DGS CALIFORNIA DEPARTMENT OF GENERAL SERVICES

CA.GOV Cal eProcure

SB/DVBE Best Practices Webinar

Hosted by Department of General Services & Veterans Affairs

Today's Topics

- Supplier Diversity Program
- SB/DVBE First Policy
- SB/DVBE Option
- SB/DVBE Emergency Registry
- Cal eProcure Search Tips
- Advocate Role and Responsibilities
- CalVet Resources
- Procurement Methods to Increase SB/DVBE Participation
- UNSPSC
- SB/DVBE Procurement Data Dashboards

Department of General Services
Supplier Diversity Program

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Office of Small Business and Disabled Business Enterprise Services

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OSDS Overview

- DGS Procurement Division
  - Certification and Outreach
    - Certification Staff - Certification and Support
    - Outreach Staff - Education, Training, and Support of Suppliers and Departments
    - Other Functions: CAR, Compliance and Program Abuse

SB/DVBE First Policy

What it is:

- Formal policy adopted by each department that requires the use of the SB/DVBE Option unless a waiver is granted

- Templates available to assist you

SB/DVBE First Policy

Benefits:

- Simplifies procurement - less work for you!
- Acquire goods/services more quickly and efficiently
- Helps you to meet the 25% and 3% requirements
- Grow your network of SB/DVBE business contacts
- Supports California's economy

Utilizing SB/DVBE Option

What it is:

- Streamlined procurement process to help increase SB/DVBE contracting participation

- Allows departments to contract directly with SB/DVBE for products/services valued between $5,000.01 to $249,999 and for Public Works between $5,000.01 to $388,000

Utilizing SB/DVBE Option

Benefits:

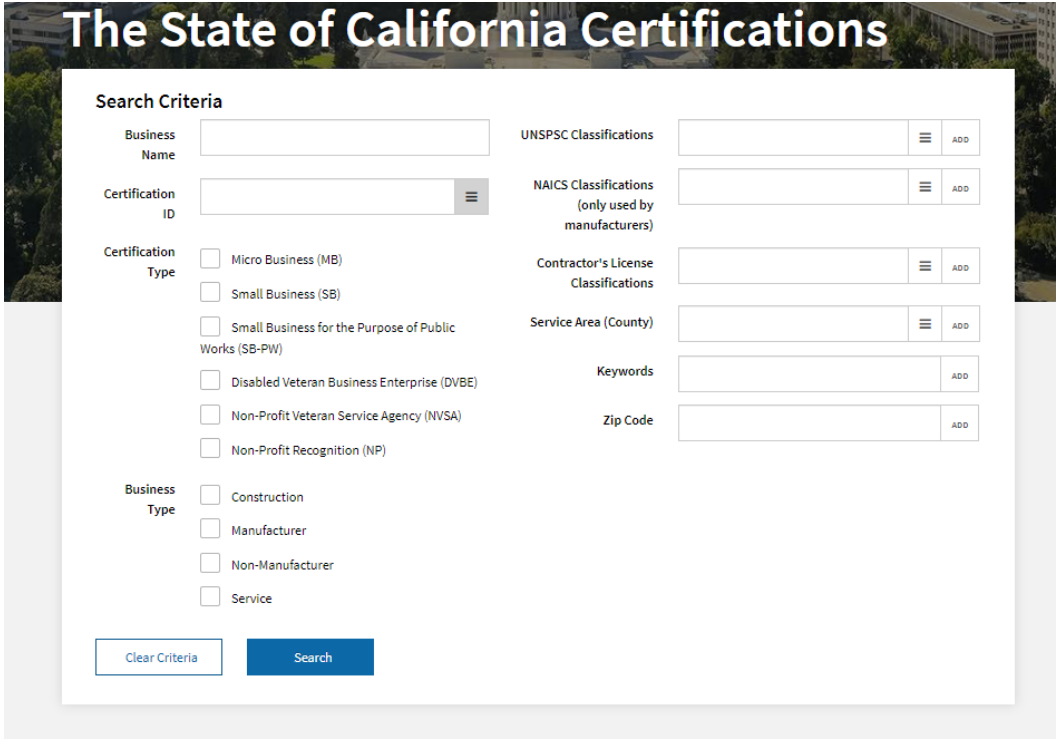
- Acquire goods/services more quickly and efficiently
- Allows you to meet the 25% and 3% requirements
- Increases opportunities to SB/DVBEs

AB 1574

- This new legislation that went into effect January 1, 2022
- Includes new requirement “to expand the pool of small businesses and microbusinesses that participate in the department’s and other state agencies’ contracts by regularly seeking out and identifying small businesses and microbusinesses that have not previously done business with your department or other state agency or that are not regularly used by the department or state agency.”
- The SB/DVBE First Policy/Option is a great way to do this!

Using Cal eProcure - SB/DVBE Search

Search by:
- Business Name
- Certification Type/ID
- Business Type
- UNSPSC Codes
- Service Areas/Zip Codes
- Keywords



SB/DVBE Emergency Registry

What is the SB/DVBE Emergency Registry?

