Meeting Recap
Thursday, November 4, 2021
10:00 a.m. to 11:00 a.m.

1. **Welcome**
   Cheryl Angeles, Supervisor, Purchasing Authority Unit (PAU), Policy, Training & Customer Services (PT&CS) Branch, Procurement Division (PD), Department of General Services (DGS)

   Cheryl Angeles opened the meeting to welcome all participants and provided instructions on participating in the Purchasing Authority Round Table (PART) Microsoft Teams meeting. She reminded participants to mute speakers to minimize background noise and that opportunities would be provided to answer questions at the end of each presenter's speech, by utilizing the Microsoft Teams raise hand feature or responding to questions submitted in Microsoft Teams Chat.

2. **Procurement Division Update**
   Angela Shell, Deputy Director, PD, DGS

   PD Customer Survey
   - Online PD Customer Survey was sent to all state agency Procurement Contracting Officers (PCOs) and Purchasing Authority Contacts (PACs) on September 29, 2021
   - About 70 individuals participated and appreciation was given to all survey participants
   - Great feedback received regarding efficient and effective procurement
   - PD Management to evaluate responses and develop action plans

   DGS Two Year Strategic Plan
   - Focus on three key areas: Procurement, Buildings, and Sustainability
   - Improve vendor and state customer service
   - Procurement Initiatives to focus on diversity, equality, and inclusion
   - PD to assist the Small Business/Disabled Veteran Business Enterprise (SB/DVBE) suppliers with contract opportunities
   - Strategic plan to be published by January 2022

   DGS New Career Executive Assignment (CEA) PD position - Statewide Diversity Manager
   - The position has been filled - announcement to post soon
   - Statewide Diversity Manager role:
     - Manage the Statewide Supplier Diversity Program and assist with SB/DVBE programs

o Assist with statewide procurement operations and assist in increasing diversity within the SB/DVBE supplier pool

AB 1574 - Target Area Contract Preference Act (TACPA)
- Updates to preference participation for distressed areas of the State
- Updates on TACPA incentives application
- Requests state agencies to expand their SB/Micro Business (MB) supplier pool
- Proactively seeks and identifies TACPA eligible SB/MB suppliers that have not previously done business with the State
- Information and requirement directions to be sent to state agencies

Prompt Payment Improvements
- Emphasis on prompt payments to SBs/DVBEs
- Late Payment Penalty reports were due to DGS on September 30, 2021
- Late Payment Penalty Reports are available on the DGS website as required by statute
- Late payments and no improvements - PD to contact state agency executives for a corrective action plan

Consolidated Annual Report (CAR)
- Reports were due November 1, 2021 and are required to be submitted promptly every year
- No extensions will be given this year
- State agencies that have not submitted their CAR or did not meet the annual goal are required to submit an improvement plan to Office of Small Business & Disabled Veteran Business Enterprise Services (OSDS)
  o Improvement Plan responses can be submitted via OSDS Survey Monkey link

SB/DVBE Advocate Role
- Empower advocates by providing sufficient resources to assist SB/DVBE suppliers
  o Instructions navigating State's SB/DVBE program process
- To improve advocate roles
  o Conduct surveys and solicit feedback
  o Request surveys from each state agency and their assigned SB/DVBE advocate
    ▪ Frequency: at each quarterly advocate meeting for the next few years
  o Focus on advocates role versus the liaison role
  o Extract percentages data from each role type
- Advocates prompted to attend quarterly meetings

3. **SB/DVBE Emergency Registry**
   Brooke Droege, Business Outreach Manager, Business Outreach Unit, OSDS, PD, DGS

   What is the SB/DVBE Emergency Registry?

- A dedicated portal for California-certified businesses to register as a supplier of emergency goods and services.
- Unlike the [CaleProcure](#) website, this portal will only include businesses that provide goods and services from predetermined emergency categories.
- State agency buyers can access and search this pool of suppliers
- Launched in October and over 450 certified businesses are registered
- Granted access to 45 state agency buyers
- Provides a fast and intuitive way for buyers to connect with SBs and DVBEs during an emergency
- Please contact Brook Droege at Brook.Droege@dgs.ca.gov for gaps in emergency categories

