



Agenda/Notes

Office of Governor Tina Kotek
RJC Economic Opportunity Committee
December 16, 2025 – Zoom
2:30 – 4:00 pm
Moderator – Javier Cervantes

MEMBERS

X	Anthony Veliz	X	James Alan Parker		Latiffe Amado
X	Ciara Pressler		Janice Mason		Marcus Mundy
	Cobi Lewis		James Cador	X	Marin Arreola
X	Evann Goss-Lemelle	E	Justice Rajee	X	Nicole Davison-Leon

OTHER ATTENDEES

	Andre Bealer	X	Javier Cervantes	X	Alexandria Straub, DAS
X	Jesse Hyatt	X	Yasmin Solorio		

Topic/Lead	Notes/Main Points	Decisions/Action Items
Framework for Advocacy: Values and Principles Exercise (All)	<i>Meeting commences at 2:30pm. Framework moved to end of agenda.</i>	
Economic Prosperity Roadmap Discussion (Jesse Hyatt)	Jesse provides information on the Prosperity Roadmap. Oregon's Prosperity Roadmap December 2025.pdf	
DAS Disparity Study Update (Alexandria Straub)	Jesse: Would it be helpful to send in real time information for the information on the new procurement role. Anthony: I don't see how it impacts us as small businesses. This is a big company and organization and solution. Maybe you have more info than I do. Feel like what will be different for us. I don't have the opportunity to lay of 20% of my office to save during low times and rehire in busy times. I don't know what that looks like for us small businesses.	Jesse to send information in real time to committee as we learn.
Updates: EO-22-15 (Co-Chairs) Workforce Workgroup (Jan & Marin)	James: Spoke with Jan. Want to ensure there is a focus on economic equity and access. The language we chose was more specific, clear about what economic justice can look like. We focused on economic outcomes, performance and metrics, corrective action and oversight. Goal was to provide roadmap for agencies to understand what requirements are and be clear on what oversight and actions.	

Ciara: A requirement for community engagement – we have enough requirements for communities to engage.

James: How do we best leverage this existing committee or others to not have to recreate another impediment to moving forward and tapping into community resourcing. We want clarity around agencies budgets and how it describes equitable and economic activity. Would be great if we had feedback over the holidays.

Javier: What’s the timeline we want for this EO? We’re at that stage where we want to get something out there and have people react to it. Would personally like to see something by end of first quarter.

Jesse: I like sooner rather than later, but that’s a big lift. Whatever the timeline is, as long as we stick to it so we can make progress for it.

Javier: Have a strong temp check in February for RJC to look and react to it.

Jesse: Should probably have it before May. Because the disparity study will have packet together.

James: Temp check in February sounds right.

Ciara: Initially we said at the end of the year but February would be great.

Marin: We’ve been meeting since February on these topics. Jan and I are looking at recommendations from now and end of January. We will present our recommendations in February meeting to EOC. Goal is to present final approval to full RJC in March for approval. The roadmap says economic opportunity is big. Want to ensure people can benefit from this initiative and look at Future Read Oregon as a model. We see more vulnerable people being involved in workforce than ever before. We want to continue this model – does need adjustments as does any other program. Want to see our work be acknowledged and taken into the whole roadmap that the council will be developing in the future. All this work is connected and is building upon one another. As a BizO commissioner, we are looking at how workforce and economic development can work together to tackle these issues. As we come up with recommendations

