



Consolidated Annual Report Training for Non- FI\$Cal Users

FISCAL YEAR 2023-24

Presented by
Imran Chaudhary
OSDS Advocacy Program Manager

CALIFORNIA DEPARTMENT OF GENERAL SERVICES

DGS

Office of Small Business
and Disabled Veteran
Business Enterprise Services

Welcome and Introductions

➤ Imran Chaudhary

OSDS Advocacy Program Manager



Housekeeping

- This training will be recorded.
- Mute yourself unless presenting.
- Keep camera off.
- During the presentation, use the chat to ask questions. Please write contact information after question in case we need to contact you.
- Slides will be provided by email.
- For any technical issues, reach out to OSDSReports@dgs.ca.gov

Agenda

- Objectives
- Background
- Reporting Requirements
- Process, timelines, extensions
- Questions and Answers
- Who to contact

Objectives

By the end of the training, you should know...

- Why and which reports are required
- What's new reporting requirement
- Who to contact with questions
- How to submit your reports by Intake Page

SB & DVBE Program Authority

REPORTING IS MANDATORY

SB and DVBE Program Statutes:

- SB - Government Code (GC) §14835
- DVBE - Military and Veterans Code (MVC) §999

Consolidated Annual Report (CAR) Statutes:

- Public Contract Code (PCC) §10111 - all reports
- Government Code (GC) §14838.1- I-Bond and,
New! Infrastructure Investment and Jobs Act (IIJA)
report 810A

New Legislation

AB 2974(Chapter 600, Statute of 2022)

Effective January 1, 2023, all state agencies awarding new contracts over \$500,000 financed, in whole or part, with IIJA federal funds, shall establish a 25% Small Business (SB) procurement participation goal on those contracts.

https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=202120220AB2974

- Exemptions are permitted for specific reasons. For exemptions, use form PD 810Ae. Submit approved exemptions to DGS/OSDS at OSDSReports@dgs.ca.gov

<https://www.dgs.ca.gov/-/media/Divisions/PD/OSDS/Certification/CAR/std810Ae.pdf>

New Legislation (Cont.)

AB 2974 (Chapter 600, Statute of 2022)

- Report annually to DGS in the Consolidated Annual Report (CAR) statistics comparing the SB and microbusiness (Micro) participation dollars for contracts funded by IIJA federal dollars to the total contract dollars for contracts funded by federal dollars.

Management Memo No. 24-02:

[Small Business Participation, wholly or partly, funded by the Federal Infrastructure Investment and Jobs Act \(IIJA\)](#)

New Legislation (Cont.)

AB 2019 (Chapter 730, Statute of 2022)

Codifies 25 percent SB participation goal.

- Requires the state to conduct a statewide procurement disparity study by January 2025.
- State departments to set annual 25% SB participation goal on their procurements
- DGS/OSDS to collect diversity data
- DGS/OSDS to recommend departments to simplify and reduce requirements to increase participation of SB/Micro, DVBE, minority/women/LGBTQ-owned firms

New Legislation (Cont.)

AB 2019 (Chapter 730, Statute of 2022)

- Departments encouraged to do outreach.
- Allows for remedial actions to be taken such as removal of delegated contract authority or restrictions on contracting activity for agencies that don't meet SB/DVBE goals in three out of five years.

BB. No. P-12-22 - SUBJECT: [Economic Equity for Small Business \(SB\) and Disabled Veteran Business Enterprise \(DVBE\) Firms and Diversity Among State Contractors](#)

New Legislation (Cont.)

AB 1574 (Chapter 756, Statute of 2021)

1. Expansion and Inclusion Efforts:

- All state departments are mandated to continuously work towards expanding the pool of bidders from the categories of Small Business (SB), Microbusiness (Micro), and Disabled Veteran Business Enterprise (DVBE).
- Departments are required to actively seek and include SB/Micro businesses in their solicitations, particularly those that have not been frequently utilized or have never been used by the state.

2. Certification of Commercially Useful Function:

- Bidders must include with their bids a certification, signed under penalty of perjury, affirming that each SB/DVBE subcontractor involved performs a Commercially Useful Function (CUF).

3. Clarification of Roles and Coordination:

- The roles of department-specific SB Advocates and SB Liaisons are clarified.
- Enhanced coordination is established between the Governor's Office of Business and Economic Development (GoBiz), the Department of Veteran Affairs (CalVet), and the Department of General Services (DGS).

New Legislation (Cont.)

➤ In Focus document resource/tool.

