

EXHIBIT A
COEP RATEPAYER EXPENDITURE
RUBRIC

Community Opportunities and Enhancements Program (COEP)
 City of Portland Environmental Services (BES) & Water Bureau

I. COEP Ratepayer Funds Eligible Activities Rubric (“Rubric”)

	X					
	A. Activity is specific to Water Bureau projects or services.	B. Activity increases diverse workforce supply and/or M/W/DBE subcontractor pool for Water Bureau projects or services.	C. Activity is specific to BES projects or services.	D. Activity increases diverse workforce supply and/or M/W/DBE subcontractor pool for BES projects or services.	E. Activity supports BES and Water environmental obligations.	
Y						
1. Expenditure of funds for <u>business technical assistance</u>	1A	1B	1C	1D	1E	
2. Expenditure of funds for <u>outreach and recruitment</u> of diverse workers	2A	2B	2C	2D	2E	
3. Expenditure of funds for <u>workforce training</u> (including pre-apprenticeship training)	3A	3B	3C	3D	3E	
4. Expenditure of funds for <u>retention</u> of diverse workers (apprentices and journey workers)	4A	4B	4C	4D	4E	

Project Review Tool: Services must be reasonably related to the provision of water or sewer services.

II. Description of X and Y Axes

X Axis:

- A. Activity is specific to Water Bureau projects or services.

The expenditure supports eligible construction firms and workers who are actively working on a Water Bureau project or providing a service directly to the Water Bureau.

- B. Activity increased diverse workforce supply and/or M/W/DBE subcontractor pool for Water Bureau projects or services.

The expenditure supports eligible construction firms and workers who may work on a Water Bureau project or could provide a service directly to the Water Bureau.

- C. Activity is specific to BES projects or services.

The expenditure supports eligible construction firms and workers who are actively working on a BES project or providing a service directly to BES.

- D. Activity increases diverse workforce supply and/or M/W/DBE subcontractor pool for BES projects or services.

The expenditure supports eligible construction firms and workers who may work on a BES project or could provide a service directly to BES.

- E. Activity supports BES and Water environmental obligations.

There are federal and state environmental obligations required of the City. Various bureaus are responsible for ensuring compliance with those obligations, including the Water Bureau and BES. Expenditures would support construction firms and workers to implement these obligations.

Y Axis:

1. Expenditure of funds for business technical assistance

Examples of activities include business development workshops, one-on-one advising, training on business software, help with COBID certification, business grants, or training on City reporting requirements.

2. Expenditure of funds for workforce training (including pre-apprenticeship training)

Funded activities include delivery of pre-apprenticeship training and participant supports such as transportation costs, childcare and work-related clothing and tools. Activities could also include support for early apprentices.

3. Expenditure of funds for outreach and recruitment of diverse workers

Examples of activities include marketing campaigns, outreach to students and community education events.

4. Expenditure of funds for retention of diverse workers (apprentices and journey workers)

Examples of activities include mentoring, networking, support services and efforts to improve jobsite culture.

III. Implementing the Rubric: Specific COEP Ratepayer Fund Expenditures Allowable Under Rubric

The following examples illustrate how the Rubric would be implemented, with the examples showing allowable expenditures of COEP Ratepayer Funds under the Rubric. These examples are illustrative and do not represent the entire universe of allowable expenditures under the Rubric.

1A. Expenditure of funds for business technical assistance / Activity is specific to Water Bureau projects or services:

[examples]

1B. Expenditure of funds for business technical assistance / Activity increases diverse workforce supply and/or M/W/DBE subcontractor pool for Water Bureau projects or services:

[examples]

1C. Expenditure of funds for business technical assistance / Activity is specific to BES projects or services:

[examples]

1D. Expenditure of funds for business technical assistance / Activity increases diverse workforce supply and/or M/W/DBE subcontractor pool for BES projects or services:

[examples]

1E. Expenditure of funds for business technical assistance / Activity supports BES and Water environmental obligations:

[examples]

2A. Expenditure of funds for outreach and recruitment of diverse workers / Activity is specific to Water Bureau projects or services:

[examples]

2B. Expenditure of funds for **outreach and recruitment** of diverse workers / Activity increases diverse workforce supply and/or M/W/DBE subcontractor pool for Water Bureau projects or services:

[examples]

2C. Expenditure of funds for **outreach and recruitment** of diverse workers / Activity is specific to BES projects or services:

[examples]

2D. Expenditure of funds for **outreach and recruitment** of diverse workers / Activity increases diverse workforce supply and/or M/W/DBE subcontractor pool for BES projects or services:

[examples]

2E. Expenditure of funds for **outreach and recruitment** of diverse workers / Activity supports BES and Water environmental obligations:

[examples]

3A. Expenditure of funds **workforce training** (including pre-apprenticeship training) / Activity is specific to Water Bureau projects or services:

[examples]

3B. Expenditure of funds for **workforce training** (including pre-apprenticeship training) / Activity increases diverse workforce supply and/or M/W/DBE subcontractor pool for Water Bureau projects or services:

[examples]

3C. Expenditure of funds for **workforce training** (including pre-apprenticeship training) / Activity is specific to BES projects or services:

[examples]

3D. Expenditure of funds for **workforce training** (including pre-apprenticeship training) / Activity increases diverse workforce supply and/or M/W/DBE subcontractor pool for BES projects or services:

[examples]

3E. Expenditure of funds for **workforce training** (including pre-apprenticeship training) / Activity supports BES and Water environmental obligations:

[examples]

4A. Expenditure of funds retention of diverse workers (apprentices and journey workers) Activity is specific to Water Bureau projects or services:

[examples]

4B. Expenditure of funds for retention of diverse workers (apprentices and journey workers) Activity increases diverse workforce supply and/or M/W/DBE subcontractor pool for Water Bureau projects or services:

[examples]

4C. Expenditure of funds for retention of diverse workers (apprentices and journey workers) Activity is specific to BES projects or services:

[examples]

4D. Expenditure of funds for retention of diverse workers (apprentices and journey workers) Activity increases diverse workforce supply and/or M/W/DBE subcontractor pool for BES projects or services:

[examples]

4E. Expenditure of funds for retention of diverse workers (apprentices and journey workers) Activity supports BES and Water environmental obligations:

[examples]