- A dedicated portal for California certified businesses to register as a supplier of emergency goods and services.
- Unlike Cal eProcure, this portal will only include businesses that provide goods and services from predetermined emergency categories.
- State department buyers can access and search this pool of suppliers.

SB/DVBE Emergency Registry

What are the benefits of the SB/DVBE Emergency Registry:

- Allows state departments to quickly identify certified businesses who are ready and able to provide goods and services during an emergency.
- Buyers can easily search the registry for certified businesses using the following search terms:
  - Certification Type
  - County
  - Emergency Category
  - Keywords
  - City

Emergency Categories List

Base Camp Operations
Buildings/Sanitation
Communications
Construction
Debris Removal
Electrical
Energy/Fuel
Erosion Control
Facilities
Fencing
Fire Protection
Food & Beverage
Hazardous Materials
Information Technology
Janitorial
Law Enforcement/Security
Lighting
Logistics/Transportation
Maintenance/Repair Medical
Miscellaneous Services
Miscellaneous Supplies
Personal Care Supplies
Portable Modular
Respiratory Products
Roadway Maintenance
Temporary Labor
Traffic Control
Vehicle Rentals (Incl. Heavy Equipment)
Vehicle Repair

SB/DVBE Emergency Registry

Which businesses are invited to sign up?

- SB/DVBE businesses who are currently ready and able to support the state of California in an emergency.
- Emergency contracting requires fast, around-the-clock turnaround times - a business should not register unless they are fully capable of immediately providing the goods and/or services they list.

SB/DVBE Emergency Registry

Which state employees should request access?

- SB/DVBE Advocates
- Any state buyers/procurement staff who may do emergency procurements or non-emergency procurements in emergency categories

SB/DVBE Emergency Registry – Buyer Access

- Buyers must register within the DGS Shared Services portal to get access to the Emergency Registry Search Portal
- In order to be granted search access buyers will need:
  - Contact information: state department email, phone, department address
  - Supervisor contact information

State Department Registration Process

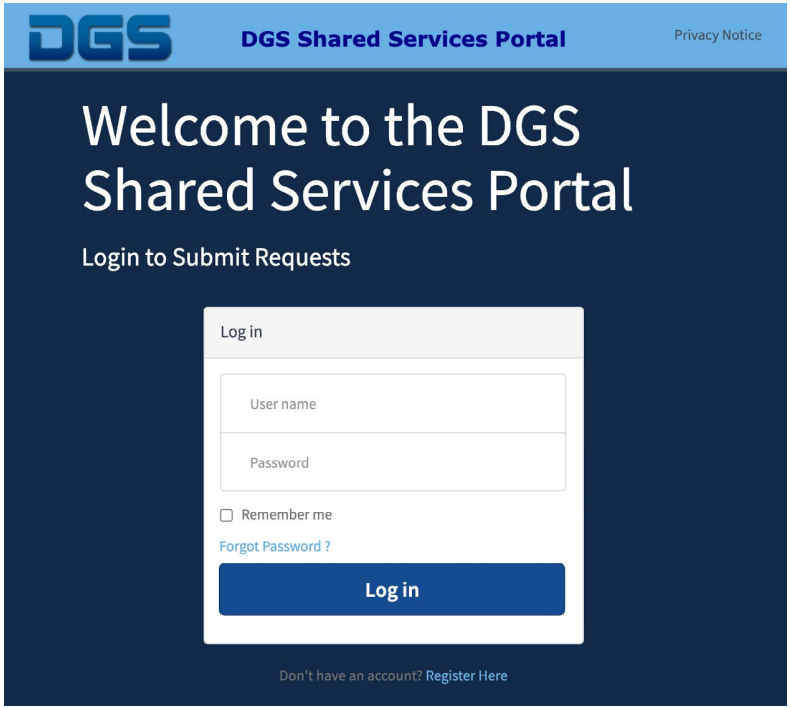
Part 1: Register in the DGS Shared Services Portal

Step 1:

Go to the DGS Shared Services Portal

Step 2:

Click Register Here, located under the log-in section, to create a log-in.



State Department Registration Process

Step 3:

