

SMALL BUSINESS AND DISABLED VETERAN BUSINESS ENTERPRISE CONTRACTING BEST PRACTICES: IMPLEMENTATION PLAN CHECKLIST

INSTRUCTIONS: For each best practice listed below, indicate whether your department is currently performing the specified task. Next, explain your department’s current process for each best practice you indicated “yes” for in the “Current Process / Implementation Plan column. For those that are checked “no,” explain how your department plans to implement the practice in the future.

CATEGORY	BEST PRACTICE	CURRENT PRACTICE	CURRENT PROCESS / IMPLEMENTATION PLAN
Bids / Contracts	<p>When drafting a Scope of Work, instruct buyers to query the SB/DVBE database to solicit those vendors first.</p> <ul style="list-style-type: none"> • Refer to Cal eProcure database 	Yes No	
	<p>Create strong bid language focused on outreach and education to acquire SB and/or DVBE awards.</p>	Yes No	
	<p>Require all bid proposals to be targeted to the SB/DVBE community.</p> <ul style="list-style-type: none"> • Refer to SB/DVBE First Policy 	Yes No	
	<p>Local requirement to contact at least one SB/DVBE in every competitive bid solicitation.</p> <ul style="list-style-type: none"> • Refer to Solicitation Language 	Yes No	
	<p>Unbundle contracts to enhance SB/DVBE participation, i.e. break contracts down into economically feasible units.</p>	Yes No	

CATEGORY	BEST PRACTICE	CURRENT PRACTICE	CURRENT PROCESS / IMPLEMENTATION PLAN
Executive Support	<p>Executive management supports the efforts of the SB/DVBE Advocate’s outreach efforts to attend DGS sponsored events.</p> <ul style="list-style-type: none"> Refer to Government Code 14845 	<p>Yes No</p>	
	<p>Top management promotes and ensures the attainment of SB/DVBE goals, as part of the department’s procurement objectives.</p> <ul style="list-style-type: none"> Refer to SB/DVBE First Policy 	<p>Yes No</p>	
	<p>Monthly and/or quarterly participation reports provided to Executive staff to make it easier for each unit and branch to monitor their individual impact of the SB/DVBE goals.</p> <ul style="list-style-type: none"> Refer to DGS’ Contracting Activity Report form 	<p>Yes No</p>	
	<p>Executive staff understands the importance of the SB/DVBE Program and the advantages it provides to SB/DVBES and the economic to the.</p> <ul style="list-style-type: none"> DGS’s “How to Do Business with the State of California” Brochure 	<p>Yes No</p>	
Outreach	<p>Assist prime contractors with locating certified SB/DVBE vendors by utilizing the United Nation Standard Product and Service Codes (UNSPSC) classifications in solicitations.</p> <ul style="list-style-type: none"> Refer to UNSPSC codes <p>NOTE: DGS is currently working on a condensed list of only 5,000 classification codes to be used for solicitations</p>	<p>Yes No</p>	

CATEGORY	BEST PRACTICE	CURRENT PRACTICE	CURRENT PROCESS / IMPLEMENTATION PLAN
Outreach (continued)	<p>Be consistent and work diligently to build working relationships with SB/DVBE firms who provide diverse services and products.</p>	<p>Yes No</p>	
	<p>Assist qualifying vendors to be certified to do business with the State of California.</p> <ul style="list-style-type: none"> • DGS's registration and certification process 	<p>Yes No</p>	
	<p>Explain the benefits of certification; provide links to the DGS website, as well as provide guidance in navigating the certification process.</p> <ul style="list-style-type: none"> • DGS's "How to Do Business with the State of California" Brochure 	<p>Yes No</p>	
	<p>Continually assist vendors with state services, procurement and contracting processes on how to do business with the State of California.</p> <ul style="list-style-type: none"> • DGS's "Introduction to State Contracting" Workshop 	<p>Yes No</p>	
	<p>Collectively share innovative ideas with the advocates and management; hold customer forums to provide education and outreach.</p> <ul style="list-style-type: none"> • Attend DGS/CalVet's Advocate Workshops 	<p>Yes No</p>	

CATEGORY	BEST PRACTICE	CURRENT PRACTICE	CURRENT PROCESS / IMPLEMENTATION PLAN
Outreach (continued)	<p>Departments should consider using focused recruitment activities outlined in Senate Bill 1045 (Polanco) to increase diversity among the underrepresented small businesses.</p> <ul style="list-style-type: none"> Refer to Senate Bill 1045, Section 11139.7 	<p>Yes No</p>	
	<p>Advertise SB/DVBE contract opportunities beyond Cal eProcure solicitations by placing them on your department's web site / homepage, diversity magazines and newspapers.</p> <p>A list of the division's upcoming solicitations:</p> <ul style="list-style-type: none"> Procurement Division Office of Business and Acquisition Services 	<p>Yes No</p>	
SB/DVBE First Policy / SB/DVBE Option	<p>Adopt a policy to procure all goods and services through SB/DVBEs when possible. Provide documentation that an attempt was made before using the formal bidding process.</p> <ul style="list-style-type: none"> Refer to SB/DVBE First Policy 	<p>Yes No</p>	
Training	<p>Acquisition staff are required to complete Cal-PCA Basic Acquisition and SB/DVBE Option training.</p> <ul style="list-style-type: none"> California Procurement & Contracting Academy web page 	<p>Yes No</p>	
	<p>Cross-train staff in reporting requirements and processes.</p> <ul style="list-style-type: none"> DGS SB/DVBE Contract Reporting web page 	<p>Yes No</p>	

CATEGORY	BEST PRACTICE	CURRENT PRACTICE	CURRENT PROCESS / IMPLEMENTATION PLAN
	<p>Continuous training of staff on how to utilize the SB/DVBE supplier community, use of the SB/DVE off-ramp for statewide contracts; and using Cal eProcure to search for and contact SB/DVBEs within the community.</p> <ul style="list-style-type: none"> • Sample Contracting Presentation 	<p>Yes No</p>	
Other	<p>Establish a vendor management tool to track products a SB/DVBE firm is authorized to resell – request quotes electronically.</p>	<p>Yes No</p>	