What are the Benefits of the SB/DVBE registry?
- Allows state agencies to identify certified businesses who are ready and able to provide goods and services during an emergency
- Buyers can easily search the registry for certified businesses using the following search terms:
    - Certification Type
    - Emergency Category
    - Keywords
    - County
    - City
- Status is constantly updated via Financial Information for California (FI$Cal) and tracks updated SB/DVBE certifications
- Results in real-time and allow buyers to export the emergency registry to an Excel spreadsheet
- Allows buyers to see the number of suppliers providing services with a given state agency over time

Emergency Registry Categories

Base Camp Operations
Buildings/Sanitation
Communications
Debris Removal
Electrical
Energy/Fuel
Erosion Control
Facilities
Fencing
Fire Protection
Food & Beverage
Hazardous Materials
Information Technology
Janitorial
Law Enforcement/Security

Lighting
Logistics/Transportation
Maintenance/Repair Medical
Miscellaneous Services
Miscellaneous Supplies
Personal Care Supplies
Portable Modular
Respiratory Products
Roadway Maintenance
Temporary Labor
Traffic Control
Vehicle Rentals (Incl. Heavy Equipment)
Vehicle Repair

- Inform or provide feedback to OSDS regarding emergency category gaps

Which businesses are invited to sign up?
- SB/DVBE businesses who are currently ready and able to support the State of California in an emergency
- Emergency contracting requires fast around-the-clock turnaround times–
  - A business should not register unless they are fully capable of immediately providing the goods/services they list
- Must be able to support state 24/7 to support state during an emergency
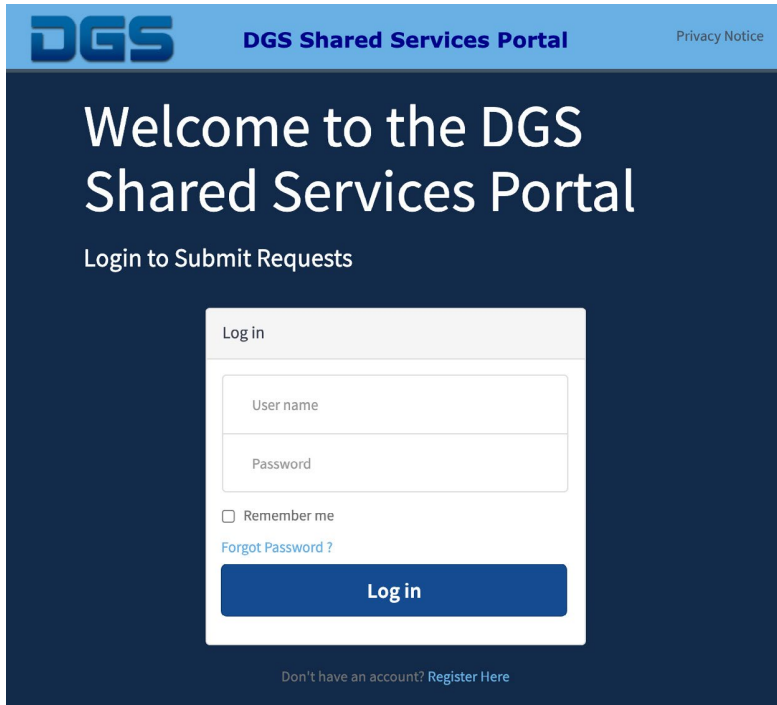
Which state employees should request access?
- SB/DVBE Advocates
- Any state buyer/procurement staff who may do emergency procurements
- Buyers must register within the DGS Shared Services portal to get access to the Emergency Registry Search Portal
- To be granted search access, buyers will need:
  - Contact information: state agency email address, phone number, state agency address
  - Supervisor contact information
- State buyers and advocates must register in the portal to obtain access to the Emergency Registry search portal
- PD encourages buyers to obtain login access now before acquiring emergency purchases

DGS Shared Services Portal Registration Instructions:

Part 1: Register in the DGS Shared Services Portal

Step 1: Go to the DGS Shared Services Portal.

Step 2: Click Register Here, located under the log-in section, to create a log-in.