[InFocus Legislative Impacts 04-03-2024.pdf](#)

DVBE Program Audit 2018-114

Audit recommendations/requirements:

- Increase accuracy
 - Develop/strengthen second departmental review for accuracy
 - Conduct sample data verification of the high dollar contracts
 - Verify reported data against procurement records.
- Ensure consistency
- Awards vs. expenditures
- Multiyear contract reported fully in the award year (front loaded)

Reporting Structure

Mandatory reporting departments

- All Agencies/Departments under DGS purchasing authority
- If you believe your department is exempt from reporting or that certain procurements/contracts are exempt, work with your legal counsel to identify the statutory exemption and write a justification, submit to OSDS. OSDS will confer with it's legal counsel for concurrence.
- DGS/OSDS does not have authority to exempt departments or contracts from SB/DVBE reporting requirements.

Reporting Structure (Cont.)

Voluntary reporting departments - electing to report

- Universities
- Offices not under the governor's jurisdiction and not under DGS purchasing authority

Consolidated Annual Report

- DGS PD 810: DVBE and SB/Micro Contracting Activity Report
Improvement plans required if SB/DVBE goal(s) not met
- DGS PD 810S: SB Option, DVBE Option & DVBE Incentive Report
- DGS PD 810A: Infrastructure Bond/ Infrastructure Investment and Jobs Act Report
Improvement Plan required if SB goal is not met
- DGS PD 810C: Consulting Services Report
- DGS PD 810E: Ethnicity, Race, Gender and Sexual Orientation Report (ERGSO)

Hyperlink: [Consolidated Annual Report](#)

Non-FI\$Cal use the following to report and submit CAR

Online Intake Pages

Pcard Summary Entry Page

ERGSO Entry Page

Online Improvement Plan Portal

Form 810 Intake Pages Access

In order to access the CAR Intake pages in FI\$Cal each department needs to have at least one user that is mapped to the SCPRS Processor role.

For security purposes, all system access and role mapping must be done between the department/CSU and FI\$Cal. OSDS is not able to assist with this process.

For more information regarding FI\$Cal access
: <https://fiscal.ca.gov/user-support/fiscal-service-center/end-user-access/>

Questions should be directed to the FI\$Cal Service Center: FiscalServiceCenter@fiscal.ca.gov

Online Intake Pages

- Non-FI\$Cal Users will be able to enter their CAR data into the FI\$Cal system.

Favorites ▾ Main Menu ▾ > FI\$Cal Processes ▾ > FI\$Cal Extension ▾ > PO ▾ > Form 810 - Intake Pages

Form 810 Contract Activity | Form 810S SB/DVBE Options | Form 810A I-Bond Report | Form 810C Consulting Services

Fiscal Year 2020-2021
 Business Unit 2660 Department of Transportation Modified On
 Modified By

Note: Form 810 have three tabs below. All three tabs must be completed before submitting the report.

Total State Contracting Activity	DVBE Participation		Small Business (SB)/Micro Business Participation		
Contracting Activity Category	Total Awarded Amount \$	Total Number of Contracts #	Share of Dollars Awarded %		Share of Number of Contracts %
1. Goods (Non-IT)	<input type="text"/>	<input type="text"/>		%	%
2. Services (Non-IT)	<input type="text"/>	<input type="text"/>		%	%
3. Construction	<input type="text"/>	<input type="text"/>		%	%
4. IT (Goods and Services)	<input type="text"/>	<input type="text"/>		%	%
5. Cal Card Transactions	<input type="text"/>			%	%
TOTALS					

For Not CAR Reportable

- 100% federally funded
- **NEW!** Exception make IIJA-funded contracts (AB 2974)–
Which are reportable in 810A
- Federal government (including grants)
- Any state or local government
- Prison Industry Authority
- Interagency Agreements
- Joint Powers Agreements
- California State Universities (CSU)
- Universities of California (UC)

Note: For more detail see Help Text near CAR reportable section.

CAR Form 810:

Count SB/DVBE prime contractors' participation at 100%!

- All purchase orders and contracts service orders, including emergency contracts.
- All contracts issued by DGS or any other department on your behalf.
- All amendments, alterations, change orders, and extensions that change the total amount by more than \$1.00.
- All contracts/POs issued pursuant to delegation of authority or under a Leveraged Procurement Agreement (LPA).
- All P-Card purchases, even if less than \$100.
- Report only State funds to the extend possible, including in mixed funded contracts.

