

CALIFORNIA DEPARTMENT OF GENERAL SERVICES



Office of Small Business
and Disabled Veteran
Business Enterprise Services

SB and DVBE

Best Practices Webinar



CALIFORNIA DEPARTMENT OF GENERAL SERVICES



Office of Small Business
and Disabled Veteran
Business Enterprise Services

Facilitator

Sitara Maroof

Statewide Advocacy Support Analyst

*Office of Small Business and Disabled Veteran
Business Enterprise Services*

Department of General Services

Advocate@dgs.ca.gov

Housekeeping

- » Meeting is not open to public
- » Mute yourself unless presenting
- » Use the chat for questions during the presentation
- » Slides will be shared
- » ASL interpreter is available for today's webinar





Agenda

Opening Remarks

Anda Draghici, OSDS Branch Chief

Statewide Advocacy Support Program

Imran Chaudhary, OSDS Statewide Advocacy Program Manager

CalVet DVBE Program

Daniel Bates, DVBE Program Analyst

SB/DVBE First Policy Guidelines & Best Practices

Darvin Manuel, Statewide Advocacy Support Manager

SB and DVBE Emergency Registry

Julee Starkey, Statewide Advocacy Support Analyst

Leveraged Procurement Agreements

Allison Kenngott, OBAS-DGS SB/DVBE Advocate

DVBE Exemption

Matt Zweier, OSDS Business Outreach Manager

UNSPSC & Procurement Data Dashboards

Brandon Asuncion, PD Intake & Analysis Unit

Business Outreach & Cal eProcure

Demeshia Swanson, OSDS Business Outreach Program Manager

Breakout Session

5-minute break -

OSDS Reporting Section

Alannah Chapman, Research and Data Specialist

Luke Scholl, Reporting Analyst

SB and DVBE Training Unit

Tommy Nguyen, OSDS Training & Development

SB/DVBE Program Compliance

Megan Wisniewski, OSDS Compliance Manager

Advocate Role and Responsibilities

Elizabeth Lesniak, SB & DVBE Advocate

The Importance of Debriefs

Imran Chaudhary, OSDS Statewide Advocacy Program Manager

California SB/DVBE Atlas Tool

Jesse Covarrubias, Statewide Advocacy Support Analyst

Closing Remarks

Imran Chaudhary, OSDS Statewide Advocacy Program Manager

5-minute break -

Smaller Agencies Session

Imran Chaudhary, OSDS Statewide Advocacy Program Manager

CALIFORNIA DEPARTMENT OF GENERAL SERVICES



Office of Small Business
and Disabled Veteran
Business Enterprise Services

Opening Remarks

Anda Draghici

OSDS Branch Chief

*Office of Small Business and Disabled
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Department of General Services

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CALIFORNIA DEPARTMENT OF GENERAL SERVICES



Office of Small Business
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Business Enterprise Services

Statewide Advocacy Support & Legislation

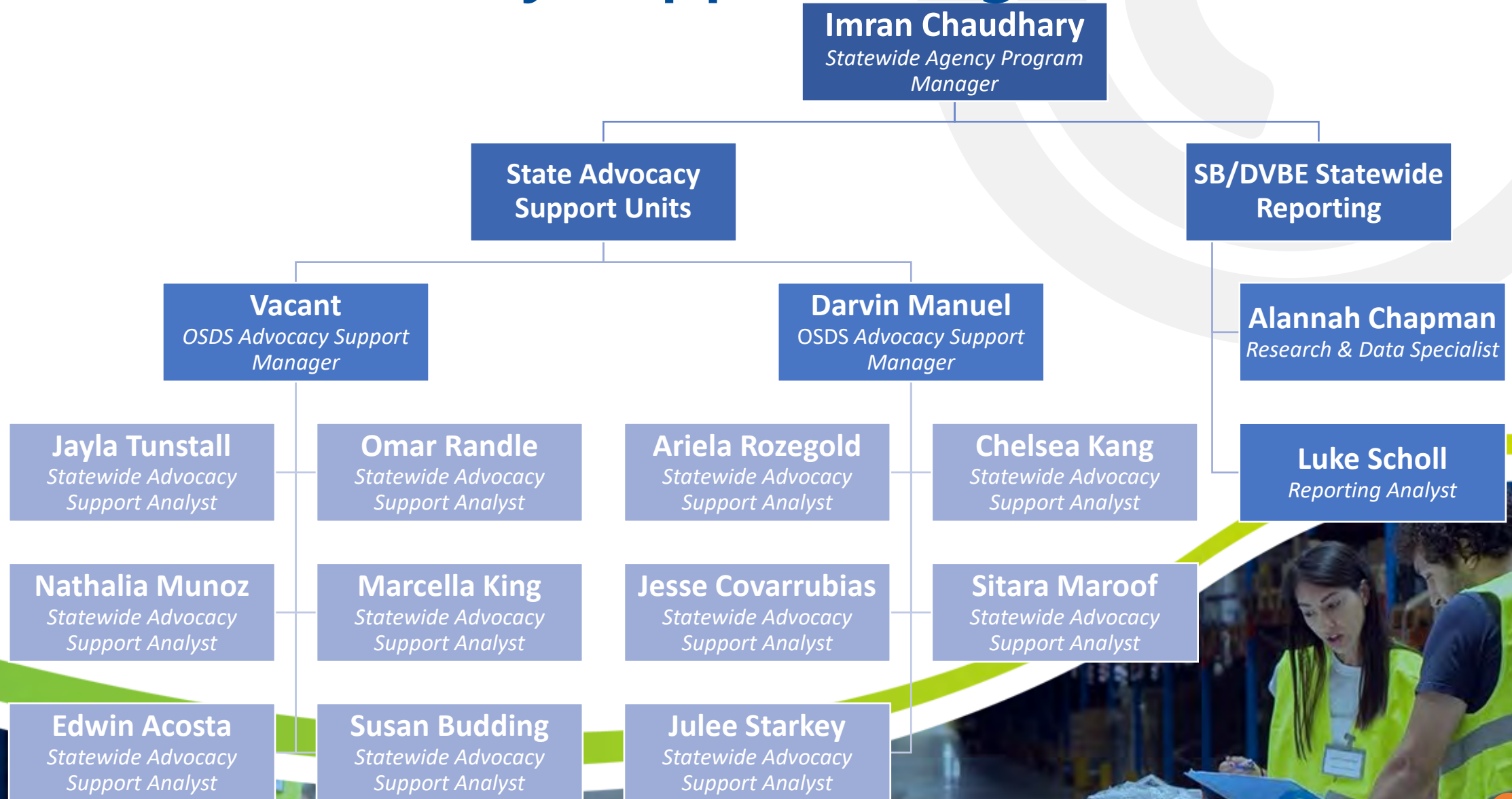
Imran Chaudhary
OSDS Statewide Advocacy Support Program Manager

*Office of Small Business and Disabled
Veteran Business Enterprise Services*

Department of General Services

Advocate@dgs.ca.gov

Statewide Advocacy Support Program



Statewide Advocacy Support Program

We can help!

- » Receive training and guidance
- » Collaborate & participate in OSDS Business Outreach events <https://www.dgs.ca.gov/PD/Events>
- » Develop outreach strategy to diversify vendor pool
- » Conduct market research to find SBs and DVBEs
- » Adopt an SB and DVBE First Policy
- » Identify best practices that help your department meet SB and DVBE mandated goals



Assembly Bill (AB) 1574

Leveraging State Procurement for an Inclusive Economic Recovery: Effective Date: 1/1/2022

Small Business Legislation Requirements

- » Requires all state departments to make continuous efforts to expand the SB/Microbusiness (Micro)/DVBE pool of bidders.
- » Requires bidders to submit with their bids a certification signed under penalty of perjury, that each SB/DVBE subcontractor performs a Commercially Useful Function (CUF).
- » Clarifies the roles of departments' SB Advocates and SB Liaisons.
- » [Assembly Bill \(AB\) 1574](#) Broadcast Bulletin



Assembly Bill (AB) 2019

State Contracts: Small Business Enterprises: Effective Date: 1/1/2023

Small Business Legislation Requirements

- » Requires all state departments to establish an overall minimum 25% SB participation goal in their annual state contracting spend.
- » Requires DGS Office of Small Business and DVBE Services (OSDS) to provide and display in Cal eProcure an option for SB/DVBE applicants to voluntarily self-identify as being at least 51% owned, managed or controlled by individuals in specified women, minority and LGBTQ categories.



Assembly Bill (AB) 2019

State Contracts: Small Business Enterprises:

Effective Date: 1/1/2023

Small Business Legislation Requirements

- » Requires OSDS to encourage state departments by simplifying contract specs and terms to increase participation of SB/Micro, DVBE and minority/women/LGBTQ-owned firms.
- » Requires OSDS to market the state SB certification benefits to federally certified Disadvantaged Business Enterprises (DBE).
- » Requires OSDS to set potential remedial actions including but not limited to , the removal of purchasing authority for departments failing to meet the SB or DVBE goal in 3 of 5 years beginning in 2022-23.



Assembly Bill (AB) 2019

State Contracts: Small Business Enterprises:

Effective Date: 1/1/2023

Small Business Legislation Requirements

- » Requires DGS to conduct a statewide procurement disparity study by January 1, 2025, (extended to end of 2026).
- » Requires all state departments' SB Liaisons to adopt and submit to GoBiz Office of Small Business Advocate (OSBA) an Economic Equity First plan by January 2024.
- » [Assembly Bill \(AB\) 2019](#) Broadcast Bulletin



Assembly Bill (AB) 2974 SB and Federal Infrastructure Investment and Jobs Act (IIJA): Effective Date: 1/1/2023

Small Business Legislation Requirements

- » Requires state departments to set a 25% SB participation requirement on each fully/partially IIJA-funded contracts over \$500,000, report this SB participation to DGS annually, and submit an improvement plan if 25% SB goal is not met. Allows for exemptions for specified reasons and requires exemptions be sent to DGS.
- » Requires SB advocates to provide SBs with information on training and technical assistance available to assist with bidding.
- » [AB 2974 Management Memo](#)



In Focus Legislative Impacts Document

- » For more information: [InFocus Legislative Impacts 04-03-2024.pdf\(Shared\) - Adobe cloud storage](#)
- » Document highlights information for advocates regarding these bills along with departmental strategies and resources.
- » FAQs related to the bills
- » Overview of SB Advocate responsibilities vs. SB Liaison responsibilities.



Statewide Advocacy Support Program

» Launching the Advocacy Partnership Program Next Week

- » What is the Advocacy Partnership Program?
- » Thank you to mentors!
 - » Caltrans, Parks and Rec, CMD, DGS and Sierra Nevada Conservancy.
- » If interested in next round, email advocate@dgs.ca.gov.



Action Items Assigned to Departments to Improve SB/DVBE Efforts:

- » Proactively reach out to large prime contractors to encourage and facilitate the inclusion of certified SB/DVBEs as subcontractors on major projects.
- » Review upcoming solicitations and break down (unbundle) larger contracts, where possible, to create more opportunities that are accessible to small and DVBE businesses.
- » Create or update department-wide Small Business and DVBE Participation Plans, making SB/DVBE outreach an intentional part of procurement strategy.
- » Set tailored participation goals for each contract, as required by regs (CCR, Title 2, Section 1896.62) rather than relying solely on general statewide targets.