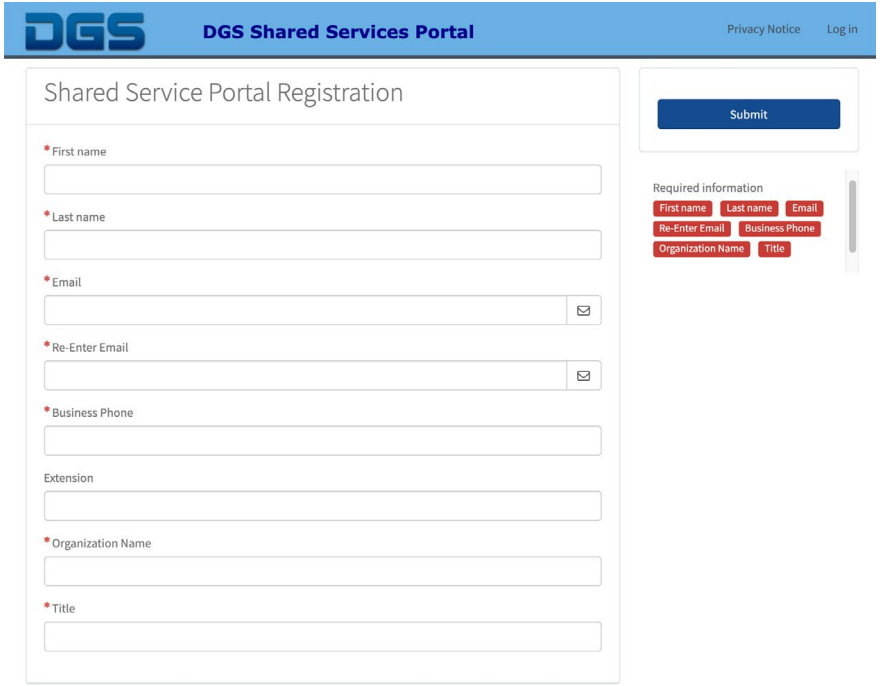
Enter the required information.

Step 4:

Check your registered email box, you will receive two emails: the first confirms your email and the second directs you to create a password.

Step 5:

Create new password.



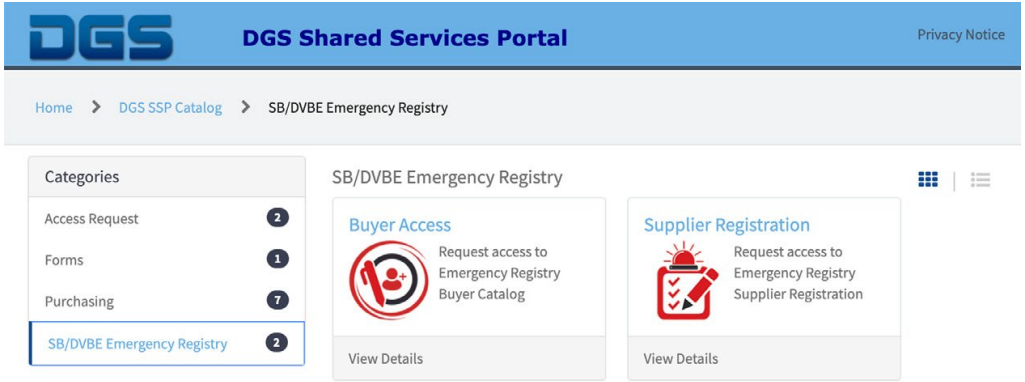
State Department Registration Process

Part 2 : Submit State Department Profile in SB/DVBE Emergency Registry – Buyer Access

Step 1:
Log-in to the DGS Shared Services Portal

Step 2:
Click SB/DVBE Emergency Registry

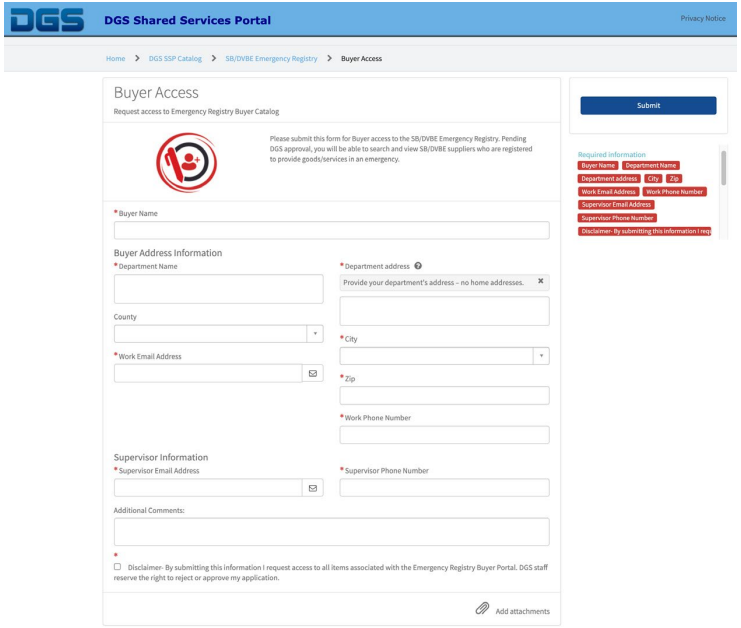
Step 3: Click Buyer Access



State Department Registration Process

Step 4: Enter in the required information. Review your information. Click Submit.

Your Submission is complete. You will receive an email with the status of your request. Upon approved, you can begin to access the SB/DVBE Emergency Registry.



