



Meeting Recap

Thursday, August 26, 2021
1:00 p.m. to 2:00 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

Appointment of New Policy, Training and Customer Service Branch Chief - Sarah Cering
Sarah's background includes:

- Thirty years as a state employee and has been with DGS since 2006
- 2006: Master Agreement Unit analyst
- 2007 – 2015: Purchasing Authority Unit (PAU) Supervisor
- 2016 - 2021: Purchasing Authority Management Section (PAMS) Manager

Emergency Operation PD Functions - Wildfires and Covid

- Impacts DGS workload - results in some delays in contracts
- DGS evaluates needs based on date and essential priorities
- Contact Carol Bangs for prioritized essential procurement requests

New CEA PD Position – Statewide Diversity Manager

- The position will evaluate the state's current programs and diversity pool – Prop 209 bans exclusion based on race and/or ethnicity.
 - Prop 209: no PD goals relating to race, only focus on SB diversity
- Responsibilities includes bill analysis, zero emission vehicles, DVBE requirements, enhancing the role of advocates and participation in PART meetings.
- The position to be filled within the next 30 days.

PD Survey

- The PAU will be distributing a survey to PCOs and PACs for customer feedback. Although DGS is considered a “control agency”, DGS considers themselves a partner. The survey will contain a few questions and will only take a few short moments of your time. The survey will be provided in the coming weeks.

3. Buy Clean California Act (BCCA)

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

- AB 137 Overview
 - New Implementation Dates – January 2022
 - ARB Consultation - ARB is a leading climate change agency in CA
 - No requirements currently, only collecting information for the new program scheduled to begin July 1, 2022
- Management Memo
 - Provide phasing period
 - Environmental Product Declaration (EPD) Collections
- Awarding Authorities' Plans
 - Authorities – CalTrans, DWR, DPR, RESD, MIL, UC, USC per BCCA
 - BCCA Implementation to address carbon in structural steel, rebar etc.
- Communication
 - External Stakeholders – Steel/Trade Industries and State Agencies
- Next Steps
 - Engage with stakeholder on implementation with the new implementation dates.

Contact Information

- Buy Clean California Mailbox: BuyCleanCalifornia@dgs.ca.gov
- MS Teams: Buy Clean California Act
- Daniel Q. Garza, Daniel.Garza@dgs.ca.gov
- Scott Fong, Scott.Fong@dgs.ca.gov
- Brenden Jiang, Brenden.Jiang@dgs.ca.gov
- Carlos Angulo, Carlos.Angulo@dgs.ca.gov

4. Upcoming LPAs

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

Awarded Contracts:

- Contract awarded for tablets - HP, Dell contracts with approximately 7 - 8 approved manufacturers

Upcoming Solicitation:

- Statewide Highway Sweepers

Solicitations in Evaluation:

- Bottled Water
- Plastic Bags

Exploring new IT goods LPAs:

- PC goods, desktops, monitors, DMV Kiosks and Chromebooks

- Utilize recent IT laptop performance level requirements survey - 20 responses received.

Multi-Function Device (MFD) Survey:

- Very few responses received.
- Surveys help decide what products are needed.
- State agencies still have an opportunity to respond to MFD survey. Access survey through Broadcast Bulletin subject: Technology Group Ideas. DGS welcomes state agency feedback.
- IT industries and new manufacturers – meeting scheduled

Master Service Agreements (MSA)

- Priorities shifted to wildfire and debris removal procurements.
 - Debris removal - aggressive assessment timeline
- Temporary Medical Staffing contract has been delayed.
- IT Consulting expires next year.
 - CDT and Office of Digital Innovation collaboration - rebranding various categories, update cost and add another classification.
- Small Parcel delivery – in progress

National Association of State Procurement Officials (NASPO)

- Auto Parts contract is still being advertised.

Software Licensing Program (SLP)

- CDT VHS contract efforts ending.
- Adobe contract used to compliment gaps between CDT contract end dates and contract start dates.

5. Policy Update

Sarah Cering, Branch Chief, Policy, Training and Customer Services Branch, PD, DGS

Two Broadcast Bulletins (BB) for DVBE withhold package

- BB part 1 - includes SCM update and the law regarding DVBE withhold.
- BB part 2 - specific to General Provisions updates and documents to include new language to contracts related to the DVBE package.
 - Addresses how to utilize and incorporate new General Provisions with existing contracts, pending solicitations and new contracts.

