

**City of Philadelphia  
Economic Opportunity Plan**

**The Redevelopment of 4200  
Monument Road for Belmont  
Behavioral Hospital**

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## **I. Introduction and Definitions**

The City of Philadelphia strongly encourages the use of certified Minority ("MBE"), Women ("WBE"), and Disabled ("DSBE")-owned businesses (collectively, "M/W/DSBEs") and minority and female workers in all aspects of the Redevelopment of 4200 Monument Road for Belmont Behavioral Hospital (the "Project") located at 4200 Monument Road ("the Site") which may include financial investment, design, construction, and operations. In support of this objective, the City of Philadelphia will require that Belmont Behavioral Hospital (the "Owner") commit to this Economic Opportunity Plan ("EOP" or "Plan"). This Plan contains ranges of projected M/W/DSBE utilization and goals for the employment of minority and female workers in connection with the Project at the Site. This Plan shall be a part of and incorporated into the resulting agreement(s) with the owners of the Redevelopment of 4200 Monument Road for Belmont Behavioral Hospital.

The Owner hereby verifies that all information submitted to the Office of Economic Opportunity ("OEO") in response to this Plan is true and correct and takes notice that the submission of false information is subject to the penalties of 18 PA C. S. Section 4904, relating to unsworn falsification to authorities and 18 PA C. S. Section 4107.2 (a)(4), relating to fraud in connection with minority business enterprises or women's business enterprises.

For the purposes of this Plan, MBE, WBE and DSBE shall refer to certified businesses so recognized by OEO. Only the work or supply efforts of firms that are certified as M/W/DSBEs by an OEO-approved certifying agency will be eligible to receive credit as a Best and Good Faith Effort.<sup>1</sup> In order to be counted, certified firms must successfully complete and submit to the OEO an application to be included in the OEO Registry which is a list of registered M/W/DSBEs maintained by the OEO and available online at [www.phila.gov/oeo/directory](http://www.phila.gov/oeo/directory).

For this Plan, the term "Best and Good Faith Efforts," the sufficiency of which shall be in the sole determination of the City, means: efforts, the scope, intensity and appropriateness of which are designed and performed to foster meaningful and representative opportunities for participation by M/W/DSBEs and an appropriately diverse workforce and to achieve the objectives herein stated. Best and Good Faith Efforts are rebuttably presumed met when commitments are made within the M/W/DSBE participation ranges established for the Project and a commitment is made to employ a diverse workforce as enumerated herein.

## **II. Project Scope**

The project will include an Inpatient Replacement Facility and a separate Outpatient Support Building on a newly envisioned campus with off street parking and newly designed green spaces. The proposed 156,000 +/- square feet inpatient facility will have five floors including seven to eight units with a total of 180 to approximately 200 beds. Each unit will have 25 beds with each wing having the opportunity to flex up to 3 beds. The final phase's outpatient facility will have 62 offices and eight (nine including the cafeteria) group programming spaces.

## **III. Goals**

### **A. M/W/DSBE Participation Ranges**

As a benchmark for the expression of "Best and Good Faith Efforts" to provide meaningful and representative opportunities for M/W/DSBEs in the Project, the following participation ranges have been

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<sup>1</sup> A list of "OEO approved certifying agencies" can be found at [www.phila.gov/oeo](http://www.phila.gov/oeo)

established. These participation ranges represent, in the absence of discrimination in the solicitation and selection of M/W/DSBEs, the percentage of MBE, WBE and DSBE participation that is reasonably attainable through the exercise of Best and Good Faith Efforts. These percentages relate to the good faith estimated cost of the entire Project. In order to maximize opportunities for as many businesses as possible, a firm that is certified in two or more categories (e.g., MBE and WBE and DSBE or WBE and DSBE) will only be credited toward one participation range as either an MBE or WBE or DSBE. The ranges are based upon an analysis of factors such as the size and scope of the Project and the availability of MBEs, WBEs, and DSBEs to participate in this development.

The following contract goals have been set for the Project:

Contracts	Minority Owned	Female Owned	DSBE	Total
Construction	20-25%	5-10%	BGFE	30-40%

#### B. Employment Goals

The owner agrees to exhaust Best and Good Faith Efforts to employ minority persons and females in its workforce of apprentices and journeymen at the following levels:<sup>2</sup>

- Minority Apprentices - 50% of all hours worked by all apprentices
- Minority Journeymen - 32% of all journey hours worked across all trades
- Female Apprentices - 7% of all hours worked by all apprentices
- Female Journeypersons - 2% of all hours worked across all trades

Local Residents
32%

#### IV. Equity Ownership

The Philadelphia Code 17-1603 requires that each Economic Opportunity Plan include information concerning the Equity Ownership (as defined) of (1) the contractor, developer and/or recipient of financial assistance required to submit the Plan; (2) participants (as defined) engaged by the contractor, developer and/or recipient of financial assistance; and (3) the eventual owner or owners of the project or contract to which the Plan relates; and requiring periodic reports for the purpose of updating Equity Ownership information; all under certain terms and conditions.

