May 1, 2022 and April 30, 2025.

Prerequisites

1. PPP applications from MWBE vendors will have been reviewed and evaluated. Using primarily the existing UPD PPP qualitative approach based on all PPP application data elements, place accepted MWBE PPP applicants in one of two categories: “good” (**Tier I**) or “very good to excellent” (**Tier II**). This qualitative grouping of MWBE vendors is linked to PPP project selection detailed in Table 1..
2. Small capital or facility maintenance work that is considered for assignment as a PPP project must be formally scored based on three criteria: a) Owner’s Risk, b) Complexity, and c) Time Completion Urgency. The scoring range for each is identified in the UPD PPP Selection and Assignment spreadsheet.
3. UPD staff must commit to consistent formal scoring of PPP work and/or projects prior to assignment.
4. During FY 2022, UPD staff will give priority to selecting MWBE vendors for PPP work and/or projects for two primary reasons: a) in order to provide opportunity to new MWBE vendors to UPD thereby fulfilling a commitment to procurement diversity and b) have UPD and MWBE vendors gain experience working with each other to gain familiarity and work towards establishing long term relationships.
5. It is acknowledged there may be categories of PPP-related work where there are no MWBE vendors available or eligible.

Procedure Steps

1. Per Board Policy Manual Chapter 5 (2021 version) sections 5.08 and 5.14 (last updated in 2016) Purchasing Authority expenditure levels where PPP is a delivery or execution option is unchanged.
2. UPD staff in FY 2022 will give priority to selecting MWBE vendors for PPP projects.

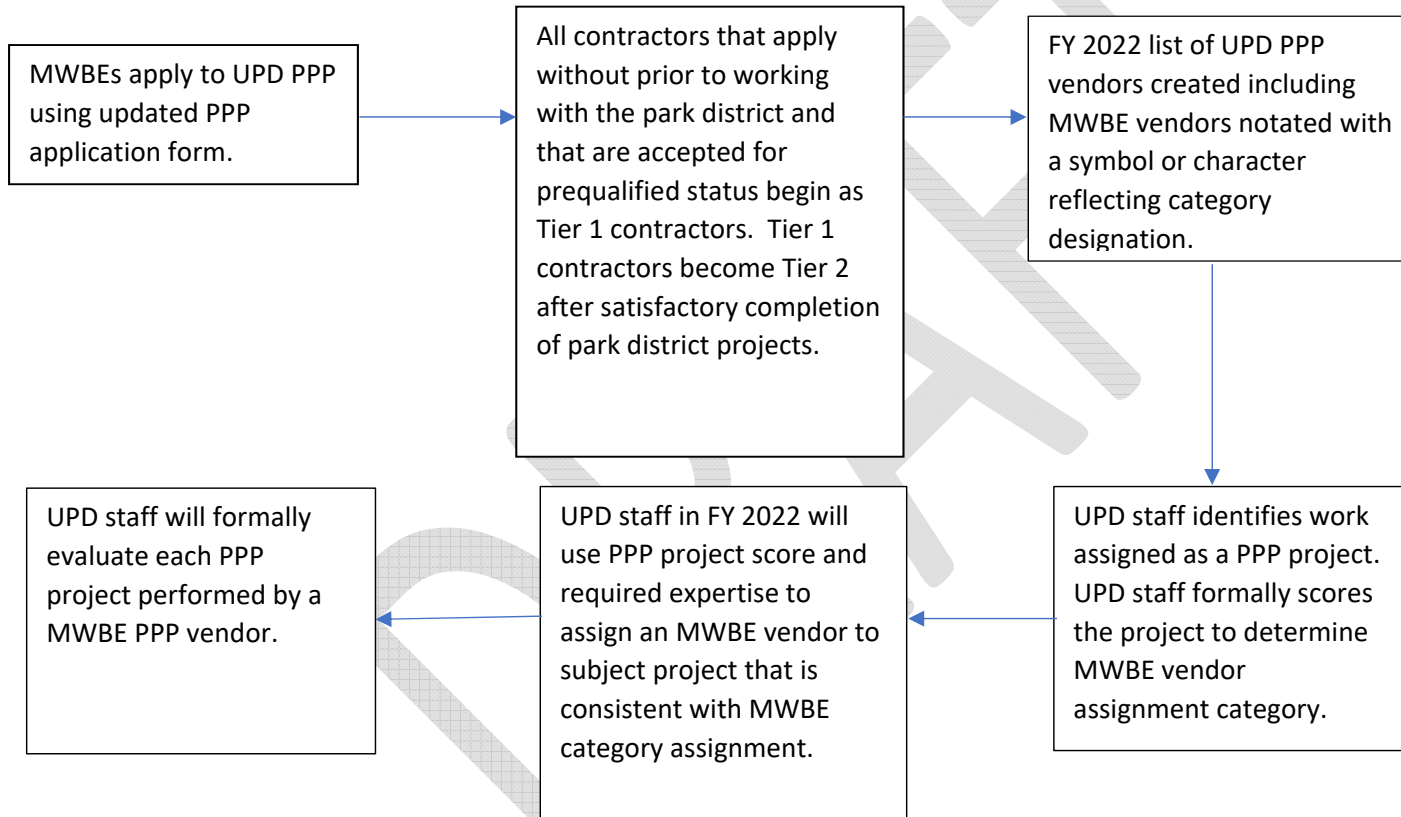


3. UPD staff will score and document the score for work that is assigned as a PPP project using the same scoring metric identified in Table 1. Projects with scores in ranges determine which category of MWBE PPP vendor is selected to perform the work.
4. UPD staff, based on the PPP project score will assign an MWBE vendor with subject expertise from the “good” (**Tier I**) or “very good to excellent” (**Tier II**) category to the PPP project. Where there is more than one MWBE PPP vendor in a category (work trade within a tier) UPD staff may seek proposals from multiple and up to three MWBE PPP providers, before selecting a non-MWBE PPP vendor. The goal is to first approach MWBEs within subject work category for PPP projects. If all MWBE proposals are too high in cost, then the UPD may go to non-MWBEs. Also, if there are no MWBEs in a category, then approach non-MWBEs and solicit cost proposals.
5. All vendors that perform PPP-related work must be evaluated and their evaluations documented. (Method and tools to be determined per UPD staff modifications to NASA Contractor Performance Assessment Review System (CPARS)).