Action Items Assigned to Departments to Improve SB/DVBE Efforts:

- » Audit routine and repetitive purchases (e.g., office supplies, IT peripherals) and ensure that where a small business or DVBE option exists, preference is given over large, non-certified vendors (such as Amazon or other corporate suppliers).
- » Use “best value” in your procurement process to balance price, quality, and supplier diversity, rather than defaulting to lowest cost alone.
- » Regularly post SB and DVBE contracting opportunities on public procurement portals, department websites, and in outreach networks. Make it easy for SBs and DVBEs to find, understand, and bid on these opportunities.
- » Host informational webinars, attend small business resource fairs, and invite SB/DVBE vendors to “how to do business” sessions to increase their readiness and engagement.



Action Items Assigned to Departments to Improve SB/DVBE Efforts:

- » Establish metrics and periodic reporting to track SB/DVBE participation and regularly update leadership and staff on progress toward goals.
- » Share successful strategies and vendors among departments—learn from peers who have exceeded participation targets.
- » Evaluate procurement documentation and processes to identify and remove unnecessary barriers that may hinder SB/DVBE participation (e.g., over-complicated forms, non-essential insurance requirements)



Advertising Solicitations:

- » The primary purpose of advertising solicitations for state departments is to maximize competition and ensure transparency in the procurement process.
- » Maximizing Competition
- » Transparency and Fairness
- » Legal Compliance



Advertising Solicitations:

- » Purpose of California State Contracts Register(CSCR)
(Outlined in SCM 14-02-3)
 - » CSCR established to maximize competition
 - » Used for posting for both prime and subcontractors
- » When Advertising is Required
 - » All solicitations unless exempt
 - » A copy kept in procurement file
 - » Required for informal and formal if purchase meets dollar threshold.
- » Solicitation Specifics
 - » Be specific on descriptions in CSCR, don't include just numbers



Advertising Solicitations:

» Good Solicitations:

- » Descriptive so that SB/DVBEs understand what is required.
- » Licenses that are needed are outlined.
- » Has pre-bid conference.

» Bad Descriptions:

- » Just include numbers and does not include a thorough description.
- » Can lead SB/DVBEs not bidding as they are unable to understand the risks and benefits of working with the state.



Advertising Solicitations:

- » California Code, Government Code - GOV § 14825.1
- » The California State Contracts Register shall be published not less than twice a month and shall include information deemed appropriate by the Department of General Services, and shall include all of the following:
 - » (a) Contract identification number.
 - » (b) A description of the contract to be performed.
 - » (c) All deadlines for submitting bid proposals or other required steps in the contract process, including the location and estimated duration of the contract where appropriate.
 - » (d) Any eligibility requirements and preferences.
 - » (e) Department, name and telephone number of the person or persons to contact for further bid and submittal information.



Advertising Solicitations:

Event Details

Event : 0000035909

24-247819 FMD BAS Maintenance

[View Event Package](#)

[View Vendor Ads](#)

Details

Event ID	0000035909	Event Version	3
Format/Type:		Event End Date:	07/11/2025 5:00PM PDT
Sell Event / RFx			
Published Date	06/18/2025 2:30PM PDT		

Description:

Building Automation System (BAS) maintenance and repairs for Delta Controls system in Los Angeles, CA.

Contact Information

Pre Bid Conference

Mandatory: Non Mandatory
Date: 06/25/2025
Time: 10:00AM
Location: Junipero Serra
State Building 320 West 4th
Street Suite 100 Los Angeles,
CA 90013



CALIFORNIA DEPARTMENT OF GENERAL SERVICES



Office of Small Business
and Disabled Veteran
Business Enterprise Services

FAQs

QUESTIONS

ASK

Q & A





CalVet DVBE Program

*Daniel Bates
DVBE Program Analyst*

DVBE Program

Department of Veteran Affairs
DVBE@calvet.ca.gov



DVBE Overview

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

- » Statewide DVBE Advocate
 - » Roberto Herrera, Deputy Secretary Veterans Services Division
- » Supporting all State agencies' DVBE advocates in 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

- » Hosted on the CalVet website
- » Serves as a communication channel for Veterans, Contractors, Small Businesses (SBs), and buyers to connect with the DVBE Unit
- » Analyst provide relevant information, guidance, and resources to all inquires
- » High-level inquiries are escalated to CalVet Management for review
- » DVBE Advisory Council addresses community-wide concerns
- » Webpage:
[https://www.surveymonkey.com/r/CalVet DVBE Request for Response](https://www.surveymonkey.com/r/CalVet_DVBE_Request_for_Response)





DVBE Overview

- » Quarterly SB and DVBE Advocates meeting
 - » Policy and Legislation updates
 - » Upcoming Outreach events
 - » Open discussions to assist Advocates struggles
- » DVBE Exemption Request (STD 816) review
 - » CalVet can provide assistance in review and recommendation for departments requesting DVBE exemptions
- » Solicitation assistance
 - » Assist with DVBE prime and/or sub-contracting vendor pool



CalVet Advisory Council

- » “Six-member” council
 - Must be a DVBE or veteran service organizations to be a member
- » Providing California's Disabled Veteran Business Enterprise community with a dedicated forum to advise the Secretary
 - This is not a policy making body
- » Taskforces will take on current issues brought by members of the DVBE community
 - Recommendations will be presented to the Statewide DVBE Advocate



Know your budget

- » Identify your annual budget early to support effective planning
- » Allocate at least 4% of your budget for DVBE spending
 - Overestimate DVBE and Small Business (SB) spending to ensure annual goals are met
- » Post business opportunities on your department's website
- » Share forecasted contracts and procurement opportunities with potential vendors
- » Offer quarterly internal training on DVBE and SB participation requirements
 - Provide quarterly status on certified spend to your Procurement Contract Officer
- » Support vendor certification through outreach and engagement

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SB/DVBE First Policy Guidelines & Best Practices

Darvin Manuel
Statewide Advocacy Support Manager

*Office of Small Business and Disabled
Veteran Business Enterprises Services*

Department of General Services

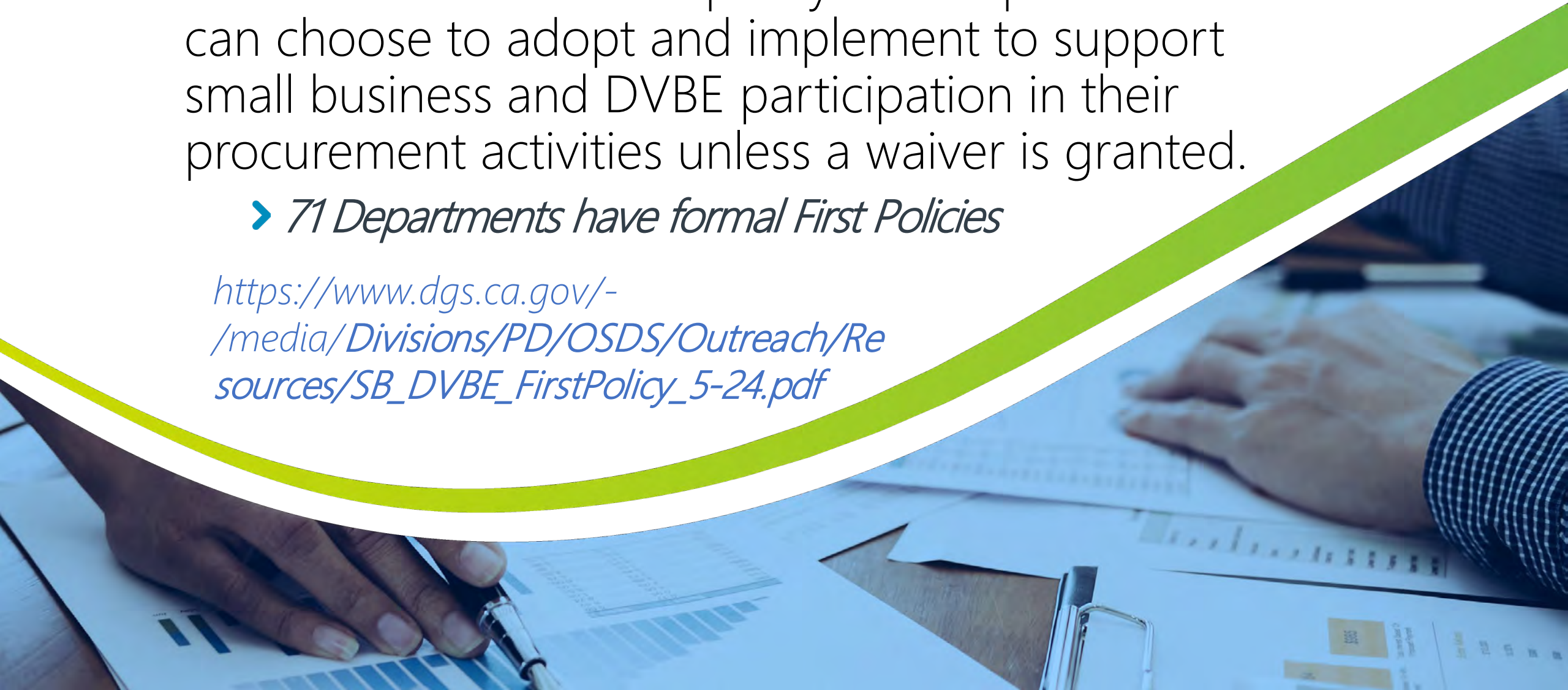
Darvin.Manuel@dgs.ca.gov

Small Business and DVBE First Policy

» A formal administrative policy that departments can choose to adopt and implement to support small business and DVBE participation in their procurement activities unless a waiver is granted.

» *71 Departments have formal First Policies*

https://www.dgs.ca.gov/-/media/Divisions/PD/OSDS/Outreach/Resources/SB_DVBE_FirstPolicy_5-24.pdf





SB/DVBE First Policy Development Guide

The SB/DVBE First Policy helps departments communicate goals for Small Business and Disabled Veteran Business Enterprise participation in procurement. It ensures procurement staff understand and comply with the state requirements while supporting California-certified SBs and DVBEs.

» Steps to Develop your SB/DVBE First Policy

- › Understand the Requirements
- › Set clear goals
- › Incorporate Key Legislation
- › Define the Role of the SB/DVBE Advocate
- › Use Effective Procurement Strategies
- › Encourage Subcontracting
- › Leverage SB Preference and DVBE Incentive
- › Address Exceptions and Exemptions

Tips for a Successful SB/DVBE First Policy Rollout

- » Document your policy in a memo that is easy to understand and reference.
- » Update the policy regularly to reflect new legislation and best practices.
- » Provide resources and training to staff to ensure consistent implementation.



Best Practices-Implementing SB/DVBE First Policy

- » Build a Strong Foundation for SB/DVBE Engagement
- » Use Data to Improve SB/DVBE Participation
- » Use Available Procurement Methods to Support SB/DVBEs
- » Make State Contracting More Inclusive
- » Improve Outreach to Underutilized Businesses
- » Be Transparent and Keep the Business Community Informed
- » Review and Update Your SB/DVBE First Policy



For more information about
SB/DVBE First Policy - Visit us at

[https://www.dgs.ca.gov/PD/Resources/Page-Content/Procurement-Division-Resources-List-Folder/Small Business and Disabled Veteran Business Enterprise Best Practices](https://www.dgs.ca.gov/PD/Resources/Page-Content/Procurement-Division-Resources-List-Folder/Small%20Business%20and%20Disabled%20Veteran%20Business%20Enterprise%20Best%20Practices)



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Office of Small Business
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SB and DVBE Emergency Registry

Julee Starkey
Statewide Advocacy Support Analyst

*Office of Small Business and Disabled
Veteran Business Enterprise Services*

Department of General Services

SBDVBEEmergencyRegistry@dgs.ca.gov

What is the SB/DVBE Emergency Registry?

