



California Department of General Services (DGS)

SB/DVBE Advocate Workshop Meeting Minutes

Date: Tuesday, June 4, 2019

Time: 1:30 P.M - 4:00 P.M.

Location: Department of Consumer Affairs
1747 N. Market Blvd, #186
Sacramento, CA 95834

Meeting Facilitator: Michael Aguilio

Recorder: Tracy Bowen & Nina Martinez

GO-BIZ – Michelle Nguyen, SB Specialist

New Director of the Office of Small Business Advocate

- Isabel Guzman – New GO-Biz Director
 - Procurement is one of her priorities
 - Looking to find challenges with small business

Grants

- Wrapping up third quarter of grants
 - Bid-match was part of proposals to fund technical assistance programs with expanding their existing services.

*Bid-match - A system similar to Cal eProcure which allows data mining of other systems to see available opportunities.

CALVET – Rose Skewis, SB/DVBE Coordinator

Elizabeth Perez – Statewide Advocate

DVBE Advisory Council Meeting

Chaired by Elizabeth Perez – Statewide Advocate Minutes will be shared when available

Next meeting will be held on August 15, 2019 at Travis AFB

DVBE Audit

- Cal Vet reviewing findings
- Developed a complaint policy
 - Use Cal Trans policy as template to create and put in place a complaint process for the department

- Create Mailbox for receiving complaints
- Email Rose Skewis at Rose.Skewis@CalVet.ca.gov for any information on creating a policy and procedures
- SB/DVBE's are not notified they are listed on contracts
 - Effective 7/1/19, implementing notification process when executing contracts to cc: subs in an attempt to make them aware they have been identified on contract

Department of General Services Legislation Update – Jordan Aquino, Legislative Consultant

DGS has no approved position on the 5 legislation bills discussed.

AB 230 (Brough) - Disabled Veteran Business Enterprises

- Requires a prime contractor utilizing a DVBE subcontractor to provide proof of payment
- Requires awarding department to review documentation received for accuracy and completeness
- **If** the amount paid does not reflect the DVBE participation committed to the awarding department must notify DGS
 - Payment information to be reflected in updated/published Consolidated Annual Report
- Requires DGS to verify conditions for DVBE subcontractor substitutions

AB 1365 (Veteran Affairs) - Disabled Veteran Business Enterprises Program

- Require awarding department to maintain specified records by a prime contractor for a minimum of six years
- Requires departments to establish appropriate review procedures to ensure accuracy and completeness of records
- Requires department to notify DVBE subcontractors listed on the bid of award of contract

AB 1808 (JED&E) – Small Business Advocate: CA Disabled Veteran Business Enterprise Program

- Requires the state's Small Business Advocate (GO-Biz) to collaborate with the state's DVBE Advocate (Cal Vet) regarding implementation of the DVBE program
 - Promote DVBE certification to veteran entrepreneurs
 - Undertake reasonable means to assist state agencies in improving SB and DVBE procurement participation

AB 1809 (JED&E) – Disabled Veteran Business Enterprises

- Prohibit a SB or DVBE from receiving a preference or incentive as part of streamlined procurement methods

- Increases the maximum value under the SB/DVBE Option to \$500,000
- Requires awarding departments to post specified information submitted by primes to the departments website
- Requires CalVet to maintain specified records of promotional efforts related to the DVBE program

SB 588 (Archuleta) – Public Contracts: Disabled Veteran Business Enterprise Program

- Imposes penalties on a prime contractor that fails to submit a certification to the awarding department regarding DVBE participation
 - First Violation: Five year contracting ban
 - Second Violation: Permanent contracting ban

DVBE Audit – Brooke Droege, DGS, Outreach Manager & Daniel Rosinsky-Larsson, Outreach Liaison

DGS survey request was sent to every department's Advocate - 77 responses received

- Survey still available for those departments that have not responded

DGS will present a different audit recommendation at each workshop for discussion.

DVBE Audit Recommendation #5 - Revamping use of Keywords and UNSPSC Codes

To ensure that awarding departments can effectively identify DVBE firms that provide needed products/services, DGS should continue to provide outreach services to DVBE firms on how to create effective keywords and choose appropriate codes.

Topics:

- What level is typically used for searches/Do you perform multiple searches with different UNSPSC code levels?
 - Parent (level 1); some use lower levels to narrow search
- How and when are Advocates using UNSPSC codes and keywords?
 - Majority use keywords only; small amount use combination to obtain a good pool of vendors
- How Broad or specific are the searches?
 - Depends on good or service –
 - If printing paper
 - Printing, copy and/or writing paper
 - If IT
 - hardware or software
 - consulting
 - specific to brand

Contracting Activity Reporting – Anda Draghici, DGS, Division of OSDS Manager

Reporting Updates

- Mandatory Reporting – Each department annually
- Changes from FY 17-18
 - Effective 1/1/19, Public Works (PW) Certification is captured under SB participation
 - Effective 1/1/19, DVBE Incentive Waiver is based on justification
 - List of Departments who met both requirements was abolished – Broadcast Bulletin forthcoming
 - DVBE Audit Recommendations/Requirements
 - Accuracy and Consistency – require departments to include a secondary review
 - Validate top dollar contracts – those that will impact SB/DVBE participation
 - Form changes
 - ADA compliance
 - Separate SB Option from DVBE Option; data no longer reported together
- Report Verification/Validation
 - Non-Fiscal Departments
 - List Contracts, Purchase Orders, Cal Card Transactions
 - Transaction Number
 - Reporting Category, Acquisition Type, Sub-Type and Method
 - Total Transaction Amount
 - Prime & Certified Subcontractor Amounts/Percentages
 - Certification Type and Expiration Dates
 - Fiscal Departments
 - Data extract including all of the above + much more
 - Support documentation for Forms 810, 810S and 810A
 - Shows data includes on subcontracting page and how is reported
 - Runs automatically when you run Form 810
 - Can be ran for the entire fiscal year, YTD, or with custom dates
 - Job-aid /instructions available
 - Available to departments using SCPRS
- SB/DVBE Subcontractor Page
 - Defect issues reported of subcontractors not populating
 - Looking for solution to prepopulate those that have already been entered
 - Transactions in complete status cannot be edited
 - Contact DGS if there are multiple contracts/purchase orders that will impact reporting
- VSDS/ERGSO Report
 - Confidential information