	<p>for our next meeting – please provide input. We want to see things happen and change. Want to have a compelling argument so Governor and staff take action. We need to address issues where we are at right now. Look forward to hearing your input throughout the process.</p> <p>Javier: Particularly with the budget constraints in the next biennium. Want to ensure we have maintenance of effort at the minimum. What Marin has also shared is the investments in the communities.</p> <p>Marin: Had a meeting with Oregon Wine Association last week. Their work is hurting, seeing impact of less workers, less workforce feeling comfortable working. They are now getting involved and aren't taking for granted these employees. They are realizing that we need to protect and invest. They are thinking to reflect and think in investing into these workers.</p> <p>The young people population are more diverse. People aren't having as many kids and as people get older and retire and use services, it's crucial for this economy to thrive and grow. Glad that locally people are taking action at the local level and realize they can't just be inactive.</p>	
<p>Framework for Advocacy: Values and Principles Exercise (All)</p>	<p><i>Javier reviews "EOC Advocacy Framework" document.</i></p> <p>Javier: What are some values or principles for advocacy we'd like to consider in short-session advocacy, or next quarter.</p> <p>Anthony: Small diverse businesses</p> <p>Evann: Not to be performative. Not trying to utilize a silver bullet to resolve the issues of every community.</p> <p>James: If we're taking about advocacy during short session, we want to ensure we don't see 'last in, first out'. That we see the broader shoulders carry the burden. We've already heard from co-chairs this session that they will focus on cuts and look at things in 2020-2021 and to tackle on a timeline. That's where most of those equity focused investments have been made. Focus on effectiveness of programs rather than the timeline.</p> <p>Ciara: The challenges of traditionally underprivileged communities are urgent and reacting unnecessary process and burden with implementation of program is added burden to these populations. Act with urgency. Avoid unnecessary or burdensome process.</p> <p>Anthony: What I'm really trying to say and I think there's a lot of expertise here. Really what I would like to see is</p>	

diverse people who are called on for their expertise. Would like to see diverse people who are brought in because of their expertise.

James: We can't cut our way out of this. Austerity will not rescue us. Economic activity and development, especially for communities that have razor thin line. It costs less to invest in economic activity and support than social services and programs. In a time of budget disasters, its better to invest than cut because we end up spending more money in social services.

Meeting concludes 3:48pm

Meeting Materials



EOC Advocacy
Framework.pdf



Advisory
Presentation 12.9.202



OAM Presentation
12.19.2025.pdf

- <https://docs.google.com/document/d/19IWxEExLxoiGwnvdnZ0ZHQ0N0oDUq96GX8xVcDZkEQA/edit?tab=t.0>
- LC 127:
<https://olis.oregonlegislature.gov/liz/202511/Downloads/CommitteeMeetingDocument/311341>
- LC 197:
<https://olis.oregonlegislature.gov/liz/202511/Downloads/CommitteeMeetingDocument/311319>
- LC 186:
<https://olis.oregonlegislature.gov/liz/202511/Downloads/CommitteeMeetingDocument/311262>

Zoom Chat

2025-08-11 11:06:10 From Jesse Hyatt to Everyone:
EO 22-15.pdf - Google Drive

2025-12-01 11:01:32 From Jesse Hyatt GOV to Everyone:
Im just talking so that you can hear me once you find the right button

2025-12-04 13:07:46 From James Alan Parker to Everyone:
<https://www.oregonlive.com/opinion/2025/11/opinion-trump-cuts-leave-oregon-with-a-billion-dollar-problem-and-no-easy-solutions.html>

2025-12-16 15:54:14 From James Alan Parker to Everyone:
<https://www.oregonlive.com/opinion/2025/11/opinion-trump-cuts-leave-oregon-with-a-billion-dollar-problem-and-no-easy-solutions.html>

15:15:27 From Ciara Pressler to Hosts and panelists:
The goals are pretty specific and have KPIs - to clarify the scope of this

15:16:50 From Ciara Pressler to Hosts and panelists:
My other thought was - there will be an incentive to move fast and get quick wins on this - YAY! - but there needs to be a requirement for sustainable ROI - I'm thinking specifically of the initial boon of a data center that ends up not employing people once constructed and drains resources.

15:17:40 From Javier Cervantes, Gov. Office (El, He, Him, His) to Hosts and panelists:
Economic Opportunity Committee Agenda (12-16, 2:30 PM)
DAS Disparity Study Update (Alexandria) 20 Min.
Framework for Advocacy: Values and Principles Exercise (All) 20 Min.
Economic Prosperity Roadmap Discussion (Jesse H taking questions) 15 Min.
Update on EO-22-15 (James and Jan) 15 Min.

15:22:16 From Javier Cervantes, Gov. Office (El, He, Him, His) to Hosts and panelists:
<https://docs.google.com/document/d/19IWxEExLxoiGwnvdnZ0ZHQ0N0oDUq96GX8xVcDZkEQA/edit?usp=sharing>

15:35:19 From James Alan Parker to Hosts and panelists:
Thank you Marin!