DRAFT Workflow for UPD PPP MWBE Inclusion and Selection

July 1, 2021





COLEMAN AND ASSOCIATES, INC.

TABLE 1. UPD PPP SELECTION AND VENDOR ASSIGNMENT METRIC

VENDOR CATEGORY ASSESSMENT	PROJECT ASSESSMENT									
	Owner Risk		Complexity of Project				Time Completion Urgency			
	Low	10	Low	10	"Soft" Schedule	10	Medium	20	"Hard" Schedule	20
	Medium	20	Medium	20	"Hard" Schedule	20	High	30	Emergency	30
	High	30	High	30	Emergency	30				
	Experience Level of Service Provider									
	Good (Tier I)									
	Very Good--Excellent (Tier II)									
	Expected Service Provider Level	Acceptable "Good" Combinations			Owner Risk		Complexity of Project		Time Completion Urgency	
	Tier I	50	←	Addition	Low	10	Medium	20	"Hard" Schedule	20
	Tier I	60			Low	10	High	30	"Hard" Schedule	20
	Tier I	60			Medium	20	Medium	20	"Hard" Schedule	20
	Unacceptable Combinations									
	Tier I	60			Low	10	Medium	20	Emergency	30
					Inconsistent w/"Emergency"					
	Expected Service Provider Level	Acceptable Very Good--Excellent Combinations			Owner Risk		Complexity of Project		Time Completion Urgency	
	Tier II	70	←	Addition	Medium	20	High	30	"Hard" Schedule	20
	Tier II	80			High	30	Medium	20	Emergency	30
	Tier II	90			High	30	High	30	Emergency	30
	Unacceptable Combinations									
	Tier II	70			Low	10	High	30	Emergency	30
					Inconsistent w/"Emergency" and "Complexity"					

Note: Only scores that are multiples of "10" are applicable. For example--15 or 25 is not acceptable to determine a category for a MWBE Vendor or to determine a score for a PPP Project.



Prioritization of MWBEs for Utilization in UPD PPP

Background

The Urbana Park District (UPD) Board and its management staff desire to increase the diversity and utilization of construction-related minority and women business enterprises (MWBEs) in their current prequalified provider program (PPP). The PPP is a list of prequalified providers that UPD management staff have evaluated and approved for assignment. Assignments meet UPD procurement policy project cost thresholds and provide management staff the option of directly assigning construction and facility maintenance projects. The current list of PPP providers was created through an application process in 2018. A new list of PPP providers inclusive of MWBEs is planned for calendar year 2022 utilizing an updated application. MWBEs will be recruited to apply through an outreach process that will include invitations to online presentations that will provide PPP background, operations, project examples, application procedures, application evaluation criteria and vendor assignment procedures.

Prioritization Guidelines

UPD, through this initiative, is seeking to provide opportunity to and utilize MWBE vendors that are in the Urbana-Champaign community. Previous to this initiative, there has not been a specific outreach initiative to attract MWBEs to this opportunity, nor a means to specifically vet and include them on the eligible PPP vendor list.

Success Criteria

In order for this program to be successful, success is interpreted using the following two metrics:

Establish a preliminary goal in year 1 (2022) of 15% of awarded Prequalified Provider contracts are to MWBE vendors/contractors. This goal may be revised per considerations such as:

- Number of MWBE vendors that apply
- Size of UPD PPP projects
- Expected FY spend in UPD PPP work categories

--MWBE vendors represented in any construction work categories are asked to provide quotes on 100% of the opportunities UPD management staff solicits for work, where an MWBE contractor has been prequalified.

Prioritization Scheme and Selection



Given the two success metrics identified above, the actual selection of MWBE vendors in a priority scheme is as follows:

For all PPP work up to \$24,999.99, UPD management staff will evaluate and score each PPP work project to assign said project to either a Tier I or Tier II category.

Through the PPP application process and subsequent evaluation, MWBEs will be assigned to either a Tier I or Tier II. Tier I vendors may only work on Tier I projects. Tier II vendors may work on Tier I or Tier II projects.

PPP Tier I Projects:

- MWBEs will be asked to provide formal or informal written quotes per current UPD Board Policy Manual, Chapter 5, Final Actions, Finances, Disbursements and Contracts, where an MWBE has been qualified within the category of work.

- The intent is to assign MWBEs first to less complicated projects so that UPD and MWBEs can build a work relationship and experience with each other under minimal risk. Project type and availability across construction trade or work categories in the first two years may prevent some MWBEs from being assigned work.

- UPD management may elect not to directly assignment work to Tier I vendors where owner risk, project complexity, schedule or unforeseen conditions in management's opinion suggest direct assignment is not appropriate.

- Evaluation of MWBEs performance will be conducted for each opportunity assigned.

PPP Tier II Project:

- Tier II MWBE contractors will be asked to provide quotes when available within an assigned work category e.g. electrical, paving, painting, demolition, etc.

- MWBE contractors who are Tier II will have priority.



Urbana Park District
Planning and Operations
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Contractor's Qualification Statement for Prequalified Provider

The Undersigned certifies under oath that the information provided herein is true and sufficiently complete so as not to be misleading. See Section 8.3 for required notary signature.

SUBMITTED BY:

Legal Firm Name _____
Common Firm Name _____
Street Address _____
City, State, Zip _____
County _____
Business Phone _____
E-mail Address _____

MINORITY AND WOMEN-OWNED BUSINESS CERTIFICATION:

1. Provide Certification Agency: _____
2. Provide Dates of Certification: _____
3. Attach Proof of Certification

Please complete if the company mailing address is different from above address.

1. Mailing Address _____
City, State, Zip _____
2. Contact Person _____
(List the person responsible for completing this form)
3. Submittal is for: () Parent Company () Division () Branch Office

Parent Company Name _____
Address _____
City, State, Zip _____

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Section 1- Federal Taxpayer Identification Number

- 1.1 Provide the firm's Federal Taxpayer Identification Number. If sole proprietorship, provide the Social Security Number.

