



# Meeting Recap

Tuesday, October 8, 2019  
1:30 p.m. – 3:00 p.m.

## 1. Welcome and Introductions

**Ricardo Martinez, Branch Chief, Policy, Training & Customer Services Branch**

Ricardo Martinez opened the meeting to welcome all attendees and introduce DGS, PART presenters and DGS, Purchasing Authority Unit staff.

In response to PART Member feedback, networking opportunities have been added to the end of the PART meeting.

## 2. FI\$Cal – Options for Line Item Food UNSPSC Codes

**Renée Alexander, Manager, E-Procurement Business Intelligence Strategies Section (EBISS)**

Food items can now be reported using UNSPSC codes

- SCO approved and will accept UNSPSC code options

Auto Parts report - Higher level of line item detail and additional options

- Auto Service/Labor – allow a minimum of 2 UNSPSC categories
- Auto parts – offers sample of higher level grouped parts

Requisition templates in Excel format

- Populates line items directly into POs
- PO still requires quantity, price and UOM to be manually updated after line items are populated
- Option to upload LPA Auto Parts purchases - allows firm fixed pricing
- Office supplies
  - EPP auto populates
  - Generic description
  - Additional role mapping required

To request FI\$Cal line item food UNSPSC codes options or auto repair/auto parts options templates/functionality or information, contact Renee Alexander via email: [Renee.Alexander@dgs.ca.gov](mailto:Renee.Alexander@dgs.ca.gov) or phone: (916) 375-4457.

## 3. Annual Contracting Activity Report (Form 810)

**Anda Draghici, Manager, Certification Section, Certification & Outreach Branch**

FI\$Cal Implementation

- June 2018 - Partial Functionality

- April 2019 – Fully Functional
- Data Validation Query with transaction detail to allow for corrections during the fiscal year
  - Allows updates and corrections while transactions are still open

#### OSDS Training-Related Activities & Resources

- 6 training sessions/webinars for FI\$Cal/SCPRS users February –April
- 2 training sessions/webinars for all departments and reporters in May
- 1 FAQ webinar in July
- 6 Broadcast Bulletins
- 2 Job-Aids developed
- 1 FI\$Cal/SCPRS User Guide for CAR Reporting
- 1 FAQ document published for CAR Reporting

#### What's new on form STD 810 Contract Award Report (CAR)

- New Small Business for the purpose of Public Works (SB-PW) effective January 2019
  - SB-PW folded into the SB participation
- Multi-year contracts are reported in full in the year of award
- SB/DVBE Subcontracting Page
  - Key feature for reporting of SB/DVBE goals
  - Must be completed on all modules (Contract, POs, Cal-Card)
  - Defect on certification not displaying was fixed on Sept. 27 – for transactions previously created
- Certified Primes
  - 100% SB and/or DVBE participation credit to departments!
- New data fields
  - SB/DVBE prime contractors & subcontractors
- Data Validation Query

#### Form STD 810 CAR Submittal

- ADA Compliance
  - Forms available on web app
- Departments in FI\$Cal & SCPRS
  - OSDS pulls FI\$Cal STD 810 CAR data
- Department's Unmet goal(s)- Data pulled from paper submittals
  - Improvement Plans Required
  - Paper submittals accepted until end of 2019

#### Form STD 810 CAR Dashboard

- A couple extensions to October 15 due to various system, data issues and user errors
- 28 mandatory reporting departments submitted reports outside the system
- 23 met the DVBE participation goal
- 18 met the SB participation goal

#### 4. CalPCA Training Update

##### **Joseph Watkins, CalPCA Supervisor and Brent Seavers, eLearning**

Advanced Certificates –Labs & Courses in complex & formal acquisitions

- Courses (under development): IT Goods, IT services, Non-IT Goods and Non-IT Services
- Estimated Completion - 2020
- Prerequisites: Basic and Intermediate Certificates