- Should not be filed with or tied back to associated contract or purchase order
 - Statue states to report only what is received from vendors
- I-Bond Activity Report
 - Will be pushed into production in a few weeks
- **Important Info**
 - SAVE all reports and validation information for department records
 - All BU reports will display who ran the report, the date, the time, and type
 - Links to Job Aids
 - [Running the 810 reports in FI\\$Cal](#)
 - [Running a departments data validation query](#)
 - Cover Letter
 - Non-Fi\$cal Departments – paper submitting departments must submit cover letter
 - Fiscal Departments can use letter as internal communication tool with Executive Management and keep for records
 - Cover letter needed if reporting for multiple BU's, submitting improvement plan, and for revisions
 - Improvement Plan: [SB/DVBE Participation Improvement Plan](#)
- **Deadlines** – Reminders forthcoming
 - July 12, 2019 – Webinar Training: CAR FAQ Session
 - August 1, 2019 - CAR Report Due by COB
 - Preferred Paper submittal: OSDSReports@dgs.ca.gov
 - August 2, 2019 - OSDS runs and saves all reports, except extensions
 - August 2 or 3, 2019 - BUs run their own final reports and SAVE FOR THEIR RECORDS
 - **Extensions – only allowed for this first year of Fi\$cal transactions**
 - Post extension - BUs to run their own report
 - October 15, 2019 - No revisions or extension past this date
 - January 1, 2020 – OSDS publishes report
- **Tips:**
 - **All Departments:**
 - Keep in touch with OSDS at OSDSReports@dgs.ca.gov
 - Run your report and data validation query, verify reported data on a sample basis monthly, or at least quarterly
 - Reconcile the reports with your transactions
 - Develop/strengthen secondary review and approval process
 - Go back and correct during the fiscal year to the extent possible
 - Contact OSDS if you reported multi-year on an annual basis to determine how we can capture and report the remaining dollars
 - **FI\$CAL Departments:**
 - Specify fiscal year on Change Orders or amendments
 - Report defects to FSC and cc OSDSReports@dgs.ca.gov
 - Sign up for July FAQ/user lab session

- OSDS Contacts:
 - CAR Report Questions:
 - OSDSReports@dgs.ca.gov
(916) 375-4940
 - Anda Draghici, OSDS Manager (always cc: OSDS Reports)
Anda.Draghici@dgs.ca.gov
(916) 375-3115
 - Improvement Plan Questions
 - Brooke Droege, Outreach Manager
Brooke.droege@dgs.ca.gov
(916) 375-4394
 - **For reports requirements, forms, and instructions, please go to:**
<https://www.dgs.ca.gov/PD/Services/Page-Content/Procurement-Division-Services-List-Folder/File-a-Consolidated-Annual-Report>

**Vendor Highlight –
Stay Safe Solutions – Jeff Tewksbury & Doug Eldridge, Representatives**

Stay Safe Solutions, Inc is a SB/DVBE (#1752562) with an extensive list of products, commodities, and solutions they can deliver. This company’s mission is to successfully fulfill and service Government contracts with their innovations, diverse products, quality, personal service, and attention. They can manage complex procurements and have successfully contracted with State departments providing copy paper, rainwear, promotional items, traffic controllers, hospital beds, car seats, and much more. They currently hold CMAS contract #4-17-84-0057A for commodity equipment and NASPO agreement #7-16-99-26-01.01 for laboratory equipment and supplies. Their contact info for additional information or feedback from this workshop is:

Jeff Tewksbury
530.409.6882
jeff@staysafesolutions.com

Douglas Eldridge
916.382.9557
bids@staysafesolutions.com

Upcoming Events – Tracy Bowen, CHP, SB/DVBE Advocate

- CalCon Expo 2019 – July 18-19-10, 2019 (Anaheim)
- Upcoming Events Link: <https://www.dgs.ca.gov/PD/Events>

Attendee List

Attended in Person

Duane McCune – Cal State University Humbolt
Kim Holmberg – Cal State University Sacramento
Amanda Blackwell – CalFire
Andrea Pina – Department of Consumer Affairs
Jennifer Crow – Food and Agriculture

Nina Martinez – Corrections and Rehabilitation HQ
Joan Dutra – First 5
Danetta DePaul – Food and Agriculture
Donna Weber – Food and Agriculture
Lauren Sharon – Department of General Services
Michele Sakamoto – Parks and Rec
Ronold Wahl – CalRecycle
Jonathan Chavez – State Hospitals
Damon Dorn Sr. – Caltrans HQ
Rose Skewis – Calvet
Anda Draghic – DGS Certification
Tracey Bowen – CHP
Jen Johnson – Controllers
Norma Miranda – F\$SCAL
Jenifer Henneke – Go-Biz
Katy Sullivan - Air Resource

18 people joined on online by Skype

Powerpoint

- PowerPoint presentation is available upon request at Advocate@dgs.ca.gov

Next SB Advocate Workshop Date

- September 10, 2019

Meeting Adjourned

Michael Aguilio, DGS at approximately 3.53 pm.