Taxpayer ID Number: _____

Section 2- Licensing

- 2.1 List jurisdictions and trade categories in which your organization is legally qualified to do business, and indicate registration or license numbers, if applicable.

- 2.2 List jurisdictions in which your organization's partnership or trade name is filed.

Section 3- Business Organization

- 3.1 Type of firm:
☐ Corporation ☐ Partnership
☐ Individual ☐ Joint Venture
☐ Other _____

If the Contractor is a **corporation**, provide the following information:

A. State in which incorporated: _____

B. Date of incorporation: _____

C. If incorporated in another state, is the corporation authorized to do business in the State of Illinois? ☐ yes ☐ no

D. Name and address of the corporation's registered agent in Illinois:

Type of work

<input type="checkbox"/> General Construction	<input type="checkbox"/> HVAC	<input type="checkbox"/> Electrical
<input type="checkbox"/> Plumbing	<input type="checkbox"/> Roofing	<input type="checkbox"/> Pavement
<input type="checkbox"/> Asphalt	<input type="checkbox"/> Arbor	<input type="checkbox"/> Landscaping
<input type="checkbox"/> Masonry	<input type="checkbox"/> Portable Toilets	<input type="checkbox"/> Sewer/Septic
<input type="checkbox"/> Water & Fire Damage	<input type="checkbox"/> Signs	<input type="checkbox"/> Fencing
<input type="checkbox"/> Exhibits	<input type="checkbox"/> Natural Areas	<input type="checkbox"/> Supplier, list type: _____
<input type="checkbox"/> Other (please specify) _____		

Section 4- Organization

4.1 How many years has your organization been in business? _____

4.2 How many years has your organization been in business under its present business name? _____

4.2.1 Under what other or former names has your organization operated? _____

4.3 Please complete the following sections as applicable to your organization:

4.3.1 Date of organization: _____

4.3.2 Name of owner (s): _____

4.3.3 President's name: _____

4.3.4 Vice Presidents name: _____

4.3.5 Secretary's name: _____

4.3.6 Treasurer's name: _____

Section 5- Experience

5.1 List the categories of work that your organization normally performs with its own forces.

5.2 Number of years the firm has been in business: _____

5.3 Number of years under present ownership: _____

5.4 On the attached sheet (Table 1), list the relevant projects your organization has completed in the past five years, giving the name of project, owner, architect, contract amount, date of completion and percentage of the cost of the work performed with your own forces.

5.4.1 State average annual amount of construction work performed during the past five years:

Section 6- Disclosures and General Questions

For a Yes answer to any question in this section, please attach explanation on a separate sheet.

6.1 In the past five years, has the firm or its predecessor been cited for violating state or federal safety, sanitary, or environmental laws? () yes () no

6.2 Has the firm or its predecessor ever been suspended or debarred by a state, federal, or municipal agency? () yes () no

Section 7- Time Availability and Fees

7.1 On the attached sheet (Table 2) provide the time schedule as to when your organization is available to provide services and response times.

7.2 Attach a **Schedule of Fees** provided on your organization's stationary and dated.

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7.3 Attach a current **Certificate of Insurance** for your company.

7.4 Prevailing Rate of Wages:

The District's prequalification designation calls for the construction of a "public work," within the meaning of the Illinois Prevailing Wage Act, 820 ILCS 130/.01 et seq. ("the Act"). The Act requires contractors and subcontractors to pay laborers, workers and mechanics performing services on public works projects no less than the "prevailing rate of wages" (hourly cash wages plus fringe benefits) in the county where the work is performed. For information regarding current prevailing wage rates, please refer to the Illinois Department of Labor's website at: <http://www.state.il.us/agency/idol/rates/rates.htm>. All contractors and subcontractors rendering services under this contract must comply with all requirements of the Act, including but not limited to, all wage, notice and record keeping duties.

Section 8- Signature

8.1 As a condition of prequalification, the Contractor agrees that it:

- A. Has read, understands, and will comply with all instructions pertaining to this statement.
- B. Will notify the Owner within five business days of any material changes to the information contained in this statement.
- C. Agrees that if any of the above conditions is violated by the firm or if any responses are found to be materially untrue, the prequalification of the firm will be suspended.
- D. Will provide yearly, current certificate of insurance for work performed in Illinois for the Owner.

8.2 Dated at this ____ day of _____

Name of Organization: _____

By: _____

Title: _____

8.3 Being duly sworn deposes and says that the information provided herein is true and sufficiently complete so as not to be misleading.

Subscribed and sworn before me this ____ day of _____

Notary Public: _____

My Commission Expires: _____

TABLE 1
RELEVANT CONTRACTS COMPLETED WITHIN THE LAST 5 YEARS. LIST UP TO 10.

Project and Location	Contract Type and Final Amount	Contractor's Portion of Work	Start and Completion Dates Month/Year	Name, Phone # of Owner & Professional Services Consultant References

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TABLE 2
TIME AVAILABILITY

Indicate on chart when contractor will be available to provide services. Indicate availability to nearest hour.
Mark "A" for Availability / Mark "AR" for increase of normal scheduled rates / Mark "NA" for Not Available

DATE / /	SUN	MON	TUE	WED	THU	FRI	SAT
5:00 am							
6:00 am							
7:00 am							
8:00 am							
9:00 am							
10:00 am							
11:00 am							
12:00 pm							
1:00 pm							
2:00 pm							
3:00 pm							
4:00 pm							
5:00 pm							
6:00 pm							
7:00 pm							
8:00 pm							
9:00 pm							

Does your business offer emergency services during hours not indicated on this chart? () yes () no

*Indicate for which holidays you are available with "AR" or "NA (not available)": _____

*Indicate a guaranteed response time during normal available hours _____.

*Indicate a guaranteed response time during an emergency situation _____.