15:46:56 From Anthony Veliz to Hosts and panelists:
Happy Holidays! Be Safe!!!

Economic Opportunity Committee Advocacy Framework: 2026 Short Session

Please list values, principles, and standards that you believe the Committee should consider for a framework as it advocates during the 2026 Short Session. Understanding that agency program expansion or new program is unlikely during the 2026 session due to adverse budget conditions. Focusing on maintenance of effort, program implementation, or rulemaking are some of the opportunities to engage and offer input or make recommendations on how agency programs execute services and apply resources.

What values, principles, or criteria should the Committee consider as a framework when advocating going into 2026? Please list.

As a refresher, the following is a list of priorities the committee has listed as its topical areas of focus.

Theme: *Continue and maintain effort of existing programs that keeps an equity focus and builds resilience for the survival of front-line communities to decide for themselves their economic opportunity and prosperity.*

Priorities:

Analyzing effectiveness of Business Oregon Programs by examining key questions like:

- Are the right people and businesses of color receiving Business Oregon dollars?
 - Who has access to key grants and other programs? Examine data on who has applied for grants? And reviewing who has been granted?
 - Create recommendations from what is learned.
- Engage Department of Justice for analysis at the appropriate time.

Finalize Recommendations for an Updated Executive Order (EO)-22-15

- Provide recommendations for Governor that encompasses language adheres to the values of equity and racial justice.
- Create the document that helps others understand EO's goals and objectives benefits all Oregonians.

Workforce Workgroup: Implemented Recommendations for Future Ready Oregon and Modeling Workforce Development

- Continue developing recommendations for the Governor to strengthen the state's workforce by expanding access to education, training, and career advancement opportunities.
- Engage the appointed workgroup that will offer their insight and recommendations to the EOC, the RJC, and then to the Governor.
 - Goal set to have the recommendations to the Governor by the first quarter of 2026.

(Note: Disparity Study. Where does that engagement fit among the priorities?)

Disparity Study



Agenda

Introductions
Timeline Overview
Subcontractor Data
Minimums and Goals
Insurance and Bonding



Timeline Overview

Timeline



2025

2026

APR MAY JUN JUL AUG SEP OCT NOV DEC JAN FEB MAR APR MAY JUN

COBID Manual (3)

Outreach
(24, 26, 27, 28)

Training
(5, 9, 21, 22)

Subcontractor Data
(16, 17, 18, 23)

Minimums and Goals
(2, 11, 13, 14, 15)

Insurance and Bonding
(6, 8, 19)

Thresholds and Unbundling
(7, 10, 29)

Bid Posting Times (4, 25)

Financial Assistance, Joint
Ventures (12, 20)





Milestones & Deliverables

Initial project started: 8/19/2025

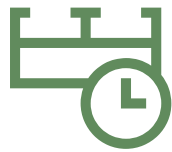
Biweekly meetings: Every other Tuesday/Wednesday for 90 days; 7 meetings total

Projected closeout: 11/18/2025

Deliverables:



Refined
recommendation
language



Implementation
roadmaps phased
timelines



Key Relevant Party
feedback summary



Final written report

Subcontractor Data



Study Recommendations

- **16 (3.b.i)** Subcontractor data collection
- **17 (3.b.ii)** Prompt payment, sub-contractor payment resolutions, electronic payment improvements
- **18 (3.b.iii)** Subcontractor commitments: track subcontractor utilization/participation
- **23 (3.c.v)** Tracking business growth

Report-Out Drafting



DISPARITY STUDY ROADMAP SUBGROUP 4: SUBCONTRACTOR DATA

RECOMMENDATIONS

16. (3.b.i.) Subcontractor data collection	ADOPT	PHASE 1
17. (3.b.ii.) Prompt payment	ADOPT	PHASE 1
18. (3.b.iii.) Subcontractor commitments	ADOPT	PHASE 1
23. (3.c.v.) Tracking business growth	ADOPT	PHASE 2

SUMMARY

The Subcontractor Data Subgroup was convened to propose methods to operationalize four key recommendations from the 2023 State of Oregon Disparity Study. These recommendations focus on increasing the creation, tracking, and use of subcontractor data from equity in public procurement.

