



Meeting Recap

Thursday, August 6, 2020
1:30 p.m. to 3:30 p.m.

1. Welcome

Cheryl Angeles, Supervisor, Purchasing Authority Unit, PD, DGS

Cheryl Angeles opened the meeting to welcome all participants, provided instructions on participating in the PART Microsoft Teams meeting and introduced PAU's newest member, Katonya Shaw.

2. Procurement Division (PD) Update

Angela Shell, Deputy Director, PD, DGS

PD staff, volunteers and Angela Shell were dispatched to the State Operations Center (SOC) to provide COVID-19 emergency goods/services procurement support

- Bulk items and services procured: Personal Protective Equipment (PPE) - \$2 billion, N95 masks - \$500 million, hand sanitizers - \$400 million, and other items such as face shields, gloves, alternate care facilities, temporary housing, patient administrative service support, and Federal Medical Stations.
- PD staff/volunteers worked at SOC 7 days a week, 12-hour shifts
 - Performing non-traditional buyer tasks: receiver role and manage deliveries
- Vendors
 - Supplied goods not in their business model to offset shortage of COVID-19 related emergency goods
 - Fraudulent activity
 - Vendor or manufacturer were not based in the U.S.
 - 40 vendors unable to provide goods due to shortages
 - Cancellation of orders and some required dispute mitigation
- Other agencies provided support: Public Health, CalTrans, CalFire

PD Business Process Changes

- 95% of PD staff are teleworking and continue to do so
- Utilizing Microsoft Teams for meetings
- Utilizing E-signatures on documents
- Update dashboard reporting

LPA Extension Delays

- PD staff unavailable due to PD COVID-19 emergency support assignment at SOC

- Workload evaluations are underway to offset impact on customer agencies

Personnel Changes

- Ricardo Martinez retired in March
 - Back fill position delayed due to PD COVID-19 emergency support assignment
- Rhonda Smith retired end of July – 40 years with DGS
 - Carol Bangs is the new Acquisitions Branch Chief. She has been with the state for 19 years.

3. Upcoming LPAs

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

COOP Auto Parts – New contract by December 2020

MSA IT Consulting - Expires April 2021; To be replaced with a new contract

Statewide Contracts

- Special Medical Compressed Gas - Expires September 2020
 - Currently in advertisement
 - No lapse in contract
 - Award expected by September 2020
- New developments - N59 masks, respirators and PPEs
- State agency new contract suggestions or comments link is available on Statewide Contracts webpage: <https://www.dgs.ca.gov/PD/About/Page-Content/PD-Branch-Intro-Accordion-List/Acquisitions/Statewide-Contracts>

4. OSDS Outreach

Jermaine Carter-Gibson, Business Outreach Liaison, Certification and Outreach Branch, PD, DGS

DVBE Exemption Request

- California Code of Regulations (CCR) Sections 1896.99.100 – 1896.99.120, known as the DVBE Incentive was updated effective January 1, 2019
- New Item - departments meeting DVBE participation goals for two out of the three previous fiscal years cannot be considered as a basis for requesting to exempt the DVBE incentive on specific solicitations
- New DVBE exemption form ready to be released
 - SCM currently being updated and on PD website
 - Must provide full and complete request

Interagency Agreement with CalVet

- Background
 - As of April 2020, CalVet and DGS, DVBE/SB advocate support teams are working together to monitor DVBE participation goals

- Meeting with agencies who do not meet DVBE participation goals
- Will streamline the DVBE participation program
- Two AGPA positions assigned to CalVet
- Advocate Support
 - Review goals
 - Provide CUF Training
 - Collect Data
- DVBE Procurement Activities
 - DGS to leverage DVBE resources

5. CalPCA Training Update

Robert Ullrey, Section Manager, CalPCA and eLearning, PD, DGS

7,500 participants registered and completed courses since the start of the COVID-19 pandemic.

Course Contents Being Re-evaluated

- Updates to basic, intermediate and advanced courses
- Some online courses being re-evaluated were taken offline
- Coordinating course updates with SCM consolidation project
- Updated to be more 'at your pace' courses
- Two new EPP courses to be added
- 20 total courses
- Intermediate, advanced and executive course contents are in evaluation and pre-production

EPP Pre-production

- Executive courses
- Intermediate courses

Intermediate Courses

- Under pre-production evaluation
- Eleven IT courses are on a fast track completion schedule
- Estimated completion by end of 2020 or beginning of 2021
- Courses categorized by acquisition method, classification and procurement roles

Self-paced Contracts Management course will be available again in the Fall of 2020 through LMS and will be updated and re-designed into several parts.

CalPCA is in the process of reviewing course content for LPA Non-IT services, MSA IT services and IT services. Non-IT services outside of LPAs are still through OLS.

6. Buy Clean California Act

Daniel Garza, Senior Procurement Engineer, Engineering Branch, PD, DGS

Overview

- Buy Clean California Act (BCCA) is the first in the nation/world and focuses on items that must meet global warming requirements.
- California is the first in the nation to implement policies for carbon footprint regarding construction materials.
- BCCA establishes a maximum limit for certain construction materials for certain state agencies.
 - Construction projects entered into contract after July 1, 2021 cannot install construction materials unless the materials meet the established maximum Global Warming Potential (GWP) or the agency claims an exemption for the material.
- PD Engineering is in the BCCA development and implementation phase
 - BCCA Policy and Procedures Implementation by July 1, 2021
- July 1, 2021, Rebar (construction material), must meet Global Warming standards set by BCCA.
- DGS will be meeting/working with state agencies to review their BCCA expectations and state agency responsibilities as awarding authorities.
- DGS has concerns that most state agencies are not as ready for these new BCCA standards to be incorporated into their procurement policies as they should be.
- Carbon Footprint set by DGS, implementation on July 1, 2020 or soon after. Subject to rebar project program meeting BCCA standards by January 2021.