CHECK LIST OF COMPLETED ITEMS
ITEMS TO BE RETURNED AS PART OF PREQUALIFICATION APPLICATION

- () Contractors Qualification Statement (page 1-4) signed and dated
- () Section 7: Answers to questions if applicable
- () Section 8: Schedule of Fees (printed on company stationery)
- () Section 8: Certificate of Insurance
- () Table 1: Contractor Work Experience
- () Table 2: Time Availability Chart

CONTRACTOR'S PREQUALIFICATION EVALUATION CRITERIA			
Criteria	Possible Points	Points	Comments
Work Experience	20		
Experience in similar work	20		
Insurance coverage	10		
Time Availability	10		
Location of Business to District	5		
Experience with similarly sized projects	10		
Successful reference checks	10		
Consideration of Fees	10		
Clarity of preparing prequalification forms	5		
Total Maximum Points	100		



CONTRACTOR PERFORMANCE ASSESSMENT REVIEW

CONTRACT / CATEGORY OF WORK	TIER STATUS		CONTRACTOR	EVALUATION PERIOD	
	<input type="checkbox"/> TIER 1 <input type="checkbox"/> TIER 2				
	A. Quality of Product or Service (Rating 1-3)	1. Unsatisfactory		2. Satisfactory	3. Exceptional
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Narrative:					
B. Schedule (Rating 1-3)	1. Unsatisfactory	2. Satisfactory	3. Exceptional	N/A	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Narrative:					
C. Cost Control (Rating 1-3)	1. Unsatisfactory	2. Satisfactory	3. Exceptional	N/A	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Narrative:					
D. Business Relations (Rating 1-3)	1. Unsatisfactory	2. Satisfactory	3. Exceptional	N/A	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Narrative:					
E. Management of Key Personnel (Rating 1-3)	1. Unsatisfactory	2. Satisfactory	3. Exceptional	N/A	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Narrative:					
F. Evaluator Statement (Rating 1-3)	Based upon scores A. – E. above, the contractor performance is evaluated to be:				
	1. Unsatisfactory	2. Satisfactory	3. Exceptional		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<p>A vendor who receives “satisfactory” evaluations on all evaluation criteria over 2 to 3 projects are moved to Tier II. In conclusion, if a vendor has a “history” of receiving satisfactory scores over all evaluation criteria they are to be moved to Tier II.</p>					

INSTRUCTIONS FOR COMPLETING CONTRACTOR PERFORMANCE ASSESSMENT REVIEW (CPAR)

Each area assessment must be based on objective data. Facts to support specific areas of evaluation must be requested from the contracting officer and other government specialists familiar with the contractor's performance on the contract under review. Such specialists may, for example, be from engineering, manufacturing, quality, logistics (including provisioning), contract administration services, maintenance, security, data, etc.

The amount of risk inherent in the effort should be recognized as a significant factor and taken into account when assessing the contractor's performance. When a contractor identifies significant technical risk and takes action to abate those risks, the effectiveness of these actions should be included in the narrative supporting the ratings from the specific area being evaluated.

The CPAR is designed to assess prime contractor performance. However, in those evaluation areas where subcontractor actions have significantly influenced the prime contractor's performance in a negative or positive way, record the subcontractor actions with the Evaluator narrative.

Evaluate all areas that pertain to the contract under evaluation, unless they are not applicable – "N/A".

When performance has changed from one period to another such that a change in rating results, Evaluator narrative must address each change.

The Evaluator should use customary industry quantitative measures where they are applicable if the contract is for commercial products.

RATINGS WILL BE IN ACCORDANCE WITH THE DEFINITIONS DESCRIBED BELOW. (With the exception of Section F)

Exceptional. Performance meets contractual requirements and exceeds many to the Government's benefit. The contractual performance of the element or sub-element being assessed was accomplished with few minor problems for which corrective actions taken by the contractor were highly effective.

NOTE: To justify an *Exceptional* rating, you should identify multiple significant events in each category and state how it was a benefit to the GOVERNMENT. However, a singular event could be of such magnitude that it alone constitutes an Exceptional rating. Also there should have been NO significant weaknesses identified.

Satisfactory. Performance meets contractual requirements. The contractual performance of the element or sub-element contains some minor problems for which corrective actions taken by the contractor appear or were satisfactory.

NOTE: To justify a *Satisfactory* rating, there should have been only minor problems, or major problems the contractor recovered from without impact to the contract. Also there should have been NO significant weaknesses identified.

Unsatisfactory. Performance does not meet most contractual requirements and recovery is not likely in a timely manner. The contractual performance of the element or sub-element being assessed contains serious problem(s) for which the contractor's corrective actions appear or were ineffective.

NOTE: To justify an *Unsatisfactory* rating, you should identify multiple significant events in each category that the contractor had trouble overcoming and state how it impacted the GOVERNMENT. However, a singular problem could be of such serious magnitude that it alone constitutes an unsatisfactory rating. An *Unsatisfactory* rating should be supported by referencing the management tools used to notify the contractor of the contractual deficiencies (e.g. Management, Quality, Safety or Environment Deficiency Reports, or letters).

EVALUATION AREAS

a. Quality of Product or Service. Assess the contractor's conformance to contract requirements, specifications and standards of good workmanship (e.g., commonly accepted technical, professional, environmental, or safety and health standards).

For example: Are reports/data accurate? Does the product or service provided meet the specifications of the contract? Does the contractor's work measure up to commonly accepted technical or professional standards? Assess the degree of Government technical direction required to solve problems that arise during performance.

For Operations Support: Assess how successfully the contractor meets program quality objectives such as producibility, reliability, maintainability and inspectability. The evaluator must be flexible in how contract success is measured; e.g., using data from field reliability and maintainability and failure reports, user comments and acceptance rates, and scrap and rework rates. These quantitative indicators may be useful later, for example, in source selection evaluations, in demonstrating continuous improvement, quality and reliability leadership that reflects progress in total quality management. Assess the contractor's control of the overall production process to include material control, shop planning and control, and statusing.

b. Schedule. Assess the timeliness of the contractor against the completion of the contract, task orders, milestones, delivery schedules, administrative requirements (e.g., efforts that contribute to or effect the schedule variance).