- » A dedicated portal for California-certified businesses to register as suppliers 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.



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.
- » OSDS can check to ensure buyers are registered when departments are citing an emergency as a reason for not meeting goals.
- » OSDS can help buyers locate SB/DVBEs by using the Emergency Registry.
- » Buyers can easily search the registry for certified businesses using the following search terms:
 - › Certification Type
 - › Emergency Category
 - › Keywords
 - › County
 - › City



Emergency Registry Categories

- » Base Camp Operation
- » Buildings/Sanitation
- » Communications
- » 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



Which businesses are invited to sign up?

- » SB/DVBE businesses that 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.



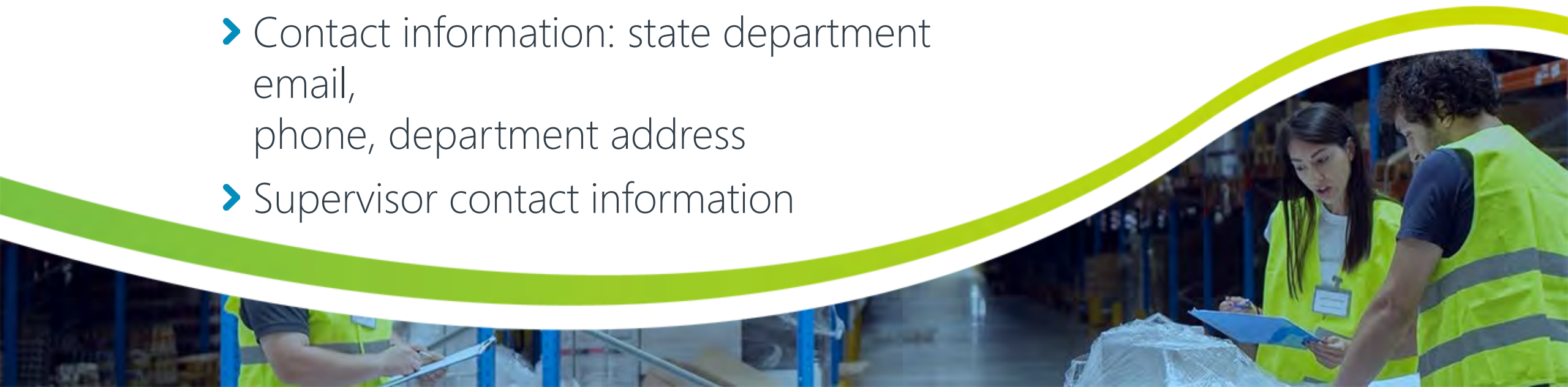
Which state employees should request access?

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



SB and 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

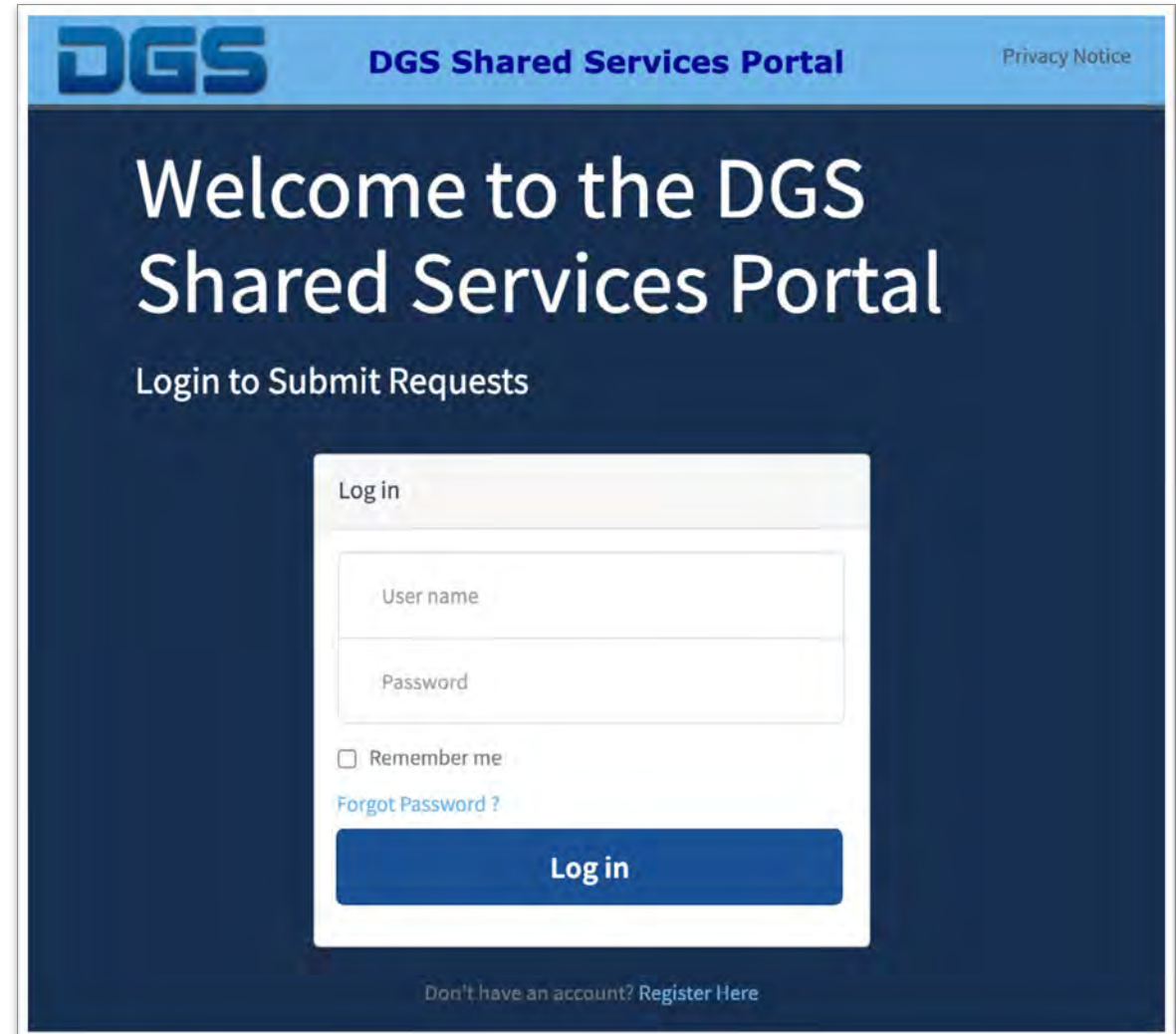
Part 1 Register in the DGS Shared Services Portal

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.



The screenshot shows the DGS Shared Services Portal login page. At the top, there is a blue header with the DGS logo on the left, the text "DGS Shared Services Portal" in the center, and a "Privacy Notice" link on the right. Below the header, the main content area has a dark blue background. It features a large white heading "Welcome to the DGS Shared Services Portal" and a sub-heading "Login to Submit Requests". In the center, there is a white login box with a "Log in" title. Inside this box are two input fields for "User name" and "Password". Below these fields is a checkbox labeled "Remember me" and a blue link "Forgot Password?". At the bottom of the login box is a large blue button labeled "Log in". Below the login box, at the bottom of the page, is a link that says "Don't have an account? Register Here".

State Department Registration Process

Step 3:

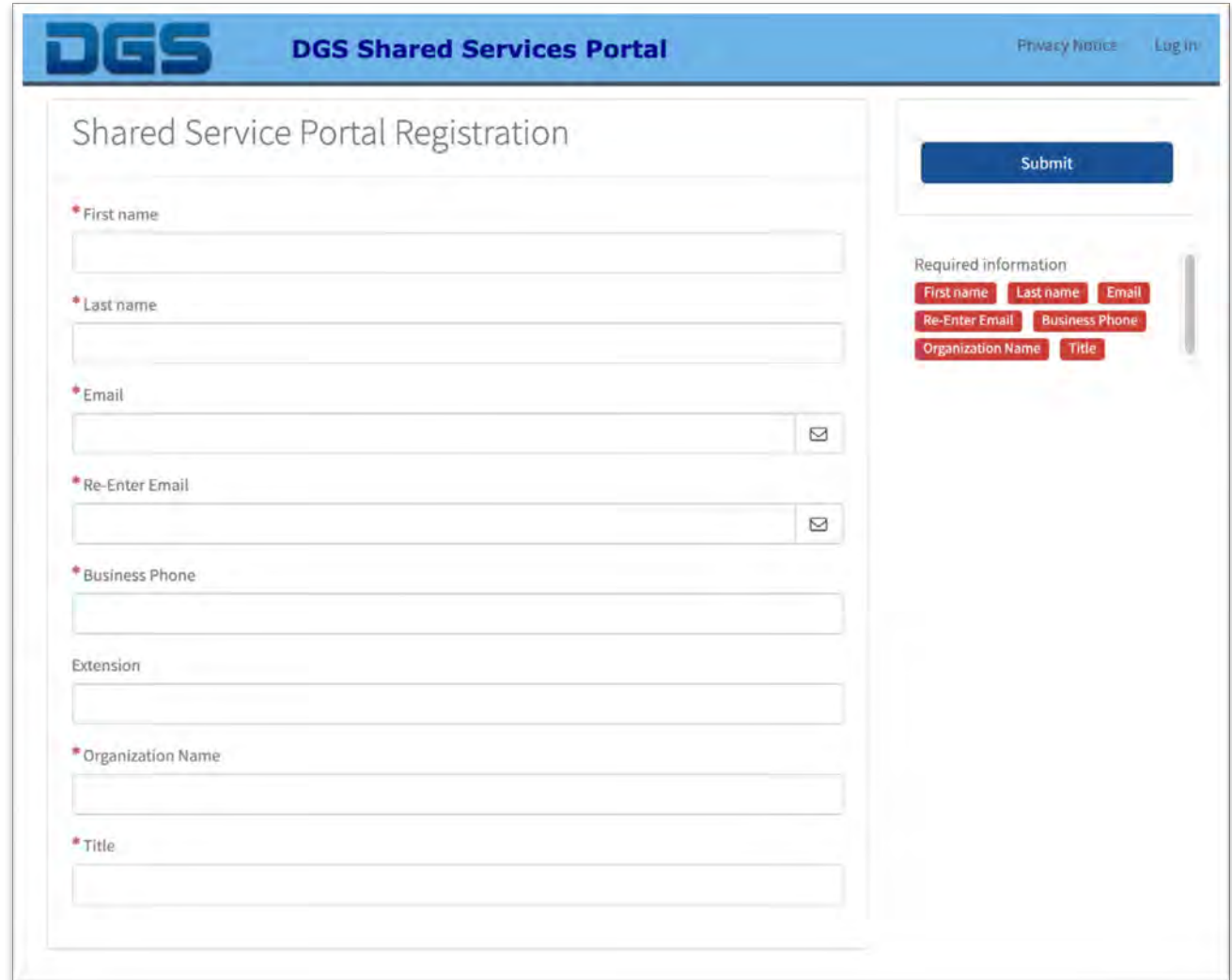
Enter the required information.

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.



