



Consolidated Annual Report

Training for Non-FI\$Cal Users

FISCAL YEAR 2024-25

Presented by

Alannah Chapman & Luke Scholl

Research and Data Specialist & Reporting Analyst

Welcome and Introductions

- Alannah Chapman – Research and Data Specialist
- Luke Scholl – Reporting Analyst
- Imran Chaudhary – Statewide Advocacy Support Section Manager
- Statewide Advocacy Support Section



Housekeeping Items

- Today's training is being recorded, but we will stop the recording before the Q&A section at the end.
- Keep your microphone muted.
- Keep cameras off.
- During the presentation, use the chat to ask questions. We will create a Q&A with all questions from the chat.
- Today's slides will be emailed out to all attendees.
- For any technical issues, reach out to Advocate@dgs.ca.gov.

Agenda

- Objectives
- Background
 - Reporting authorities
 - Who is required to report
 - Relevant legislation
 - Audit response
- Report requirements
 - Reviewing all five DGS PD 810 forms Intake Pages
- Submission process, timelines and extensions
- Reporting resources
- Questions and answers

Objectives

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

- Which reports are required and why
- Background of each report
- How data is captured/reported
- Who to contact with questions
- How to submit your reports by Intake Pages
- How to submit an Improvement Plan
- Important reporting deadlines, including when to submit an Improvement Plan

Legal Authorities

SB and DVBE Program Statutes:

- Small Business Procurement and Contract Act - Government Code (Gov. Code), [Section 14835 et seq.](#)
- California Disabled Veteran Business Enterprise Program - Military and Veterans Code (MVC), [Section 999 et seq.](#)
- Infrastructure-Related Bond Acts of 2006 (I-Bond) and Infrastructure Investment and Jobs Act Reporting and Small Business Participation: [Section 14838.1](#)

Consolidated Annual Report (CAR) Statute:

- Public Contract Code (PCC) [Section 10111](#)

Mandatory Reporting Departments

What is a “Mandatory Reporting” department?

- All agencies or departments that were granted a [purchasing authority](#) through DGS (primary and secondary).
- Agencies or departments that are under the California Governor’s authority.

REPORTING IS MANDATORY

Seeking an exemption?

- If a department or certain types of contracts administered by a department are believed to be exempt from reporting, a justification citing the legal basis must be sent to OSDS Reports for review.
 - Departments should work with their legal counsel for exemption requests.
 - DGS’ OSDS will confer with DGS’ Office of Legal Services for concurrence on the exemption.
 - DGS’ OSDS does not have the authority to exempt departments or contracts from reporting requirements.

Voluntary Reporting Departments

What is a “Voluntary Reporting” department?

- Independent state agencies or departments not granted a purchasing authority through DGS.
- Not under the California Governor’s authority.
- Universities of California, California State Universities, the Lottery Commission, Public Employees Retirement System, State Teachers’ Retirement System, etc.
- Encouraged to report!
- Encouraged include SBs and DVBEs in their contracting and procurement activities!

Assembly Bill 1574

Assembly Bill 1574 (Chapter 756, Statute of 2021)

- State departments or agencies to make continuous efforts to expand pool of certified bidders and regularly seek out and include certified businesses in their solicitations especially if those certified businesses that have not contracted with the state before.
- Requires signed certification, done under penalty of perjury, that the work done by each SB or DVBE subcontractor serve as a commercially useful function (CUF).
- Enhanced coordination between GO-Biz, CalVet and DGS in order to assist certified businesses with gaining contracting or subcontracting opportunities.

Assembly Bill 2974

Assembly Bill 2974 (Chapter 600, Statute of 2022)

- All state departments or agencies that award a new contract that is over \$500,000 and financed, in whole or part, with federal Infrastructure Investment and Jobs Act (IIJA) funds, **shall** establish a 25% SB participation goal on those contracts.
- Exemptions are permitted in certain situations and must be approved by the head of a state department or their designee.
 - Approved exemptions completed on the DGS PD 810Ae and sent to OSDs.
- IIJA funded contracts and their respective SB participation amounts are captured on the DGS PD 810A.
- **Management Memo No. 24-02:** [Small Business Participation, wholly or partly, funded by the Federal Infrastructure Investment and Jobs Act \(IIJA\)](#)

Assembly Bill 2019

Assembly Bill 2019 (Chapter 730, Statute of 2022)

- Codified the 25% SB participation goal.
- SB or DVBE certification applicants can voluntarily self-identify as specified diversity categories.
- DGS' OSDS to establish, provide and recommend strategies to simplify contract specifications to increase SB/DVBE participation or participation of women-, minority- or LGBTQ-owned businesses.
- DGS to conduct a statewide procurement disparity study to be completed in 2025.
- DGS to consider appropriate remedial actions if a mandatory reporting department fails three out of five reporting years to meet SB or DVBE goals. Include but are not limited to removal of a department's delegated contract authority or placement of additional restrictions on contracting activities.
- **BB. No. P-12-22 - SUBJECT:** [Economic Equity for Small Business \(SB\) and Disabled Veteran Business Enterprise \(DVBE\) Firms and Diversity Among State Contractors](#)

In Focus - Summary of Recent Legislation Impacting SB/DVBE and State Strategies on OSDS website!