Certification Types and SB/DVBE Participation Goals

Certification Type Criteria	DVBE	SB	Micro designation	SB-PW	NVSA Nonprofit
Counts toward participation	DVBE goal	SB goal	SB goal	SB goal on public works transactions only	SB goal

**SB(Micro), then
SB, then
SB-PW (PW sub-types only)**

SB and DVBE counted on both goals

Helpful Links to find Certified Firms:

- [SB/DVBE Emergency Registry](#)
- [CaleProcure](#)

SCPRS- P-Card/Cal-Card FY Summary Entry Page

Navigation: Favorites > Main Menu > **FISCAL Processes > FISCAL Extension > PO > PCard FY Summary Entry**

Contract Activity Report (CAR) - PCard FY Summary Entry

Instructions for Non-FISCAL Departments:
Enter the value of all Cal-Card transactions for goods, services, construction, and IT goods and services that have not been reported in SCPRS, regardless of the transaction dollar amount. The values entered for the fiscal year will be reported in the Contracting Activity Report (CAR) Form 510.

Business Unit 3100 Exposition Park

One row per fiscal year!

Fiscal Year		Personalize Find [?] []					First	1-2 of 2	Last
Fiscal Year	Total PCard Dollars	Total Dollars to DVBE	Total Dollars to MB	Total Dollars to SB	Last Updated By	Last Update Date/Time			
1 2018-2019	80,000.00	2,500.00	1,500.00	18,000.00	Jon Tugade	12/19/18 3:31:00PM	+	-	
2 2017-2018	90,000.00	2,000.00	1,000.00	21,000.00	Jon Tugade	12/19/18 3:31:00PM	+	-	

Buttons: Save | Return to Search | Previous in List | Next in List | Notify

Form 810 - Contracting Activity Report

Report ID: RPTPO130

FORM 810 Contracting Activity Report

Agency:	Part 0 Contracting Activity				Part 1 Certified Disabled Veteran Business Enterprise (DVBE) Participation in State Contracting Activity												
Contracting Activity Category	Awarded		Share of Total Contract		Total to DVBE Prime Contractors		Total to DVBE Sub-Contractors			Total to DVBE Prime & Sub-Contractors			Percentage of Total DVBE Contracts (Column I / Column A)		Share of DVBE Contracts by Activity		
	Amount \$	Number of Contracts #	Share of Dollars Awarded %	Share of Number of Contracts %	Amount \$	Number of Contracts #	Awarded Amount \$	Number of Sub-Contracts awarded to DVBE #	Number of contracts with DVBE Sub-contractors %	Amount \$	Total Number of DVBE Contracts #	Number of Contracts with DVBE Participation (Prime or Sub) #	DVBE Participation %	Contracts with DVBE Participation in All Contracts %	Dollars Awarded %	Number of Contracts %	
	A	B	AN	BN	C	D	E	F	FM	G (C+E)	H (D+F)	HM (D+FM)	I (G/A)	J (HMB)	GN	HN	
1. Goods (Non-IT)	A1	B1	AN1	BN1	C1	D1	E1	F1	FM1	G1	H1	HM1	I1	J1	GN1	HN1	
2. Services** (Non-IT)	A2	B2	AN2	BN2	C2	D2	E2	F2	FM2	G2	H2	HM2	I2	J2	GN2	HN2	
3. Construction (Non-IT Services -Public Works)	A3	B3	AN3	BN3	C3	D3	E3	F3	FM3	G3	H3	HM3	I3	J3	GN3	HN3	
4. IT (Goods & Services)	A4	B4	AN4	BN4	C4	D4	E4	F4	FM4	G4	H4	HM4	I4	J4	GN4	HN4	
5. Cal-Card Transactions	A5	B5	AN5	BN5	C5	DVBE Participation						I5	J5	GN5	HN5		
TOTALS	A6	B6			C6							I6	J6				
					# DVBE Firms Awarded - Prime		# DVBE Firms Awarded - Sub			# Awards by DVBE Cert ID - Prime		# Awards by DVBE Cert ID - Sub					
					GQ14		EE14			GH14		IJ14					

CAR Categories

Total awards

Column I displays the DVBE participation achieved!

Form 810 - Contracting Activity Report (Cont.)

Total to SB/MB Prime and Sub Contractors						Percentage of Total SB/MB Contracts			
Awarded Amount \$		Number of Contracts with SB/MB participation (Prime or Sub) #		Number of SB/MB Contracts #		SB/MB Participation %		Contracts with SB/MB Participation in All Contracts %	
Q (M+O)		RM (N+PM)		R (N+P)		S (Q/A)		T (R/B)	
		SB	MB	SB	MB	SB	MB	SB	MB
1,493.35	45,138.52	3	8	3	8	0.31%	9.24%	11.54%	30.77%
16,976,034.82	309,608.16	2	7	2	6	40.97%	0.75%	10.53%	31.58%
0.00	0.00	0	0	0	0	0.00%	0.00%	0.00%	0.00%
9,094.37	24,642.57	1	2	1	2	6.95%	18.84%	3.57%	7.14%
0.00	0.00					0.00%	0.00%		
16,986,622.54	379,389.25	SB Participation				40.39%	0.90%	8.22%	21.92%
17,366,011.79						41.29%			30.14%

Column S displays the SB participation achieved!

