



Meeting Recap

Thursday, February 17, 2022
1:30 p.m. to 2:45 p.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. Opportunities to answer questions will be provided at the end of each speaker's presentation or at the end of the PART meeting.

2. Procurement Division Update

Angela Shell, Deputy Director, PD, DGS

DGS strategic plan moved to a two-year plan beginning this year and will be published soon.

2021-2022 Strategic Goals

1. Restructured Administrative Billing Process
 - DGS administrative fees on overall state agency Fiscal Year (FY) spend instead of per purchase
 - Information will be provided to each state agency's accounting department in the next few months
 - To be implemented by next FY
 - May lower DGS administrative fees for the majority of state agencies and slightly increase for some state agencies
2. Development of SB/DVBE Vendor Training Program in collaboration with Go-Biz and Chamber of Commerce Small Business Administration Facilities
 - Deliver a training program to help vendors navigate the procurement process such as how to handle paperwork and respond to bids successfully
 - Two-year training plan
3. IT General Provisions Revamp in collaboration with CDT, CA Government Operations Agency, Agency Information Officers (AIOs), and Chief Information Officers (CIOs). Goals:
 - Update IT procurement policies and process
 - Provide navigation tools and guides on appropriate general provision application
 - Attain IT vendor community feedback on IT general provision language

- Estimated completion: six months or more
- 4. Consolidated SCM, Volume 2
 - Next phase – update and verify content and ensure all procurement policy updates are incorporated correctly as per Broadcast Bulletins and Management Memos
 - Estimated completion by the end of December
 - Online consolidated SCM is available, and format is similar to SAM

2022-2023 PD Goals will focus on procurement improvements, efficiency, equality, and innovation. In tandem with CA Government Operations Agency's procurement efficiency and innovation efforts.

- Strengthen SB/DVBE Advocate's Roles
 - DGS conducted an SB/DVBE Advocate Survey
 - Determines what is needed to strengthen SB/DVBE Advocate roles such as training expectations and assistance needed from DGS
 - Determines what the dedicated SB/DVBE resources state agencies have at their disposal
 - Responses have not yet been received
- Utilize Best Value Evaluations when using DGS LPAs
 - Encourage state agencies to use Best Value assessment process for CMAS, Masters Agreements when allowable to maximize vendor pools
- Low bids and RFPs
 - DGS to attain feedback from state agencies
 - Additional communication and information coming soon
- DGS Sustainability
 - DGS: enhance PD sustainability operations
 - DGS to provide training to state agencies on Environmentally Preferable Purchasing (EPP)
 - FI\$Cal EPP reporting
 - Implement additional EPP intermediate training, forthcoming this year
 - Public Works
 - Buy Clean California Act Amendment - moved implementation to July 1, 2022. Public limits for global warming procurement requirement are due to go into effect
 - Projects advertised after July 1, 2022, will be expected to contain global warming potential information.
- General Service Workgroup (GSW)
 - Consists of larger state agencies with complex projects who meet on a quarterly basis
 - Example topic discussions: current procurement challenges, DGS proposed solutions to procurement issues and procurement policy updates
 - Public works contracting requirement updates
 - DGS, PD in collaboration with DGS, Office of Legal Services (OLS) with emphasis on improving procurement efficiencies

- Attain additional public works contracting policy feedback from state agency procurement chiefs

Announcements – New DGS Agency Secretary, Amy Tong appointed March 1, 2022

- Amy Tong previously held a position as the Director of the Office of Digital Innovation (ODI) and prior to ODI she was the Director of the California Department of Technology.
- As a result of changes in DGS Agency Secretary assignment, DGS visions, priorities, and direction may shift slightly.

Appreciation given to participants of the PD Customer Survey

- Informative results received
- PD goal to collaborate with state agencies
- State agencies are welcome to reach out to Angela Shell directly. The information received will assist PD in providing the best level of customer service to state agencies.