DVBE Program Audit 2018-114

Audit recommendations/requirements for annual reporting for CAR:

1. An increase in reporting accuracy, which would include a way to strengthen departmental review and to verify reported data.
2. A way to ensure reporting was consistent between departments.
3. A decision that reporting to be based on award amounts rather expenditures.
4. A decision that multiyear contracts reported in the award year (front loaded).

In response to the audit, the implementation of reporting in FI\$Cal did the following:

1. Eliminated departments' intensive labor and paper submittals. The system is fully automated to capture procurement and contracting data.
2. Met audit recommendations/requirements:
 - Allows for a system-generated Data Validation Query (DVQ) for FI\$Cal transacting departments to verify their procurement or contracting transactions.
 - The DVQ allows for departments to enhance their internal departmental review for accuracy.
 - Addressed the lack of reporting consistency by automatically calculating transactions based on award totals and front-loaded multiyear contracts.
 - Increased accuracy in reporting due to the automation and reduced human errors with paper submittals.

Non-FI\$Cal Department Report Validation

Maintain record supporting all reported totals and SB/DVBE participation:

- List of contracts, standalone purchase orders, Cal Card Transactions
- Contract or Purchase Order IDs
- Total Award Amount
- Date of amendments and change orders
- Reporting Categories, Acquisition Type, Acquisition Sub-Type and Acquisition Method
- Prime and subcontractor certification information (at the time of award)
 - Certification IDs
 - Certification type
 - Dates certification started and ended
- Percentage of work and dollar amounts for subcontractors
- Percentage of state funds

Conduct secondary review and approval prior to submission!

Background and Legislation Recap

- Legal authorities behind the SB, DVBE Programs and reporting for CAR
 - [PCC Section 10111](#)
- Mandatory and Voluntary reporting departments
- Relevant legislation
 - Make continuous efforts to expand pool of certified bidders and regularly seek out certified businesses that have not contracted with the state before (AB 1574)
 - Codified 25% SB participation (AB 2019)
 - AB 2019 Allows for DGS to consider appropriate remedial actions to be taken if a mandatory reporting department fails three out of five reporting years to meet the SB or DVBE goals (AB 2019)
- DVBE Program Audit recommendations and requirements
 - Reporting based on awarded amount
 - Front-loading multiyear contracts
- Maintenance of contracting and procurement records
- Secondary review and approval prior to submission

Consolidated Annual Report (CAR)

Composed of 5 different reports that FI\$Cal will generate after Intake Pages have been submitted:

- DGS PD 810 – Contracting Activity Report
 - If only using SCPRS, a Data Validate Report/Query will generate
- DGS PD 810S – SB Option, DVBE Option and DVBE Incentive Report
- DGS PD 810A – Infrastructure Bonds of 2006 (I-Bond) / Infrastructure Investment and Jobs Act (IIJA) Report
 - If only using SCPRS, a Data Validate Report/Query will generate
- DGS PD 810C – Consulting Services Report
- DGS PD 810E – Ethnicity, Race, Gender and Sexual Orientation Report (ERGSO)

Obtaining Access to Intake Pages

- Intake Pages are a non-FI\$Cal transacting department's way to submit the reports for CAR manually.
- Each department needs to have at least one user that is mapped to the SCPRS Processor role.
- All system access and role mapping must be done between the department/state entity and FI\$Cal.
 - **DGS or OSDS is not able to assist with this process.**
- For more information regarding FI\$Cal access, please visit the [End User Access|FI\\$Cal - State of California. One state. One system](#) webpage.
- Any questions about gaining access or role mapping should be directed to the [FI\\$Cal Service Center](#) - FiscalServiceCenter@fiscal.ca.gov.

Form 810 – Intake Pages Pathway

- Intake Pages are the equivalent of submitting reportable numbers manually.
- Departments that do not transact within FI\$Cal (Non-FI\$Cal departments) will be able to enter their CAR data into the FI\$Cal system.