Belmont Hospital is publicly traded company. Equity ownership is dispersed and regulated by the Security Exchange Commission.

Following the completion of the project, the project owner is responsible for meeting the reporting guideline identified in the Philadelphia Code.<sup>3</sup>

<sup>2</sup> These goals are based upon the recommendations of the Mayor's Advisory Committee on Construction Industry Diversity (MACCID), published in the 2009 MACCID Report; they have been augmented by OEO over time based upon labor market data.

<sup>3</sup> Per The Philadelphia Code 17-1603: *Continuing Reporting Requirements*.

(i) Within 30 days of each anniversary of the date that the Plan is finally certified, the contractor, developer and/or recipient of financial assistance shall file with the Chief Clerk of Council and the certifying agency an addendum to the original

## V. Diversity Practices

In compliance with Chapter 17-1603, the Economic Opportunity Plan shall contain a statement from the contractor, developer, and/or recipient of financial assistance summarizing past practices by identifying and describing examples of processes used to develop diversity at any/all levels of its organization including, but not limited to, Board and managerial positions. This statement shall also summarize strategic business plans specific to current or past practices of M/W/DSBE utilization on government and non-government projects and procurement.

### I. Describe employment and recruitment policies used to achieve diversity in your workforce.

Belmont Hospital is proud to announce that 64% of its staff is minority, and 66% are women. Belmont Hospital in furtherance of achieving its goals will determine the most appropriate level of staffing at the facility to fulfill its mission and meet the needs of the population in the area. Hiring will be consistent with the determination of a sufficient level of staffing. An internal application process will be available for current employees however; internal applicants are not guaranteed an available position. The most reasonably qualified applicant will be hired for available positions.

To ensure diversity within any and all levels of Belmont Hospital the following recruitment procedures will be adhered to:

- Position Description: Each job in the company should have an updated written job description.
- Job Openings: When notice of job vacancy occurs, the department director should first determine if filling the position is necessary, and if so, are modifications necessary to address business needs. The department directors will then complete a requisition form, obtain required signatures/approvals and submit to Human Resources for posting.
- Recruitment (Job Posting): All approved positions are posted weekly on the recruiting platform. Job postings will be placed in the local classified advertising, internet job sites, postings to academic institutions, state employment offices and other employment agencies or sources to ensure a diverse and capable workforce.

Belmont Hospital will continue to comply with all federal and state laws concerning the employment of persons with disabilities in compliance with the Americans with Disabilities Act (ADA) and Amendments Act (ADAAA). Belmont Hospital will not discriminate against qualified individuals with disabilities in regard to application procedures, hiring, advancement, discharge, compensation, training and other terms or conditions of employment. Belmont Hospital will make reasonable accommodations for qualified applicants or employees with a disability so they can perform the essential functions of a job unless doing so creates an undue hardship for the company.

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Plan that provides the Equity Ownership information required in subsection (g)(2), updated so that it is accurate as of the anniversary date. This requirement shall continue until the project is completed.

(ii) The final EOP report required pursuant to § 17-1604(2)(a) shall include updated Equity Ownership information that is accurate as of the date of the final report.

(iii) After the final EOP report has been filed, the owner or owners of the completed project shall have a continuing obligation to file a Statement of the owner's or owners' Equity Ownership within 30 days of each anniversary of the date that the final EOP report is submitted. The Statement shall be accurate as of the relevant anniversary date, and shall be filed with the Chief Clerk of Council and the certifying agency. No Statement shall be required if the completed project is not privately-owned.

It is Belmont Hospital's policy to provide equal employment opportunity to all employees and applicants for employment regardless of any individual's race, creed, color, religion, national origin, sex, age, physical or mental disability, and genetic information unrelated to the individual's ability to perform essential functions of a particular job; status as a military veteran or qualified disabled veteran; or any other characteristic protected under applicable state, federal and local laws. Additionally, it is the company's policy to provide promotion and advancement or transfer opportunities, compensation, participation in training or educational activities or programs, discipline and termination in a nondiscriminatory fashion.