State Department Access

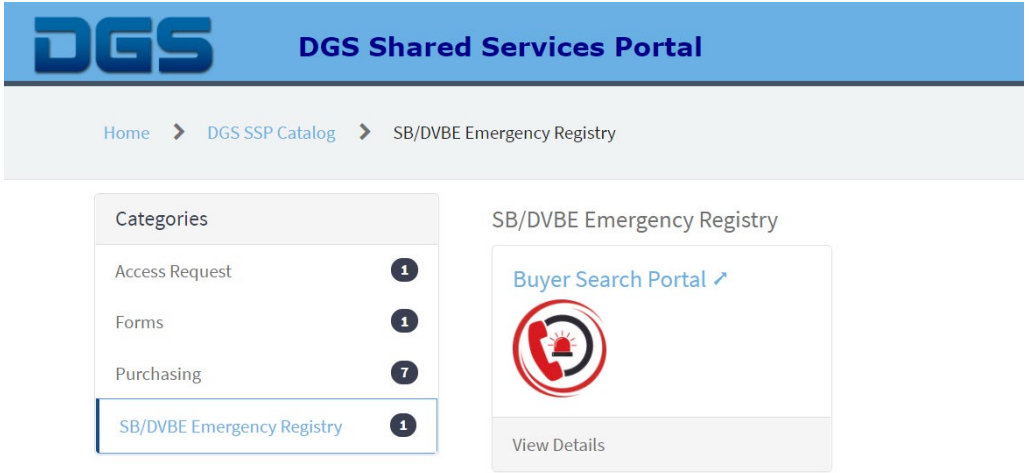
Part 3: Access Buyer Search Portal and Search Certified Businesses

Step 1: Log-in to DGS Shared Services Portal

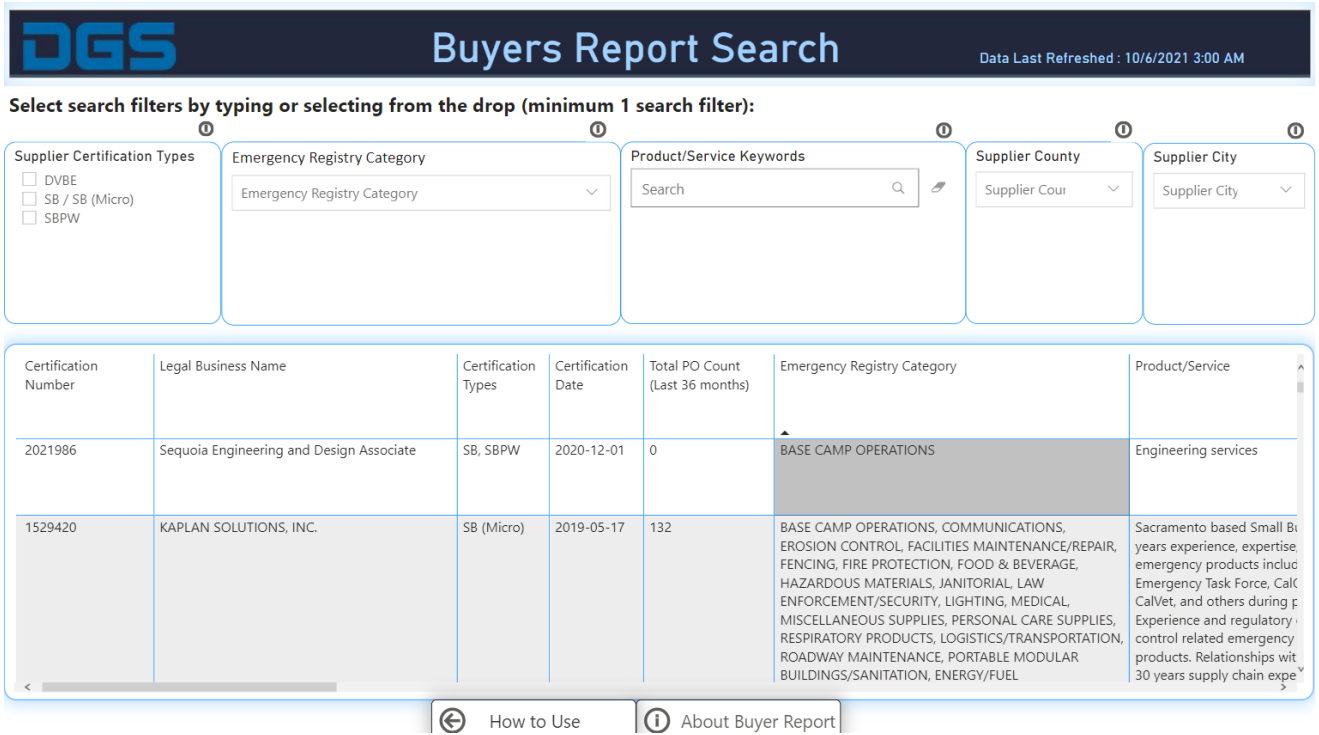
Step 2: Click on SB/DVBE Emergency Registry

Step 3: Click on Buyer Search Portal

Step 4: Enter Search Criteria



Buyer Report Search



SB/DVBE Emergency Registry Resources

For step-by-step instructions and access to the registry:

SB/DVBE Emergency - State Department Information

For questions or more information:

SBDVBEEmergencyRegistry@dgs.ca.gov

OSDS is Here for You!