Intake Pages – Form 810 Total Contracting Activity

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
Business Unit

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				

of Certified DVBE's as Prime # of Awards to DVBE's as Prime
of Certified DVBE's as Subs # of Awards to DVBE's as Subs
of Certified SB's as Prime # of Awards to SB's as Prime
of Certified SB's as Subs # of Awards to SB's as Subs

Save **Submit** **Print Report**

Intake Pages – Form 810 DVBE Participation

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 [Form 810 - Intake Pages](#)

[Form 810 Contract Activity](#) |
 [Form 810S SB/DVBE Options](#) |
 [Form 810A I-Bond Report](#) |
 [Form 810C Consulting Services](#)

Fiscal Year:
 Business Unit:
 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	Awarded Amount \$ (Prime)	Number of Contracts # (Prime)	Awarded Amount \$ (Sub)	Number of Sub Contracts Awarded to DVBE #	Number of Contracts with DVBE Sub-contractors #	Awarded Amount \$ Prime or Sub	Number of Contracts with DVBE participation (Prime or Sub) #	Total Number of DVBE Contracts #	DVBE Participation %	Contracts with DVBE participation in All Contracts %	Dollars Awarded %	Number of Contracts %
1. Goods (Non-IT)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				%	%	%	%
2. Services (Non-IT)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				%	%	%	%
3. Construction	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				%	%	%	%
4. IT (Goods and Services)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				%	%	%	%
5. Cal Card Transactions	<input type="text"/>								%	%	%	%
TOTALS									%	%		

of Certified DVBE's as Prime
of Awards to DVBE's as Prime

of Certified DVBE's as Subs
of Awards to DVBE's as Subs

of Certified SB's as Prime
of Awards to SB's as Prime

of Certified SB's as Subs
of Awards to SB's as Subs

Intake Pages – Form 810 SB Participation

[Favorites](#) > [Main Menu](#) > [FISCAL Processes](#) > [FISCAL 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:
 Business Unit: 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	Awarded Amount \$ (SB Primes)	Awarded Amount \$ (Micro Primes)	Number of Contracts # (SB Primes)	Number of Contracts # (Micro Primes)	Awarded Amount \$ (SB Sub)	Awarded Amount \$ (Micro Sub)	Number of Sub Contracts awarded # (SB)	Number of Sub Contracts awarded # (Micro)	Number of Contracts with SB Sub-Contractors #	Number of Contracts with Micro Sub-Contractors #	Awarded Amount \$ (SB Prime and Sub)	Awarded Amount \$ (Micro Prime and Sub)
1. Goods (Non-IT)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2. Services (Non-IT)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3. Construction	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4. IT (Goods and Services)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5. Cal Card Transactions	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
TOTALS	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

of Certified DVBE's as Prime
of Awards to DVBE's as Prime

of Certified DVBE's as Subs
of Awards to DVBE's as Subs

of Certified SB's as Prime
of Awards to SB's as Prime

of Certified SB's as Subs
of Awards to SB's as Subs

DGS PD 810: Contracting Activity Report

Report ID: RPTPO130

FORM 810 Contracting Activity Report

Agency:

CAR Categories

FORM 810 Contracting Activity Report																
Agency:																
Contracting Activity Category	Part 0 Total State Contracting Activity				Part 1 Certified Disabled Veteran Business Enterprise (DVBE) Participation in State Contracting Activity											
	Total Contract*		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 D /Column A)		Share of DVBE Contracts by Activity	
	Awarded Amount \$	Number of Contracts #	Share of Dollars Awarded %	Share of Number of Contracts %	Awarded Amount \$	Number of Contracts #	Awarded Amount \$	Number of Sub-Contracts awarded to DVBE #	Number of contracts with DVBE Sub-contractors #	Awarded Amount \$	Total Number of DVBE Contracts #	Number of Contracts with DVBE Participation in (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 (HM/B)	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	N/A	GN5	N/A
TOTALS	A6	B6			C6								I6	J6		
Total awards																
					# DVBE Firms Awarded - Prime				# DVBE Firms Awarded - Sub				# Awards by DVBE Cert ID - Prime			
					CQ14				EF14				GH14			
</																

DGS PD 810: Contracting Activity Report

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!

DGS PD 810: Contracting Activity Report

- All purchase orders, Pcard purchases and contracts

This Includes:

- Emergency contracts
- All contracts issued by DGS or any other department on the reporting department's behalf.
- All standalone POs.
- All POs off of Leveraged Procurement Agreements (LPA).
- All POs off of Design Build Contracts.
- All amendments, alterations, change orders, and extensions that change the total amount by more than \$1.00.
- All state funds, including in mixed funded contracts.

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

Form 810: Reporting Categories

Four 810 CAR reporting categories correspond to Acquisition Types

Category	Acquisition Type	Acquisition Sub-type
Non-IT Goods	Non-IT Goods	All
Non-IT Services	Non-IT Services	All except Public Works
Construction	Non-IT Services	Public Works
IT (Goods, Services)	IT Goods or IT Services	All

- Pcard transactions are collected in their own category.
- SB-PW are counted under SB participation only on Public Works contracts/projects!