Step 4: Check your registered email box, you will receive two emails: the first email confirms your email address, and the second email directs you to create a password.
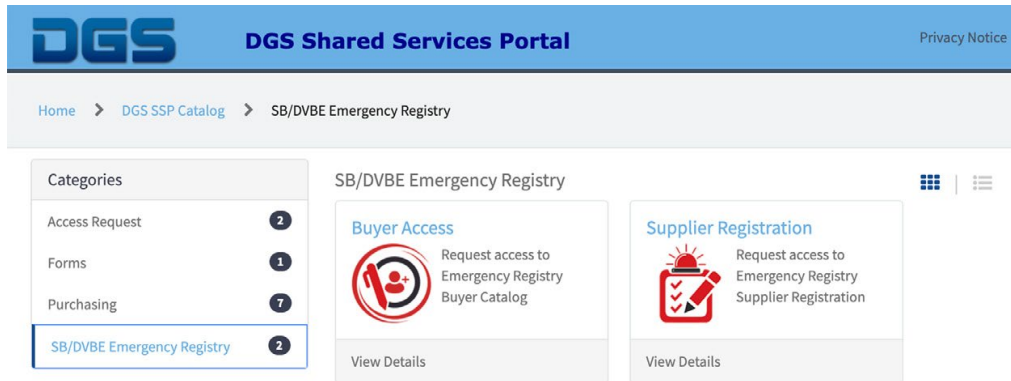
Step 5: Create a new password.

Part 2: Submit State Department's Profile in SB/DVBE Emergency Registry – Buyer Access

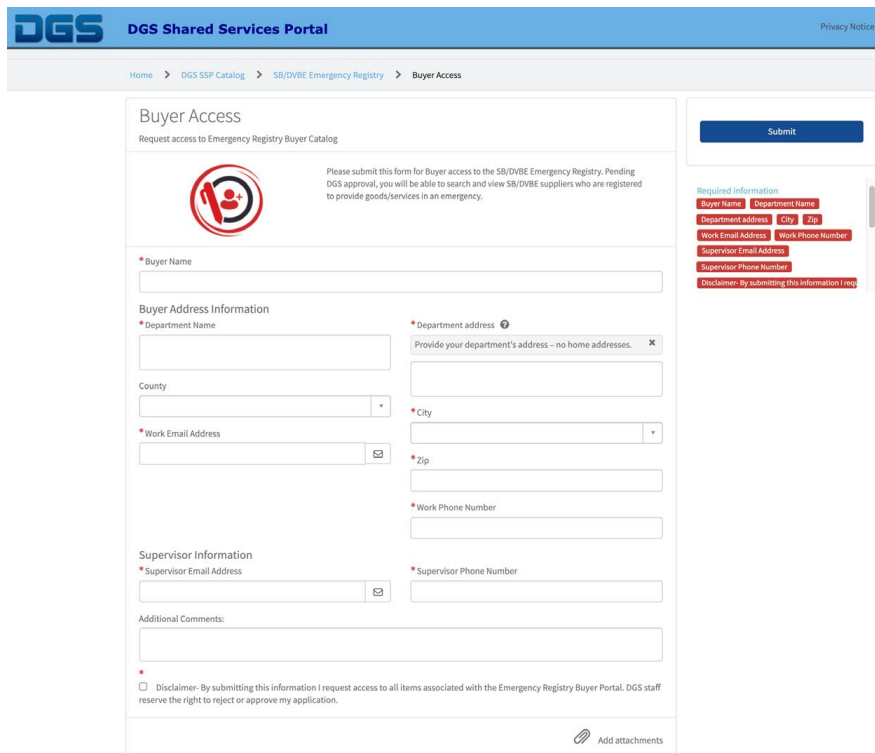Step 1: Log in to the DGS Shared Services Portal.

Step 2: Click SB/DVBE Emergency Registry.

Step 3: Click Buyer Access.

Step 4: Enter the required information. Review your information. Click Submit.

Your submission is complete. You will receive an email with the status of your request. Upon approval, you can begin to access the SB/DVBE Emergency Registry Buyer Search Portal.

Part 3: Access Buyer Search Portal

Step 1: Log in to DGS Shared Services Portal.

Step 2: Click on SB/DVBE Emergency Registry.

Step 3: Click on Buyer Search Portal.

Step 4: Enter search criteria.