Form 810S – SB/DVBE Option and DVBE Incentive

Form 810S (Supplemental Repc) STATE OF CALIFORNIA - DEPARTMENT OF GENERAL PROCUREMENT DIVISION
 Report ID: RPTPO130

Form 810 S SB/DVBE Option & DVBE Incentive Report

Run By:
Run Date:
Run Time:

AGENCY: Fiscal Year: DEPARTMENT:

SB Option

Part 1	Total Contract Dollars Awarded as a Result of Option	Number of Contracts Awarded	
PC 10111 Mandated	Column A	Column B	Public Contract Code 10111 Section (e) (7) the number of contracts and dollar amounts awarded annually pursuant to Section 14838.5 (a) and 14838.7 (a) of the Government Code to Small Businesses, and
	A1	B1	

DVBE Option

Part 2	Total Contract Dollars Awarded as a Result of Option	Number of Contracts Awarded	
PC 10111 Mandated	Column A	Column B	Public Contract Code 10111 Section (e) (7) the number of contracts and dollar amounts awarded annually pursuant to Section 14838.5 (a) and 14838.7 (a) of the Government Code to Disabled Veteran Business Enterprises (DVBEs).
	A2	B2	

Comments

DVBE Incentive

Part 3	Total Contract Dollars Awarded as a Result of DVBE Incentive	Number of Contracts Awarded as a result of DVBE Incentives	
MVC 999.5	Column A	Column B	DVBE participation on contracts Veterans Code Section 999.5. C of contracts to all DVBEs as a collection system cannot identify indicate that in the comments bo
	A3	B3	

Comments

Acquisition Method:
SB Option
Public Works SB Option

Acquisition Method:
DVBE Option
Public Works DVBE Option

DVBE Incentive Waiver
Checkbox left unchecked
Or
Contracts awarded as a result of DVBE Incentive

Form 810S: SB and DVBE Option – Part 1 and Part 2

Under SB/DVBE Option, the suppliers (prime) should be certified!

SB or DVBE Option

- If the contract is \$5,000.01 to \$249,999.99

Public Works SB or DVBE Option:

- If the contract is \$5,000.01 up to \$461,000

BB. No. P-02-24 - SUBJECT: [SB and DVBE Option Acquisition Methods – Dollar Threshold Increase for Public Works Contracts](#)

[Government Code \(GC\) Section 14838.5\(a\)](#)

Form 810C Consulting Services Report

Form 810C (Consulting Services Report) STATE OF CALIFORNIA – DEPARTMENT OF GENERAL SERVICE
PROCUREMENT DIVISION

Form 810C Consulting Services Report

Run By: Mamta Srivastava
Run Date/Time: 11/1/2021 9:52:52 AM
Report Type: Individual

Contractors List

Explanation Section

Agency: General Government												Fiscal Year: 2020-2021										
												Department: 8780 - "Little Hoover" Commission										
Line #	Transaction ID #	Report Codes & Amounts										Contractor's Name	Contractor's ID #	Number of Bids	Contract Action Dates				Consulting Services Justification			Explanation
		Entered \$	Acquisition Method Code	Low Bid Y/N	Amended \$	Acquisition Method Code	Low Bid Y/N	Completed \$	Acquisition Method Code	Low Bid Y/N	Signed				Work Started	Work Amended	Work Completed	Contract Purpose	Beneficiary	Justification		
0														0								

REPORT CODES & AMOUNTS SUMMARY									
	Total Amount \$	Total Contract Number #	Low Bid		Acquisition Method Code			Total CMAS & MSA	
			Y	N	3 - Non Competitive Bid	4 - California Multi Award Schedule	5 - Master Service Agreement		
Entered	0.00	0	0	0	0	0	0	0	
Amended	0.00	0	0	0	0	0	0	0	
Completed	0.00	0	0	0	0	0	0	0	

Approver's Information			
Name:		Title:	
Signature:		Date:	
Telephone:		Fax:	
Email:		City & Zip:	
Notes:			