Certification Types and SB/DVBE Participation Goals

DVBE	SB	Micro SB designation	SB-PW	NVSA Nonprofit
DVBE goal	SB goal	SB goal	SB goal on public works transactions only	SB goal

- Firms with both SB and DVBE certifications are counted on both goals!
- When determining SB participation credit, departments should calculate participation by adding award totals for MBs first, then SBs that are not MBs, then SB-PWs that are not SBs (PW sub-types only).

Helpful Links to find Certified Firms:

- [SB/DVBE Emergency Registry](#)
- [Cal eProcure](#)

SCPRS - P-Card FY Summary Entry Page

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		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	+	-

Save Return to Search Previous in List Next in List Notify

What is Not CAR Reportable

- 100% federally funded contracts or procurements
- IJIA-funded contracts with approved exemptions ([DGS PD 810Ae](#))
- Agreements or procurements with the federal government (including grants)
- Agreements or procurements with any state or local government
- Agreements or procurements with the Prison Industry Authority (CalPIA)
- Interagency Agreements
- Joint Powers Agreements
- Agreements with California State Universities (CSU)
- Agreements with Universities of California (UC)
- Loans, local assistance or subvention agreements
- Any court-ordered settlements or costs
- Real estate/property leases
- Contracts or procurements that are, **by law**, not required to be captured for CAR

DGS PD 810 Recap

- Completing CAR via Intake Pages
 - All contracts, purchase orders and PCard purchases must be captured for the report
- Four main reporting categories
- Accuracy is key!
 - Report on initial award amount
 - Count of unique certified firms and number of awards to certified firms
 - Award amounts and participation percentages to Small Businesses and Micro Businesses
 - Subcontracting information
 - Percentage of state funds used
- Use Save and Submit button features
- Up Next – 810S: SB Option, DVBE Option and DVBE Incentive Report!

Intake Pages – Form 810S SB/DVBE Options

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[Form 810 Contract Activity](#) [Form 810S SB/DVBE Options](#) [Form 810A I-Bond Report](#) [Form 810C Consulting Services](#)

Fiscal Year

Business Unit

Modified On

Modified By

	Total Contract Dollars Awarded	Number of Contracts Awarded
SB Option	<input type="text"/>	<input type="text"/>
DVBE Option	<input type="text"/>	<input type="text"/>
DVBE Incentive	<input type="text"/>	<input type="text"/>

[Save](#) [Submit](#) [Print Report](#)

[Form 810 Contract Activity](#) | [Form 810S SB/DVBE Options](#) | [Form 810A I-Bond Report](#) | [Form 810C Consulting Services](#)

DGS PD 810S: SB Option, DVBE Option and DVBE Incentive Report

Form 810S (Supplemental Report)			STATE OF CALIFORNIA - DEPARTMENT OF GENERAL SERVICE PROCUREMENT DIVISION	
Report ID: RPTPO130				
Form 810 S SB Option, DVBE Option and DVBE Incentive Report				
AGENCY:			Fiscal Year:	DEPARTMENT:
			SB Option	
Part 1 PC 10111 Mandated	Total Contract Dollars Awarded as a Result of Option	Number of Contracts Awarded	Public Contract Code 10111 Section (c) amounts awarded annually pursuant to Section 999.5 (a) and (b) of the Government Code to Small Businesses, and Microbusinesses (SB/MBs).	
	Column A	Column B		
	\$0.00	0		
			DVBE Option	
Part 2 PC 10111 Mandated	Total Contract Dollars Awarded as a Result of Option	Number of Contracts Awarded	Public Contract Code 10111 Section (e) amounts awarded annually pursuant to Section 999.5 (a) and (b) of the Government Code to Disabled Veteran Business Enterprises (DVBEs).	
	Column A	Column B		
	\$0.00	0		
Comments:				
			DVBE Incentive	
Part 3 MVC 999.5	Total Contract Dollars Awarded as a Result of DVBE Incentive	Number of Contracts Awarded as a Result of DVBE Incentive	This report (Part 3) captures DVBE participation on contracts awarded using the DVBE Incentive pursuant to Military and Veterans Code Section 999.5. Column A includes the total contract dollars awarded using the DVBE Incentive. Column B includes the number of contracts awarded using the DVBE Incentive. If your data collection system cannot identify contracts and dollars attributed to the DVBE Incentive, indicate that in the comments box.	
	Column A	Column B		
	\$0.00	0		
Comments:				
Approver's Information:				
Name:		Title:		
Signature:		Date:		
Telephone:		Fax:		
Email:		City & Zip:		
Notes:				

