Sidebar – Inclusion Plan Evaluation.

For projects above $305,000, the Inclusion Plan is required. You must allot at least 10% of the total written points. The Department must include at least one interview question on the topic. Remember some federal rules require a DBE Plan instead, so seek FAS advice on federally-funded projects.

1. All firms must attach and fill out the Inclusion Plan, or you must reject then as "non responsive."
2. You need not develop a matrix for point assignments. Score points based on your total assessment of the Plan:
    a. How much the firm intends to subcontract. Greater subcontracting, particularly in scopes of work where there is reasonably well known WMBE availability, shows a good-faith effort and/or intention.
    b. Greater voluntary goals show a stronger good-faith effort. These aspirational goals become material to the contract. There is no required mandatory goal that the respondent must meet to be eligible; these are voluntary and aspirational indicators of good faith efforts.
    c. Strong past performance.
    d. Training and mentoring programs.
    e. A team that presents WMBE firms already engaged and committed for subcontracting is a strong good faith effort.
    f. If the project requires hiring of new staff, diversity in employment should be considered.
    g. The WMBE work should be meaningful. If it is all secondary work with little relation to the true scope of the contract, that may well indicate lesser effort at utilizing the WMBE administrative, technical and professional experts. If all WMBE is auxiliary, such as office supplies for an engineering contract, that would not be a meaningful WMBE outreach on its own.
3. Important:
    a. Do not use the voluntary utilization goal as a single measure. It is only one measure as a good-faith indicator of effort, but is not the only measure of the good faith efforts taken or intended
    b. Remember the spirit of the Inclusion Plan is seeking a responsive, good-faith effort to include WMBE firms. It is not a requirement or "set aside" goal.