NMSDC | Advancing Economic Equity Together

Certification Update Meeting for RMSDCs

Kris Oswold
Certification Project Lead
kris.oswold@nmsdc.org
404-775-7305

Our Agenda

Duration	Topic
8 mins	**Project Scope / Timeline / Milestones**
6 mins	**MBE Profile** i. New Features ii. Profile Update Campaign iii. Subscription Services
10 mins	**MBE Search** i. New Features & Access ii. Certified Shared Database iii. RMSDC Role
10 mins	**Certification** i. New Features ii. Governance iii. RMSDC Role
5 mins	**MBE Lead Management** i. New Features ii. Reimbursement Programs
6 mins	**Next Steps – addressing Issues and Risks**
15 mins	**Q&A**

Project Scope / Timeline

Status: **Green**

Phase	Capabilities	3Q23			4Q23		2024
1	MBE Search	Discovery / Business Process Design		Data Analysis and Integration	Iterative Systems Dev. & Release Planning and Prep.	Training & Adoption (MBE Search, Member Services, & Wave 1 Certification deployment)	Continue Wave 1 + Additional Certification Deployment Waves
1	MBE Engagement						
1	Certification Process						
2	Member Management						

We are Here

- ❑ Process Design Phase is completed
- ❑ Build Phase began in October (multiple 2-week sprints)
- ❑ Deployments scheduled:
  - **MBE Search**: November
  - Member Management: Targeting December
  - **Certification (Wave One):** December (MCC/MPC and IFC) & January (MBE)
  - **Certification (Waves Two-Five):** April, July, September, November (*will advance schedule as capacity allows*)
    - More than 2400 certifications in the queue (*in late August*)
    - Approximately 1/3 over 90 days and 1/3 untouched

Phase 1 Project Milestones

Updated 7/31/23

(A time in the project that shows an important achievement. Milestones show a clear sequence of events that build up to project completion.)

#	Milestone	Planned Start Date	Actual Start Date	Planned Comp. Date	Actual Comp. Date	Status
1	Board Approval of Hybrid Implementation Obtained	5/11/23	5/11/23	5/11/23	5/11/23	Complete
2	Wave One RMSDCs Finalized & Staffing Requirements Established	4/25/23	4/25/23	7/31/23		In Progress
3	RMSDC Migration Survey Conducted and Implementation Checklist Created	6/14/23	6/14/23	8/18/23		In Progress RMSDC Info Needed
4	To-Be Processes Documented	7/1/23	7/17/23	8/31/23	9/22/23	Competed
5	Certification Training and Pre-Certification Materials Ready	8/1/23	8/1/23	10/31/23		In Progress
6	Appeals, Audit and Strategy Committees Formed	8/1/23	8/1/23	10/25/23		In Progress
7	**MBE Search Transitioned to Zoho**	**10/1/23**		**11/XX/23***		**In Progress**
8	Wave 1 Staffing Selected & Onboarded	7/3/23		12/1/23*		In Progress
9	**MBE Profile Update Campaign**	**10/22/23**		**10/26/23**		**Not Started**
10	**Certification Deployment Wave 1 (G.I. 2023 and 2 RMSDC's Jan 2024)**	**12/16/23**		**1/31/23**		**Not Started**
11	Deployment Waves 2-5: April, July, September, November 2024	4/1/24		12/21/24		Not Started

*Dates may shift slightly based on other project activity

New Features: MBE Profiles

Improved profiles will make it easier for Corporations to find qualified MBEs

MBE Profile Enhancements
- ❑ Capability statements
- ❑ Video introductions
- ❑ UNSPSC codes and descriptions
- ❑ Aligned and subscribed RMSDCs
- ❑ Company logos
- ❑ 800-character limit to business descriptions
- ❑ New self-serve profile update feature

United Nations Standard Product & Service Codes:
UNSPSC
- ❑ Designed to find suppliers
- ❑ Segment, Family, Category and Commodity levels
- ❑ Introduces new relevant keywords