2. Provide the race, gender, and residential (local) status of your:

	Gender		Race					
	Male	Female	White	Black	Asian	Hispanic	American Indian/Alaskan	Two or more Races
<b>Directors</b>	3	13	15	1				
<b>Management</b>	6	18	13	9	1			1
<b>General Workforce</b>	141	279	158	270	13	10	3	6

	Resident Status					
	Philadelphia County	Montgomery County	Delaware County	Other County	DE	NJ
<b>Directors</b>	7	2	1	3		3
<b>Management</b>	11	4	4	2		3
<b>General Workforce</b>	276	56	52	22	7	18

3. Identify your organization's methods of solicitation and utilization of Minority, Woman and Disabled Businesses (M/W/DSBEs). Please be specific in describing outreach and any procurement policies that are focused on creating or sustaining business relationships with M/W/DSBEs.

Belmont Hospital will determine the most appropriate level of staffing at the facility to fulfill its mission and meet the needs of the population in the area. Hiring will be consistent with the determination of a sufficient level of staffing. An internal application process will be available for current employees however; internal applicants are not guaranteed an available position. The most reasonably qualified applicant will be hired for available positions.

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- **Recruitment (Job Posting):** All approved positions are posted weekly on the recruiting platform. Job postings will be placed in the local classified advertising, internet job sites, postings to

academic institutions, state employment offices and other employment agencies or sources to ensure a diverse and capable workforce.

It is the policy of Belmont Hospital to ensure fair consideration of all contractors and suppliers in its day-to-day purchase or lease of goods and services. Belmont Hospital recognizes that working with a wide range of contractors and suppliers provides an open, competitive and diverse business environment.

In establishing this policy, Belmont Hospital is recognizing its responsibilities to the community that it serves and the society in which it conducts business. The inclusion of women-owned and minority owned businesses will be a function of its normal day-to-day purchasing and contracting activities.

Belmont Hospital's goal is to promote opportunities for utilization of minority and women-owned businesses in procurement activities.

- Identify goods and services that women-owned and minority businesses can provide.
- Identify and create a vendor database of minority and women-owned businesses. The database will be maintained and available to all buying staff for the purpose of soliciting quotes, bids and proposals for the hospital. In order to expand its minority and women-owned database, Belmont Behavioral Hospital will utilize a lists provided by:
  - Minority Business Development Center of Philadelphia
  - Greater Philadelphia Minority Strategic Business Alliance
  - Women's Business Development Center
  - Alliance of Women Entrepreneurs

Belmont Hospital will track purchasing from minority and women-owned businesses and report information to the company's Board.

4. What percentage of your company's total spend with vendors and suppliers is attributable to M/W/DSBEs? Please include a list of the largest M/W/DSBEs used by your organization in the last 12 months.

It should be noted that 7.3% is attributable to M/W/DBEs

Advanced Furniture Service Group  
421 North 7<sup>th</sup> Street  
Suite 711  
Philadelphia, PA 19123

CCI Consulting\*  
Hillcrest Building II  
Blue Bell, PA 19422

Carsten's Health Industries, Inc.  
PO Box 99110  
Chicago, IL 60693

Comitale National Inc.  
1683-B Winchester Road  
Bensalem, PA 19020

Commercial Supply  
13 S. Cliff Court  
Churchville, PA 18966

Corporation Interiors Inc.  
223 Lisa Drive  
New Castle, DE 19720

EML Uniforms, LLC  
P.O. Box 319  
Dresher, PA 19025

Eagle Fence Co., Inc.  
2073 Bennett Rd.  
Philadelphia, PA 19116

Graybar Electric Company  
PO BOX 414396  
Boston, MA 02241-439

Ideal Supply Company  
611 A County Line Road,  
Huntington Valley, PA 19006

Jule's Jewels  
PO Box 626  
Blue Bell, PA 19422 0626

Life Safety Services, LLC.  
4720 Pinewood Rd.  
Louisville, KY 40218

Mecta Corporation  
19799 SW 95<sup>th</sup> Ave.  
Tualatin, OR 97062

Pacifico Ford Inc.  
6701 Essington Ave  
Philadelphia, PA 19153

Staples Business Advantage  
Boston, MA 02241-5256

Strategic Marketing Design  
12 Coriander Drive  
Princeton, NJ 08540

Up To Date Laundry  
1221 Desoto Road  
Baltimore, MD 21223

Zoll Med Corporation  
NY, NY 10087-7028

5. Describe any initiatives made by your organization to increase investment and promote equity ownership by minorities and women.

Belmont Hospital is a publicly traded company, and must adhere to federal regulations with respect to increasing equity ownership.