3. Office of Small Business and Disabled Veterans Services (OSDS) Updates

Nancy Huth, OSDS Manager, PD, DGS

Matt Zweier, Customer Relations Manager, OSDS, PD, DGS

Consolidated Annual Report (CAR) for FY 2020-21

- Due to continued COVID pandemic state of emergency, the State did not meet the SB/DVBE participation goals for the first time in 13 years.
- Report includes a \$21 Billion contract award which is the highest recorded in the history of the SB/DVBE program.

DVBE Subcontracting Training

- How to complete the STD 817 and DVBE subcontracting report STD 810D
 - Additional required fields will be on the forms
- Webinar training scheduled on February 24, 2022, and March 2, 2022
- Additional information on the webinar will be sent out to state agencies

Assembly Bill 1574 Regarding Government Code §14838

- Brings diversity and expands the pool of SB/DVBE eligibility
- Update SCM to reflect the new legislation and provide outreach strategies
- Additional information will be provided via Broadcast Bulletin

Supplier Diversity Data Collection Efforts in Bidder/Supplier Registration

- Completion of the data collection effort by March 30, 2022
- Data to be used for outreach
- Additional information will be provided

22nd State Agency Recognition Award (SARA) Announcement

- Scheduled for Wednesday, April 27, 2022, at 10:00 am

- State agencies and SB/DVBE Advocates' celebration
- Live Virtual Event - additional information will be provided
- Last day to submit SB/DVBE Advocate or other staff and manager nominations: February 18, 2022
- Important to nominate your SB/DVBE Advocates or other staff deserving of recognition. There should be a nomination from each state agency.

SB/DVBE Advocate Survey

- SB/DVBE Advocate Survey identifies what is needed to strengthen the SB/DVBE Advocate role, how SB/DVBE vendor procurement process can be improved, and what tools are needed to help state agencies connect with the SB/DVBE business community.
- PD, DGS encourages all SB/DVBE Advocates to take the survey
- Data will not be shared and only used to improve Advocate program
- Ten-minute survey available until March 4, 2022
- Email survey questions to Matt Zweier at Advocates@dgs.ca.gov

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

Reminder that the deadline for submitting non-IT goods purchase estimates to OTA is April 1, 2022.

Statewide Contracts and Master Agreements in evaluation

- PC Goods – Laptops, PCs, etc.
- Fleet Vehicles – including zero emission vehicles
- IT Consulting – in collaboration with CDT

Other LPAs Under Development

- Temporary Medical Staffing
- Office Moving Services
- Small Parcel Delivery Services – UPS
- Certified Shorthand Reporters
- Destruction Services– in the interim a CMAS is available during this time

New LPA Request Process

- Download and complete request form located on DGS, PD website: [Request New Leveraged Agreement for State Agencies \(ca.gov\)](#)
- Send completed request form to DGS, Intake and Analysis Unit (IAU) IAU@dgs.ca.gov

RFO Templates

- Acquisitions Branch is developing RFO templates as required in LPA user instructions

- Feedback sent to state agencies on desired RFO elements
- Additional information to be posted via Broadcast Bulletin in April

NASPO FedEx Agreement

- Signed with two vendors and other agreements are under development
- Broadcast Bulletin will be sent to ensure state agencies use contracts.

Supply Chain Issues

- State agencies are encouraged to contact Statewide Contract (SC) Administrators for exemptions to purchase items outside of the SC

5. Supply Chain Impacts

Angela Shell, Deputy Director, PD, DGS

PD is aware of supply chain impacts with regard to electronic computer chips and chemicals.

- Projected impact timeline length: six months to one year
- LPAs also impacted

DGS requests voluntary state agency feedback on their supply chain issues and experience with vendors who are reluctant to do business with the State due to payment issues – delayed payments on delivered goods or services.