We can help you:

- Find SB/DVBEs that meet your needs
- Serve as a resource to suppliers and Advocates
- Identify Best Practices that help you meet SB/DVBE goals
- Identify outreach opportunities - https://www.dgs.ca.gov/PD/Events

OSDS Contact Information

Office of Small Business and DVBE Services
California Department of General Services

BusinessOutreach@dgs.ca.gov

Department of General Services
SB/DVBE Advocate

Dr. Kathryn A. Hill
SB/DVBE Advocate
Department of General Services

OBASAdvocate@dgs.ca.gov

Advocate Expectations and Tools for Success

- Understand your department's buying needs.
- Clarify procurement processes for vendors.
- Troubleshoot prompt payment issues / Assure resolution
- Management support is KEY!
- Promote smart policies to ensure that your department will meet its annual goals
- Maintain consistent communication with DGS, CalVet and other advocates
- Stay current on legislation impacting the SB/DVBE program.

Advocate Expectations, cont'd

- Propose updates to desk manuals, policies and procedures, solicitation documents and forms, as necessary.
- Review all SB/DVBE Waiver requests carefully - make sure all requirements listed in the Scope of Work, such as minimum qualifications, are necessary and not limiting the vendor pool.
- Set a 3% mandatory DVBE goal on all formal solicitations (IFB, RFP).
- Review CAR Data regularly to make sure SB/DVBE prime and subcontractor information is captured accurately.

Advocate Best Practices

- Introduce yourself to your department buyers
- Create a shared folder to share vendor capabilities statements. Organize them by the goods or services provided.
- Prepare a template email to respond to vendors promptly. Share links to helpful resources.
- Create a SB/DVBE Advocate email address. Maintain mailbox for Advocate matters and designate a backup when you will be out-of-office.
- Keep your contact information up-to-date on the SB/DVBE Advocate Directory.

Advocate Resources

- Connect with other Advocates on the List Serve: List Serve Access
- Connect with OSDS: Advocate@dgs.ca.gov
- Advocate Update Form: SBDVBE Advocate Update Form
- Upcoming Advocate meeting info: https://www.dgs.ca.gov/PD-Advocate-Info
  - Next SB/DVBE Advocate Meeting is 5/12/22 1:30 - 4 p.m.
- CAR Report Progress contact: OSDSReports@dgs.ca.gov
- 2022 SARA Awards: 22nd Annual State Agency Recognition Awards (ca.gov)

CalVet

Daniel Bates & Sharee Nuez
DVBE Program Analysts
Disabled Veteran Business Enterprise (DVBE)
California Department of Veterans Affairs

DVBE@calvet.ca.gov

DVBE Overview

The California Department of Veterans Affairs DVBE unit primary functions are:

- Supporting all State agencies DVBE advocates are continuously striving to meet the 3% contracting requirement
- CalVet Advisory Council which provides California's Disabled Veteran Business Enterprise community with a dedicated forum to advise the Secretary on program improvements to support veteran entrepreneurship
- DVBE Request for Response

DVBE Request for Response

- Survey housed on CalVet website
- Avenue for Veterans, Contractors, SBs, and buyers to contact DVBE unit
  - Staff review all inquires within 5 business days
  - Provide information and resources
  - CalVet Management review high level inquires
  - DVBE Advisory Council review concerns regarding the DVBE community
- Webpage: https://www.surveymonkey.com/r/CalVet_DVBE_Request_for_Response

DVBE Overview

- Quarterly SB/DVBE Advocates meeting
  - Policy and Legislation updates
  - Upcoming Outreach events
  - Open discussions to assist Advocates struggles
- DVBE Exemption Request (STD 816) review
  - CalVet will provide analysis and recommendation
- Solicitation assistance
  - Review solicitations
  - Search and contact firms

DVBE Advocate Survey

- Survey went live September 17, 2021
  - Seeking top 5 Goods and Services departments have difficulty procuring
  - Challenges departments face
  - Department best practices to meet DVBE goal

- 59 Advocates participated in survey
  - Survey was extended to 2/28/22
  - Data currently in review

DVBE Resources

Key Websites:

https://www.calvet.ca.gov/about-us/doing-business

https://www.calvet.ca.gov/calvet-programs/veteran-services

Leveraged Procurement Agreements

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Department of General Services

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Leveraged Procurement Agreements

- The Acquisitions branch establishes Leveraged Procurement Agreements (LPAs) for commonly purchased goods and services.

- LPAs leverage the state's buying power and simplify the procurement process for state departments and local government entities.