Basic Certificate – Self-paced overview of informal policy, process & tools

- Courses: How The State Buys, BAC 1 – Foundations, BAC 2 – Acquisition Planning
- Courses under development: BAC 3 – Approaches & Methods, BAC 4 – Solicitations Processes, and BAC 5 – The Agreement
  - Estimated completion - December 2019
- BAC certificate expires after five years

Basic Certificate “Bridge” offered until courses BAC 3-5 are completed

- Courses: How The State Buys, BAC 1, BAC 2, Acquisitions Under \$10,000, Leveraged Procurement Agreements, Non-Competitively Bid, Small Business/DVBE
- Meets PA Accreditation BAC training requirements
  - PA Accreditation training requirement: PAC plus one buyer must be BAC trained

Intermediate Certificate – Self-paced courses, Webinars & face-to-face Labs about informal buys

- Courses: Acquisitions Under \$10,000, CA Multiple Award Schedules, Commercially Useful Function, Contract Management, Evaluation & Award, Leveraged procurement Agreements, Non-Competitively Bid, Reasonable Accommodations Acquisitions (new addition under development), Services Contracting, Small Business/DVBE, Statement of Work

Executive Certificate – Self-paced courses on oversight & approval for all acquisitions

- Designed for high level executive management, PCO or PAC
- Courses: EC 1 – How the State Buys, EC2 – Small Business/DVBE, EC 3 – Statement of Work, EC 4 – Leveraged Procurement Agreements, EC 5 – Non-Competitively Bid Acquisitions, EC 6 – Reasonable Accommodation Acquisitions (new addition under development)

Environmentally Preferable Purchasing – Self-paced a la carte courses on how to “buy green”

- Courses (under development): BAC 6 – EPP: Basic, EC 6 – EPP: Executive, IC 12 – EPP: intermediate

Learning Management System (LMS)

- Learning paths: Basic, Intermediate, Advanced, Executive Office and Environmentally Preferable Purchasing
  - Color code each course viewed on LMS webpage according to the associated learning path
    - Basic – Green; Intermediate – red; Advanced – yellow; Executive Office – purple; Environmentally Preferable Purchasing – green
- Users have up to 30 days to complete a registered online course

CalPCA Contacts:

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(916) 375-4628

[Joseph.Watkins@dgs.ca.gov](mailto:Joseph.Watkins@dgs.ca.gov)  
(916) 375-4637

## 5. Legislative Update

### **Ken DeVore, Legislative Consultant, Office of Policies, Procedures & Legislation**

AB 230 - Require awarding departments to provide proof of payment to DVBEs and provide DVBE percentage in contract data

- Prohibits change in SB/DVBE mid-contract without proper approval and documentation
- Author pulled back and will revisit

AB 572 -A two-year bill, California DeForestation-Free Procurement Act

- Targets procurements with vendors directly causing deforestation
- Author pulled back and will revisit

AB 971 - Governor signed and enacted bill– High value IT projects in access of \$500,000

- Must have a post project evaluation
- DGS and CDT to create an evaluation performance form to verify IT project is successfully implemented

AB 1365 - Committee on Veterans Affairs, DVBE Program

- Awaiting governor’s signature

- Require departments to certify and validate prime contractor information/data and retain records for six years

AB 588- Verify DVBE participation requirements are upheld on awarded contracts

- Awarding departments shall withhold up to \$10,000 on last payment or full amount if less than \$10,000 of contract if prime contractor has not provided DVBE participation requirements stipulated on contract
- Prime contractor must provide DVBE subcontractor work performance certification
- 15 to 30 calendar days to respond
- Public works projects exempted

## **6. Upcoming and Existing LPAs**

**Rhonda Smith, Acquisition Branch Chief, Procurement Division**

Leveraged Procurement Agreements (LPA)