This assessment of the contractor's adherence to the required delivery schedule should include the contractor's efforts during the assessment period that contribute to or effect the schedule variance. This element applies to contract closeout activities as well as contract performance. Instances of adverse actions such as the assessment of liquidated damages, or issuance of Cure Notices, Show Cause Notices, and Delinquency Notices are indicators of problems which may have resulted in variance to the contract schedule and should therefore be noted in the evaluation.

c. Cost Control. (Not required for Firm Fixed Price or Firm Fixed Price with Economic Price Adjustment). Assess the contractor's effectiveness in forecasting, managing, and controlling contract cost.

For example, does the contractor keep within the total estimated cost (what is the relationship of the negotiated costs and budgeted costs to actual)? Did the contractor do anything innovative that resulted in cost savings? Were billings current, accurate and complete? Are the contractor's budgetary internal controls adequate?

d. Business Relations. Assess the integration and coordination of all activity needed to execute the contract, specifically the timeliness, completeness and quality of problem identification, corrective action plans, proposal submittals, the contractor's history of reasonable and cooperative behavior, customer satisfaction, timely award and management of subcontracts, and whether the contractor met small/small disadvantaged and women-owned business participation goals.

Is the contractor oriented toward the customer? Is interaction between the contractor and the government satisfactory, or does it need improvement? Timely award and management of subcontractors should include subcontract costs and problem resolution. Also, in making the assessment, include the adequacy of the contractor's accounting, billing, and estimating systems; and the contractor's management of government Property (GFP), if a substantial amount of GFP has been provided to the contractor under the contract.

e. Management of Key Personnel (For Services and Information Technology Business Sectors only - Not Applicable to Operations Support). Assess the contractor's performance in selecting, retaining, supporting, and replacing, when necessary, key personnel.

For example, how well did the contractor match the qualifications of the key position, as described in the contract, with the person who filled the key position? Did the contractor support key personnel so they were able to work effectively? If a key person did not perform well, what action was taken by the contractor to correct this? If a replacement of a key person was necessary, did the replacement meet or exceed the qualifications of the position as described in the contract schedule?

f. Evaluator Statement. Check the statement which best applies to the contract evaluation.

Evaluator Narrative. A short, factual narrative statement is required for all assessments regardless of rating. Cross-reference the comments in this block to their corresponding evaluation area listed above. Each narrative statement in support of the area assessment must contain objective data. An exceptional cost performance assessment could, for example, cite the current under-run dollar value and estimate at completion. A marginal assessment could, for example, be supported by information concerning personnel changes or schedule delinquency rate. Key personnel familiar with the effort may have been replaced by less experienced personnel.

Sources of data may include customer/field surveys or evaluation of contractor reports.

NARRATIVES GUIDELINES

- Address contractor performance: Recent Relevant
- Collect input from entire program/project team
- Provide reader a complete understanding of contractor's performance
- Narrative required for each rated element
- Address:
 - Rating changes from prior reports
 - Benefit/impact to Government
- Recognize:
 - Risk inherent in effort
 - Government's role in contractor's inability to meet requirements
- Indicate major/minor strengths/weaknesses
- Consistent with:
 - Program metrics
 - Ratings
 - Contract objectives
- Document problems and solutions
- Contain nonpersonal and objective statements

Below are samples of narratives.

NOT Sufficient

Quality – Rating: **Exceptional**

The contractor is exceptional. They continually provide high-quality training and services.

The above narrative is missing details to support rating; details to tell entire story; supporting documentation/metrics.

Sufficient

Quality – Rating: Exceptional

Contractor has provided exceptional quality to our 40 worldwide locations during this reporting period. For example, ST requirements were changed and Contractor adjusted to providing 15 training sessions per month versus 10 without additional cost through use of an "express setup" module that requires less instructor preparation time. This allowed users to be trained 3 months more quickly than required. The contractor also aggressively represented the government's interest in dealing with their vendor to correct a system software malfunction. They worked with the vendor to revise the terms and conditions of the warranty clause to correct errors with no cost to the government. They also implemented a new risk management system that reduced potential risk actions by 50%. This also saved the government considerable stress and ensured a constant throughput of aircrew members trained.

NOT Sufficient

Quality – Rating: Satisfactory

In our opinion, the contractor has done really well in terms of schedule. The Training Manager, Jack Jones, is pleasant and easy to work with. He adapts to our schedule changes amazingly and never complains. He also went above and beyond and fixed our printer and fax without charging the government and he continued to meet all the contract objectives in the interim. Great job!

The above narrative is missing details to support rating; supporting documentation/metrics; used individual's name; work is outside the contract scope; subjective phrases.

Statements to Avoid –

"Outside Contract Scope"

"Our Opinion"

"It Appeared"

"We Believe"

"We Hope"

"We Were Not Happy"

"We Did Not Like"

"We Think"



BENEFITS & INCLUSION

“You Belong Here” promotes the creation of welcoming and supportive park and recreation experiences for everyone, while encouraging an inclusive and responsive staff culture. This celebrates inclusion regardless of age, ethnicity, culture, income, ability, lifestyle, interests—everyone and anyone belongs here!

Staff

The Urbana Park District is proud to be an equal opportunity employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, age, veteran status, or other protected status as required by applicable law. The Urbana Park District offers many inclusive employee benefits including:

- Tuition reimbursement
- Potential of fully paid Family Medical Leave Act (FMLA) absence as an accrued benefit that can be used for parental leave, or for the serious medical condition of an employee or family member
- On-the-Job-Training (OJT); position-specific onboarding and supported and guided education/training
- Informal mentoring
- Professional development opportunities (about diversity, equity, and inclusion and to enhance diversity, equity, and inclusion)
- You Belong Here Matrix Team
- Memberships to diverse professional organizations and associations that promote diversity, equity, and inclusion

Community

The Urbana Park District is committed to creating a diverse environment for its staff and also for community members. In 2015, the park district began placing even greater emphasis on the creation of a welcoming, affirming, and inclusive culture in which all community members and staff feel they belong; hence the “You Belong Here” expression accompanying the park district logo. The Urbana Park District has many inclusive offerings such as:

- free Play Days in the Park
- expanded scholarship program
- printed flyers in multiple languages
- Spanish translator on staff
- broadening reach with a “Park Van” filled with recreational equipment that can be taken to neighborhoods and events

**Learn more about our commitment to diversity, equity, and inclusion
on page 8 of our Strategic Plan by visiting:**

https://www.urbanaparks.org/assets/1/6/Strategic_Plan_11.pdf



science & evidence-based professional development

12/24/2020

Final Project Synopsis

Workforce Consultative Services

(Review of Recruitment and Interview Materials)

for

Urbana Park District

Urbana Park District recently released its 2020 Strategic Plan, which highlights four pillars. One of the four pillars, entitled “You Belong Here”, emphasizes diversity, equity, inclusion, and belonging (DEIB). On the backdrop of a global pandemic and social justice unrest particularly around race, Urbana Park District recognized the timeliness of investing in and continuing its efforts to achieve the vision related to You Belong Here.