High Level Overview:

Adopt and Phase Recommendation

Within Each Recommendation:

Case for Action and Prioritized Suggestions

CASE FOR ACTION

Oregon currently lacks a consistent, centralized method for collecting subcontractor data across agencies. Without this data, it is difficult to assess subcontractor participation, track equity outcomes, or ensure that small and diverse businesses are receiving meaningful opportunities. A centralized data portal would improve transparency, support compliance monitoring, and help the state better understand who is doing the work and who is being left out. Collecting this data at both award and invoicing stages would allow for more accurate tracking of subcontractor utilization and payment practices and would support the state's broader equity and accountability goals.

SUGGESTED NEXT STEPS

Training Topic/ Alignment #	Priority (Effort / Impact)	Contributors	Notes/Next Step Ideas What initial steps should be taken?
Maximize NIGP code selection (16 / 3.b.i.)	Low Effort / Medium Impact	DAS, Agency Procurement Staff	Include in procurement training; develop guidance. Increase small business participation with better notification of bid opportunities
Collect negative data (e.g., unsuccessful bids) (16 / 3.b.i.)	Medium Effort / High Impact	DAS, OregonBuys users, Sovra (eprocurement platform contractor)	Design post-bid survey and contact all bidders; Integrate with OregonBuys to identify barriers/biases (e.g., bidding times, use of NIGP codes, timing of project, scope, insurance, evaluation criteria); use to improve solicitation
Expand data collection beyond COBID to include all firms	Medium Effort / High Impact	DAS, Community Partners, Chambers, Sovra (eprocurement platform contractor)	Allow filter in system. Track nonprofits, community orgs, vendors, regardless of size/COBID certification from under-represented communities (e.g., LGBTQIA+ owned businesses, disabled-owned, Refugee-owned, etc.)

Recommendation 16

Subcontractor Data Collection



Summary of Recommendation

- Collect subcontractor data at both award and invoicing stages.
- Include key fields: subcontractor contact info, type of work, award amount, and payments to date.
- Require prime contractors to report payments to subs monthly and solicit verification from subcontractors.
- Expand data collection beyond COBID-certified firms to include other small/diverse businesses.
- Develop a centralized data portal and capacity metrics by sector.

Recommendation 17

Prompt Payment



Summary of Recommendation

- Insert prompt payment clauses into all contracts and solicitations.
- Track payments from primes to subs through a centralized system.
- Consider mediation services to resolve withheld payments.
- Explore direct payment/payment liaison options available for subcontractors.
- Develop an “equity scorecard” to evaluate prime contractor payment practices.

Recommendation 18

Subcontractor Commitments



Summary of Recommendation

- Track subcontractor utilization on an invoice-by-invoice basis.
- Ensure primes use subcontractors to the full extent of their commitments or provide justification for underutilization.
- Use tools like B2Gnow integrated with OregonBuys and finance systems.
- Include change order justifications and audit compliance during and after contracts.

Recommendation 23

Tracking Business Growth



Summary of Recommendation

- Track small business growth using multiple data sources (e.g., COBID, SOS, DOR, SAIF).
- Include metrics like revenue, employee count, and sub-to-prime progression.
- Tag vendor data with geographic identifiers to assess regional disparities.
- Require growth data reporting during license renewal.
- Use data to inform outreach, resource allocation, and equity measurement.

Minimums and Goals



Study Recommendations

- **2 (2)** Specific contract goals for individual groups (POC- and women-owned)
- **11 (3.a.viii)** Requirements to contract with new businesses/set asides
- **13 (3.a.xi)** Mandatory subcontractor minimums
- **14 (3.a.xii)** Small business contract goals (neutral)
- **15 (3.a.xiii)** Small business set asides

Report-Out Drafting



EXECUTIVE SUMMARY

SUBGROUP 5: MINIMUMS AND GOALS

RECOMMENDATIONS

2. (2) Specific contract goals for individual groups (POC- and women-owned)	ADOPT	PHASE 2
11. (3.a.vii) Requirements to contract with new businesses/set asides	DO NOT ADOPT	
13. (3.a.xi) Mandatory subcontractor minimums	ADOPT	PHASE 1
14 (3.a.xii) Small business contract goals (neutral)	ADOPT	PHASE 1
15. (3.a.xiii) Small business set asides	ADOPT	PHASE 1