Common Supply Chain Issues

- Packaging costs have sky-rocketed
- IT goods delivery have been delayed 45 days

Common Product Availability Issues

- Many vendors are no longer interested in doing business with the State.
 - Vendors are not willing to meet the Covid related restrictions (testing, vaccinated, etc.).
 - Participating vendors have reduced from ten to twelve vendors to only one vendor response.
- Paper industry
 - Last two years and prior to COVID pandemic, a significant amount of paper industry mills have closed.
 - Recycled paper is difficult to acquire
 - Vendors state high production costs have led to inability to sustain low paper price and keep sales productive, further resulting in closed paper mills and lack of recycled paper availability.
 - DGS is working with Office of State Publishing (OSP) to address the paper supply concerns.
 - OSP may seek to explore other opportunities for purchases

Common Payment Issues

- SB/DVBE Vendors
 - Lacked awareness of the delivered goods Acceptance Testing requirements
 - Vendors are unprepared for or are unable to meet the delivered goods Acceptance Testing requirements.
 - Vendors need to be aware of the delivery provisions they agreed upon when accepting state purchase orders.

6. Policy Update

Sarah Cering, Branch Chief, PT&CS Branch, PD, DGS

Consolidated SCM Volume 2

- Phase II: To review all topics and revise SCM content
- Prioritize time-sensitive updates to reflect current changes in the state law (i.e., AB 1574)

E-Market Place

- Renée Alexander, eProcurement Business Intelligence Strategies Section Manager, tasked to provide future E-Market Place updates.

TACPA AB 1574

- Release of updated policy by end of February
- Jesse Robey, IT Specialist I, Dispute Resolution Unit (DRU), tasked to provide AB 1574 updates

IT General Provisions (GP) Refresh (Revision) Project

- Discovery completed for IT GPs with state and local governmental agencies which includes:
 - Risks to software terms and conditions (TC) and acceptance of supplier's TCs (current policy is against acceptance of supplier's TCs)
 - LPA TCs, CMAS and use of FI\$Cal Standard Comments
 - Legal questions on how it applies to SBs, and the order of precedence for LPAs.
 - How to efficiently access and share the State's standard general provisions for both state agencies and vendors.

Analyze new SB subcontracting bill requiring the STD 817 and what it applies to.

SIMM 71B

- Collaborating with CDT to improve SIMM 71B form

IT Reporting Requirements

- Improve and enhance the collection and utilization of data

IT Proprietary Publications

- Collaborative efforts with CA State Library and CDT

- Options to purchase subscriptions through CA State Library in order to streamline common publications such as newspapers and magazines.
- Provide procurement legal process on state contract terms and conditions usage versus vendor license provisions, and contract STD 213 versus purchase order document usage for low dollar amounts.

Bidder Declaration

- OSDS to update form

Legislative Bills

- 2022: 21 procurement bills
- 2021: 28 procurement bills are still active
- Tracking and updates will be provided on bills that have been passed and have taken effect on procurement activities.

NCB Justification

- Increase NCB limit higher than \$25,000
 - Has not been revised or increased for several years and is due to be revisited
 - Possibly align with non-IT goods dollar thresholds
- Update policy on LPA NCB non-IT services and tackle commonly asked questions
- Non-IT goods purchase estimate submittal deadline to OTA: April 1, 2022
 - NCB pre-procurement form submittal at least 45 days prior to services needed

7. TACPA Update

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

- Worksite Preferences have been changed and are now identified as Workplace Preferences
- Hiring Preferences are now identified as Workforce Preferences
- Workplace and Workforce are separate and can be applied separately
- Workforce Preferences can now be applied up to 5%, increased from prior 4%
- Combined total amount of these Preferences, i.e., Workplace and Workforce cannot exceed \$100,000
- Contracts exceeding \$100,000 should include TACPA Preference language and TACPA forms
- TACPA Applications are reviewed by DGS, PD, DRU. Review time can take up to five business days.
- Please submit your TACPA Preference documentation to TACPA@dgs.ca.gov
- Upcoming updates:
 - Exemptions to regulatory process
 - TACPA AB 1574 does not cover exemptions
 - Release proposed by end of 2022
 - SCM Volume 1 and the (Consolidated) SCM Volume 2 TACPA updates by end of February