As such, Urbana Park District began conversations with Krys Ardayfio Consulting in September 2020, and by December 10th secured third-party consultative services to collaboratively guide, assist, help lead, and implement intentional diversity, equity, inclusion, and belonging (DEIB) with regard to Urbana Park District’s workforce development efforts and desire to increase diversity through improved employment practices.

The robust consultative services, spanning from mid-December to December 23rd, included:

- Several proposal meetings and written proposals (via phone and Zoom)
- Two Consultative Meetings totaling three hours (via Zoom)
- Several brief phone and email check-ins and exchanges of work
- 21 hours of project work

The project resulted in a comprehensive approach to increasing DEIB in the current recruitment, search and screen, selection, interviewing, and hiring process. The comprehensive approach can be applied to any future opening, and was applied to three immediate openings:

1. Development Manager
2. Facilities Maintenance Technician I
3. Grounds Maintenance Technician I

The new DEIB workforce development toolkit/approach was preliminarily built through the review of 9 existing documents and the creation of 11 new documents/tools as follows:

	Development Manager	Facilities Maintenance Technician I	Grounds Maintenance Technician I
Job Description Gender Bias Analysis Results	Bonus	Bonus	Bonus
Readability	Bonus	Bonus	Bonus
Position Description	Reviewed	Reviewed	Reviewed
Interview Rubric	Reviewed	Created	Created
Interview Questions	Reviewed	Reviewed	Reviewed
Written Assessment	Not recommended	Reviewed (recommend hands-on option)	Not recommended
DEI Interview Questions	Reviewed		
Benefits of Inclusion	Created		
DEI Informed Selection Checklist	Created		
Summary of Recommendations	Created		
Meeting 1: Notes	Created		
Meeting 2: Notes	Created		
Final Project Synopsis (this document)	Created		
Toolkit (Google Drive)	Created		

The entire Project and DEIB Workforce Development Toolkit can be found at https://drive.google.com/drive/folders/1R-8zC_WZ_Npnrx_PotvNx833juOLW_XF?usp=sharing

Recommendations

The preliminary content was in fact generally suitable. As such, the focus was on ensuring a DEIB lens and capturing and highlighting any missing DEIB content and verbiage. As such, each document was reviewed or created with a general DEIB lens relying mainly on the consultant's skill and experience with DEIB best practices. Recommendations from the document review process are found in **red** colored font in the final documents and are summarized here:

1. Each job description was analyzed using two tools. First, the language in each job description was analyzed using a gender bias tool and assessed to be more feminine coded than masculine coded. This outcome was deemed acceptable

based on the goal to ensure ample female applicant representation without hindrance to male applicant appeal.

2. Second, to ensure accessibility and reduce educational and learning barriers, each job description was analyzed for readability using an analysis tool. Each was found to be appropriately readable for the education level required in the respective job description.
3. DEIB work and opportunities already being done were captured and highlighted in a separate Benefits of DEIB document to accompany job postings
4. DEIB verbiage was absent from the job description content and was thus woven into the job descriptions to avoid the appearance of being an after thought if simply placed at the end or in a separate document.
5. Other edits include clarifying the reporting chain and removing the word “incumbent” and replacing with the job title to ensure readability
6. Where appropriate, details about hardware (i.e. laptops) and the work environment and office space (residential and non-residential) were updated to reflect the new work culture resulting from the COVID pandemic.
7. Education/experience equivalency statement was inserted to highlight willingness to consider applicants with diverse backgrounds
8. Diverse applicants tend to not apply for positions for which they are qualified. To encourage applicants recognize they are qualified and will be supported in becoming qualified, support verbiage was added, such as highlighting On-the-job-training, informal mentoring, and support and guidance toward securing required certifications (e.g. CDL, CPR)
9. Written assessment/questions were not recommended for all position, but should also be presented in the form of a hand-on activity/demonstration and walk-through to accommodate various learning styles and to better assess ability to do vs ability to read
10. Interview questions were edited to include more subvert DEIB questions and a separate question for overt DEIB questions
11. Scoring scale and score sections were added to interview questions to quantify answers to increase objectivity, decrease subjectivity, and decrease bias
12. Interview rubrics were drafted such that rubric categories correspond to interview questions, for which scores are calculated instead of guesstimated.
13. Subjective rubric categories were separated out from more objective categories. In this way, two separate scores are visible and calculated such that there is an objective score and a subjective score to help inform the magnitude of bias in the rubric scoring process
14. The rubric was organized in a stem-and-leaf manner such that it is immediately visually obvious how “important” or heavily weighted rubric categories are based on the number of interview questions in each category
15. To ensure inclusion, the interview questions and DEIB Master List of questions was added to in a manner to capture willingness and interest in growth vs. experience and skill
16. As a courtesy, a DEIB Committee Checklist was drafted.