SCM Consolidation Project

- Appreciation given to all who are working on the project and to Kim Agustin's collaboration with the SCM consolidation.
- Currently there are approximately 600 feedback line items to review.

PD Bill analysis and Legislative concepts in progress.

IT General Provisions (GP) Model Contract Language Revision

- Requested by IT industry
- Project Plan under development
- Project lead - Rosemary Linares
- Collaboration with CDT and OLS
- PART members are welcomed to participate in the IT GP workgroup. Email interest to PAMS@dgs.ca.gov
- SCM Update: Requests to Modify GP process
- Draft Request to Modify GP process – internal PD review
- Final Draft Request to Modify GP process - share with PART members for feedback by end or mid-September 2021.

Define Sustainability – SCM update

- Collaborate with Daniel Garza, EPP group and other stakeholders

Define Control Section 11-10 –Annual Budget Letter for Software Licenses

- Collaboration with CDT and DOF
- Provide additional SCM definitions

BB released last week to rescind DOF Budget Letter 21-23

- No longer required to include budget certification requirements for procurements submitted to DGS.

6. Consolidated Annual Report (CAR) Update

Nancy Huth, Certification Manager, Office of Small Business (SB) and Disabled Veteran Business (DVBE) Enterprise Services (OSDS), PD, DGS

CAR due date has been extended for this year to October 31. No additional extensions.

Two New FI\$Cal CAR Functionalities

- California Governor's Office of Emergency Services (Cal OES)
 - Mission Task ID and Statewide Incident ID
- Form 810 - Intake Pages
 - Form 810, Form 810C, Form 810S, Form 810A
 - Form 810A - provides online CAR submittals for deferred and exempt state agencies
 - Intake Pages includes term of the contract activity for SB/DVBE Option and DVBE incentive
 - Allows Form 810 changes for state agencies transacting in FI\$Cal - contact DGS, OSDS to unlock Form 810
 - Allows copies and records of forms to be saved online
 - Submitted CAR data will automatically be combined with the Annual FI\$Cal system generated CAR reports.
- There were two FI\$Cal CAR training sessions with approximately 165 attendees.

BB will be released for two additional FI\$Cal CAR training sessions in September 2021.

Small Business (SB) and Disabled Veteran Business Enterprise (DVBE) Regulations

- Updates in progress
- Draft for public comments by October 2021
- BB will be announced for final release date

7. Contract Classification

Sarah Cering, Branch Chief, Policy, Training and Customer Services Branch, PD, DGS

Misclassified NCB contracts

- DGS identified an increase in contract misclassifications that raised concerns/issues
 - It's important to classify contracts correctly and determine who has oversight, DGS or CDT, so items are submitted correctly and processed in a timely manner.

CalPCA Courses - Contract Classification

- Course Subjects: IT vs Non-IT, Goods vs. Services, SaaS Provisions, Sub-contract Types, Public Works, Legal Services, Subscriptions (how you pay for goods/services), Delegated vs. Non-Delegated, and Telecom vs. IT.
- Self-paced training – to include decision making educational materials.

DGS Assistance

- If you have questions on contract classification, contact PAU at PAMS@dgs.ca.gov
 - Example: prior to contract submittal or approval verify contract classification is correct with state agency's assigned PA specialist.

DGS, PD Strategic Action

- CDT collaboration
 - Determine current IT industry standards
 - Define IT contract and what IT services are considered under CDT oversight
- Prevent misclassified NCB contracts
- Produce effective and efficient state agency contracts
- Improve consistent procurement processes

8. SCM Consolidation

Kim Agustin, Staff Services Manager I, eProcurement Unit, eBISS, PD, DGS

- Held SCM Consolidation Kick-Off Meeting on July 22, 2021
 - 33 participants were identified and invited
 - 26 participants attended the meeting & volunteered to assist in the review
- Requested review and feedback on the SCM Consolidation web pages
 - Received 19 responses, which was a 73% response rate
 - Total number of findings were 597

- Categorized responses and findings
 - First into Phase 1 & Phase 2
 - For Phase 1 findings, further categorized and prioritized
- Release date of the online consolidated SCM is expected in mid-September

9. Upcoming PART Customer Survey
Angela Shell, Deputy Director, PD, DGS

This topic was addressed during the PD Update and no additional information was added.