- TACPA forms update (STD 830, DGS PD-525, and DGS PD-526)

8. PD Customer Survey Update

Cheryl Angeles, Purchasing Authority Unit Supervisor, PD, DGS

- Appreciation given to all who participated and provided responses to the Survey.
- PD Survey Results of the twelve questions were sent out to all PCOs and PACs about week ago.
- The first twelve questions and the pie charts showing the percentages were included in the document.
- DGS is working on reviewing the data showing areas to improve customer service, and reviewing the narrative responses provided by the participants.
- Once all of the information has been reviewed and DGS has provided responses, the information will be shared with all PCOs and PACs, hopefully by the next PART meeting.

9. Updates to the Standard Comments for FI\$Cal POs

Mary Snovel, FI\$Cal Procurement Lead, DGS

Appreciation was given to FI\$Cal partners who assisted in the Standard Comments updates.

FI\$Cal Standard Comment List in development since the FI\$Cal Go-Live in 2015. Goal is to consolidate commonly used standard comments for consistency and efficiency prior to updating general provisions in FI\$Cal.

- FI\$Cal Standard Comments are used on requisitions, procurement contracts, events (for posting to CSCR) and purchase orders
- They may be printed on the PO for suppliers to view or to be used internally as notes to approvers or documentation purposes
- DGS PD has created its own set list of Statewide Comments for all state agencies to use, such as the reference to the General Provisions
 - Statewide comments pertain to statewide laws, policy, and LPA user instructions.
- State agencies may also create their own unique Standard Comments through the FI\$Cal Configuration Modification Request (CMR) process.
 - State agency's specific Standard Comments are different than the Statewide Comments in that they are regularly used by the state agency only.

The following information is a step-by-step slide demonstration on how to upload Standard Comments and Fields in FI\$Cal. (continue to next page)

Maintain Purchase Order

Purchase Order

Business Unit 7760 PO ID NEXT Combo Edit Status Not Validated PO Status Open Budget Status Not Chk'd

Copy From Hold From Further Processing Dispute Enter dispute information Activity Log

*PO Date 02/15/2022 Doc Tol Status Valid

*Supplier DDFLOORS-001 Supplier Search Advanced Supplier Search LPA Contract ID

*Supplier ID 0000000015 Supplier Details D & DLF...
 *Buyer 10001682 Meaghan Harrington

PO Reference Leased Financed

PAA Number

Header Details PO Defaults PO Activities Actions Confidential

Activity Summary **Add Comments and Attachments**
 Add Ship To Comments
 Add Reportable Attachment
 Procurement Group

Contract Activity Report (CAR) - Form 810
 CAR Reportable No Add Subco
 Statewide Incident ID Statew
 Mission Task ID

Add Items From Catalog Purchasing Kit Item Search

Maintain Purchase Order Purchase Order PO Header Comments

Business Unit 7760 PO ID NEXT Supplier DDFLOORS-001

*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort

Comments **Use Standard Comments** Find View All First 1 of 1 Last Inactivate

Send to Supplier Show at Receipt
 Show at Voucher Approval Justification

Associated Document Attachment Attach View Delete Email

From -> PO 7760-NEXT OK Cancel Refresh

Contract Activity Report (CAR) - Form 810

Lines

Line	Item	Description	EPP/SABRC	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		chair	Add EPP/SABRC	2.0000	EA	56101504	250.00	0.00	Open

View Printable Version View Approvals Close Short All Lines *Go to More...