#### **VI. Responsiveness**

A. The owner shall identify M/W/DSBE commitments and other agreements evidencing their intent to use Best and Good Faith efforts to employ minority persons and females at the levels stated herein. The identified commitments constitute a representation that the M/W/DSBE is capable of providing commercially useful goods or services relevant to the commitments and that the Owner has entered into legally binding commitments or other legally binding agreements with the listed M/W/DSBEs for the work or supply effort described and the dollar/percentage amounts set forth. In calculating the percentage of M/W/DSBE participation, the standard mathematical rules apply in rounding off numbers. In the event of inconsistency between the dollar and percentage amounts listed on the form, the percentage will govern.

B. M/W/DSBE commitments are to be memorialized in a written subcontract agreement. Letters of intent, quotations, contracts, subcontracts and any other documents evidencing commitments with M/W/DSBEs become part of and an exhibit to the Agreement resulting from the RFP.

C. OEO will review the owner's commitments for the purpose of determining whether Best and Good Faith Efforts have been made. OEO reserves the right to request further documentation and/or clarifying information at any time during the construction and development of the Project.

#### **VII. Compliance and Monitoring of Best and Good Faith Efforts**

A. The owner agrees to cooperate with OEO in its compliance monitoring efforts, and to submit, upon the request of OEO, documentation relative to its implementation of the Plan, including the items described below:

- Copies of signed contracts and purchase orders with M/W/DSBE subcontractors
- Evidence of payments (cancelled checks, invoices, etc.) to subcontractors and suppliers to verify participation; and
- Telephone logs and correspondence relating to M/W/DSBE commitments.
- To the extent required by law, the Owner shall ensure that its on-site contractors maintain certified payrolls which include a breakout of hours worked by minority and female apprentices and journeypersons. These documents are subject to inspection by OEO.

#### **B. Prompt Payment of M/W/DSBEs**

The owner agrees and shall cause its contractors to ensure that M/W/DSBEs participating on the Project receive prompt payment for their work or supply effort within five (5) days after receipt of payment from the project owner.

#### **C. Oversight Committee**

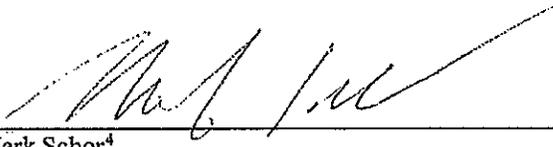
For this Project, in the sole discretion of the City, an oversight committee may be established consisting of representatives from the Owner, representatives of the building trades, the construction manager, and the City which may include the Project site's district councilperson, OEO, and appropriate community organizations ("Committee"). The Committee will meet regularly to provide advice for the purpose of facilitating compliance with the Plan.

#### D. Reporting

The owner agrees to file an annual report with the City of Philadelphia and City Council concerning the performance of the Economic Opportunity Plan through the duration of the Project. In addition, during construction, the Owner will provide "snapshot" reports containing updates for certain categories of information contained in its annual report on a monthly basis during construction. Snapshot reporting will include: (i) utilization of M/W/DSBEs, and (ii) the hiring and employment of minorities and females. All reports (quarterly & annually) provided to the City under this section will also be provided to the Office of Economic Opportunity.

### VIII. Remedies and Penalties for Non-Compliance

A. The owner agrees that its compliance with the requirements of this Plan is material to the Agreement. Failure to comply with the Plan may constitute a substantial breach of the Agreement and is subject to the remedies and penalties contained therein or otherwise available at law or in equity. Notwithstanding the foregoing, no privity of contract exists between the City and any M/W/DSBE identified in any contract resulting from implementation of the Plan. Neither the Owner nor the City intends to give or confer upon any such M/W/DSBE any legal rights or remedies in connection with subcontracted services under any law or policy or by any reason of any contract resulting from implementation of the Plan except such rights or remedies that the M/W/DSBE may seek as a private cause of action under any legally binding contract to which it may be a party.

  
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Mark Schor<sup>4</sup> 6/2/16  
Chief Executive Officer Date  
Belmont Behavioral Hospital  
4200 Monument Rd., Philadelphia, PA  
(215) 581-3868

  
\_\_\_\_\_  
Angela Dowd-Burton<sup>5</sup> 6/6/2016  
Executive Director Date  
Office of Economic Opportunity  
City of Philadelphia

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<sup>4</sup> The Owner's Representative is required to sign and date, but the City reserves the right to obtain the Owner's Representative signature thereon at any time prior to Plan certification. The Owner Representative will receive from the City a certified copy of its Plan which should be filed with the Chief Clerk of City Council within fifteen (15) days of the issuance and published by OEO, in a downloadable format, on the OEO website.

<sup>5</sup> Pursuant to Section 17-1603 (2) of The Philadelphia Code, the representative of the City of Philadelphia's Office of Economic Opportunity, the "certifying agency", certifies that the contents of this Plan are in compliance with Chapter 17-1600.