The screenshot shows the 'DGS Shared Services Portal' registration page. The header includes the 'DGS' logo, the portal name, and links for 'Privacy Notice' and 'Log In'. The main heading is 'Shared Service Portal Registration'. On the right, there is a blue 'Submit' button and a 'Required information' section with a scrollable list of fields: First name, Last name, Email, Re-Enter Email, Business Phone, Organization Name, and Title. The main form area contains input fields for each of these fields, with red asterisks indicating required fields. The 'Email' and 'Re-Enter Email' fields include email icons on the right side of the input boxes. The 'Extension' field is located below the 'Business Phone' field.

DGS DGS Shared Services Portal Privacy Notice Log In

Shared Service Portal Registration

Submit

Required information

- First name
- Last name
- Email
- Re-Enter Email
- Business Phone
- Organization Name
- Title

* First name

* Last name

* Email

* Re-Enter Email

* Business Phone

Extension

* Organization Name

* Title

State Department Registration Process

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

Step 1:

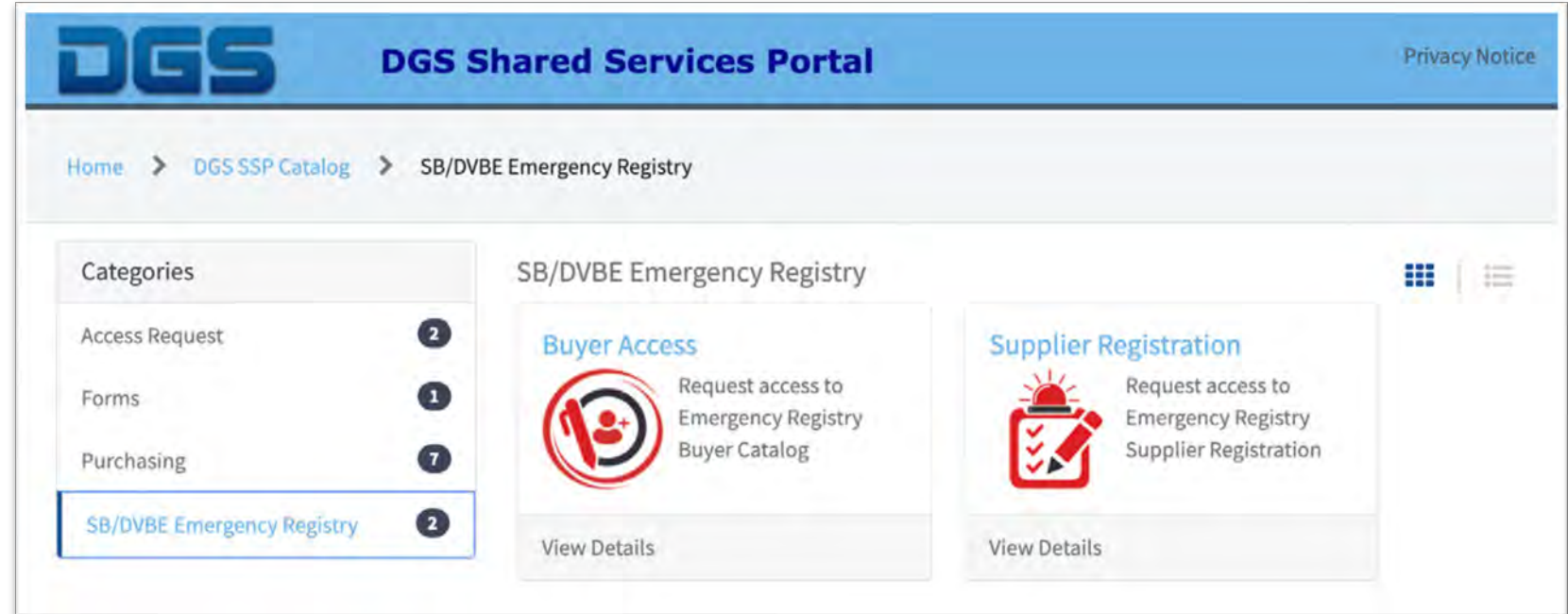
Log in to the DGS
Shared Services Portal

Step 2:

Click SB/DVBE
Emergency Registry

Step 3:

Click Buyer Access



State Department Registration Process

Part 3 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.

The screenshot shows the 'Buyer Access' form on the DGS Shared Services Portal. The form is titled 'Buyer Access' and 'Request access to Emergency Registry Buyer Catalog'. It includes a logo for the State of California and a disclaimer: 'Please submit this form for Buyer access to the SB/DVBE Emergency Registry. Pending DGS approval, you will be able to search and view SB/DVBE suppliers who are registered to provide goods/services in an emergency.' The form contains several required fields marked with an asterisk: Buyer Name, Department Name, Department address, County, City, Work Email Address, Zip, Work Phone Number, Supervisor Email Address, and Supervisor Phone Number. There is also a section for 'Additional Comments' and a checkbox for a disclaimer. A 'Submit' button is located at the top right. A sidebar on the right lists 'Required information' with links to each field: Buyer Name, Department Name, Department address, City, Zip, Work Email Address, Work Phone Number, Supervisor Email Address, Supervisor Phone Number, and a link to the disclaimer.

DGS Shared Services Portal

Home > DGS SSP Catalog > SB/DVBE Emergency Registry > Buyer Access

Buyer Access

Request access to Emergency Registry Buyer Catalog

Please submit this form for Buyer access to the SB/DVBE Emergency Registry. Pending DGS approval, you will be able to search and view SB/DVBE suppliers who are registered to provide goods/services in an emergency.

Required information

- Buyer Name
- Department Name
- Department address
- City
- Zip
- Work Email Address
- Work Phone Number
- Supervisor Email Address
- Supervisor Phone Number
- Disclaimer: By submitting this information I request

* Buyer Name

Buyer Address Information

* Department Name

* Department address

County

* Work Email Address

* City

* Zip

* Work Phone Number

Supervisor Information

* Supervisor Email Address

* Supervisor Phone Number

Additional Comments:

☐ Disclaimer: By submitting this information I request access to all items associated with the Emergency Registry Buyer Portal. DGS staff reserve the right to reject or approve my application.

Add attachments

State Department Access

Part 3 Access Buyer Search Portal and Search Certified Businesses

Step 1:

Log in to the DGS
Shared Services Portal

Step 2:

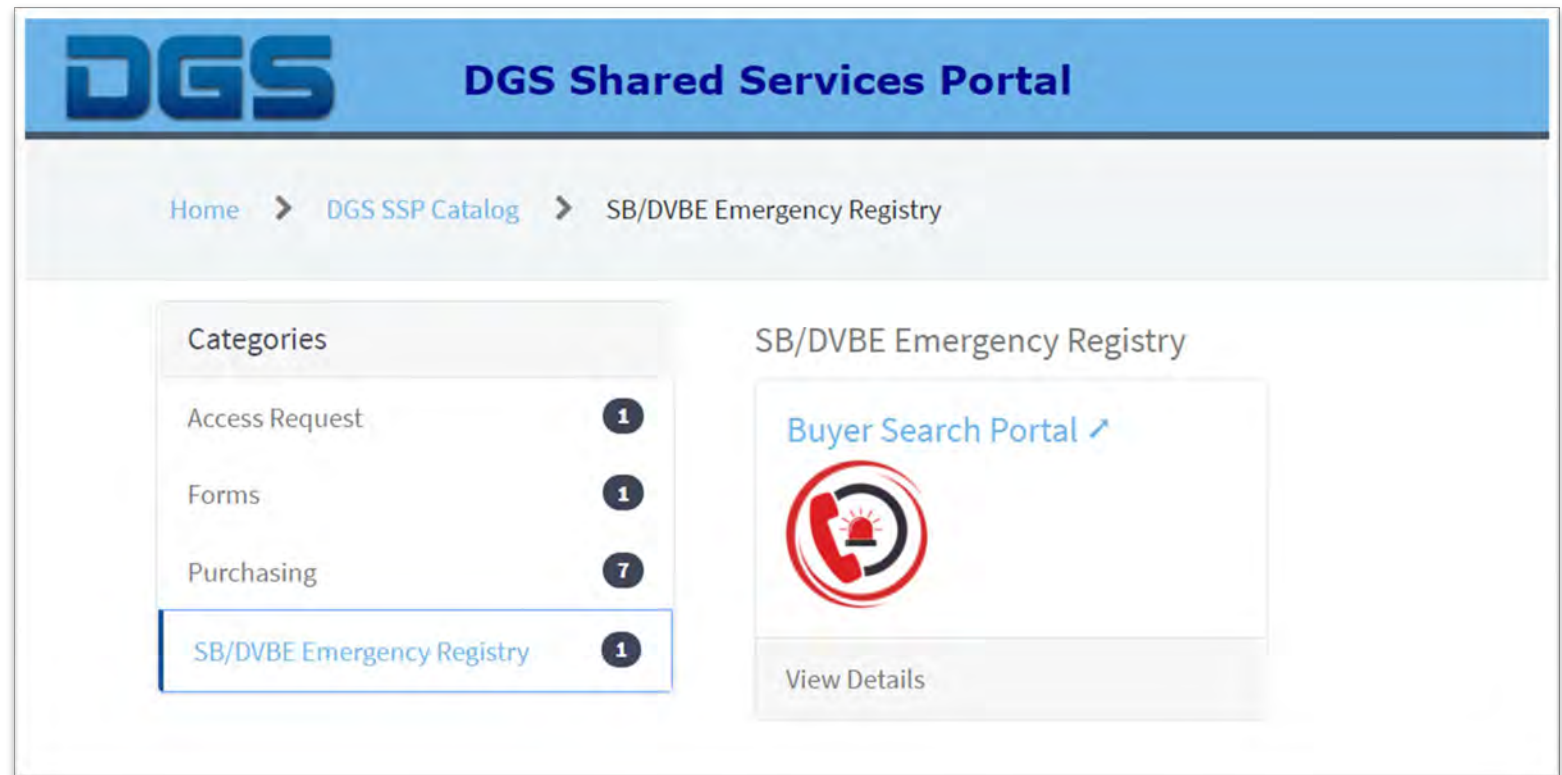
Click SB/DVBE
Emergency Registry

Step 3:

Click Buyer Access

Step 4:

Enter Search Criteria



Buyer Report Search

DGS

Buyers Report Search

Data Last Refreshed : 10/6/2021 3:00 AM

Select search filters by typing or selecting from the drop (minimum 1 search filter):

Supplier Certification Types

☐ DVBE

☐ SB / SB (Micro)

☐ SBPW

Emergency Registry Category

Emergency Registry Category

Product/Service Keywords

Search

Supplier County

Supplier County

Supplier City

Supplier City

Certification Number	Legal Business Name	Certification Types	Certification Date	Total PO Count (Last 36 months)	Emergency Registry Category	Product/Service
2021986	Sequoia Engineering and Design Associate	SB, SBPW	2020-12-01	0	BASE CAMP OPERATIONS	Engineering services
1529420	KAPLAN SOLUTIONS, INC.	SB (Micro)	2019-05-17	132	BASE CAMP OPERATIONS, COMMUNICATIONS, EROSION CONTROL, FACILITIES MAINTENANCE/REPAIR, FENCING, FIRE PROTECTION, FOOD & BEVERAGE, HAZARDOUS MATERIALS, JANITORIAL, LAW ENFORCEMENT/SECURITY, LIGHTING, MEDICAL, MISCELLANEOUS SUPPLIES, PERSONAL CARE SUPPLIES, RESPIRATORY PRODUCTS, LOGISTICS/TRANSPORTATION, ROADWAY MAINTENANCE, PORTABLE MODULAR BUILDINGS/SANITATION, ENERGY/FUEL	Sacramento based Small Business with 30 years experience, expertise in emergency products including Emergency Task Force, CalFire, CalVet, and others during past 30 years experience and regulatory control related emergency products. Relationships with 30 years supply chain experience

[How to Use](#)[About Buyer Report](#)

Resources

SB DVBE Emergency Registry State Department Webpage

<https://www.dgs.ca.gov/PD/News/Page-Content/Procurement-Division-News-List-Folder/SBDVBE-ER-State-Department-Information?search=emergency%20registry>

Instructional Guide for State Departments

https://www.dgs.ca.gov/-/media/Divisions/PD/OSDS/Outreach/Resources/StateDept_Instructions.pdf

Service Now

https://DGS.Service-now.com/dgs_ssp

If there is an Emergency category you use often that is not on the list, please reach out to us.