High Level Overview:

Adopt and Phase Recommendation

Within Each Recommendation:

Case for Action and Prioritized Suggestions

Recommendation 2

Specific Contract Goals (race-gender conscious)



- Recommend adopting small business goals for individual groups
- Emphasize the need for further research before implementing statewide
- Support goals that:
 - Meaningfully increase access for Oregon small businesses
 - Ensure enforceability, agency accountability, and alignment with equity values
- Highlight that current approaches must evolve to meet these standards

Recommendation 11

New Businesses Set Asides



- **Do not recommend** implementing new-business subcontracting requirements or set-asides as currently written
- While supportive of helping new businesses succeed, the workgroup raised concerns:
 - Potential to blur lines between contracting and employment
 - Monitoring challenges
 - Risks to prime contractors lacking infrastructure or support
- Recommendation:
 - Allow more time for in-depth review and refinement
 - Focus on identifying the most effective strategies to support new businesses

Recommendation 13

Mandatory Subcontractor Minimums



- Support for implementing subcontractor minimums tailored by:
 - Individual agency requirements
 - Contract size, type, and industry
- Encourage prime contractors to meet minimums through:
 - Incentives such as evaluation points in RFP scoring

Recommendation 14

Small Business Contract Goals (neutral)



- Support for adopting neutral small business participation goals tailored to each agency
 - Goals should vary by contract type, size, and industry
 - Participation should be measured by spend, not just contract count

Recommendation 15

Small Business Set Asides



- Support for adopting small business set-asides, with key revisions for clarity:
 - Original language referenced “small prime contracts” and encouraged participation “as prime contractors”
 - Workgroup recommends removing both references
- Revised language should:
 - Avoid limiting small businesses to prime contractor roles
 - Ensure small businesses can benefit from set-asides in various capacities

Insurance and Bonding



Study Recommendations

- **6 (3.a.iv)** Adjust bonding requirements
- **8 (3.a.v)** Review insurance requirements
- **19 (3.c.i)** Equitable standardized bonding rates

Report-Out Drafting



DISPARITY STUDY ROADMAP
SUBGROUP 6: INSURANCE AND BONDING

RECOMMENDATIONS

6. (3.a.iv) Bonding	ADOPT	PHASE 2
19. (3.c.i) Bonding assistance	ADOPT	PHASE 2
8. (3.a.v) Insurance	ADOPT	PHASE 1

SUMMARY

The state should move forward with refining bonding and insurance requirements to reduce barriers for small businesses while maintaining appropriate risk safeguards. Bonding requirements, particularly for smaller projects, may be unnecessarily burdensome and should be reassessed through a direct impact study to ensure that the requirements are appropriate for the state's needs and do not create unnecessary barriers to entry for small businesses.

High Level Overview:
Adopt and Phase Recommendation

Within Each Recommendation:
Case for Action and Prioritized Suggestions

Recommendations 6 and 19

Bonding



6. (3.a.iv) ***Bonding.***

1. Should move forward bonding adjustments but not as specified in the study; need a project to assess
 - Risk of adjusting needs to be quantified
 - Data collection – more data is needed
 - Experts need to weigh in
 - Decide which types of bonding need to be looked at
2. Educational resources should be part of the solution

ADOPT but not as written, Phase 2, High Effort/Moderate Impact

19. (3.c.i) ***Bonding assistance.***

1. Need to collaborate with other entities to move forward
2. Should determine if this is value add or another hurdle versus changing requirements

ADOPT pending bonding research, Phase 2, High Effort/Moderate Impact

Recommendation 8

Insurance



8. (3.a.v) ***Insurance requirements.***

- Mandate use of the Insurance Tool
- Mandatory training
- Standard language in the contract for indemnity and insurance
- Clearly state in contracts why deviations from standard insurance apply
- Data collection – the effort and impact don't make sense for past data; we should put in requirements to collect going forward
- Auditing functions
- Annual Insurance Tool review, adjustment will be made when identified as appropriate
- Vendor education/resources
- Make a note that determining insurance requirements are correct does not mean there is not still a barrier for small businesses and options/resources should be found to support them.