- Codes
- Acquisition Method Code**
- 1 - Competitive Others
 - 2 - Formal Competitive
 - 3 - Non Competitive Bid
 - 4 - California MultiAward Schedule
 - 5 - Master Service Agreement
 - 6 - Emergency
 - 7 - Others
- Note: Not all acquisition methods are captured in 810C

Form 810C – Consulting Services Report

Public Contract Code §§10111 and 10335.5

"Consulting services contract," means services that do all of the following:

- Consulting Services Contracts are those that are defined for services of an advisory nature.
- The final product is a transmittal of information in either written or verbal form.
- The product may be answers to questions, the design of systems or plans, workshops, seminars, retreats or conferences.
- All "Consulting Services Contracts" must be reported unless excluded.

Form 810C - Consulting Services Report

Not captured on Form 810C:

- Contracts/agreements between a state agency or department and the federal government
- Contracts/agreements with local agencies to subvene federal funds for which **No** matching State funds are required
- Contracts to develop, maintain, administer or use licensing or proficiency examinations
- Architectural and Engineering (A&E) per Chapter 10 (commencing with 4525) of Division 5 of Title 1 of the Government Code

Form 810E: ERGSO Report

Form 810 E ERGSO Report

STATE OF CALIFORNIA - DEPARTMENT OF
GENERAL SERVICE
PROCUREMENT DIVISION

Form 810 E Ethnicity, Race, Gender, Sexual Orientation (ERGSO) Report

Run By:
Run Date:
Run Time:
Report Type:

Agency:		Department:			
Fiscal Year:		All Contracts			
		Goods	Services	Construction	Totals
		Column A	Column B	Column C	Column D
Part 1	Ethnicity Classifications				
	Asian-Indian	\$ -	\$ -	\$ -	\$ -
	Black	\$ -	\$ -	\$ -	\$ -
	Hispanic	\$ -	\$ -	\$ -	\$ -
	Native American	\$ -	\$ -	\$ -	\$ -
	Pacific-Asian	\$ -	\$ -	\$ -	\$ -
	Other	\$ -	\$ -	\$ -	\$ -
	TOTALS	\$ -	\$ -	\$ -	\$ -
Part 2	Race Classifications				
	American Indian or Alaska Native	\$ -	\$ -	\$ -	\$ -
	Asian	\$ -	\$ -	\$ -	\$ -
	Black or African American	\$ -	\$ -	\$ -	\$ -
	Native Hawaiian or Other Pacific Islander	\$ -	\$ -	\$ -	\$ -
	White	\$ -	\$ -	\$ -	\$ -
	Other	\$ -	\$ -	\$ -	\$ -
	TOTALS	\$ -	\$ -	\$ -	\$ -
Part 3	Gender				
	Female	\$ -	\$ -	\$ -	\$ -
	Male	\$ -	\$ -	\$ -	\$ -
	Transgender	\$ -	\$ -	\$ -	\$ -
	TOTALS	\$ -	\$ -	\$ -	\$ -
Part 4	Sexual Orientation				
	Lesbian	\$ -	\$ -	\$ -	\$ -
	Gay	\$ -	\$ -	\$ -	\$ -
	Bisexual	\$ -	\$ -	\$ -	\$ -
	TOTALS	\$ -	\$ -	\$ -	\$ -
Comments					
Part 5	Approved By:				
	Name:				
	Title:				
	Telephone:				
	Fax:				
	Email Address:				
	Signature:				

Form 810E: ERGSO Report

Public Contract Code §10111

Includes voluntarily provided contract dollars by business owners on:

- Ethnicity
- Race
- Gender
- Sexual orientation

Information received on **Voluntary Statistical Data Sheets (VSDS)**

Do not save VSDS in procurement files, save all of them separately from contracts!

For FI\$Cal & Non-FI\$Cal Departments:

- Buyers enter VSDS data on the *ERGSO Data Entry Page*
- The system will aggregate the data for department/state

Voluntary Statistical Data Sheet (VSDS)

DGS PD 802 (Rev 04/19)

VOLUNTARY STATISTICAL DATA SHEET
Information to be used for reporting purposes only

Public Contract Code 10111 requires state agencies to capture information on ethnicity, race and gender (ERG) of business owners on all awarded contracts and procurements to the extent that the information has been voluntarily reported to the department. The awarding department is prohibited from using this data to discriminate or provide a preference in the solicitation or acceptance of bids, quotes, or estimates for goods, services, construction and/or information technology. This information shall not be collected until after the contract award is made. The completion of this form is **strictly voluntary**.