If you have questions, please email

SBDVBEEmergencyRegistry@dgs.ca.gov



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FAQs

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Q & A



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Leveraged Procurement Agreements

Allison Kenngott

OBAS-DGS SB/DVBE Advocate

Procurement Division

Department of General Services
Allison.Kenngott@dgs.ca.gov

Leveraged Procurement Agreements

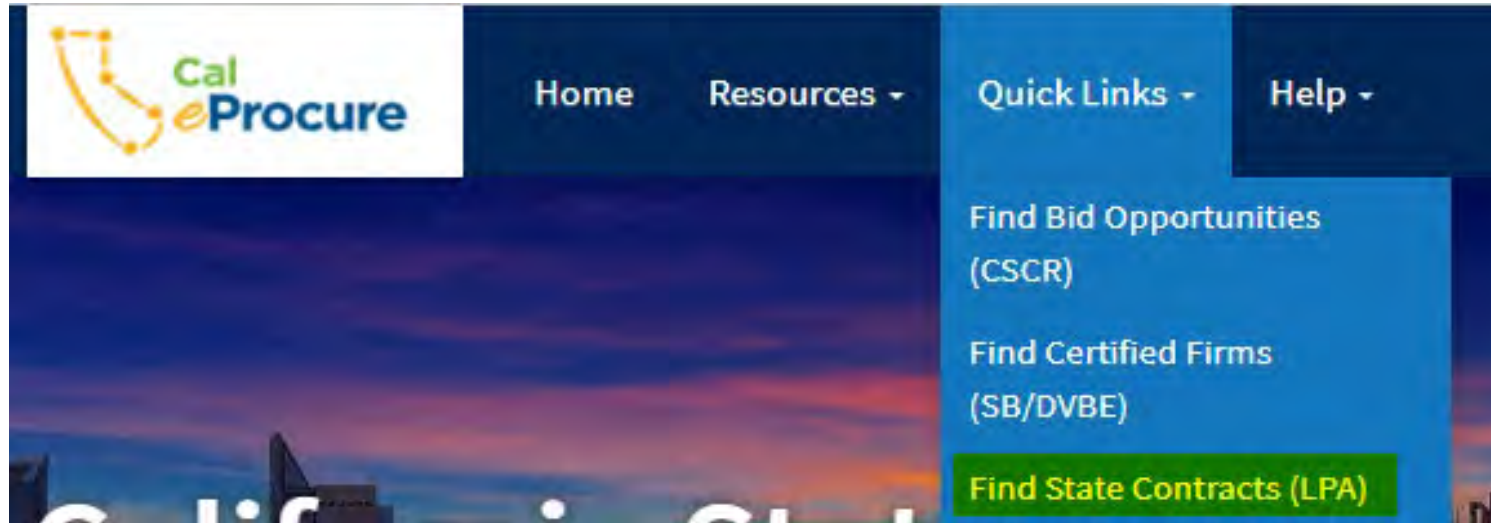
- » The Acquisitions Branch establishes Leveraged Procurement Agreements (LPAs) for commonly purchased goods and services
- » LPAs leverage the state's buying power and simplify the procurement process for state departments and local government entities



Leveraged Procurement Agreements

Finding LPAs

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



Leveraged Procurement Agreements

Finding LPAs

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

State Leveraged Procurement Agreements

Search Contracts

Contract ID

Description

Contract Type

Buyer ID

- Step 4: Sort by Certification Type

View 100 < 1-10 of 4917 > Download							
Contract ID	Contract Description	Contract Type	Supplier Name	Certification Type	Begin Date	Expire Date	Buyer
<div><div></div>00000000000000000000000088334</div>	IBM License True-Up	Departmental	ALLIED NETWORK SOLUTIONS INC	DVBE	01/01/2023	12/31/2023	Wei Peach
<div><div></div>1-16-58-25</div>	SELF-SUPPORTING STEEL COMMUNICATIONS TOWERS	Statewide Contract	WESTERN UTILITY TELECOM INC		01/25/2016	01/24/2024	Willie Orphe, III

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 SB preference and DVBE incentives to increase participation
- » SB and DVBE off-ramp provision may be included



Statewide Contracts cont.

SB/DVBE Off-Ramp Guidelines

- » Typically included in mandatory statewide contracts for commonly purchased commodities when there is no SB or DVBE participation (Contractor is a large business and no subcontracting participation by SBs or DVBEs)
- » Allows departments to award purchases within 5% of statewide contract pricing to SBs or DVBEs instead of the mandatory LPA
- » Off-Ramp availability and rules for usage are included in the User Instructions for each statewide contract





Leveraged Procurement Agreements

Statewide Contracts Index

- » A sortable spreadsheet of high-level contract information and links to Cal eProcure LPA page with details and user instructions for each contract
- » Located on the DGS-PD home page:
<https://www.dgs.ca.gov/PD>

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





Advantages for SB and DVBE

- » State agencies must consider offers from SBs and DVBEs when using CMAS
- » Contracts to SBs are exempt from the DGS administrative fee (DGS bills state agencies for CMAS transactions.)
- » CMAS waives the incentive fee for SBs. Typically, CMAS charges a fee to suppliers for local government (counties, cities, K-12 schools, community colleges, etc.)



CMAS AGREEMENT SEARCH

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

Select search filters (minimum 1 search filter):

<div>BRAND-3M</div>	<div>CMAS Supplier Name</div>	<div>Check all that apply: <input checked="" type="checkbox"/> Small Business (SB) <input type="checkbox"/> Disabled Veteran Business Enterprise (DVBE)</div>	<div>CMAS Agreement Number</div> <div>Base Schedule Number</div> <div>Contractor Location (City)</div>
---------------------	-------------------------------	---	--

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@HIGHSPEEDLOGISTICS.GOV.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	LGENSELMAN@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:

[California Multiple Award Schedules](#)

CMAS Search Portal Link:

<https://cmasearch.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
- » Simplifies the purchasing process for the end user
- » Offers both IT and Non-IT MAs
- » Agencies may be required to conduct Request for Offers (RFOs) from awarded suppliers
- » Small Business and DVBE Resellers are available!



Master Agreements Contact Information

Visit the Website:

[Master Agreements](#)

Contact:

Masters@dgs.ca.gov





Software Licensing Program (SLP)

- » Software discounts are negotiated with major software publishers then passed on to the state
- » Reduces the need for individual departments to conduct separate acquisitions for proprietary software licenses and software upgrades.

Software Licensing Program (SLP)

» Available Categories

- » Software, Maintenance
- » Support
- » SaaS/Cloud
- » Implementation Services
- » Installation
- » Training
- » IaaS/PaaS

» Not Available

- » Standalone Hardware, Consulting, Standalone Training, and Standalone Installation Services



Software Licensing Program (SLP)

- » Departments must solicit from a minimum of three (3) contractors.
- » Award is based upon lowest cost or best value, determined by departments.
- » Small Business and DVBE resellers are available.



Software Licensing Program (SLP) Contact Information


Visit the website:

[Software Licensing Program \(ca.gov\)](https://softwarelicensing.ca.gov)

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:

[Cooperative Agreements](#)

Contact:

PD Cooperatives@dgs.ca.gov



CALIFORNIA DEPARTMENT OF GENERAL SERVICES

50 YEARS

DGS

Office of Small Business
and Disabled Veteran
Business Enterprise Services

FAQs

QUESTIONS

ASK

Q
&
A

CALIFORNIA DEPARTMENT OF GENERAL SERVICES



Office of Small Business
and Disabled Veteran
Business Enterprise Services

DVBE Exemptions

Matt Zweier
OSDS Business Outreach Manager

*Office of Small Business and Disabled
Veteran Business Enterprise Services*

Department of General Services

BusinessOutreach@dgs.ca.gov

DVBE Exemption Request (STD 816)

- » Purpose: To waive DVBE requirement and/or incentive
- » Prepared by buyers and processed by each department
- » Review justification
- » Conduct independent research
- » Link to form [STD. 816](#)
- » [SCM Volume 2, Section 1201.1](#)
- » [CCR Section 1896.70](#)



DVBE Exemption Request Form (STD. 816)

Department Info

Request (3 Options):

- EXEMPT Requirements and INCLUDE Incentive.
- EXEMPT Incentive and INCLUDE Requirements.
- EXEMPT both Requirements and Incentive.

Exemption Justification

Signature Approvals

STATE OF CALIFORNIA DVBE EXEMPTION REQUEST STD 816 (Rev. 09/20)		Department of General Services
INSTRUCTIONS Use this form to request approval to exempt the Disabled Veteran Business Enterprise (DVBE) Program Requirements and/or DVBE Incentive. Submit one form per solicitation. Do not bundle multiple solicitations together. For additional information, see the State Contracting Manual.		
DEPARTMENT INFORMATION		
DEPARTMENT (includes Boards, Commissions, and Associations)		
PROCUREMENT IDENTIFIER(S) (include requisition number and estimated amount of purchase if applicable)		
CONTACT NAME		
BUSINESS STREET ADDRESS		
BUSINESS MAILING ADDRESS (if different from Street Address)		
BUSINESS PHONE	BUSINESS EMAIL	
THE DEPARTMENT REQUESTS TO:		
<input type="checkbox"/> EXEMPT the DVBE Program Requirements and INCLUDE the DVBE Incentive. Please ensure that: <ul style="list-style-type: none">• The reason for exempting the DVBE Program Requirements is provided in the Exemption Justification section below.• The purchase indicates the DVBE Program Requirements have been exempted, but the DVBE Incentive applies.		
<input type="checkbox"/> EXEMPT the DVBE Incentive and INCLUDE the DVBE Program Requirements. Please ensure that: <ul style="list-style-type: none">• The reason for exempting the DVBE Incentive is provided in the Exemption Justification section below.• The purchase indicates the DVBE Incentive has been exempted, but the DVBE Program Requirements apply.		
<input type="checkbox"/> EXEMPT the DVBE Program Requirements and the DVBE Incentive. Please ensure that: <ul style="list-style-type: none">• The reason for exempting the DVBE Program Requirements and the DVBE Incentive is provided in the Exemption Justification section below.		
EXEMPTION JUSTIFICATION Reason(s) for excluding the DVBE Program Requirements and/or DVBE Incentive for this purchase:		
SIGNATURE APPROVAL (Department designee completing the Std. 816)		
PRINTED NAME	TITLE	
SIGNATURE (Please click here to sign with a Digital ID)	DATE	
SIGNATURE APPROVAL (Highest ranking executive or designee only)		
PRINTED NAME	TITLE	
SIGNATURE (Please click here to sign with a Digital ID)	DATE	

