



Meeting Recap

Tuesday, January 19, 2021
1:30 p.m. to 2:30 p.m.

1. Welcome

Cheryl Angeles, Supervisor, Purchasing Authority Unit, Policy, Training & Customer Services (PT&CS) Branch, PD, DGS

Cheryl Angeles opened the meeting to welcome all participants and provided instructions on participating in the PART Microsoft Teams meeting and reminded participants to mute speakers to minimize background noise.

2. Procurement Division (PD) Update

Angela Shell, Deputy Director, PD, DGS

DGS Director Daniel Kim has left state service to take a Yolo County position as of December 2020. Jennifer Osborn who previously worked at CDCR has recently been approved as the new DGS Chief Deputy Director and is also the Acting Director for DGS until the vacant DGS Director position is filled.

- California State Proposed Budget - Released a week ago which includes an eight-page summary. Sections regarding procurement will focus on Small Business (SB) as a priority. Many state agencies have SB buy first procurement policies, however, there will be some additional information later to come on internal requirements. Recommend state agency procurement policies to find ways to address and focus on SB buys first. The budget also focuses on equity in procuring such as providing all bidders an opportunity to compete in all competitive procurements.
- DGS Strategic Goals - Large scale PD goals for calendar year.
 - Create an E-marketplace - state contracts catalogue implementation to easily view procurement sources.
 - E- market will provide bulk pricing and a sustainability tool embedded in FI\$CAL similar to the PIA Punchout functionality.
 - Focus on sustainability purchases- track gas/water consumption. Over 1 million items purchased to be turned into bulk order.
 - E-market IT Project will be a long-term multi-year goal.
 - Emergency Contract Vendor Registry – Necessitated by CA fire disasters and the COVID pandemic. Registry will contain searchable state registered contractors who can provide emergency services caused by a natural disaster or health related pandemic. Registry includes SB/DVBE vendor database. Interested contractors are able to register and be added to the registry.

- SCM Consolidation - Continue to combine SCM (2, 3, and F) versions and update statewide forms and electronic signature policy. Completion by this year.
- COVID Procurements – PD buyer duties diverted to address COVID procurement needs including vaccine responses and are still reporting to the State Operations Center (SOC). PD continues to renew or extend LPAs to mitigate a lapse in contract time.
- Masks - Statewide Contract LPA has 58 vendors to choose from and provides two purchasing levels - under 1M (standard pricing) and over 1M (bulk pricing). Recommend acquiring masks from the state’s stockpile in lieu of mask purchases on the statewide contract. These masks have already been purchased for state agency use. Submit requests to the SOC, Logistic and Commodities Task Force.
- Angela thanked the PAU Team and PAU leadership team, Sarah Cering and Cheryl Angeles, for completing the implementation part of the Accreditation schedule and for a successful first year of the Accreditation program.

3. Purchasing Authority Accreditation

Cheryl Angeles, Supervisor, Purchasing Authority Unit (PAU), PT&CS Branch, PD, DGS

Purchasing Authority (PA) Accreditation program was started years ago to develop a process, enabling state agencies to improve purchasing processes.

- In December 2020, PAU completed most of the state agencies under the first phase of the PA Accreditation program.
- Once accredited to a Tier, state agencies now enter the Accreditation maintenance phase.
- Accreditation maintenance is scheduled on a triennial cycle and involves a re-assessment of a state agency’s procurement policies and procedure manual and compliance with procurement standards and measures at the accredited Tier level. The initial accreditation included CDT consultation. In the maintenance phase, CDT consultation will no longer occur.
- Current [PAU web page](#) provides a partial 2021-2023 Accreditation Schedule and will be updated when the SCM consolidation is finalized.
- State agencies already accredited can submit feedback to PAMS@dgs.ca.gov.

4. Upcoming LPAs

Carol Bangs, Branch Chief, Acquisitions Branch, PD, DGS

- Statewide Contract Masks –multiple contracts available and some are available in bulk.
- PD is always accepting requests from state agencies for statewide contracts. Submit requests to PD, DGS - CustServ@dgs.ca.gov
- Visit Cal [eProcure](#) to receive free Automatic Bid Notifications. To view all current solicitations, click Quick Links and select View/Search Bids.

Solicitation Title/Description	Contact Email	SB Preference	DVBE Requirement/Incentive	Advertisement link to CSCR
Signs, Roadway	rudolph.jimenez@dgs.ca.gov	In Development	In Development	Upcoming
Paint, Recycled Latex	amanda.lewis@dgs.ca.gov	In Development	In Development	Upcoming
Herbicides	rudolph.jimenez@dgs.ca.gov	Yes	Incentive Only	Event ID 0000017761
Fire Bulldozers	erica.sehhesiogroves@dgs.ca.gov	In Development	Incentive Only	Upcoming
Tablets	eugene.shemereko@dgs.ca.gov	Yes	Yes	Event ID 0000014575
Commercial Car Rental Services	adriana.barajas@dgs.ca.gov	Yes	No	Event ID 5209924
Information Technology Consulting Services	Thomas.Simonin@dgs.ca.gov	In Development	In Development	Upcoming

5. Policy Update

Sarah Cering, Manager, Purchasing Authority Management Section, PT&CS Branch, PD, DGS

Sarah thanked PD and the PAU team for the completion of the Accreditation program implementation and the many meetings over several years. The first round of Accreditation implementation into PA Tiers has been completed and is now in the maintenance phase of the Accreditation process.