- Acquisition Method - SB Option
- Acquisition Method - Public Works SB Option

- Acquisition Method - DVBE Option
- Acquisition Method - Public Works DVBE Option

- Contracts awarded as a result of a DVBE Incentive

Form 810S: SB or DVBE Option Acquisition Methods

- Allowed by [Government Code Section 14838.5](#)
 - Contracts may be awarded for goods, services or IT valued from \$5,000.01 to \$249,999.99 to a certified SB or a DVBE, without advertising as long as price quotations are obtained from two or more certified SB/MBs or two or more DVBEs.
 - More instructions can be found in the State Contracting Manual, Vol. 2, [SB/DVBE Option - 1405.3](#)
- SB or DVBE Option for Public Work Contracts:
 - Maximum threshold increased to \$461,000
 - BB. No. P-02-24 - SUBJECT: [SB and DVBE Option Acquisition Methods - Dollar Threshold Increase for Public Works Contracts](#)

Note: The prime contractor must be certified when using either the SB or DVBE option!

Form 810S: DVBE Incentive and DVBE Incentive Exemptions

- [Military and Veterans Code Section 999.5, subdivision \(a\)](#) applies to all competitive solicitations, unless a DVBE exemption is approved.
- BB. No. P-08-20 - SUBJECT: [DVBE Incentive Exemption Regulation Update & DVBE Exemption Request Form \(STD 816\)](#)
- Departments must follow their own internal policies and procedures to receive an approved STD 816.
- More information can be found in SCM, Vol. 2, [Exemptions to the DVBE Incentive Requirement - 1202.1](#)
- Do not include contracts or procurements that have an Acquisition Method of SB or DVBE Option or other noncompetitive acquisition method in the DVBE Incentive total.

810S – SB Option, DVBE Option and DVBE Incentive Report Recap

- Use the 810S tab to complete. Accuracy is key!
 - Acquisition Method – SB Option
 - Acquisition Method – Public Works SB Option
 - Acquisition Method – DVBE Option
 - Acquisition Method Public Works DVBE Option
- DVBE Incentive Exemptions are completed on an STD 816
- For DVBE Incentive calculations, do not include:
 - Contracts with an approved STD 816
 - Contracts awarded because of an SB or DVBE Option Acquisition Method
 - Contracts awarded due to a noncompetitive acquisition method
- Supplier must be certified at the time of award!
- Up Next – A quick break and then the 810A: I-Bond/IIJA Activity Report.



BREAK TIME!

**PLEASE
RETURN IN
10 MINUTES**

Form 810 Intake Pages – 810A I-Bond/IIJA

Form 810 Contract Activity | Form 810S SB/DVBE Options | **Form 810A IBond/IIJA Report** | Form 810C Consulting Services

Fiscal Year

Business Unit

Modified On

Modified By

IBond/IIJA	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 Prime Contractors (SB)	IBond/IIJA Total \$ to Prime Contractors (Micro)	IBond/IIJA Total \$ to Sub Contractors (SB)	IBond/IIJA Total \$ to Sub Contractors (Micro)	IBond/IIJA Total \$ to Prime & Sub Contractors
IIJA Division A						%					
IIJA Division B						%					
IIJA Division E						%					
IIJA Division F						%					
IIJA Division G Title IX						%					
Prop 1						%					
Prop 1B						%					
Prop 1C						%					
Prop 1D						%					
Prop 1E						%					
Prop 84						%					
Grand Total						%					

Save

Submit

Print Report

DGS PD 810A: I-Bond/IIJA Activity Report

STATE OF CALIFORNIA - DEPARTMENT OF GENERAL SERVICES
PROCUREMENT DIVISION

Form 810 A IBond/IIJA Act Report

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

Agency: General Government						Fiscal Year: 2022-2023		Department: 8880 - Financial Information System					
Part 0		Part 1				Part 2							
IBond/IIJA ID and IBond/IIJA Dollars		Certified Disabled Veteran Business Enterprise (DVBE) Participation				Certified Small Business/Micro Business (SB/MB) Participation							
IBond/IIJA ID*	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:

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

SB Participation

Form 810A: I-Bond/IIJA Activity Report Part 2

Government Code §14838.1

- New contracts over \$500,000 financed in whole or part with the proceeds of the Infrastructure Investment and Jobs Act (IIJA).
- 25% Small Business participation goal required.
- Unless an exemption determination is made ([Gov. Code, § 14838.1, subd. \(c\).](#))
- An Improvement Plan is required when the 25% SB participation goal for IIJA contracts is not met.
- Department's SB Liaison must publish upcoming such contracts and send OSDS the links.