MBE Profile Updates at Conference
- ❑ October 23-25 in NMSDC booth and around
- ❑ Preconference emails
- ❑ OA23 update: 10/22
- ❑ Power Talk: 10/24

Subscription Services
- ❑ Streamlined, self-serve process
- ❑ Prorate annual fee

New Features: MBE Search

Numerous enhancements based on stakeholder feedback and leading-edge thinking

MBE Search Enhancements

- ❑ UNSPSC and NAICS codes (descriptions used as keywords)
- ❑ Unlimited data export
- ❑ Visibility to expired certifications, as well as in-progress renewals and compliance reviews
- ❑ RMSDC staff to have national search capability
- ❑ Search results returned by relevance
- ❑ New filters to refine the results
- ❑ Flexible list and profile views
- ❑ Subscribed MBEs included in RMSDC searches

Certified Shared Database (CSD)

- ❑ WBENC & NGLCC expecting a soft launch in Oct
  - ❑ NMSDC planning to join as early as Dec

RMSDC Role: MBE Profile & Search Preparation

Easy transition if all parties are ready and work together. Local corporation access is biggest risk.

RMSDC Role: MBE Search

1. Complete any profile updates already requested
2. Provide a list of local corporate members to enable ID creation and deployment communications (template to be provided)
3. Update any websites, flyers, etc. that may reference NMSDC Central or other search links
4. Reinforce the importance of having up to date, searchable MBE profiles
5. Attend training sessions on MBE Search
6. Promote the new profile and search capabilities to corporate members

Notes:

- **NMSDC Central** will sunset when MBE Search deploys in November
- Need to a list of **Local Corporation** search users to ensure they get access to MBE Search
- **Regional Adapt One** instances will not have new profile fields. Will be sunset as certification deploys by region.

New Features: Certification and Governance

Certification Features

❑ Improved user experience
- ✓ Adaptive journey with help content to reduce errors, omissions, and rework
- ✓ Messaging feature with MBE on status or issues
- ✓ Enables sharing of documents across companies

❑ Workflows designed for staff skill progression

❑ New SLA visibility and reporting

❑ Improved data, reports, and dashboards

❑ MBE, MCC/MPC, & IFC certifications

Governance

❑ Dedicated certification staff & leadership

❑ Integrated features improve transparency, accountability, and accuracy
- ✓ Visibility to criteria assessment throughout the process
- ✓ Escalation process
- ✓ Flexible Quality Assurance process
- ✓ Appeals Committee

❑ Audit Committee to oversee certification delivery

❑ Strategy Committee to oversee criteria and certification types

RMSDC Role: Certification Preparation

RMSDC Role: Certification

1. Each president to report site visit decision for their own council by 10/13
2. Continue to process certifications until your region is migrated to the new process and system
3. Resolve any open MBE transfers before migration
4. Address issues that may impact your MBEs
   - Report any paper records for current or 2023 expired MBEs
   - Report government certification relationships that depend on Adapt One or other data source
5. Address risks that could impact your council and MBEs
   - Validate ZIP Code alignment
   - Validate certification rates
6. Update any websites, flyers, etc. that contain certification process detail and/or links to application (Content guidance will be provided)
7. Attend training sessions on relevant content (e.g., site interviews, pre-qualification resources, etc.)

New Features: MBE Lead Management

Opportunities at your fingertips, and manual reports eliminated if you leverage the new system

What is an MBE lead
- ❑ A business that has the potential to get MBE certified and join the network
- ❑ Zoho can capture leads from a variety of sources and prioritize and track them

Leads can assist you with MBE recruitment
- ❑ MBE leads generated from pre-qualification and application activity
- ❑ MBE leads generated from certification expirations
- ❑ Reimbursement programs managed through Lead Management feature
- ❑ Capable of ingesting, distributing, and tracking leads from multiple sources

RMSDC Role
1. Stay tuned for more detail information on Leads in Zoho
2. Consider if you want to streamline your local certification reimbursement programs

Next Steps

1. Site Interviews

- Presidents to individually express their intent by 10/13/23 regarding continuing site interviews

2. Issues and Risks

- Validate/Update Certification Rates and ZIP Code Alignments by 10/20/23
- Respond to six question survey ASAP (was due on 8/8/23, sent again on 9/29/23)
- See email from Kris Oswold on 9/29/23 for additional detail.
  (Content included on following slides. Failure to address issues and risks will negatively impact MBEs, your council, and corporations in your regions.)