- Standing item –SCM consolidation: At the last PART meeting, Kim Agustin explained PD, Policy Unit’s process to consolidate each of the policy pieces in SCM 2, 3, and F which in some areas are duplicative or contain conflicting information.
- Priority Assignments – Policy on DVBE implementation related bill: Received 76 comments from PART members and state agencies which has been greatly appreciated and the feedback is currently being reviewed.
- E-Signature Management Memo - currently working towards electronic signature policy updates.
- PD is currently consulting with CDT on non-reportable IT service and reportable project IT service SCM policy updates.

6. UNSPSC Updates

Renée Alexander, Manager, E-Procurement Business Intelligence Strategies Section (EBISS), PT&CS Branch, PD, DGS

Viewed screen of a FI\$Cal UNSPSC updated Custom List.

- Previously the UNSPSC list consisted of over 55K codes.
- State only uses approximately 6K, however, most are used incorrectly.
- Updated code set versions total 135K codes.
- Purpose of the update is to create a smaller custom list that is accessible and easily searched and enables users to make correct choices.
- The UNSPSC code has been reduced from 10 digits to an 8-digit commodity code. The list now has a refined hierarchy and an easier “Key Word” search feature to help obtain the correct item and a match with a potential supplier(s).
- For more information visit the Statewide Procurement Data Dashboard website: <https://www.dgs.ca.gov/PD/Resources/Page-Content/Procurement-Division-Resources-List-Folder/Intake-and-Analysis-Unit?search=dashboard>.

7. DVBE Exemption Update

Danetta Jackson, Manager, Business Outreach Program, Office of Small Business and Disabled Veteran Business Enterprise Services (OSDS), PD, DGS

- DVBE Incentive Exemption Regulation Update & DVBE Exemption Request Form STD 816 ([Broadcast Bulletin dated 12/31/20, P-08-20](#))
- Policy is effective immediately and must be implemented by March 1, 2021.
- The new form STD 816 will be required to be completed for DVBE Exemptions. Previously GSPD 07-04 waiver was used, required one signature and was a manual process. The STD 816 exemption replaces the GSPD 07-04 waiver and is an accessible format with electronic signature.
- Designate individuals that are authorized to complete, approve and sign STD 816 Form.
- Recommend each state agency to review specific updated DVBE policies in SCM 2, 3, and F and update their internal procurement DVBE policies and procedure manuals.
- Prior to completing STD 816 Form, ensure exemption does not prevent achievement of the annual three percent (3%) DVBE participation goal.
- Approvals on STD 816 are required prior to releasing a solicitation and/or soliciting offers.
- Include/attach the approved STD 816 Form to requests for DGS/Procurement Division services such as Purchasing Authority Increase request (PAIR) or for One Time Acquisitions(OTA).
- Exemption requirement applies to all contracts, NCBs and Statewide Contracts.
- Complex exemption requests may take longer - as best business practice, be sure to factor additional time into the solicitation timeline.

- OSDS created a data validation tool to view current DVBE transactions which helps OSDS assess if the state agency's DVBE goals have been met.
- For inquires email to OSDSReports@dgs.ca.gov.

8. Implementation of SB 588, AB 230 and AB 1365

Carl Josephson, Manager, Compliance and Quality, OSDS, PD, DGS

DGS has provided guidance regarding changes to the Disabled Veteran Business Enterprise (DVBE) program's subcontracting requirements resulting from enactment of three bills - modifying Military and Veterans Code Section 999.5 and adding Sections 999.55 and 999.7.

- AB 230 passed on January 1, 2020
- AB 1365 passed on January 1, 2020
- SB 588 passed on January 1, 2021
- **Broadcast Bulletin - [P-08-20 released 12/31/20](#)**
- **Changes in progress to SCM 2, 3, and F**
- **Changes in progress to General Provision Language**
 - GSPD 401 Non-IT Commodities
 - GSPD 401 IT
- **Changes in progress to Applicable Forms**
 - DGS PD 810D
 - DGS PD 810P

9. CALPCA Update

Joseph Watkins, Supervisor, CalPCA Unit, PT&CS Branch, PD, DGS

CalPCA has 2-day Contract Management seminar coming up and is geared for state agencies with Purchasing Authority. Encourage state agencies to register and/or enroll. If you have CalPCA questions, email CalPCA at CalPCAOnline@dgs.ca.gov.

- Each of 5 BAC modules must be completed before the next one will open.
- CalPCA is currently updating broken links.
- Encourage students to take the class. Students familiar with the subject matter and are able to find the correct links, please pass the link information along to other students.