Leveraged Procurement Agreements

Finding LPAs

- State Contracts Index Listing contains high level contract information for each contract, including links to the Cal eProcure LPA details page.
  - Located on the DGS-PD home page: https://www.dgs.ca.gov/PD

Leveraged Procurement Agreements

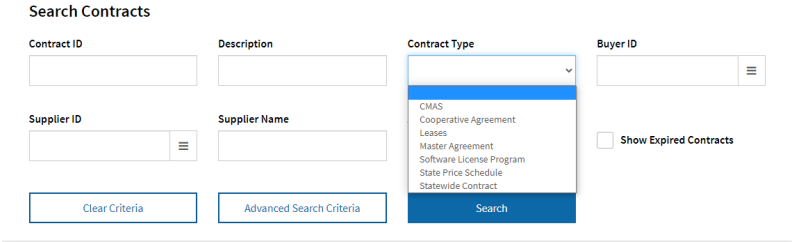
Finding LPAs Con't.

- Search Cal eProcure for LPAs
  - Step 1: Cal eProcure: https://caleprocure.ca.gov/pages/index.aspx
  - Step 2: Quick Links → "Find State Contracts (LPA)"

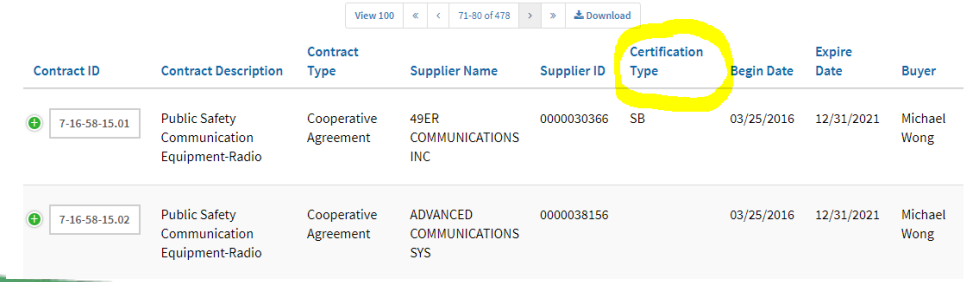
Leveraged Procurement Agreements

Finding LPAs Con't.

- Step 3: Search by Contract ID, Description, or Contract Type



- Step 4: Sort by Certification Type



Contract ID	Contract Description	Contract Type	Supplier Name	Supplier ID	Certification Type	Begin Date	Expire Date	Buyer
7-16-58-15.01	Public Safety Communication Equipment-Radio	Cooperative Agreement	49ER COMMUNICATIONS INC	0000030366	SB	03/25/2016	12/31/2021	Michael Wong
7-16-58-15.02	Public Safety Communication Equipment-Radio	Cooperative Agreement	ADVANCED COMMUNICATIONS SYS	0000038156		03/25/2016	12/31/2021	Michael Wong

Statewide Contracts

- Offers non-IT goods and IT goods and services
- Established through a competitive bidding process
- Reduces the need for individual departments to conduct repetitive bids for like products
- Most are mandatory for state departments and available for use by local government entities
- Solicitations include small business preference and DVBE incentives to increase participation
- SB/DVBE offramp provision may be included in resulting contracts

LPA Contact Information

Leveraged Procurement Agreements
Department of General Services

https://www.dgs.ca.gov/PD-LPA

Contract Search and State Contracts Index Listing:
https://www.dgs.ca.gov/PD/Services/Page-Content/Procurement-Division-Services-List-Folder/Find-Leveraged-Procurement-Agreements

Multiple Awards Program Section (MAPS)

Yolanda Tutt
Contract Administrator
Master Agreements Unit
Department of General Services

Yolanda.Tutt@dgs.ca.gov or (279) 946-8401

Multiple Awards Program Section (MAPS) Overview

- The Multiple Awards Program Section consists of four programs:
  - California Multiple Award Schedules (CMAS)
  - Master Agreements (MAs)
  - Software Licensing Program (SLP)
  - Cooperative Agreements

California Multiple Award Schedules (CMAS)

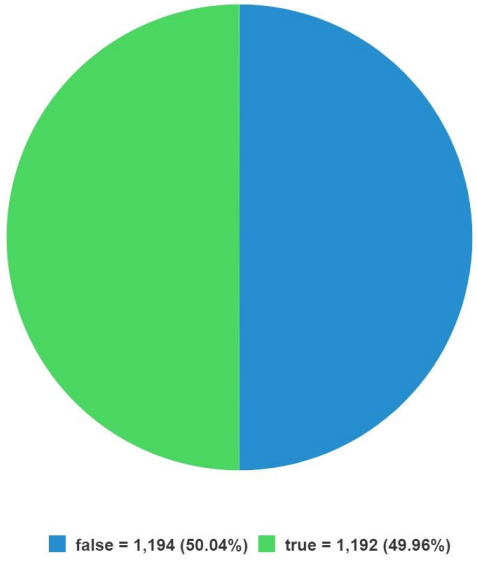
- Streamlined procurement process based on pricing from federal GSA schedules and other multiple award contracts where pricing has been deemed fair, reasonable, and competitive.