Favorites Main Menu > Purchasing > Purchase Orders > Add/Update POs

Maintain Purchase Order

Business Unit 7760 PO ID NEXT Combo Edit Status Not Validated PO Status Open Budget Status Not Chk'd

Copy From Hold From Further Processing Dispute Enter dispute information Activity Log

*PO Date 02/15/2022 Doc Tol Status Valid

*Supplier DDFLOORS-001 Supplier Search Advanced Supplier Search LPA Contract ID

*Supplier ID 0000000015 Supplier Details D & DLF...
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PAA Number

Header Details PO Defaults PO Activities Actions Confidential

Activity Summary **Add Comments and Attachments**
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Associated Document Attachment Attach View Delete Email

From -> PO 7760-NEXT OK Cancel Refresh

Contract Activity Report (CAR) - Form 810

Look Up Comment ID

SetID STATE
 Standard Comment Type STW

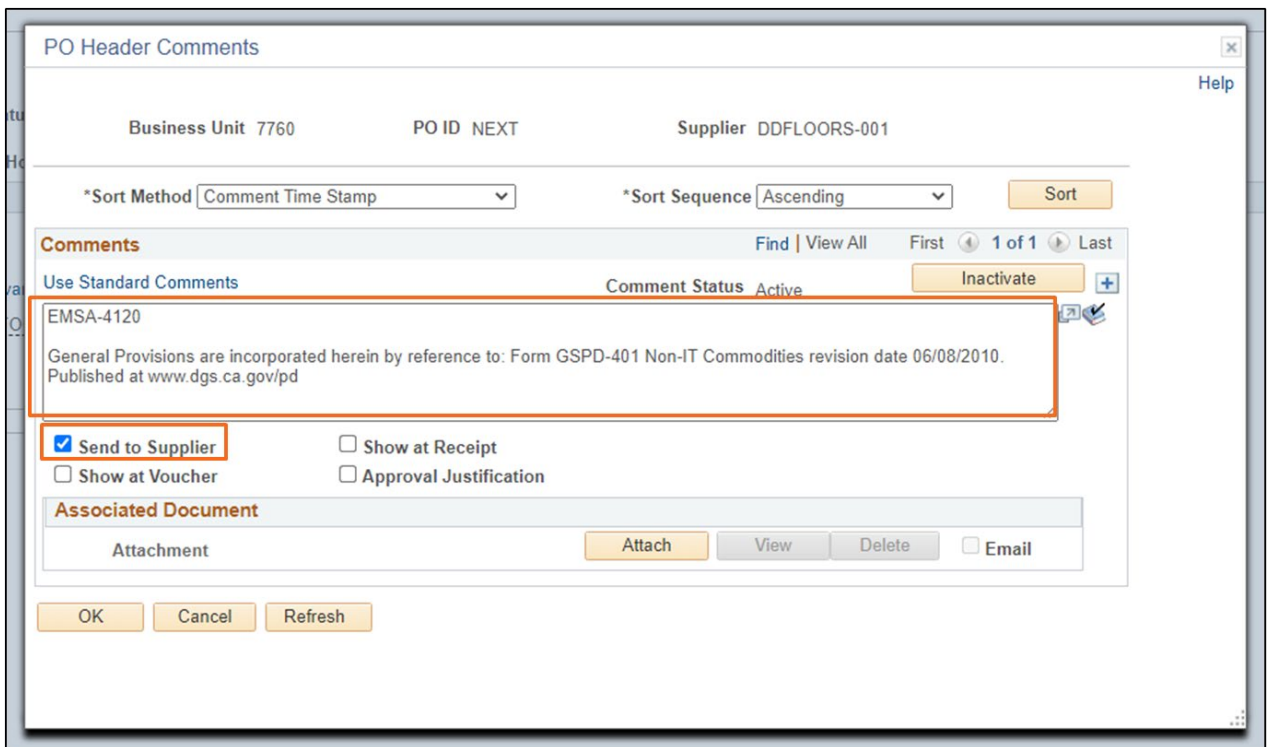
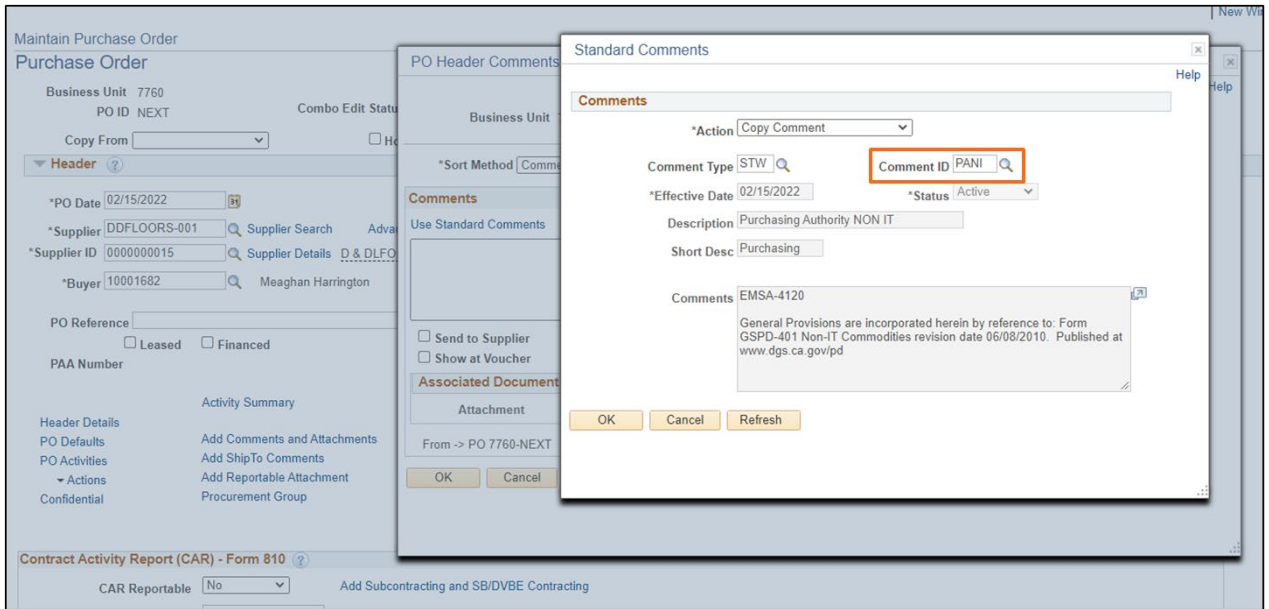
Standard Comment ID begins with
 Description begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-18 of 18 Last