Exemptions:

- A department is responsible to determine which IIJA funded contracts are exempted from the 25% SB participation goal. Completed on the [DGS PD 810Ae](#).
- Report each instance in which a IIJA exemption determination is made to DGS, Office of Small Business and Disabled Veteran Business Enterprise Services (OSDS) at OSDSReports@dgs.ca.gov.

Form 810A: I-Bond/IIJA Activity Report Part 3

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.

Form 810A: I-Bond/IIJA Activity Report Part 4

Infrastructure Investment and Jobs Acts (IIJA) of 2023:

- Division A, The Surface Transportation Reauthorization Act of 2021.
- Division B, The Surface Transportation Investment Act of 2021.
- Division E, The Drinking Water and Wastewater Infrastructure Act of 2021.
- Division F, Broadband.
- Title IX of Division G, the Build America, Buy America Act

810A: I-Bond/IIJA Activity Report Recap

- Completed on 810A tab.
- New contracts over \$500,000 financed in whole or part by IIJA require 25% SB participation goal required
 - Improvement Plan is required when the 25% SB participation goal is not met.
- A department is responsible to determine exemptions, and all exemptions are completed on the [DGS PD 810Ae](#)
- Ensure all IIJA funds are being appropriately captured and reported.
- Up next – The 810C Consulting Services Report.

Form 810 Intake Pages – 810C Consulting Services

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

Fiscal Year: _____ Business Unit: _____ Modified On: _____ Modified By: _____

List of Transactions

	Transaction Type	Transaction ID#	Entered	Entered \$	Acquisition Method Code (E)	Low Bid Y/N (E)	Amended	Amended \$	Acquisition Method Code (A)	Low Bid Y/N (A)	Completed	Completed \$	Acquisition Method Code (C)	Low Bid Y/N (C)
1	PO	7679	<input checked="" type="checkbox"/>	3000.00	Non Competitive Bid	N	<input type="checkbox"/>		Non Competitive Bid	N	<input checked="" type="checkbox"/>	6000.00	Non Competitive Bid	N
2	PCard	3145325235	<input type="checkbox"/>		California MultiAward Schedule	Y	<input checked="" type="checkbox"/>	45464.000	California MultiAward Schedule	Y	<input type="checkbox"/>		California MultiAward S	Y
3	Contract	523	<input checked="" type="checkbox"/>	67788.000	Non Competitive Bid	Y	<input type="checkbox"/>		Non Competitive Bid	Y	<input type="checkbox"/>		Non Competitive Bid	Y

Report Codes & Amounts Summary

	Total Amount \$	Total Contract Number #	Low Bid [Y]es	Low Bid [N]o	3 - Non Competitive Bid	4 - California Multi Award Schedule	5 - Master Service Agreement	Total CMAS & MSA
Entered	70788.00	2	1	1	2			
Amended	45464.00	1	1			1		1
Completed	6000.00	1		1	1			

Save Submit Print Report

Find View All First 1-3 of 3												
N (C)	Contractor's Name	Contractor's ID#	Number of Bids	Contract Signed Date	Contract Work Started Date	Contract Work Amended Date	Contract Work Completed Date	Contract Purpose	Beneficiary	Justification	Explanation	
▼	OSDS test	123	3	03/01/2021	05/03/2021	05/31/2021	05/31/2021	test1	test2	test3	test3333333333	
▼	osds tesr	345	2	01/01/2021	05/01/2021	05/31/2021	06/01/2021	test2	tset4	test5	test5555555555	
▼												

DGS PD 810C: Consulting Services Report

Form 810C (Consulting Services Report)

STATE OF CALIFORNIA - DEPARTMENT OF GENERAL SERVICE
PROCUREMENT DIVISION

Form 810C Consulting Services Report

Agency:												Fiscal Department:											
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																							

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:			

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

Acquisition Method Codes

What are Consulting Services?

- The 810C consolidates data on consulting service transactions that were entered (awarded), amended and/or completed during the reporting fiscal year.
- Consulting services contracts are defined within [PCC Section 10335 et seq.](#) and they:
 - Are advisory in nature.
 - Provide a recommended course of action or personal expertise.
 - Have an end product that is basically a transmittal of information either written or verbal and that is related to the governmental functions of state agency administration and management and program management or innovation.
 - Have a final product that may include answering specific questions to design of a system or plan, or workshops, seminars, retreats and conferences.

What should not be on the 810C?