Future Recommendations

1. In a very clear manner, perhaps with consistent headings, ensure that job description categories correspond to interview questions that correspond to rubric categories
2. Create continuity by developing and communicating to supervisors clear hiring guidelines and hiring process expectations including number of interviews, duration of interviews, use of assessments/demonstrations, and use of the DEIB Workforce Toolkit. Remember that equity is not sameness, and there will exist variations between positions and departments based on what is customary for each profession (e.g. equipment assessment for maintenance, tournament planning scenarios for activities directors, etc.)
3. Meet with supervisors to assess job vacancies as they arise, documenting the hiring process, reviewing outdated job descriptions, and cataloging hiring processes across departments.
4. Consider highlighting the work that's already been done and is being done by making it more visible on the website. Consider revolving website banners that are more diverse. Consider the placement of the Strategic Plan in a more obvious place. Consider the perception of the presence of hegemony in the history page of the organization.
5. Expand interview committee to include community partners
6. Research pipelines to place job descriptions that would deliver a diverse candidate pool
7. Utilize internship programs to groom diverse candidates for full time positions
8. Offset wage concerns by highlighting the flexibility and support of Urbana Park District for those who maintain additional employment (such as in the Gig Economy)

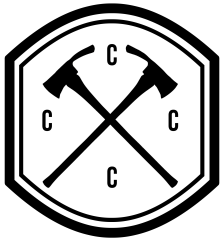
Urbana Park District DEI Interview Questions

To be chosen as appropriate per position by hiring manager (1-3 questions per interview)

1. How has your background and experience prepared you to be effective in an environment that holds diversity, equality, and inclusivity as core to our mission and values?
2. What does it mean for you to have a commitment to diversity? How have you demonstrated that commitment in the past, and how would you see yourself demonstrating it here?
3. What is your vision of diversity, equality, and inclusivity at a park district?
4. In your experience, what are the challenges faced by members of historically underrepresented groups in the workplace? What strategies have you used to address these challenges, and how successful were those strategies?
5. Tell me about a time that you adapted your style in order to work effectively with those who were different from you.
6. What kinds of experiences have you had in relating with people whose backgrounds are different than your own?
7. Can you recall a time when you gave feedback to a colleague who was not accepting of others?
8. Tell me about a time when you had to adapt to a wide variety of people by accepting/understanding their perspectives.
9. What have you done to further your knowledge/understanding about diversity, equality, equity, and inclusivity? How have you demonstrated your learning?
10. Tell us how you work with people to create or foster diversity in the workplace.
11. What efforts have you made, or been involved with, to foster cultural competence?
12. Tell me about a time when you helped a new team member acclimate to your department. How did you go about making them feel welcome and a part of your unit? How was the new member received by your coworkers?
13. It can be difficult to work with individuals who have very different backgrounds (in terms of cultural or education). Tell me about time when you had to work with someone from a

different background. What difficulties did you experience? How did you work through them?

14. When stressed or busy, individuals often fall back on categorizations for the sake of efficiency. From there, it can be a short space to stereotyping. How do you avoid this sort of negative categorizing?
15. Tell me about a time when you realized a different perspective was needed to improve the quality of a project and you'd need someone with a different background or skillset. What was the project, how did you realize this, and how did you acquire and incorporate the new perspective you needed?
16. Have you ever had the opportunity to participate in diversity, equity, and inclusion training or workshops? If yes, what was it like? If no, describe your level of interest in learning more about diversity, equity, and inclusion moving forward?



AUGUST M. BALL

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MEET THE FOUNDER

SPECIALTIES:

- Company Culture & Conflict Management
- Organizational Assessment & Capacity Building
- Recruitment, Hiring & Retention for Diversity, Equity & Inclusion
- Employee Engagement & Professional Development
- Environmental Education & Training Program Design
- Public Speaking (Keynotes, Plenary Sessions & Panel Discussions)

August M. Ball is the founder, CEO and Lead Consultant of **Cream City Conservation**, a two-prong social enterprise. First, Cream City Conservation & Consulting works with environmental, corporate and community based organizations to address internal cultures and practices that contribute to a racial homogeneity. Through equity audits, inclusion surveys, racial literacy building workshops, policy and practice review and coaching, the firm provides insight and recommendations to organizations that help them cultivate inclusive and equitable environments, develop intentional green career pathways, culturally responsive programs and identify and mitigate bias in all aspects of the organization.

Second, the **Cream City Conservation Corps** provides paid training and work experience to young adults 15-25 years of age, whose social identities are under and inequitably represented in various conservation, agriculture and green infrastructure industries. The model is a closed loop system between the Consulting firm and the Corps program which cultivates the next generation of environmental stewards while preparing organizations to attract, develop and retain a diverse pool of leaders. The Corps program is supported by profits from the consulting firm, fee-for-service contracts and community partnerships.

August received her formal education from UW-Parkside and UW-Milwaukee. She studied Sociology, Community Education and Non-Profit Management. A self-taught conservationist, she has continued her education informally via organizations such as Center for Diversity in the Environment, Paradigm, Policy Link and the National Outdoor Leadership School (NOLS)

A native of Southeastern Wisconsin but citizen of the world, having lived in Southeast Asia for 15 years, she speaks three languages fluently. When not teaching, August enjoys traveling the globe, cooking, hiking and will shamelessly sing karaoke whenever the opportunity presents itself.