Standard Comment ID	Description
1003	Catalog or market pricing
1004	Cost/benefit analysis
1007	Controlled pricing
1010	Mail invoice to bill address
401	GSPD401IT
EMSA	EMSA4120
F&R	FAIR AND REASONABLE HISTORICAL
GTC	Non-IT Services
IG1	Purch Authority and LPA
IT	IT Goods and Services
LPA	Leveraged Procurement Agreemen
NIT	Non-IT Goods
NITS	Non-IT Services
ODTR	OFF DUE TO ROUNDING
OIG	OIG Agreement Link
PA	pa
PAIT	Purchasing Authority IT g/s
PANI	Purchasing Authority NON IT



Activity Summary *Dispatch Method [P Firm]

Header Details
 PO Defaults
 PO Activities
 Actions
 Confidential

View/Edit Comments and Attachments
 Add ShipTo Comments
 Add Reportable Attachment
 Procurement Group

Amount Summary
 Merchandise 500.00
 Freight/Tax/Misc. 0.00
 Total Amount 500.00 USD Calculate

Contract Activity Report (CAR) - Form 810
 CAR Reportable [No] Add Subcontracting and SB/DVBE Contracting
 Statewide Incident ID [] Statewide Incident Description
 Mission Task ID [] Mission Task Description []

Add Items From
 Catalog
 Purchasing Kit

Lines
 Details | Ship To/Due Date | Statuses | Item Information | Attributes | BFO | Contract | Receiving