The data you provide on this form should best describe the *ownership of your business*. Ownership of a business should be determined as follows:

- For a business that is a sole proprietorship, partnership, corporation, or joint venture at least 51 percent is owned by one or more individuals in a classification designated below or, in the case of any business whose stock is publicly held, at least 51 percent of the stock is owned by one or more individuals in a designated classification, or
- For other business entities, the owner is the person controlling management and daily operations and who "owns" the business.

For purposes of this report, respond only if the business has its home office in the United States and which is not a branch or subsidiary of a foreign corporation, firm, or other business.

Ethnicity/Minority Classification - As defined in Public Contract Code Section 2051

- Asian-Indian** – a person whose origins are from India, Pakistan, or Bangladesh.
- Black** – a person having origins in any of the Black racial groups of Africa.
- Hispanic** – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race.
- Native American** – an American Indian, Eskimo, Aleut, or Native Hawaiian.
- Pacific Asian** – a person whose origins are from Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Trust Territories of the Pacific including the Northern Marianas
- Other** – Any other group of natural persons identified as minorities in the respective project specifications of an awarding department or participating local agency.

Race Classification – As defined by the Office of Management and Budget, Federal Register Notice, October 30, 1997, at <https://www.whitehouse.gov/wp-content/uploads/2017/11/Revisions-to-the-Standards-for-the-Classification-of-Federal-Data-on-Race-and-Ethnicity-October30-1997.pdf>

- American Indian or Alaska Native
- Asian
- Black or African American
- Native Hawaiian or Other Pacific Islander
- White
- Other

Gender Classification

- Female
- Male
- Transgender

Sexual Orientation Classification – As defined by Public Contract Code 10111(f)

- Lesbian
- Gay
- Bisexual

ITEMS BELOW TO BE COMPLETED BY STATE AGENCY/DEPARTMENT ONLY

- Goods
- Services
- Construction

Total Contract Purchase: \$2,000
Contract Award Date: 7/8/16

FI\$Cal and SCPRS - ERGSO Data Entry

Fi\$Cal Buyers and SCPRS Processors can enter VSIDS data on this page

Favorites ▾ Main Menu ▾ **FI\$Cal SCPRS ▾ > ERGSO Data Entry**

ERGSO Entry Page

Business Unit 0020 Legislative

Ethnicity, Race, Gender, and Sexual Orientation (ERGSO) Find | View All First 1 of 1 Last

*Award Amount *Award Date 02/06/2019 *Contract Type

Ethnicity

Asian-Indian	Black	Hispanic	Native American	Pacific Asian	Other (specify)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Race - Check all that apply

American Indian or Alaska Native	Asian	Black or African American	Native Hawaiian or Other Pacific Islander	White	Other (specify)	Multiracial (check all that apply)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>

Gender

Male	Female	Transgender	Other (specify)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Sexual Orientation

Lesbian	Gay	Bisexual
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History

Form 810A I-Bond/IIJA Activity Report

New and Updated!

Form 810 A IBond/IIJA Act Report

STATE OF CALIFORNIA - DEPARTMENT OF GENERAL SERVICES
PROCUREMENT DIVISION

Run By: DGS SB/DVBE Cert Manager
Run Date: 5/5/23
Run Time: 9:45:50 AM
Report Type: Individual

Agency: General Government		Part 1				Part 2							
Part 0		Certified Disabled Veteran Business Enterprise (DVBE) Participation				Certified Small Business/Micro Business (SB/MB) Participation							
IBond/IIJA ID and IBond/IIJA Dollars	IBond/IIJA Total Contract \$	IBond/IIJA Total \$ to DVBE Prime Contractors	IBond/IIJA Total \$ to DVBE Sub Contractors	IBond/IIJA Total \$ to DVBE Prime & Sub Contractors	IBond/IIJA Total DVBE %	IBond/IIJA Total \$ to SB/MB Prime Contractors		IBond/IIJA Total \$ to SB/MB Sub Contractors		IBond/IIJA Total \$ to SB/MB Prime & Sub Contractors		IBond/IIJA Total SB/MB %	
	A	B	C	D (B+C)	E (D/A)	F		G		H (F+G)		I (H/A)	
						SB	MB	SB	MB	SB	MB	SB	MB
IIJA Division A	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
IIJA Division B	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
IIJA Division E	25,000.00	25,000.00	0.00	25,000.00	100.00	25,000.00	0.00	0.00	0.00	25,000.00	0.00	100.00	0.00
IIJA Division F	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
IIJA Division G Title IX	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Prop 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Prop 1B	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Prop 1C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Prop 1D	1,000.00	1,000.00	0.00	1,000.00	100.00	1,000.00	0.00	0.00	0.00	1,000.00	0.00	100.00	0.00
Prop 1E	5,000.00	5,000.00	0.00	5,000.00	100.00	5,000.00	0.00	0.00	0.00	5,000.00	0.00	100.00	0.00
Prop 84	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Grand Total	31,500.00	31,000.00	0.00	31,000.00	98.41	31,000.00	0.00	0.00	0.00	31,000.00	0.00	98.41	0.00