SB/DVBE Emergency - State Department Information

For questions or more information email: **SBDVBEEmergencyRegistry@dgs.ca.gov**

4. **Upcoming Leveraged Procurement Agreements (LPAs)**
   Carol Bangs, Branch Chief, Acquisitions Branch, PD, DGS

   LPA Surveys
   - Two Broadcast Bulletins on surveys are pending
   - Green Waste survey released to customer state agencies
   - Provides awareness through Broadcast Bulletins

   One-Time Acquisitions (OTA) Fiscal Year Deadlines
   - Information Technology (IT) Goods and Services – February 1, 2022
   - Non-IT Goods – April 1, 2022

   Upcoming Contracts
   - Small Parcels - National Association of State Procurement Officials (NASPO) Agreement: extended to February 2022 to address concerns with a lapse in service
     - Addendum currently in progress
   - IT Consulting - Master Service Agreement (MSA)
     - Received feedback from customer state agencies
     - Collaboration with California Department of Technology (CDT) and Office of Digital Innovations (ODI), Government Operations (GovOps) and state agencies to increase and expand classifications
     - Name change to, "Technology, Digital and Data Consulting"

   - PC Goods - Statewide Contract for laptops, desktops, and monitors
     - Surveys sent out to customer state agencies and feedback received
     - New contract – completion expected quickly
     - Supply transport delays due to COVID - impacts supply chain/supplier fulfillment
       - Recommend SB/DVBE off-ramp process
       - Exemption requests: contact the Contract Administrator

   GovOps Study - SB/DVBE Vendor Contracting Challenges
   - Solicitation requirements are too high
     - California Multiple Award Schedules (CMAS) or MSA:
       - 10-year experience and/or 5 customer references are too high
       - State agency to identify what requirements are appropriate to the procurement - help offers be more competitive
   - Non-awarded bidders are discouraged at times
     - State agency to provide a debrief
       - Explain what was non-compliant and/or reasons for non-award
       - Encourage bidders to learn what state agencies need for a successful bid
   - State agency late payments

- Discuss with supplier reasons for late payments and provide good faith efforts to make timely prompt payments

5. **Policy Update**
   Sarah Cering, Branch Chief, Policy, Training & Customer Services (PT&CS) Branch, PD, DGS

   State Contracting Manual (SCM) Consolidation
   - Phase 1- Convert to ADA Format
     - Delayed due to technical issues
     - Office of Polices, Procedures and Legislation (OPPL) meeting on November 12: review required changes before PD management review
     - Broadcast Bulletin: to announce the release of SCM Consolidation, estimated completion date December 2021
     - Existing SCM 2, 3, and F: archive after consolidated SCM is completed
   - Phase 2- Update Policy Content
     - New and outstanding procurement policies
     - Begins January 2022

   Upcoming Broadcast Bulletins
   - SCM consolidation "Flow Basis": announce new format and content topic updates as each are completed
   - AB 1574: TACPA policy updates and expected implementation
   - DVBE Withhold Policy:
     - PART member and OSDS reviewed
     - Remaining edits are in progress
     - Final review to PD Deputy Director, Angela Shell, and the DGS Director, Anna Lasso

   IT General Provision Update
   - DGS and CDT - collaborating on changes to the IT General Provisions and Cloud Provisions
     - Revisit and identify updates to IT service and goods policy, proprietary software, and Software as a Service (SaaS) policies
     - Address IT Service Maintenance and Operations in provisions
   - DGS OPPL workgroup in communication with IT industry for feedback
   - Next Steps:
     - Solicit feedback from stakeholders/state agencies and SB/DVBE IT vendor communities
     - DGS legal team to review proposed draft for final review and release of updated IT General Provisions
     - Webinar: Procurement Classification to be available in January 2022

   AB 1574 – TACPA Update
   - Improvement plan - include procurement professionals & vendor training development and outreach to promote the TACPA Program

- SCM updates - include directions to state buyers on the updated TACPA program requirements
- Bidder Declaration form - DGS to update as a result of AB 1574

CalPCA Training

- CalPCA and CDT collaboration: develop IT Classification Training
  - Identify updates to IT service/SaaS policies
    - SaaS and Proprietary IT Services/Goods Classification
    - IT Services Maintenance and Operation
    - IT Goods/Services Purchasing Authority Thresholds
  - Produce webinar by January 2022
- Technical Modernization Funds are available for the IT modernization project - PD to collaborate with CDT
- Convert webinars to self-paced courses and develop "How to" courses:
  - State agency's purchasing authority dollar threshold application and acquisition method usage
  - Environmentally Preferable Purchasing (EPP)
  - Contract Classification
  - Contract Management
  - Purchasing Authority Accreditation deficiency data to develop content/topics
  - PD Customer Service Survey results to develop content/topics