ADOPT, Phase 1, Moderate Effort/Moderate Impact

Q&A

Office of Procurement Equity

das.procurementequity@das.oregon.gov



Department of Administrative Services



Changes to the Oregon Accounting Manual
12.12.2025

Agenda

- 01** Introductions
- 02** OAM Changes
- 03** ACH Updates
- 04** Contact for Issues



Introductions

Oregon Accounting Manual Changes



Part of the payment issue is our policies

OAM 10.20.00.PR

- 141 Agencies should process vouchers on a timely basis (within 45 days for most vendors, within 30 days for construction vendors) to avoid paying interest on accounts, as required by statute. **For cash management purposes, however, payments should not be made too soon so that the State can maximize interest earnings.**



There are penalties for late payment

OAM 10.40.00

- 121 The state pays overdue account charges incurred by state agencies that do not promptly pay for goods and services provided by private businesses. Claims are considered “overdue” if a check or warrant is 45 days from the date the agency received the invoice, or the date of the initial billing statement if no invoice is received, or the date the claim is certain by agreement of the parties or by operation of law. Overdue account charges will not exceed 8-percent per annum and are to be paid against an agency’s appropriation or limitation.

We can fix the language to drive faster payment processing



Agencies shall process vouchers on a timely basis. The state's vendors have performed a service or provided a good for the benefit of state government, once all required approval, documentation, and verifications have been obtained, **payments shall be issued without unnecessary delay. Timely payment supports strong vendor relationships**, maintains the state's reputation for fiscal responsibility, and helps avoid late fees or service disruptions. As required by statute and to avoid paying interest on accounts, most vendors must be paid within 45 days while construction-related vendors must be paid within 30 days. Agencies shall not purposefully delay payments, even to enhance interest earnings.



When is a payment considered late

If a state agency does not pay a private vendor on time for goods or services, the state may be responsible for paying late charges. For most vendors, **a payment is considered overdue if it is not made within 45 days of one of the following:**

- The date the agency received the vendor's invoice,
- The date of the initial billing statement (if no invoice was provided), or
- The date the claim became valid by agreement or by law.

Late charges are limited to 8% per year and must be paid from the agency's existing appropriation or budget authority.

Help prevent delayed payments



- 1. Review your agreement for the individual(s) who should receive your invoice.**
 - Getting the invoice to the right person is critical, particularly in larger state agencies.
- 2. Ensure all relevant supporting documentation is included in your invoice.**
 - Is anything missing that's required in your contract?
- 3. Ensure your own contact information is up to date.**
 - Respond to any follow up questions from the state ASAP.
- 4. Sign up for direct deposit – upcoming slides!**

New Direct Deposit Form

There is a faster way to get vendors paid




The new **Direct Deposit Authorization Form** for Statewide Vendor / Employee Travel (not PERS/Payroll) is now available and ready for use!

This updated form is designed to make the direct deposit process **clearer, more secure and easier to complete.**

The transition period ended **December 15,**
only the new form will be accepted.

What's new?



- **New submission address:** SFMS/ACH Coordinator 155 Cottage Street NE, FL 3, Salem, OR 97301
- **Electronic submission option:** Secure upload  [Submit via Box](#)
- **Signature requirements:** Only forms with original (wet), **blue** ink signatures or Adobe digital certified signatures are accepted.
- **Bank verification required:** A **bank letter** or **voided check** must be attached.
- **Additional fields:** Old banking information is now required when making changes or cancellations.



Sign up for Direct Deposit

Please remember to:

- Discard any outdated versions of the form.
- Always use this link to access the most current version:

👉 [Direct Deposit Authorization Form](#)

If you have any questions, please contact the
ACH coordinator at ACH.Coordinator@das.oregon.gov
or call **971-900-9771**.



Reporting Payment Issues

How do I resolve payment issues



Filing a Complaint Through the Office of Small Business Assistance

STEP 1 Attempt to resolve it at the agency **BEFORE** turning to us

STEP 2 Check whether your dispute is in our jurisdiction

STEP 3 **AFTER** steps #1 & #2, if you still have a concern then call or write. Please provide a copy of material gathered in Step #1



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