WWW.CREAMCITYCONSERVATION.ORG



CULTURE + INCLUSION SURVEY



PREPARED BY



KEY AREA WHERE WE ARE THRIVING

CONTRIBUTION TO BROADER PURPOSE	85%
OPPORTUNITIES & RESOURCES	84%
BELONGING	81%
VOICE	78%
DECISION-MAKING	77%
EQUITY	76%

KEY AREAS OF OPPORTUNITY

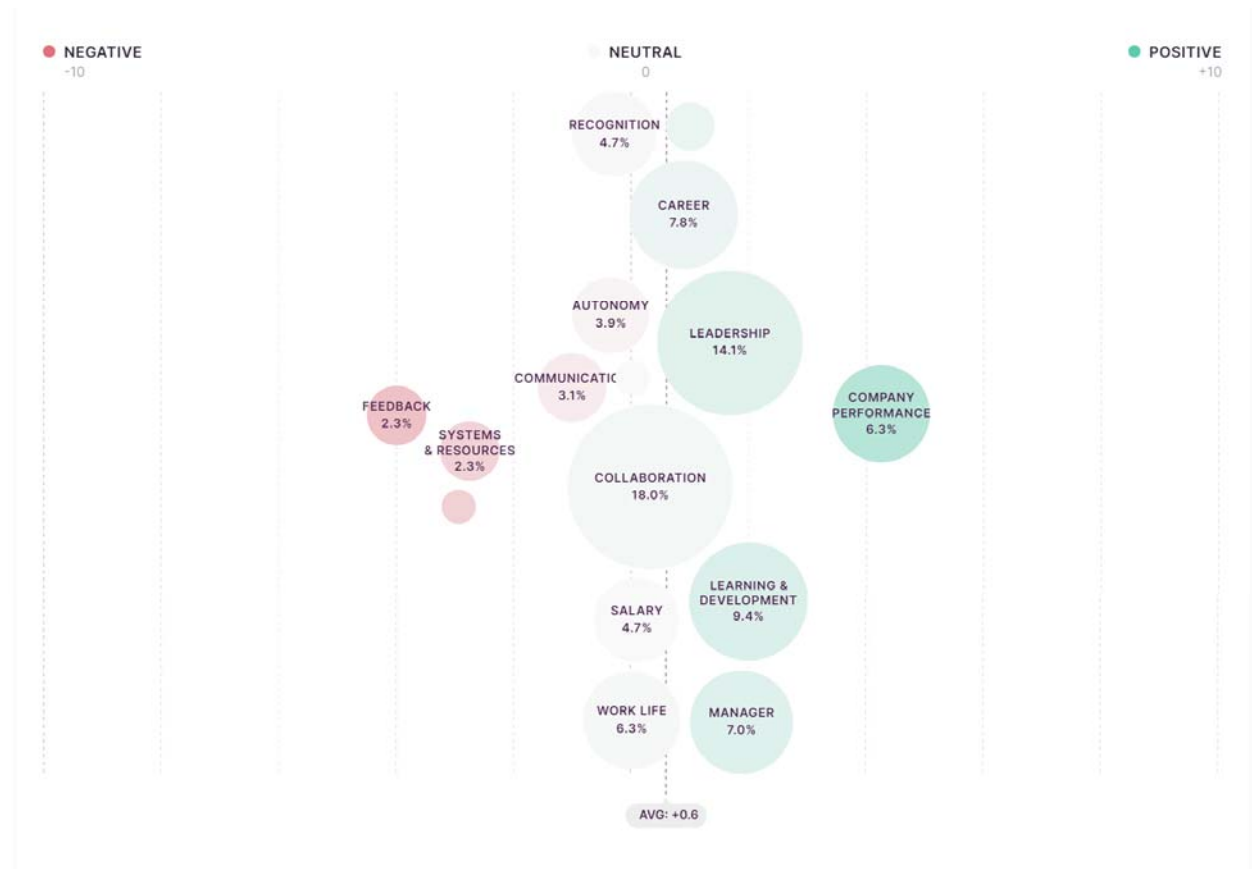
FAIRNESS

73%

DIVERSITY

69%

COMMENT THEMES





FOCUS AREAS

AND SUGGESTED ACTION ITEMS



DIVERSITY

Focus On 'Culture Add' When Hiring

To build a diverse team, change language from 'culture fit' to 'culture add' when hiring. [Help Scout](#) focuses attention on what a candidate adds to the culture of the team to align it.

Why?: Looking for a candidate with 'culture fit' introduces ambiguity into the recruiting process because it can signal that you are seeking traits and backgrounds that fit into an existing culture, rather than someone who will add to the culture.

Instructions:

- Before an interview, shift your focus away from 'being like us' to what can they contribute to our culture that is missing and is a benefit or bonus to what currently exists.
- Communicate to interviewers (through an interview training, or otherwise) that a focus on culture add is more appropriate than measures in the past, such as "would I get a beer with this person?"
- Consider inclusion training. Inclusive, psychologically safe teams operate more effectively and in the long run perform better. With ongoing training, your leaders and all members of the team should learn how to support a team of diverse individuals.

DIVERSITY

Action: The Diversity Tipping Point

To create well-performing teams, organizations should consider focusing on achieving a 'critical mass' of team members from different social and cultural groups. While it is difficult to determine the exact diversity tipping point, studies suggest that a critical mass of one-third is necessary to ensure that teams can harness the benefits of diversity.

Why?: Studies have shown that when there is only one token minority member in a team, this person may become a representative for their minority group, rather than an equally valued team member. In more balanced groups, stereotyping is reduced, and minority members are more likely to be regarded as equal team members.

Instructions: When designing teams, aim towards one-third of team members being from minority groups where possible.

DIVERSITY

Inclusive Hiring Process

Support diverse hiring by building an [inclusive process](#) to ensure a range of different talent is attracted and has an equal experience during the interview process. For example, *machine learning company Textio* stripped job descriptions of biased language and removed the prefix of Mr/Mrs/Ms from application platforms.

Why?:

Ensures that bias is mitigated throughout the application process and interview experience to give all talent an equal opportunity to showcase their skills. Acknowledge that recruiting processes may exhibit biases of the team; taking extra steps to address sexism, racism and ableism can lead to better outcomes for underrepresented talent.

Instructions:

- Audit your recruitment process with a focus on the areas and processes that are most prone to bias.
- Include a cross-section of the organization to workshop ideas on how to remove/add in more neutral language.
- Review your on-site interview process; to ensure people of all abilities have an equal experience and are able to request reasonable accommodations.

DIVERSITY

Empower Hiring Teams

Allow each team to decide how to add diversity to their team. For example, when building a job description for a new role, have all team members consider what skills their existing team lacks and make sure that criteria is added to the job description, or responsibilities are shifted to include upskilling others. When evaluating candidates, have existing team members consider diversity in their evaluation criteria.

Why?: This ensures that you're not just hiring like-minded, like-skilled team members but considering all areas of diversity and skillsets to broaden the team capabilities.

Instructions:

You could assign someone to the role of 'diversity monitor' who leads the team's effort to diversify and identify where the team lacks diversity and where it could benefit from it. They could consider diversity of:

- *Skills*: For example, what skill is missing from the existing team's collective expertise such as a new technical skill or language spoken?
- *Perspective*: For example, would it be beneficial to add someone who has been a customer or end user of your company?
- *Previous work environment*: For example, does the candidate bring a transferrable skill from a different environment? Is their value if they come from a startup environment, or a more established company?
- *Lived experience*: For example, does this person's gender, race, disability, socio-economic status, etc. bring diversity of thought to the team?



QUESTIONS?