The Small Business Improvement Plan must include an I Bond Action Plan when participation specific to I Bonds is less than 25%

Comments:

DVBE Participation

SB Participation

Name:		Title:	
Signature:		Date:	
Telephone:		Fax:	
Email:		City & Zip:	

Form 810A I-Bond/IIJA Activity Report

Infrastructure Bond Acts of 2006

- The Highway Safety Traffic Reduction, Air Quality and Port Security Bond Act.
- The Housing and Emergency Shelter Trust Fund Act.
- The Kindergarten-University Public Education Facilities Bond Act.
- The Disaster Preparedness and Flood Prevention Bond Act.
- The Safe Drinking Water, Water Quality and Supply, Flood Control, River and Coastal Protection Bond Act.

Government Code §14838.1 (d)

- 25 percent Small Business participation goal in all contracts financed with the proceeds of the infrastructure related bond acts of 2006
- An Improvement Plan is required when the SB participation goal for I-Bond contracts is not met

Form 810A I-Bond/IIJA Activity Report

Infrastructure Investment and Jobs Acts (IIJA) of 2023:

- The Surface Transportation Reauthorization Act.
- The Surface Transportation Investment Act.
- The Drinking Water and Wastewater Infrastructure Act.
- Broadband.
- The Build America, Buy America Act.

Form 810A I-Bond/IIJA Activity Report

Government Code §14838.1 (e)

- New contracts over \$500,000 financed in whole or part with the proceeds of the Infrastructure Investment and Jobs Act (IIJA)
- 25 percent Small Business participation goal
- Unless an exemption determination is made
- An Improvement Plan is required when the 25 % SB participation goal for IIJA contracts is not met
- Advocate must publish upcoming such contracts and send OSDs the links.

CAR for FI\$Cal Users Resources

- [Consolidated Annual Report Training – Form 810 – Intake Pages](#)
- [Consolidated Annual Report – Frequently Asked Questions](#)
- [FI\\$Cal/SCPRS User's Guide to CAR Reporting](#) (see Pcard section)
- [CalOES Mission Task & Statewide Incident IDs Training](#)
- [Intake Page Job Aid](#)
- [ERGSO Entry Page Job Aid](#)

Important!

The Departments need to follow the following procedure to submit the report:

- **Non- FI\$Cal departments:** submit reports via Intake pages.