Implementation

- Development of Policy/Procedures
 - Implementation is subject to Agency's BCCA policies
 - Agencies to establish new policy guidelines on construction project contract amendments and ensures construction material changes meet the BCCA standards.
 - DGS to work with agencies to develop training and policies to ensure compliance with BCCA.
 - Agencies: UC, CSU, Parks and Recreation, DOT, CDCR, RESD, DGS, CDCR, DWR, CalFire.
 - Policy on general contractor's BCCA standards submittal
 - Identify BCCA standards
 - Share methodology to other awarding authorities
 - Develop standardization of BCCA awarding process
 - Meets global warming standards declarations are now required from contractors
 - Exemptions/What if scenarios
 - Outreach plans
 - Agency outreach plans (Web FAQs, external outreach), if any.

Expectations

- Responsibilities between DGS and agencies per legislation
 - Agencies to be proactive and identify issues or misunderstandings as soon as possible.
 - Agencies to progress with policies to identify disconnects.
 - DGS should not be expected to field contractor questions regarding agency policy.
 - DGS cannot demand external stakeholder to produce EPDs if they do not wish to (i.e. glass and mineral wool industry).
- Awarding Authorities
 - Agencies are expected to field contractor questions regarding their agency policy for implementing BCCA.
 - Agencies need to figure out how to address lack of compliant EPDs. If projects exempted from BCCA due to this, then DGS will report obstacles back to Legislature for future improvements to law.

7. NCB and Protest Updates

Jesse Robey, Information Technology Specialist I, Dispute Resolution Unit, PD, DGS

NCB Portal Updates

- As of June 19, 2019, all NCB, LTB, and SCR requests are only accepted via the NCB Portal.
- As of May 7, 2020, all Password resets are handled via an automated Password reset tool on our NCB Portal homepage. (Faster Password resets)
- NCB Dashboard is now available for public view and captures all NCBs, LTBs, and SCRs valued at \$1,000,000.00 or more.
- The information provided on the NCB Dashboard includes contractor's name, dollar amount, amendment amount (if applicable), amendment number (if applicable), approval date, and the request number.
- To request a password reset, simply click the Forgot Password link on the sign-on page. It will then ask for your email address.
 - The reCAPTCHA function is a new security measure being implemented to protect the state's systems. As you may have seen in other systems, both state and non-state, reCAPTCHA is a method designed to screen malicious intrusions by asking you to click on images meeting a certain description. Once you've completed that step and it has verified that your email address is authorized by DGS to access the NCB Portal, it will send your new password to your state-issued email address.

NCB Portal Tips

- DGS cannot reset passwords for CDT's version of the NCB Portal. Also, our automated password reset tool will not support CDT's NCB Portal. Contact CDT at NCBRequests@state.ca.gov
- Signature Authority Delegation (SAD) Forms are required for changes to Executive staff. These forms must be signed (digital or handwritten) by Executive staff (i.e. Directors, Deputy Directors, and Designees) and these Executives will need to request access through the NCB Portal (and be approved) prior to being assigned an Approver role. (SCM Vol. F. 6.2.2 Signature Authority) You may request a SAD form at PDNCB@dgs.ca.gov.
- PCOs may inquire about their department's current registered users and deactivating users at PDNCB@dgs.ca.gov.
- Be sure to validate dollar amounts and dates prior to submission.
- Documents that should be submitted: STD. 821 (Services), SIMM 71B (IT), SOWs, Cost breakdowns (may be within SOW), AB/SB Language (if applicable), current valid quote(s) (within 90 days of submission), Sole Source Proprietary Letter (signed by vendor), and STD. 213 & STD. 215 (if amending).

Protest Process Reminders

- Currently only DGS & CDT can utilize the Alternative Protest Process (APP).
- DRU reviews Non-IT Goods, IT Goods, IT Services, and IT Goods & Services Traditional Protests.
- For Traditional Protests, it is DRU's responsibility to:
 - Coordinate Traditional Protests (time sensitive)
 - Review department solicitations.
 - Make recommendations to withdraw intent to award and/or cancel solicitation due to error in solicitation requirements.
 - Identify missing protest information.
- Protest requests and inquiries should be directed to PDProtest@dgs.ca.gov.

NCB, LTB, and SCRs

- Dollar amount below \$25,000 does not need to be submitted
- Emergency contracts should not be entered into the NCB portal.

As a response to an increase in 6611 negotiations requests, PD reminds agencies that DGS and CDT are the only agencies authorized to conduct 6611 per statute.

8. SCM Consolidation

Angela Shell, Deputy Director, PD, DGS on behalf of Sarah Cering, Manager, Purchasing Authority Management Section, PD, DGS

SCM Consolidation updates

- Strategic goal is extended to 2021
- Crosswalk completed between SCM 2, 3 and F
- Incorporate FI\$Cal and non-Fi\$Cal user policies

- Policy change to consolidate SCM to one single volume – SCM Volume 2
- Contain DGS Broadcast Bulletins not yet incorporated from prior SCM versions
- Format similar to SAM i.e. topics with links
- Incorporate differences between IT vs. non-IT services
- Incorporate policy on vendor signed sole source proprietary letter
- Estimated completion date August 2021