For more information about or assistance with the DVBE
Exemption

contact the Advocacy Support Section

at *advocate@dgs.ca.gov*



CALIFORNIA DEPARTMENT OF GENERAL SERVICES



Office of Small Business
and Disabled Veteran
Business Enterprise Services

UNSPSC & Procurement Data Dashboards

*Brandon Asuncion
Associate Governmental Program Analyst
PD Intake & Analysis Unit*

*eProcurement & Business Intelligence
Strategies Section (eBISS)*

Department of General Services
Brandon.Asuncion@dgs.ca.gov

Procurement/Intake & Analysis Unit

UNSPSCs (United Nations Standard Products and Services Code)

- » Where to find information regarding UNSPSC
 - » Go to www.dgs.ca.gov and type "UNSPSC" in search bar
- » Understanding the UNSPSC coding
 - » For help, contact helpUNSPSC@dgs.ca.gov
- » UNSPSC Replacement Search Dashboard
 - » Removed unused codes, consolidated codes and added more context to codes



Procurement/Intake & Analysis Unit

Certified SB/DVBE Spend Comparison Dashboard

- » Where to find the dashboard
 - » Go to www.dgs.ca.gov and type "Dashboard" in search bar
- » Understanding the SB/DVBE Spend Dashboard
 - » Dashboards created to as a visual tool to show how much money was spent with certified vendors compared to noncertified 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:
 - Select a fiscal year
 - Type in an applicable UNSPSC description (e.g., PAPER or FISH) and hit enter.
 - Right click and select 'Drill through' on a line to view "Certified Vendors" and "Noncertified Vendors" spend details
 - Right click and select 'Drill through' on a vendor's name see vendor spend details by Department





eProcurement & Business Intelligence Strategies Section (eBiss)

UNSPSC Questions: HelpUNSPSC@dgs.ca.gov

Dashboard Questions: IAU@dgs.ca.gov

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

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

CALIFORNIA DEPARTMENT OF GENERAL SERVICES



Office of Small Business
and Disabled Veteran
Business Enterprise Services

Business Outreach & Cal eProcure

Demeshia Swanson
OSDS Business Outreach Program Manager

*Office of Small Business and Disabled
Veteran Business Enterprise Services*
Department of General Services
BusinessOutreach@dgs.ca.gov

Leveraging OSDS Business Outreach

- » Approximately 250 outreach events in Fiscal Year 2024–25
- » Exhibiting, workshops, panels, and matchmaking activities
- » Strategic partners and host organizations
- » Subject matter experts





Using Cal eProcure - Certified SB and DVBE Firm Database

Search by:

- » Business Name
- » Certification ID/Type
- » Business Type
- » UNSPSC Classification
- » Keywords
- » Services Areas/ZIP Codes
- » Contractor's License Classification

The State of California Certifications

Search Criteria

Business
Name

Certification
ID

Certification
Type

- ☐ Micro Business (MB)
- ☐ Small Business (SB)
- ☐ Small Business for the Purpose of Public Works (SB-PW)
- ☐ Disabled Veteran Business Enterprise (DVBE)
- ☐ Non-Profit Veteran Service Agency (NVSA)
- ☐ Non-Profit Recognition (NP)

Business
Type

- ☐ Construction
- ☐ Manufacturer
- ☐ Non-Manufacturer
- ☐ Service

UNSPSC Classifications



ADD

NAICS Classifications
(only used by
manufacturers)



ADD

Contractor's License
Classifications



ADD

Service Area (County)



ADD

Keywords

ADD

Zip Code

ADD

Clear Criteria

Search



Supplier Diversity Information

- ◆ Certified Firm's Cal eProcure Profile
- ◆ Supports Targeted Outreach Efforts
- ◆ Supports Diversity, Equity and Inclusion
- ◆ Builds a Diverse Supplier Pool

Certification Profile

State of California Certification



Certification ID: 2034007

Legal Business Name

Outreach Test Co

Doing Business As (DBA) Name1

Doing Business As (DBA) Name2

Office Phone Number

916/375-4940

Business Fax Number

Business Web Address

Service Areas

Fresno

Address

707 3rd Street

West Sacramento

CA 95605

Email:

BusinessOutreach@dgs.ca.gov

Total Number of Employees

1

Business Types

Service

[View Keywords](#)

[View Classifications](#)

[View Supplier Diversity Information](#)

Supplier Diversity Information

Certification ID: 2034007

Outreach Test Co

All businesses are encouraged to provide voluntary diversity data information in their Cal eProcure profiles. Collecting voluntary diversity data will help the state of California to gain insight into the cities, counties, communities and industries where better support is needed to foster supplier diversity in state contracting. It will also help us to shape policies and develop strategies to advance the equitable inclusion and utilization of small and diverse businesses in California's state procurement and contracting opportunities.

Diversity Category	Diversity Descriptions
Ethnicity	Hispanic or Latino
Race	Two or more races
Gender	Non-binary
LGBTQIA	
Disabled	No

The Supplier Diversity Certification information voluntarily provided by the firm below is not administered or endorsed by the Department of General Services, is displayed for general information purposes only, and has not been verified. This site may contain links to a third party, which we do not warrant, endorse, or assume liability for. You may access the portal/website of the certifying agency administering each certification to review and confirm this information.

Supplier Diversity Certifications		Link	Certification ID #
Small Business Administration 8(a) (SBA 8(a))	Administered through the Small Business Administration	SBA	
Woman Business Enterprise (WBE)	Administered through the California Unified Certification Program/Caltrans	CUCP	

[Return To Certification Profile](#)

Q
&
A

FAQs

QUESTIONS

ASK



Breakout Session

Room 1: Finding Vendors for Niche Contracts

*Michele Sakamoto, SB/DVBE Advocate & Contract Analyst
Dept. of Parks and Recreation*

Room 2: Overcoming Outreach Challenges

Demeshia Swanson, OSDS Business Outreach Program Manager

*Office of Small Business and Disabled
Veteran Business Enterprise Services*

Department of General Services

Advocate@dgs.ca.gov

CALIFORNIA DEPARTMENT OF GENERAL SERVICES



Office of Small Business
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Business Enterprise Services

Break

Will start in 5 minutes

*Office of Small Business and Disabled
Veteran Business Enterprise Services*
Department of General Services
Advocate@dgs.ca.gov

CALIFORNIA DEPARTMENT OF GENERAL SERVICES



Office of Small Business
and Disabled Veteran
Business Enterprise Services

OSDS Reporting

Alannah Chapman, Research and Data Specialist
Luke Scholl, Reporting Analyst

*Office of Small Business and Disabled
Veteran Business Enterprise Services*
Department of General Services
OSDSReports@dgs.ca.gov



OSDS Reporting Best Practices

- » Strategies from departments that have consistently met the goals **and** departments who have had recent success in meeting the goals.
- » Diligence and accuracy are key!
 - » Review data on Data Validation Query (DVQ) or internal records and reports throughout the year.
 - » Monitor progress toward SB and DVBE participation goals.
 - » Address reporting errors or system errors sooner rather than later.



OSDS Reporting Best Practices

- » Maintain records supporting all reported totals and SB/DVBE participation.
- » List of contracts, standalone purchase orders, Cal Card transactions, LPA purchase orders, design build purchase orders and the respective award amounts
- » Prime and subcontractor certification information at the time of award
- » [Assembly Bill 2974](#) - New contracts over \$500,000 financed in whole or in part with IIJA have a 25% SB Participation Goal
- » Management Memo 24-02: [Small Business Participation, wholly or partly, funded by the Federal Infrastructure Investment and Jobs Act \(IIJA\)](#)



OSDS Reporting Best Practices

- » Meet monthly with contracting or procurement teams.
- » Update management on participation goal status throughout the fiscal year.
- » Subscribe to DGS Broadcast Bulletins.
- » Ensure department's SB/DVBE Advocate's contact information is up-to-date.
- » Visit reporting webpages
 - » CAR - [File Consolidated Annual Report for State Contracting](#)
 - » DVBE Subcontracting Report - [File DVBE Subcontracting Report](#)
 - » LPPPR - [File Penalty Paid Report for Late Payments to Businesses](#)



OSDS Reporting Best Practices

- » Correct errors throughout the fiscal year to the extent possible.
- » Verify certification is active at time of award and through entirety of the contract.
- » Review SB/DVBE Subcontracting menu to ensure certifications are reflecting accurately before finalizing contracts.
- » Encourage department buyers, PCard reconcilers or SCPRS processors to attend necessary trainings, including both those offered by DGS and FI\$Cal.
- » Develop and/or strengthen internal secondary review and approval processes.



OSDS Reporting Best Practices

- » Using and reviewing the DVQ
 - » CAR “Y” versus “N”
 - » Verify Acquisition Methods and Acquisition subtypes
 - » CAR Reported dollar amounts
 - » Amendments or Change Orders
 - » Dept. Contract vs. Dept. Contract PO
 - » Subcontracting information
 - » Certification information
 - » Percentage of state funds



OSDS Reporting Best Practices

- » CAR Deadlines
 - » July 31: Last day to request CAR extension
 - » October 1: **CAR** deadline for FI\$Cal depts.
 - » October 1: **CAR** Intake submission from Non-FI\$Cal depts.
 - » October 1: **Improvement Plans**
 - » Oct 15: Latest extension deadline.
- » DVBE Subcontracting Report Deadline
 - » Nov. 1: **810D** deadline
- » Late Payment Penalty Paid Report
 - » Sept. 30: **DGS PD 800** deadline
- » Reach out to OSDSReports@dgs.ca.gov

CALIFORNIA DEPARTMENT OF GENERAL SERVICES



Office of Small Business
and Disabled Veteran
Business Enterprise Services

SB and DVBE Training Unit

Tommy Nguyen
Training & Development Associate

*Office of Small Business and Disabled
Veteran Business Enterprise Services*
Department of General Services
SBDVBETraining@dgs.ca.gov



New SB and DVBE Training Unit

» SB and DVBE trainings on navigating state contracting are live and can be found:

[SB-DVBE-Training-Unit \(ca.gov\)](https://www.ca.gov/SB-DVBE-Training-Unit)

Visit our YouTube Video Resources

- [SB/DVBE Training Videos](#)

Current Classes	Upcoming Classes
Marketing with the State	SB/DVBE Option Fair & Reasonable
Understanding CUF	Bidding on Departmental Contracts
Prompt Payment	California Multiple Awards Schedule
LPA Bidder Training	
Environmentally Preferable Purchasing	



SB/DVBE Program Compliance

Megan Wisniewski
OSDS SB/DVBE Compliance Manager

*Office of Small Business and Disabled
Veteran Business Enterprise Services*

Department of General Services

SB.DVBECOMPLIANCE@dgs.ca.gov

Requesting DVBE Subcontractor Substitution

Documentation should include:

- Completed *DGS PD 07-06* DVBE substitution Request form.
- Contract award summary.
- Prime contractor's written substitution request to Awarding Agency.
- Prime's substitution notice sent via certified mail to the original DVBE(s).
- Written response from original DVBE(s) within 5 days of the Prime's written notice.
- Prime's written substitution notice to the replacement DVBE(s).
- Written response from replacement DVBE(s) to prime's substitution request.



Requesting DVBE Subcontractor Substitution

Documentation Continued:

- Awarding agency written substitution notice to both the original and proposed replacement DVBEs, including instructions for objecting to the substitution.
- Printed Certified DVBE Summary Page to verify replacement DVBE certification.
- Replacement DVBE(s) Subcontractor Agreement and/or DGS form DGS PD 843.
- Written objections submitted by original DVBE(s) (if applicable).
- Written notice to original DVBE(s) of hearing (if applicable).