- Suppliers do not need their own GSA schedule or base contract. They may piggyback on another company's schedule/contract.

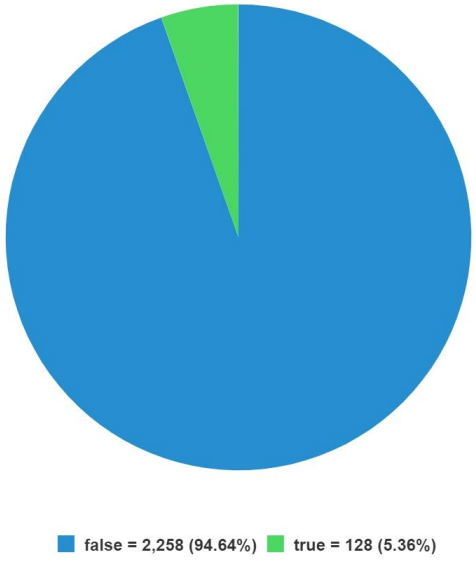
- Non-IT commodities, non-IT services, and IT goods and services may be offered through CMAS.

CMAS Awarded to SB & DVBE Suppliers

Percentage of all CMAS awarded to SB 49.96%



Percentage of all CMAS awarded to DVBE 5.36%



As of 3/08/2022

Advantages for Certified SB & DVBE Companies

- State agencies must consider offers from certified SB and/or certified DVBE, when available.

- DGS bills State agencies for CMAS transactions. Sales to California certified small business enterprises are exempt from the DGS administrative fee.

- CMAS charges an incentive fee to suppliers for local government sales (counties, cities, K-12 schools, community colleges, etc.). CMAS waives the incentive fee for California certified small business enterprises.

CMAS Portal

- Portal went live on February 1, 2021.
- Improved the CMAS application process and made it even easier. Current processing time is averaging 3-5 days.
- Eco friendly. We have eliminated all paper from our processes.
- Eliminated many of the deficiencies we typically saw in the paper applications.
- Quarterly reports can be submitted through the portal and payments may be made via credit/debit card or electronic check.
- Multiple users for a company can be added to the portal allowing for different users to have different rolls and permissions.

CMAS AGREEMENT SEARCH

Data Last Refreshed : 7/20/2021 2:00am

Select search filters (minimum 1 search filter):

BRAND-3M

CMAS Supplier Name

Check all that apply:

- Small Business (SB)
- Disabled Veteran Business Enterprise (DVBE)

CMAS Agreement Number

Base Schedule Number

Contractor Location (City)

CMAS Agreement Number	CMAS Supplier Name	Term End Date	Contact Email	Business Enterprise Type	Base Schedule Number	Base Schedule Holder
4-19-51-0081A	EMPIRE SAFETY	5/31/2024	TCRAWFORD@EMPIRESAFETY.COM	SB	GS-21F-089BA	SEVA TECHNICAL SERVICES INC
3-20-70-3852J	EMPOWER MINDS LLC	12/6/2021	suzanne@empowerminds.com	SB	GS-35F-0097Y	GLOBAL DATA CENTER INC
4-19-75-0085A	CALIFORNIA DISTRIBUTION LLC	7/29/2024	SUPPORT@CALDISTRIBUTION.NET	DVBE and SB	GS-02F-0213P	AMERICAN WAREHOUSE
3-14-84-0031A	VISIONS OF VIDEO	6/30/2022	SANDRAM@VISIONSOFVIDEO.COM	SB	GS-07F-0291Y	FERBAK INC
4-20-75-0087B	HIGH SPEED LOGISTICS INC	8/4/2024	MQUARTO@HIGHSPEEDLOGISTICSGOV.COM	SB	47QSEA19D00AY	NOBLE SALES CO INC
4-20-75-0090B	GREEN RAMP GROUP LLC	7/29/2024	MGRUMLEY@GREENRAMPGROUP.COM	DVBE and SB	GS-02F-0213P	AMERICAN WAREHOUSE
4-19-73-0033B	CALIFORNIA JANITORIAL SUPPLY CORP	11/11/2023	MCHIAPPE@CALJANSUPPLY.COM	SB	GS-07F-035BA	STAPLES INC
4-18-75-0073A	AMERICAN WAREHOUSE GOL LLC	7/29/2024	LGENDELMAN@AMERICANWHS.COM	SB	GS-02F-0213P	AMERICAN WAREHOUSE
4-13-73-0024A	Advantage West Government Product Solutions	6/30/2026	keith.anderson@gps-mil.com	SB	GS-07F-0617X	Advantage West Investment Enterprises, Inc.

CMAS Contact Information

Visit the Website:

https://www.dgs.ca.gov/PD/About/Page-Content/PD-Branch-Intro-Accordion-List/Acquisitions/California-Multiple-Award-Schedules

CMAS Search Portal link:

https://cmassearch.azurewebsites.net/

Contact:

CMAS@dgs.ca.gov

Master Agreements

- Master Agreements (MAs) are competitively bid contracts available to any agency that expends public funds.
- Prequalified list of vendors.
- Simplify the purchasing process for the end user.
- Offers both IT and Non-IT MAs.
  - Primarily services
- User Agencies may be required to conduct Request For Offers (RFOs) from awarded Suppliers.