Line	Item	Description	EPP/SABRC	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	chair	chair	Add EPP/SABRC	2.0000	EA	56101504	250.00000	500.00	Open

View Printable Version
 View Approvals

Activity Summary *Dispatch Method [P Firm]

Header Details
 PO Defaults
 PO Activities
 Actions
 Confidential

View/Edit Comments and Attachments
 Add ShipTo Comments
 Add Reportable Attachment
 Procurement Group

Amount Summary

Contract Activity Report (CAR) - Form 810
 CAR Reportable [No] Add Subcontracting and SB/DVBE Contracting
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Line	Item	Description	EPP/SABRC	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	chair	chair	Add EPP/SABRC	2.0000	EA	56101504	250.00000	500.00	Open

View Printable Version
 View Approvals

Save | Notify | Refresh

PO Line Comments

Business Unit 7760 PO ID NEXT Supplier DDFLOORS-001

Line 1

*Sort Method [Comment Time Stamp] *Sort Sequence [Ascending] Sort

Comments
 Use Standard Comments
 Use Item Specifications

Comment Status Active Inactivate

Send to Supplier Show at Receipt
 Show at Voucher

Associated Document
 Attachment Attach View Delete Email

From -> PO 7760-NEXT

OK Cancel Refresh

View/Edit Comments and Attachments
 Add ShipTo Comments
 Add Reportable Attachment
 Procurement Group

Amount Summary

Contract Activity Report (CAR) - Form 810
 CAR Reportable [No] Add Subcontracting and SB/DVBE Contracting
 Statewide Incident ID [] Statewide Incident Description
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1	chair	chair	Add EPP/SABRC	2.0000	EA	56101504	250.00000	500.00	Open

View Printable Version
 View Approvals

Save | Notify | Refresh

PO Line Comments

Business Unit 7760 PO ID NEXT Supplier DDFLOORS-001

Line 1

*Sort Method [Comment Time Stamp] *Sort Sequence [Ascending] Sort

Comments
 Use Standard Comments
 Use Item Specifications

Comment Status Active Inactivate

Send to Supplier Show at Receipt
 Show at Voucher

Associated Document
 Attachment Attach View Delete Email

Mail hardcopy of invoice to Bill To Address. Must reference PO # above.
 PO LINE COMMENT

OK Cancel Refresh



Purchase Order

Department of General Services
111 First Street
Suite 100A
ZIG
WEST SACRAMENTO CA 95605
United States

Table with 3 columns: Open, Draft, Dispatch Via Print. Rows include Purchase Order, Date, Revision, Payment Terms, Freight Terms, Ship Via, Buyer, Phone, Currency, and LPA Contract ID.

Supplier: 0000000015
D & DLFOOSR
111 First Street
Suite 100A
SACRAMENTO CA 95864-0732
United States

Ship To: 111 First Street
Suite 100A
ZIG, 7-330
WEST
SACRAMENTO CA
95605
United States

Attention: Not Specified
Bill Code: 030025

Bill To: 111 First Street
Suite 100A
ZIG
WEST SACRAMENTO
CA 95605
United States

Certification#:29035 Small Business /Micro Business
Begin Date:04/06/2019 Expiration: 04/30/2022
DVBE Begin Date: Expiration:

Tax Exempt? N Tax Exempt ID:

Main purchase order table with columns: Line-Sch, Item/Description, Mfg ID, Quantity, UOM, PO Price, Extended Amt, Due Date. Includes line item 1-1 for 'chair' and summary rows for Schedule Total, Item Total, and Total PO Amount.

Mail hardcopy of invoice to Bill To Address. Must reference PO # above. PO LINE COMMENT

EMSA-4120
General Provisions are incorporated herein by reference to: Form GSPD-401
Non-IT Commodities revision date 06/08/2010. Published at www.dgs.ca.gov/pd

Please send questions and/or comments to the FI\$Cal Service Center mailbox: FiscalServiceCenter@fiscal.ca.gov