BIDDER DECLARATION

1. Prime bidder information (Review attached Bidder Declaration Instructions prior to completion of this form):
- a. Identify current California certification(s) (MB, SB, NVSA, DVBE): _____ or None ☐ (If "None", go to Item #2)
- b. Will subcontractors be used for this contract? Yes ☐ No ☐ (If yes, indicate the distinct element of work your firm will perform in this contract e.g., list the proposed products produced by your firm, state if your firm owns the transportation vehicles that will deliver the products to the State, identify which solicited services your firm will perform, etc.). Use additional sheets, as necessary.
- _____
- c. If you are a California certified DVBE: (1) Are you a broker or agent? Yes ☐ No ☐
(2) If the contract includes equipment rental, does your company own at least 51% of the equipment provided in this contract (quantity and value)? Yes ☐ No ☐ N/A ☐

2. If no subcontractors will be used, skip to certification below. Otherwise, list all subcontractors for this contract. (Attach additional pages if necessary):

Subcontractor Name, Contact Person, Phone Number & Fax Number	Subcontractor Address & Email Address	CA Certification (MB, SB, NVSA, DVBE or None)	Work performed or goods provided for this contract	Corresponding % of bid price	Good Standing?	51% Rental?
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>



Elements of SB 588

SB 588 established Military and Veterans Code (MVC) 999.5 and 999.7.

- ◆ Establishes that prime contractors on contracts with DVBE incentive, on contract completion, must certify to awarding departments: (1) The total amount the prime contractor received under the contract, (2) the name and address of the DVBE that participated in the performance of the contract and the contract number, (3) the amount and percentage of work the prime contractor committed to provide one or more DVBE(s) under the requirements of the contract and the amount each DVBE received under the contract, (4) That all payments on the contract have been made to the DVBE. Upon request by the awarding department, the prime contractor shall provide proof of payment for the work, and (5) that the DVBE proposed in the bid or proposal to the state was used on the contract unless a substitution was requested and approved.



Elements of SB 588

- ❖ For violations of numbers (1)-(4) above from MVC 999.5(d), the awarding department must:
 - Send a Cure Notice to the prime contractor giving them 15-30 days to fulfill the MVC 999.5(d) requirements.
 - Withhold \$10,000 from the final payment or the full final payment if less than \$10,000, until a prime contractor can certify that those conditions were met.
- ❖ The Legislative Analyst Office completes a comprehensive assessment of the DVBE program and submit a report to the Legislature that all state entities shall assist it in to the greatest extent possible.
- ❖ To sue for compliance, a competitor or contractor must contact the contracting administrator or DVBE Advocate of the awarding department OR reach out to sb.dvbecompliance@dgs.ca.gov.



CALIFORNIA DEPARTMENT OF GENERAL SERVICES



Office of Small Business
and Disabled Veteran
Business Enterprise Services

Advocate Role and Responsibilities

*Elizabeth Lesniak
SB & DVBE Advocate*

Business Services Office

CAL FIRE

Elizabeth.Lesniak@fire.ca.gov

Advocate Role and Responsibilities

Expectations and Tools for Success

- » Know your department's buying needs
- » Clarify procurement processes for vendors
- » Troubleshoot prompt payment issues
- » Create a dedicated SB/DVBE Advocate email address and designate a backup
- » Prepare a template email to respond to inquiries promptly.
- » Share links to helpful vendor resources
- » Update SB/DVBE Advocate Directory contact info



Advocate Role and Responsibilities

Encourage SB/DVBE Participation

- » Promote smart policies to ensure your department meets its annual SB/DVBE participation goals
- » Become an expert in identifying SB/DVBE in Cal eProcure and/or using the [Procurement dashboard](#) and [CalSAT](#)
- » Update SB/DVBE-related desk manuals, policies and procedures, solicitation documentations and forms
- » Review SB and DVBE Exemptions requests carefully
- » Track and review CAR data monthly to ensure SB and DVBE prime and subcontractor information is captured correctly



Advocate Role and Responsibilities

Build a Culture of SB/DVBE Awareness

- » Build an active partnership with your department buyers.
- » Be visible: present SB/DVBE program information and resources on an ongoing basis at team meetings.
- » Create a shared folder to share vendor capabilities statements.
- » Stay current on legislation impacting the SB/DVBE programs.
- » Management support is key.



Advocate Role and Responsibilities

Resources

- » Connect with other Advocates on the ListServ: [ListServ Access](#)
- » Connect with Statewide Advocacy Support Program: Advocate@dgs.ca.gov
- » Update Advocate Contact Information: [SB and DVBE Advocate Update Form](#)
- » Attend Quarterly Advocate Meetings: <https://www.dgs.ca.gov/PD-Advocate-Info>
- » CAR Report contact: OSDSReports@dgs.ca.gov
- » 2025 SARA Awards: [24th Annual State Agency Recognition Awards \(ca.gov\)](#)



CALIFORNIA DEPARTMENT OF GENERAL SERVICES



Office of Small Business
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Business Enterprise Services

The Importance of Debriefs

*Imran Chaudhary
OSDS Statewide Advocacy Support Program Manager*

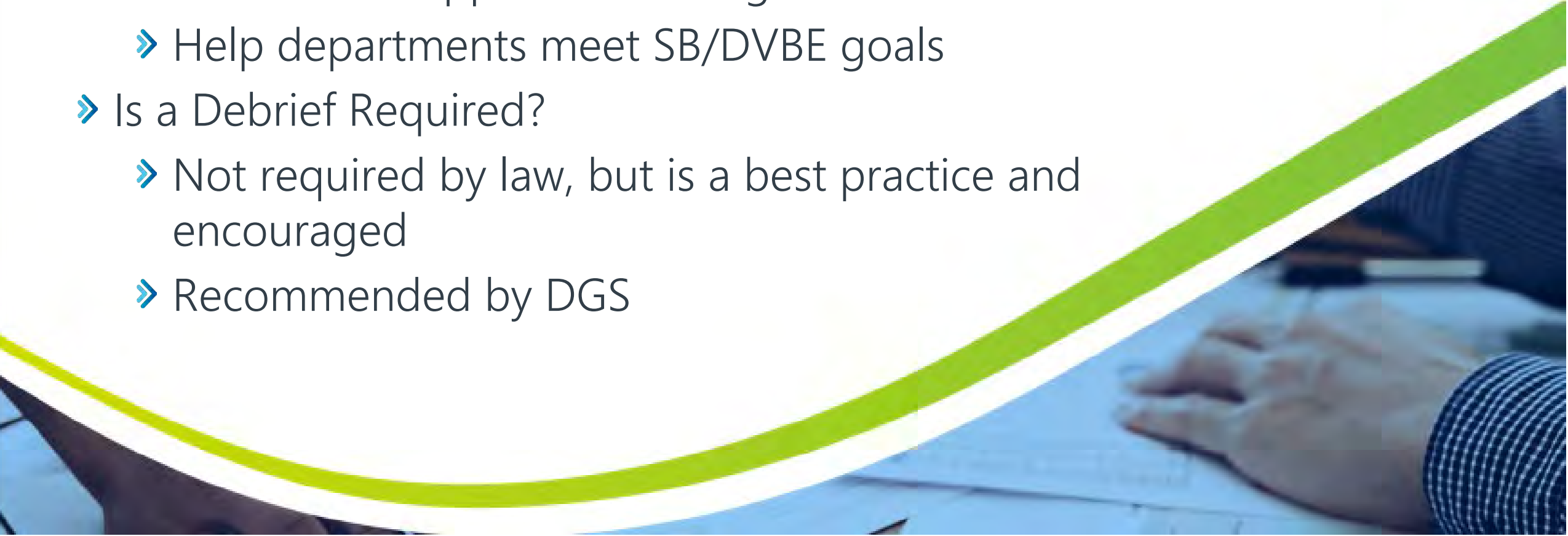
*Office of Small Business and Disabled
Veteran Business Enterprise Services*

Department of General Services

Imran.Chaudhary@dgs.ca.gov

Importance of Debriefs

- » Why Provide Vendor Debriefs?
 - » Demonstrate transparency
 - » Build long-term trust and vendor relationships
 - » Feedback to support vendors' growth
 - » Help departments meet SB/DVBE goals
- » Is a Debrief Required?
 - » Not required by law, but is a best practice and encouraged
 - » Recommended by DGS





Importance of Debriefs

- » Benefits for Departments and Vendors
 - » For departments: reduces misunderstandings, enhancing quality and competitiveness of future bids and insights into improving language.
 - » For vendors: clarifies strengths and weaknesses of their proposal, offers feedback and increases confidence.
- » Key Steps in the Debriefing Process
 - » PCC 10300 and the requirement to maintain competition and fairness.



Importance of Debriefs

- » Set a deadline to request a debrief.
- » Develop a template/checklist for consistency
- » Set a time limit
- » Establish ground rules in consultation with legal
- » Set the tone upfront, acknowledge emotions
- » Train staff on Dos and Don'ts
- » Invite all interested vendors who would like a debrief, but meet with them separately
- » Make debriefs a standard part of procurement



Importance of Debriefs

- » Focus on facts and published evaluation criteria
- » Protect confidentiality
- » Be timely and professional
- » Document the process
- » Debriefs & SB/DVBE Goals: Leads to Success
 - » Debriefs can help SB/DVBE understand requirements and standards
 - » Increases likelihood of a bidder having success in the future
 - » Opportunity to clarify requirements unique to SB/DVBE contracting

CALIFORNIA DEPARTMENT OF GENERAL SERVICES



Office of Small Business
and Disabled Veteran
Business Enterprise Services

California SB/DVBE Atlas Tool

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What Does CalSAT Do?

- » User-friendly interactive mapping tool
- » Locates certified SBs and DVBES across California
- » Highlights regions that may benefit from additional outreach
- » Integrates CalEnviroScreen 4.0 data
 - » Identifies most disadvantaged communities based on their CalEnviroScreen scores
 - » Based on geographic, socioeconomic, public health and environmental burden indicators
- » Combines procurement activity and firm locations





Why this Matters

- » \$13.5 billion awarded in state contracts (FY 2023-24)
 - » \$3.5 billion to Small Businesses
 - » \$625.8 million to DVBEs
- » SB contracts generate \$5.9 billion in new economic activity
- » DVBE contracts generate \$1.2 billion in new economic activity
- » Supports over 35,000 net new jobs and \$2.8 billion in labor income
- » Every \$100 spent = \$196 total economic output
- » 68% of SB dollars stay in-state vs. 48% for large businesses

Aligning with AB 1574

- » Requires departments to continuously expand their SB, MB, and DVBE bidder pool
- » Calls for regularly seeking certified businesses that are:
 - » Not regularly used by your department
 - » Not previously used by the state
- » CalSAT helps identify:
 - » Underutilized certified businesses
 - » Regions with low SB/DVBE presence
 - » New outreach opportunities
- » Supports targeted action to meet statutory requirements
- » Builds a more inclusive and competitive contracting environment



How CalSAT Works

County Details

Search by City

Search by Certification ID

Search by Business Name

Search by UNSPSC

Select a Fiscal Year

2024-2025

DGS

STATE OF CALIFORNIA

OFFICE OF SMALL BUSINESS

AND DISABLED VETERAN BUSINESS ENTERPRISE SERVICES

Select a County from table below then click here to view city-level details.