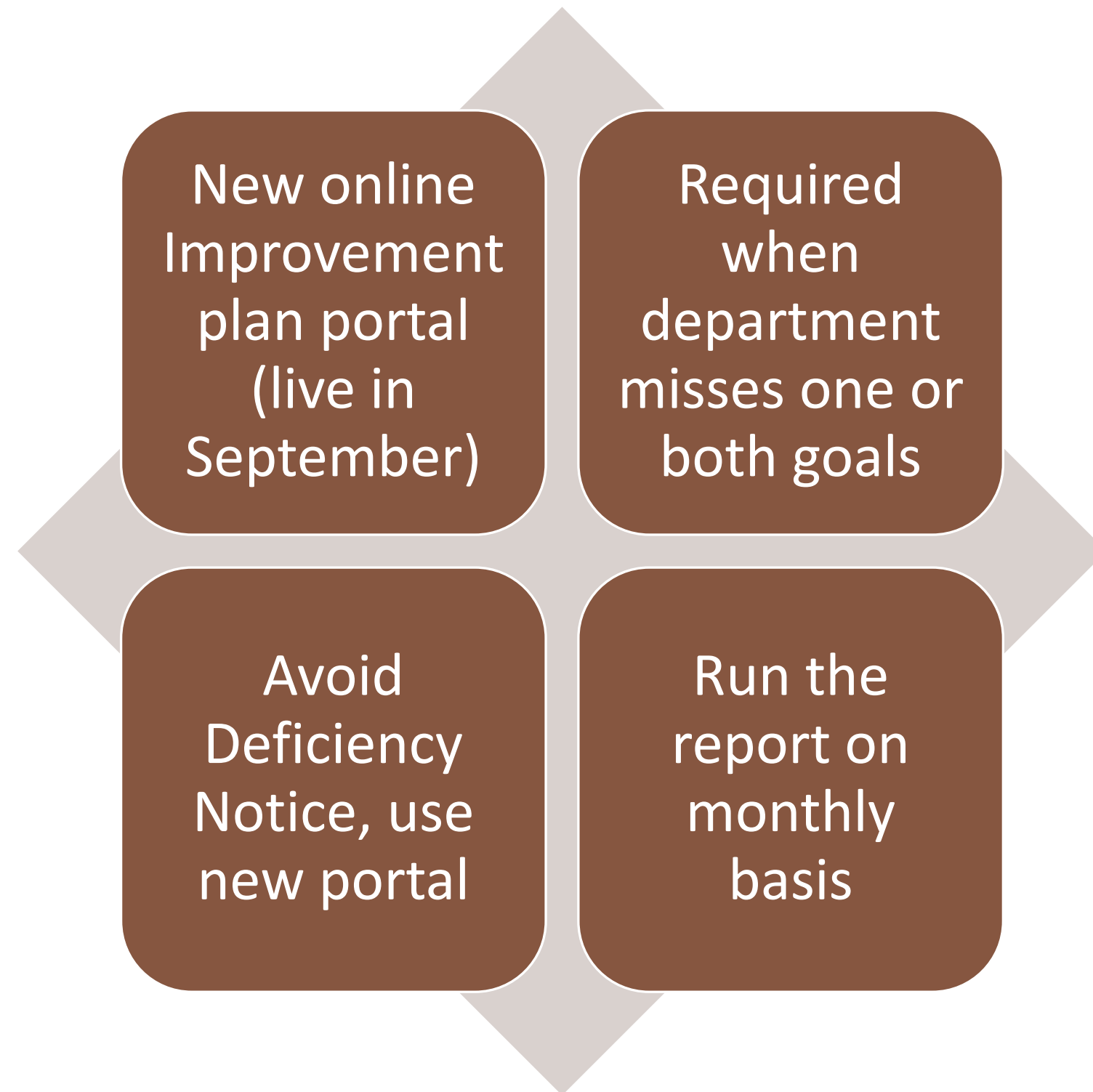
Cover Letter

Non-FI\$Cal departments are required to submit a cover letter to OSDS.

Include:

- If multiple BUs, specify what BUs are included in the report.
- An analysis of trends and any anomalies in the SB/MB or DVBE participation.
- Review of progress on all prior year Improvement Plan items enacted and their effect on current participation goals.
- Send to OSDSReports@DGS.ca.gov

Improvement Plans



Improvement Plans



QUESTIONS ARE BEING
REFORMATTED



DEPARTMENTS CAN ADD
COMMENTS IN OPEN-TEXT
BOXES



COMMUNICATIONS WILL
ANNOUNCE THE NEW PORTAL



ADVOCACY SUPPORT UNIT IS
HERE TO HELP!



EMAIL
ADVOCATE@DGS.CA.GOV



NEW QUESTIONS ON IJJA.
REPORT HERE TO SUBMIT IJJA
IMPROVEMENT PLAN

Important CAR Reporting Deadlines

In 2024, OSDS conducted 4 training sessions for FI\$Cal/SCPRS departments

May 7 OSDS conducts CAR training for Non-FI\$Cal departments

May 8 OSDS conducts CAR training for FI\$Cal departments

May 14 OSDS conducts CAR training for Non-FI\$Cal departments

May 17 OSDS conducts CAR training for FI\$Cal departments

June 1 - 30 OSDS sends reminders about upcoming reporting

July 31 Last day to request extension from OSDS

October 1 due date

Note - Due to the statewide data compilation complexities, extensions beyond October 15 cannot be approved.

Important CAR Reporting Deadlines (Cont.)

October 1

CAR Report + Improvement Plans DUE DATE

October 15

No revisions or extension past this date

January – February

DGS sends Purchasing Authority deficiency letters to departments not reporting/not submitting improvement plans

January -March

OSDS publishes the report

Last Minute Tips

- Keep in touch with OSDS at OSDSReports@dgs.ca.gov
- Reconcile the reports with your transactions
- Develop/strengthen secondary review and approval process
- Submit an Improvement Plan if not meeting one/both goals

Contact OSDS

CAR Report Questions:

OSDSReports@dgs.ca.gov

(916) 375-4940

Improvement Plan Questions:

**Imran Chaudhary, Advocacy Support Program
Manager**

Imran.Chaudhary@dgs.ca.gov

(279) 799-4644

Questions?

THANK YOU!