3. MBE Search

- Provide list users from local corporation who need access to MBE Search by 10/27/23 (template to be provided, planning 2 users per company)
- Promote and attend training webinars
- Reinforce appropriate use of the data

Q&A

Issues to Resolve (email from Kris Oswold on 9/29/23)

- **Issue 1**: Some councils may still have **paper certification records** for currently certified, or recently expired, MBEs.
  - **Impact:** If this is the case and those records have not been uploaded into AdaptOne, those MBEs will have to resubmit all of their application paperwork the first time that they Renew or experience a Compliance Review once your region migrates to the Zoho platform.
  - **Resolution:** Inform the NMSDC Certification team if this is an issue in your council and help assess how large the issue is. We will work collaboratively to find a solution that minimizes the impacts to MBEs.

- **Issue 2:** Some councils have **government certification agreements** that, could be negatively impacted by the switch to new technology, unless any specific needs are identified and communicated to the NMSDC in advance.
  - **Impact:** Depending on the relationships with government agencies and any dependencies on sending or receiving certification information, the data or reports used to facilitate the relationship may be interrupted. If there are special certification requirements that a council has incorporated into local processes, those requirements could also be lost during the migration to the Zoho system and Hybrid Model.
  - **Resolution:** Provide information on any government certification agreements that you have in place and work with the national team to attempt to meet the local need. The national team cannot plan for local requirements that have not been shared with them.

- **Issue 3**: In the event a council may not be **adhering to all the NMSDC guidelines and policies on certification**, we could find cases where the region certified a business, but that business could be denied upon renewal once migrated to the national process. Or the reverse could be true where a region denied a certification that could get approved in the hybrid model if they reapply and meet the national standards.
  - **Impact:** This type of inconsistency would reflect poorly on the entire network and could generate more serious concerns from MBEs experiencing the inconsistency.
  - **Resolution:** It is best to identify and address any inconsistencies in the delivery of the certification program now and not be surprised later. Please talk with your certification team and identify and areas of risk, including any specific certifications that may become an issue so we can work together now on finding the best solutions. This is not a case of wanting to look backwards to assign any blame, it is a genuine effort to make this transition as smooth as possible for our MBEs.

Risks to Mitigate (email from Kris Oswold on 9/29/23)

- **Risk 1: RMSDC Alignment**. The new system will align MBEs to regional councils by ZIP Code, today the alignment is done manually based on agreements between councils when states are shared. For councils to be credited with the appropriate list of certified MBEs and receive the expected Certification revenue, the ZIP Code alignment should match the current geographic alignment of councils as closely as possible.
  - **Impact:** If the ZIP Code alignment programmed in Zoho does not match the current alignment, revenue and MBE distribution will not occur as expected. This risk is particularly high for councils that split states (e.g., three councils split Texas).
  - **Mitigation:** A ZIP Code validation sheet will be sent to you in the next couple of weeks with the request that you confirm that your council has the correct ZIP Code ranges assigned.

- **Risk 2: Certification rates**. We have collected each council's current certification rates from your websites and intend to use those rates when we deploy the hybrid certification model. It will be important for each RMSDC to validate that the rates that will be programmed into the Zoho system are accurate. The manual process of gathering the rates online is open to human error, and could be impacted by timing issues should a rate change have occurred after the data was gathered.
  - **Impact:** Incorrect rates could be collected from MBEs and the amount remitted to the councils could be different than what they planned.
  - **Mitigation:** A rate validation sheet will be sent to you in the next couple of weeks with the request that you validate or update your current certification rates.