- Contracts that are not considered a “consulting services” contract is defined within [PCC Section 10335 et seq.](#) and includes:
 - Contracts between a state agency or department and a local agency or the federal government
 - Contracts with local agencies, as defined in [Revenue and Taxation Code Section 2211](#), to subvene federal funds for no matching state funds are required
 - Architectural and Engineering (A&E) contracts per Chapter 10 (commencing with 4525) of division 5 of Title 1 of the Government Code

DGS PD 810C – Consulting Services Report Recap

- Completed on the 810C tab.
- Consulting services defined according to PCC Section 10335 et seq.
- Accuracy is key!
 - Ensure all consulting services contracts are entered in.
 - Entered, amended and/or completed checkboxes
 - Complete all applicable entry fields
 - Verify calculated totals are correct
- Use Save feature
 - Complete Consulting Services Justification window
- Up Next – 810E: Ethnicity, Race, Gender and Sexual Orientation report

Form 810E: ERGSO Data Entry Page

ERGSO Entry Page

Business Unit

Ethnicity, Race, Gender, and Sexual Orientation (ERGSO) Find View 1 First 1-2 of 2 Last

*Award Amount *Award Date 10/27/2021 *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"/>

*Award Amount *Award Date 10/27/2021 *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"/>

Enter data for another DGS PD 802 - VSDS

Form 810E: Voluntary Statistical Data Sheet (VSDDS) - DGS PD 802

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(c)

- ☐ **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, Inuk, 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:

Contract Award Date:

- Departments must identify and enter in the contracting category, total contract purchase (award) amount and the contract award date.

DGS PD 810E: ERGSO Report

Report ID: RPTP0130		STATE OF CALIFORNIA - DEPARTMENT OF GENERAL SERVICES 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 Column A	Services Column B	Construction Column C	Totals Column D
Part 1	Ethnicity Classifications				
	Asian-Indian	\$0	\$0	\$0	\$0
	Black	\$0	\$0	\$0	\$0
	Hispanic	\$0	\$0	\$0	\$0
	Native American	\$0	\$0	\$0	\$0
	Pacific-Asian	\$0	\$0	\$0	\$0
	Other	\$0	\$0	\$0	\$0
	TOTALS	\$0	\$0	\$0	\$0
Part 2	Race Classifications				
	American Indian or Alaska Native	\$0	\$0	\$0	\$0
	Asian	\$0	\$0	\$0	\$0
	Black or African American	\$0	\$0	\$0	\$0
	Native Hawaiian or Other Pacific Islander	\$0	\$0	\$0	\$0
	White	\$0	\$0	\$0	\$0
	Other	\$0	\$0	\$0	\$0
	TOTALS	\$0	\$0	\$0	\$0
Part 3	Gender				
	Male	\$0	\$0	\$0	\$0
	Female	\$0	\$0	\$0	\$0
	Transgender	\$0	\$0	\$0	\$0
	TOTALS	\$0	\$0	\$0	\$0
Part 4	Sexual Orientation				
	Lesbian	\$0	\$0	\$0	\$0
	Gay	\$0	\$0	\$0	\$0
	Bisexual	\$0	\$0	\$0	\$0
	TOTALS	\$0	\$0	\$0	\$0
Comments:					
Part 5	Approved By:				
	Name:				
	Title:				
	Telephone:				
	Fax:				
	Email Address:				
	Signature:				

- Reports on voluntarily provided diversity information from business owners.
- The diversity information is split into three primary contracting categories
- Those contracting categories are split up by diversity categories:
 - Ethnicity
 - Race
 - Gender
 - Sexual orientation

Form 810E: ERGSO Report

- Reporting on voluntarily provided diversity information is required according to [PCC Section 10111](#).
- The DGS PD 802 - Voluntary Statistical Data Sheet (VSDS) or any information collected on the form **must** be saved and maintained separately from the contracting or procurement file!
 - Information is provided voluntarily by business owners and must be maintained in a confidential nature.
 - Maintains the integrity of the procurement process as the information on the VSDS should have no impact or weight on the final contract or procurement award.
- FI\$Cal will automatically calculate totals for all diversity categories and contracting categories.
- Job Aids are available to help guide users on where to go to enter in diversity information:
 - [ERGSO Entry Page Job Aid](#)
 - [FI\\$Cal/SCPRS User Guide to CAR Reporting](#)

DGS PD 810E: Recap

- FI\$Cal automatically generates DGS PD 810E based on what is entered in the ERGSO Data Entry Page
- Suppliers reporting on their diversity data and sending in a VSDS are optional.
 - It is possible to have nothing to report for a fiscal year.
- VSDS must be kept separately from the contracting or procurement file.
- Up Next – Submissions, Cover Letters, Reporting Best Practices, Remedial Actions and Improvement Plans!

Submissions & Corrections

OSDS Reports will pull the reports directly from FI\$Cal after the CAR due date. There is no need to email the reports to the OSDS if your department completed and **submitted** the 810 forms via Intake Pages.

Note: Make sure to click the submit button on every tab and subtab of the Intake Pages to submit each report. Otherwise, the report will reflect zero in each entry field of the generated report.

Contact OSDS Reports as soon as possible if there is an error in the Intake Page submission. We can reopen the submission 810 tabs and applicable subtabs for corrections.