Master Agreements Contact Information

Visit the Website:

https://www.dgs.ca.gov/PD/About/Page-Content/PD-Branch-Intro-Accordion-List/Acquisitions/Master-Agreements?search=master%20agreements

Contact:

Masters@dgs.ca.gov

Software Licensing Program (SLP)

- The SLP was established in January 1994.
- Software discounts are negotiated with major software publishers then passed on to the State, through the SLP contracts established with authorized participating re-sellers.
- SLP agreements are established to reduce the need for individual departments to conduct repetitive acquisitions for proprietary software licenses and software upgrades while taking advantage of the large volume discounts offered by the software publishers.

Software Licensing Program (SLP)

- SLP agreements consist of Software, Maintenance & Support, Implementation, Training, Installation, SaaS.
- The following Categories are available on SLP: Software, Maintenance, Support, SaaS/Cloud, Implementation Services, Installation, Training, IaaS/PaaS.
- Standalone Hardware, Consulting, Standalone Training and Standalone Installation Services are not available under the SLP.
- To use, departments solicit a minimum of three (3) contractors. Award is based upon lowest cost or best value, determined by departments need.

Software Licensing Program (SLP) Contact Information

Visit the Website:

https://www.dgs.ca.gov/PD/About/Page-Content/PD –Branch-Intro-Accordion-List/Acquisitions/Software-Licensing-Program

Contact:

SLP@dgs.ca.gov

Cooperative Agreements

- DGS-PD partners with purchasing consortiums, such as the National Association of State Procurement Officials (NASPO), to establish cooperative agreements for California state and local agencies to use.

- Cooperative agreements are based on master agreements established by a lead entity, which are written, solicited and executed under that lead entity's procurement rules.

- Offers Non-IT commodities, non-IT services, and IT goods and services.

Cooperative Agreements Contact Information

Visit the Website:

https://www.dgs.ca.gov/PD/About/Page-Content/PD-Branch-Intro-Accordion-List/Acquisitions/Cooperative-Agreements

Contact:

PDCooperatives@dgs.ca.gov

UNSPSC & SB/DVBE Dashboards

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Manager-Intake & Analysis Unit
eProcurement & Business Intelligences
Strategies Section (eBiss)
Department of General Services

Alan.Moreno@dgs.ca.gov

Procurement/Intake & Analysis Unit

UNSPSC (United Nations Standard Products and Services Code)

- Where to find information regarding UNSPSC
  - https://www.dgs.ca.gov/PD-UNSPSC
  - Go to www.dgs.ca.gov and type in “UNSPSC” in search bar
- Understanding the UNSPSC coding
  - For help, contact helpUNSPSC@dgs.ca.gov
- UNSPSC Replacement Search Dashboard
  - Removed unused codes
  - Added more context to codes
  - Consolidated codes

Procurement/Intake & Analysis Unit

Certified SB/DVBE Spend Comparison Dashboard

- Where to find the dashboard:
  - https://www.dgs.ca.gov/PD/Resources/Page-Content/Procurement-Division-Resources-List-Folder/Intake-and-Analysis-Unit-Dashboards?search=dashboard
  - Or go to www.dgs.ca.gov and type in “DASHBOARD” in search bar
- Understanding the SB/DVBE Spend Dashboard
  - The dashboard was created to provide a visual tool to show how much money was spent with certified vendors compared to non-certified vendors

Procurement/Intake & Analysis Unit

Certified SB/DVBE Spend Comparison Dashboard

- Certified SB/DVBE Spend Dashboard
  - Shows the total spend on each UNSPSC code
  - Provides the purchase order frequencies
  - Visually shows how much is spent over time

Procurement/Intake & Analysis Unit

Certified SB/DVBE Spend Comparison Dashboard

- How to use the dashboard:
  - Enter the desired fiscal year. You may select “Clear Filter” to show all (3) years of data
  - Enter the applicable UNSPSC description (e.g. PAPER or FISH)
  - Hit enter after the selections have been made
  - Double click on the line that is applicable
  - The results will show the total spend under “Certified Vendors” and “Non-Certified Vendors”
  - Double click on a vendor’s name to show further detail
  - The results will show the total spend from each State Department

Intake & Analysis Unit Contact Information

eProcurement & Business Intelligences Strategies Section (eBiss)
Department of General Services

https://www.dgs.ca.gov/PD-UNSPSC

https://www.dgs.ca.gov/PD-Dashboards

IAU@dgs.ca.gov

HelpUNSPSC@dgs.ca.gov

Questions & Answers

Contact Information

Office of Small Business and DVBE Services
California Department of General Services

BusinessOutreach@dgs.ca.gov

Thank You for Participating!