- Contract Index List revisions
  - Added columns for amended dates and links to renewal or extended contracts
  - Encourage department to submit feedback
- User Instruction revisions
  - Provide streamlined and standardized user instructions
  - Estimated completion in six months
- Exemption Request form
  - Reminder to submit when desired items are not found on mandatory statewide contracts
- Bottled Water contract
  - Expired
  - Recommend purchase under department's PA delegation
- Office Move contract, MSA
  - Broadcast Bulletin announcing contract has been removed
  - User instructions under development-estimated completion in 1-2 weeks
  - RFO required
- Statewide Telemetry contract
  - Proof of Concept phase
  - Estimated completion February 2020
- Statewide Tablet contract
  - Renewal under development
  - Customer Survey to be sent in October
- Remanufactured Toner contract
  - Evaluation phase
- New Master Agreements under development
  - Professional Grade tools and Diagnostic Equipment
  - Vehicle Lifts and Garage Associated Equipment

- Police Radar/Lidar Speed Enforcement & Speed Advisory Systems, Parts and Accessories
- Temporary Medical Staffing
- E-Pay contract
  - Extended
- SLP
  - Added Google and is now available

Please complete and submit contract request forms for new LPA contract ideas/concepts.

## 7. NCB Portal Update

**Jesse Robey, IT Specialist 1(Lead), Dispute and Resolution Unit**

As of June 19, 2019: NCB, LTB, and SCR requests require NCB Portal submittal.

- NCB Dashboard
  - Available for public view
  - Captures all NCBs, LTBs, and SCRs valued at or greater than \$1 million
  - Contractor name
  - Dollar amount
  - Amendment amount (if applicable)
  - Amendment number (if applicable)
  - Approval date
  - Request Number

### NCB Portal Tips

- Password Resets
  - DGS NCB Portal
    - [PDNCB@dgs.ca.gov](mailto:PDNCB@dgs.ca.gov)
    - Must be from user (No 3rd party resets)
    - Does not update CDT NCB portal
  - CDT NCB Portal
    - [NCBRequests@state.ca.gov](mailto:NCBRequests@state.ca.gov)
- Prior to Submission
  - PCOs must approve access to portal
  - PCO information must be up to date - if not, NCB cannot be processed
  - Approver Role Assignments
    - New Directors, Deputy Directors, and Designees (excluding PCOs)
    - Must request NCB Portal access
  - Validate Dollar Amounts and Dates
  - Verify budget – cannot modify once submitted
  - Quotes should not be older than 90 days

- “Copy NCB” feature to transfer 70% of previous NCB to new NCB request
- Documentation Submittal Requirements
  - STD 821 (Services)
  - SIMM 71B (IT)
  - SOWs
  - Cost breakdowns (May be within SOW)
  - SB/AB Language (if applicable)
  - Current valid quote(s)  
(within 90 days of submission)
  - Sole Source Proprietary Letter (signed)
  - STD 213 & STD 215 (if amending)
    - Provide history, how contract became an NCB and what is the requested NCB intent
- SCR Renewal tips
  - Determine if there is a dollar amount increase from previous SCR
  - Determine previous amount expended and prepare to justify expenditure amount
  - Explain reasons to increase dollar amount especially if dollar amount is significantly more than previous expenditure amount

CALPCA will post NCB portal training video

## **8. SCM Volumes 2,3 and F Consolidation**

**Ricardo Martinez, Branch Chief, Policy, Training & Customer Services Branch**

- SCM Volume 1 is not included in the consolidation effort
- Two-year project
- Slowed due to staff turnover
- Estimated completion by end of 2021

## **9. Executive Orders**

**Angela Shell, Deputy Director, Procurement Division**

Two executive orders within DGS, Procurement Division

- EO N1919
  - Changes DGS sustainable purchasing practices, food and recycling materials policies and procedures.
    - Impacts FI\$Cal reporting
    - Track IT software for sustainable purchases
- RFI 2 Project - Request for Innovative Concepts
  - Based on 6611 negotiations
  - Develop problem statement – industry to respond with solution

- CDT and DGS are the only departments allowed to use RFI 2
- Estimated full implementation - March 2020