OSDS and all reporting departments should SAVE all reports ran on the due date or closest to the due date for their own records!

Improvement Plans

- Required if a department misses one or both participation goals for a reporting fiscal year.
- A new contract over \$500,000 funded either partially or fully by IIJA to complete an Improvement Plan if 25% SB participation goal was not met.
- Submitted through [DGS Shared Services Portal](#) (new users will have to register)
 - [Guide to accessing the Improvement Plan](#)

For questions about Improvement Plans, please contact:

**Statewide Advocacy
Support Section**

Advocate@dgs.ca.gov

Imran Chaudhary

Statewide Advocacy Support
Section Manager

Imran.Chaudhary@dgs.ca.gov

(916) 597-3139

Cover Letters

Departments submit to OSDS only if:

- They are reporting for multiple BUs or other state entities.
- If your department failed to meet one or more of its participation goals due to extreme or uncontrollable circumstances. While this cover letter will not exempt the department from any of its reporting requirements, it will allow OSDS to better assess the hurdles the department is facing and develop strategies to better aid them in meeting their goals in the future.

Please include the following:

- If reporting for multiple BUs or state entities, specify which groups are included in the report.
- An analysis of trends and any anomalies in the SB or DVBE participation.
- Review of progress on all prior year Improvement Plan items enacted and their effect on current participation goals, if applicable.

Cover letter submissions must be sent to OSDSReports@DGS.ca.gov by Oct. 1. Submitting a cover letter is not the same as submitting an Improvement Plan.

Important – AB 2019 Remedial Actions

- AB 2019 requires DGS to consider remedial actions for any department that does not meet either the SB or DVBE participation goals for three out of five years beginning with fiscal year 2022-23.
- Letters have been sent to departments that did not meet 2 out of 3 years.
- An interdepartmental work group developed the remedial actions.
- Once approved, communications explaining the remedial actions will be sent to departments.
- As required by law, the 2024-25 CAR will include a list of departments subject to remedial actions and what those remedial actions are.

Important CAR Reporting Deadlines

July 31	Final day to request an extension.
October 1	CAR Report + Improvement Plans DUE DATE
October 2	OSDS runs and saves all reports, except extensions
October 1 or 2	BUs run their own final reports and SAVE FOR THEIR RECORDS
Post extension	BUs to run their own report
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

Reporting Best Practices

- Keep in touch with OSDS at OSDSReports@dgs.ca.gov
- Verify and validate any internal contracting data and/or SCPRS entries. Keep track of reportable numbers through the fiscal year.
- Encourage department buyers or SCPRS processors take necessary trainings and enter in transaction information into SCPRS accurately
- Correct internal data or SCPRS transactions throughout the fiscal year to the extent possible
- Visit OSDS' webpages frequently to access guides and other reporting resources
- Subscribe to DGS [Broadcast Bulletins](#) to be notified of upcoming events and trainings, policy changes and other reporting related announcements
- Ensure your department's SB/DVBE Advocate's contact information is up-to-date in our [SB/DVBE Advocate Directory](#).

Resources and Tools for CAR Reporting

- All trainings, resources, tools and job aids can be found on our [File Consolidated Annual Report for State Contracting](#) webpage.
 - [Consolidated Annual Report - Frequently Asked Questions](#) (in the process of being revised!)
 - [FI\\$Cal/SCPRS User Guide to CAR Reporting](#)
 - [ERGSO Entry Page Job Aid](#)
 - [Intake Pages Job Aid](#)
 - [CalOES Mission Take & Statewide Incident IDs Training](#)
 - [DGS PD 810Ae - SB IIJA Participation Exemption](#)

Other Helpful Resources

- [FI\\$Cal Service Center|FI\\$Cal - State of California. One state. One system.](#)
- [Office of Small Business and Disabled Veteran Business Enterprise Services](#)
- [SB/DVBE Best Practices for State Departments](#)
- [State Contracting Manual, Vol. 1](#)
- [State Contracting Manual, Vol. 2](#)
- [California Legislative Information](#)
- Subscribe to DGS [Broadcast Bulletins](#)
- Subscribe to receive DGS [Management Memo](#) updates
- [OSDS Compliance Webpage](#)

Contact OSDS

REPORTING RELATED QUESTIONS

Alannah Chapman, Research and Data Specialist

Luke Scholl, Reporting Analyst

OSDSReports@dgs.ca.gov

WAYS TO INCREASE SB OR DVBE PARTICIPATION AND IMPROVEMENT PLAN QUESTIONS

Statewide Advocacy Support Section

Advocate@dgs.ca.gov



BREAK TIME!

**PLEASE
RETURN IN 5
MINUTES**

Questions?

THANK YOU!