California SB/DVBE Atlas Tool (CalSAT)

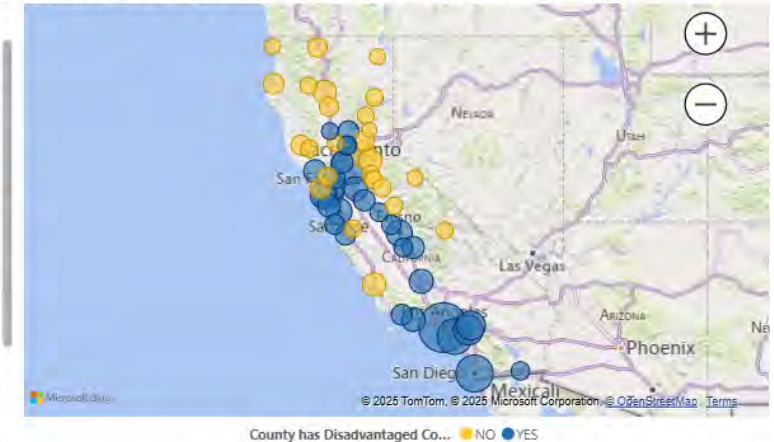
County Details

Instructions: To view City level details, select a County from the table below then right click and select 'Drill through' or click on button above.

County	Disadvantaged Communities (Disadv. Comm.) Share - %	Disadv. Comm. - Count	SB/DVBE in Disadv. Comm. - %	Total SB/DVBE Count	State Dollars to SB/DVBEs in Disadv. Comm. - %	Total State Dollars to SB/DVBEs	Prime Contractor Dollars to SB/DVBE Subcontractors	State Purchase Orders to SB/DVBEs in Disadv. Comm. - %	Total Purchase Orders to All SB/DVBEs - Count
Alameda County	13.48%	36	25.98%	970	82.46%	\$64,480,365.23	\$10,939,877.79	55.97%	436
Amador County	0.00%	0	0.00%	45	0.00%	\$2,776,064.77	\$61,846.10	0.00%	0
Butte County	2.44%	1	2.61%	153	1.16%	\$18,178,825.46	\$975.36	0.47%	5
Calaveras County	0.00%	0	0.00%	45	0.00%	\$1,433,378.09	\$0.00	0.00%	0
Colusa County	0.00%	0	0.00%	21	0.00%	\$3,683,649.96	\$0.00	0.00%	0
Contra Costa County	17.71%	31	19.87%	629	14.25%	\$38,348,297.40	\$9,629,151.53	9.20%	133
Del Norte County	0.00%	0	0.00%	6	0.00%	\$291,963.51	\$0.00	0.00%	0
El Dorado County	0.00%	0	0.00%	265	0.00%	\$37,981,764.96	\$64,904.50	0.00%	0
Fresno County	53.69%	80	49.31%	507	71.29%	\$72,449,372.04	\$797,299.76	80.98%	2,780
Glenn County	0.00%	0	0.00%	17	0.00%	\$3,732,985.41	\$0.00	0.00%	0
Humboldt County	0.00%	0	0.00%	131	0.00%	\$6,012,937.82	\$0.00	0.00%	0
Imperial County	73.68%	14	83.02%	53	99.30%	\$10,227,350.09	\$0.00	90.59%	77
Inyo County	0.00%	0	0.00%	15	0.00%	\$560,979.04	\$0.00	0.00%	0
Kern County	53.06%	52	51.47%	340	30.95%	\$7,104,877.75	\$44,329.96	45.95%	431
Kings County	61.90%	13	56.25%	64	29.60%	\$5,394,501.52	\$7,066.57	60.84%	101
Lake County	0.00%	0	0.00%	33	0.00%	\$2,965,012.00	\$0.00	0.00%	0
Lassen County	0.00%	0	0.00%	31	0.00%	\$1,654,768.73	\$0.00	0.00%	0
Los Angeles County	43.01%	677	40.96%	4,736	40.06%	\$155,281,480.16	\$26,179,584.33	46.78%	1,744
Madera County	57.89%	11	55.42%	83	20.31%	\$1,827,965.78	\$33,087.49	50.57%	44
Marin County	0.00%	0	0.00%	156	0.00%	\$5,493,152.85	\$202,569.61	0.00%	0
Mariposa County	0.00%	0	0.00%	25	0.00%	\$2,875,864.98	\$0.00	0.00%	0
Mendocino County	0.00%	0	0.00%	101	0.00%	\$12,986,353.19	\$2,598,183.31	0.00%	0
Statewide Total	25.62%	1,468	26.08%	20,698	29.91%	\$1,639,614,956.82	\$149,974,730.31	29.41%	12,855

[Click here for more information on the calculations.](#)

Counties - Size by Number of SB/DVBE Certified Firms



Counties - Size by Total State Procurement Dollars to SB/DVBE Certified Firms



Refining Results

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Search by City

Search by Certification ID

Search by Business Name

Search by UNSPSC

1. Select a Fiscal Year

2024-2025

DGS

STATE OF CALIFORNIA

OFFICE OF SMALL BUSINESS

AND DISABLED VETERAN BUSINESS ENTERPRISE SERVICES

2. Search by UNSPSC

72151200 - Special trade construction & maintenance services - Heating cooling air condit. HVAC constructi...

Select a Certified Firm from table below then click here to view UNSPSC Profile details.

California SB/DVBE Atlas Tool (CalSAT)

Location of SB/DVBE Certified Firms

SB/DVBE Certified Firm Details

Instructions: To view more details, select a Certified Firm from the table below then right click and select 'Drill through' or click on button above.

SB/DVBE Certification ID	Name	County	City	In Disadvantaged Community? Y/N	Number of Certified Firms
2042530	AKAM DEVELOPMENT CORPORATION	Orange County	Mission Viejo	NO	1
2042505	SLAYTON MECHANICAL CONTRACTORS, INC.	San Diego County	Lakeside	NO	1
2042319	PREMIER MECHANICAL LLC	Kern County	Keene	NO	1
2042295	CAL BEAR HEATING AND AIR	Sacramento County	Rancho Cordova	NO	1
2041942	ROXANA NARAGHI	Los Angeles County	Los Angeles	NO	1
2041804	DYNAMIC HOME PERFORMANCE INC.	Sacramento County	Citrus Heights	YES	1
2041433	BEE CONSTRUCTION INC.	Orange County	Costa Mesa	NO	1
2041335	XPRESS HEATING & AIR	San Bernardino County	Upland	YES	1
2041306	SUB ZERO HVAC SERVICES	Sacramento County	Citrus Heights	NO	1
2041185	ALPHA PRIME SOURCING LLC	Orange County	Mission Viejo	NO	1
2041017	REYNOLDS HEATING AND A/C	Butte County	Oroville	NO	1
2040950	COLD SNAP AIR CONDITIONING LLC	Tehama County	Red Bluff	NO	1
2040902	ZIMMER MECHANICAL CO LLC	San Diego County	La Mesa	NO	1
2040603	ONYX MARINE SOLUTIONS LLC	San Diego County	Chula Vista	NO	1
2040522	MORRIS LEVIN & SON	Tulare County	Tulare	YES	1
2040485	TRI VALLEY HVAC LLC	Alameda County	Pleasanton	NO	1
2040413	THP MECHANICAL LLC	El Dorado County	El Dorado Hills	NO	1
2040287	PACIFIC GENERAL CLEANING SERVICE INC	Orange County	Santa Ana	YES	1
2040208	BWE PROPERTY SOLUTIONS LLC	Sacramento County	Citrus Heights	YES	1
2040193	GOLDEN GATE MECHANICAL, INCORPORATED	Santa Clara County	Santa Clara	YES	1
2039784	KOOLRITE REFRIGERATION	Los Angeles County	Palmdale	NO	1
2038516	ATLE CORPORATION	Santa Clara County	Santa Clara	NO	1
Total					485

Drilling into CalSAT Data

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Total					485

Location of SB/DVBE Certified Firms

In Disadvantaged Community? Y/N

NO

Y 38.655793719

X -121.4477401

Fiscal Year

2024-2025

County

Sacramento County

City

Sacramento

Census Tract Number

6067007204

Certification ID

2003640

Certification Type

SB

First Year Certified

2020

State Procurement Dollars to SB/DVBEs

344113.43

Total Purchase Orders - Count

1

Prime Contractor Dollars to SB/DVBE

0

Subcontractors

Industry Type

Construction,Service

Focused Outreach & Vendor Engagement

- » Filter by geography, UNSPSC code, and disadvantaged community status
- » Identify gaps in available SBs and DVBES
- » Locate underutilized SBs and DVBES in specific regions
- » Support focused outreach to ready-to-contract certified firms
- » Maximize time and resources by aligning outreach with need
- » Strengthen supplier pool and expand competition





Resources

- » Access the CalSAT Tool
 - » [CalSAT Mapping Tool](#)
- » CalSAT Frequently Asked Questions
 - » [CalSAT FAQs](#)
- » CalSAT Overview on DGS website
 - » [SB DVBE Atlas Tool CalSAT](#)
- » 2024 Economic Impact Study of SB and DVBE Programs-Key Findings
 - » [2024 EIS Key Highlights](#)
- » CalEnviroScreen 4.0
 - » [CalEnviroScreen 4.0 – OEHHA](#)

If you have any questions, please email
Advocate@dgs.ca.gov

CALIFORNIA DEPARTMENT OF GENERAL SERVICES



Office of Small Business
and Disabled Veteran
Business Enterprise Services

Closing Remarks

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Department of General Services

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Contact Information

Statewide Advocacy Support Program

Office of Small Business and DVBE Services

California Department of General Services

Advocate@dgs.ca.gov



CALIFORNIA DEPARTMENT OF GENERAL SERVICES



Office of Small Business
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Business Enterprise Services

Break

Will start in 5 minutes

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Department of General Services
Advocate@dgs.ca.gov

CALIFORNIA DEPARTMENT OF GENERAL SERVICES



Office of Small Business
and Disabled Veteran
Business Enterprise Services

Smaller Agency Session

Imran Chaudhary
OSDS Statewide Advocacy Support Program
Manager

*Office of Small Businesses
and Disabled Veteran Enterprises*

Department of General Services
Advocate@dgs.ca.gov

Common Challenges for Smaller Agencies

Just one contract can drastically skew our SB and DVBE percentages!

There's a limited pool of specialized suppliers!

There are just not enough resources!

Our mandatory LPAs are not with SB/DVBEs!

SB and DVBE pricing is not as competitive!

Our purchases are done by another department!





Recommendations for Common Smaller Agency Challenges:

- » Finding Vendors for Niche Contracts
 - › Reach out to the [OSDS Advocacy Section](#) for help in finding SB contractors.
 - › Reach out to [CalVet](#) for help in finding DVBEs.
 - › Break up large contracts.
 - › Use and/or mandate SB/DVBE subcontractors.
 - › Utilize the Emergency Registry.



Recommendations for Common Smaller Agency Challenges:

- » Overcoming Outreach Challenges
 - Partnering with OSDS to host an event.
 - Partnering with other departments to host events.
 - Attend events hosted by DGS, other departments or Local Organizations.



Recommendations for Common Smaller Agency Challenges:

» Handling Mandatory LPAs

- Work with Acquisitions on the forefront to include certified SBs and DVBES or an off-ramp.
- Reach out to OSDs for help in modifying existing challenges to include off-ramp.

For more information or assistance,
contact the Advocacy Support Section
at *advocate@dgs.ca.gov*



CALIFORNIA DEPARTMENT OF GENERAL SERVICES



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FAQs

QUESTIONS

ASK

Q & A



*Thank You
for Participating*

