



# Meeting Recap

Tuesday, August 15, 2023  
1:30 p.m. to 2:30 p.m.

## 1. Welcome

**Nick DeAngelis, Purchasing Authority Unit (PAU) Supervisor, Department of General Services (DGS), Procurement Division (PD)**

Nick DeAngelis welcomed all participants and provided instructions on participating in the Purchasing Authority Round Table (PART) meeting. As the meeting is being held through Microsoft Teams (MT) remotely, participants were instructed to mute microphones to minimize background noise. For questions, participants are to utilize the MT meeting hand feature or enter questions in the MT chat. Opportunities to ask questions will be provided at the end of each speaker's presentation and the end of the PART meeting.

## 2. Procurement Division and Policy Updates

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

### DGS 60<sup>th</sup> Anniversary Event

- Event planning is underway - the event is scheduled for October 2023
- Events will include Procurement Division hiring recruitment and new PD services offered.

### One-Time Acquisitions (OTA)

- Record high requests received in OTA last fiscal year.
- Non-IT procurement requests are still in progress through September 28.

### Dispute Resolution Unit (DRU)

- Record high requests received for protests and Public Records Act (PRA)
- PRAs exceeded the 200 per-year average.
- Re-organization into two units
  - Non-Competitive Bids (NCB), Special Category Request (SCR) and Limited to Brand (LTB) Unit
  - TACPA, PRA, Disputes and Protests Unit
  - Two open supervisory positions for these units
    - Staff Services Manager I (SSM I) for TACPA, PRA, Disputes and Protests Unit
    - IT Supervisor for the NCB, SCR, and LTB Unit
    - SSM I and IT Supervisor vacancy announcements are currently closed.
- TACPA

- Outreach development/Implementations per Executive Orders and enacted 2022 Legislative Bills underway.
- Increase in TACPA applications received over past fiscal years.

#### Non-Competitive Bids (NCB)

- Record high NCB requests this FY end.
  - Minimal resources have been impacting processing timelines.
- NCB process improvements
  - DGS and the California Department of Technology (CDT) collaborated on IT Project Authority assessment to reduce back and forth communication between CDT and state agencies.

#### Contract Classification Quick Guide

- Combines State Administrative Manual (SAM) and existing State Contracting Manual (SCM) policy on contract classifications.
- Provides state agency procurement programs a reference guide for classifying procurements for various acquisition methods.
- Feedback request sent to the PART focus group with a due date response of August 18, 2023.
- Broadcast Bulletin will announce the Contract Classification Quick Guide and provide the website link location once the guide is finalized.

### **3. OSDS Updates**

**Araceli Mohseni, Advocate Support Manager, Statewide Advocacy Support Program, Office of Small Business and Disable Veteran Business Enterprise Services (OSDS), DGS, PD**

#### Count of Certified Firms as of July 2023

- 17,974 SB
  - 15,449 SB (Micro)
  - 2,474 SB
- 3,950 SB (Public Works)
- 1,852 DVBE (includes dual – SB and DVBE/triples - SB, MB, and DVBE)

#### OSDS Certification Backlog

- Certification staff are continuing to work processing certification requests.
- Revisions to OSDS internal certification procedures are currently in progress to improve certification processing times.
- If a state agency is currently working with a firm that has an application already submitted to the OSDS certification office and requires an expedite, please contact [OSDSHelp@dgs.ca.gov](mailto:OSDSHelp@dgs.ca.gov).

#### Small Business/DVBE Compliance

- Open recruitment for a manager and staff in the SB/DVBE Compliance Program.
- Eighteen (18) program abuse cases are currently under evaluation.

- Eleven (11) compliance investigations are currently under evaluation.

#### Small Business and DVBE Regulations

- Revised SB/DVBE regulations became effective June 29, 2023.
  - Incorporates AB 1574, SB 588, AB 230, and AB 1365.
  - Appreciation was given to Sarah Cering's staff who assisted with SB/DVBE regulation revisions.
- Section 1896.5 Small Business Participation Goals added to the SB regulations.
  - Added to meet and exceed state departments' 25% SB participation goals.
  - Requires departments to implement procedures and expand their pool of SB and DVBE bidders.
  - Includes explicit authority for departments to set contract specific SB participation goals and to establish appropriate SB participation requirements.
  - Describes the determining factors for setting SB participation goals.
  - Includes the potential bidders' requirements to qualify as responsive bidders on contracts with SB participation.

#### Upcoming 2023 Events

- August 3 - Program Managers Supplier Diversity Best Practices Forum, Western Regional Minority Supplier Development Council
- August 16 - 44th Annual Statewide Convention, California Hispanic Chambers of Commerce
- August 17 - Webinar series with the Sacramento Regional Builders Exchange
- August 30 - 19th Annual Procurement & Resource Fair, Caltrans
- September 6 - Multicultural Business & Career Expo, Russian American Media Foundation
- September 7 - Meet the Primes, San Diego Airport
- September 25 - 13th Annual Veteran and Small Business Trade Show
- October 12 - 2023 Insurance Diversity Summit, California Department of Insurance
- For details, visit: <https://www.dgs.ca.gov/PD/Events>
  - Contact OSDS for outreach event support/information and hosting networks.
- Follow OSDS on LinkedIn at: <https://www.linkedin.com/company/dgs-osds>
- Encourage state agencies to participate in the events to expand the pool of suppliers.

#### SB/DVBE Training Unit

- The SB/DVBE Training Unit will offer the small business owner and their employees a how-to approach for navigating the state bidding and contracting process.
  - Leveling the procurement playing field and training module implementation is one of PD's high-priority strategic goals.
- Training Modules
  - CUF, Marketing, EPP training, and more!
  - Modules will be available later this year.
  - Details and timelines are forthcoming.

#### Statewide Advocacy Unit

- Best Practices Webinar

- August 16, 2023
  - 10–11:30 a.m. (for departments spending over 2 million dollars)  
[Registration Link](#)
  - 2–3:30 p.m. (for departments spending less than 2 million dollars)  
[Registration Link](#)
  - Both sessions will have ASL services.
- Mandatory for departments who missed their SB and/or DVBE participation goal for FY 2021 – 2022
- Broadcast Bulletin has been released, Bulletin #: E-05-23 – RE: [Small Business \(SB\) and Disabled Veteran Business Enterprise \(DVBE\) Participation in State Contracting Best Practices Webinar](#).
  - 250 attendees for the afternoon session
  - 150 attendees for the morning session
- Highly recommended for all State Advocates, PACs, and PCOs.
- Verify if you are required to register by contacting [Araceli.Mohseni@dgs.ca.gov](mailto:Araceli.Mohseni@dgs.ca.gov).
  - 17 required agencies have not registered for training.

#### 4. CalPCA Updates

**Robert Ullrey, Learning Development Chief, PT&CS Branch, DGS, PD**

##### Introduction to New CalPCA Manager

- Lucinda Winward

##### New Offerings

- Statement of Work self-paced course can be taken anytime online via the LMS. Formerly this class was only given as a quarterly webinar.

##### Request for Subject Matter Experts (SMEs) and Pilot Testers

- Appreciation was given to SMEs who have assisted in course development.
- SMEs
  - Assisted in developing course content.
  - Reviewed course materials prior to course deployment.
- Pilot Tests
  - CalPCA will email state agencies asking for pilot testers.
    - Contract administrator SMEs will be targeted for pilot testers.
    - Half-hour commitment
    - Critical for material/content quality assurance

##### In Production

- Acquisition Types
  - New basic course – an in-depth exploration into acquisition methods as defined in FI\$CAL classifications.
  - Aids buyers in distinguishing between various acquisition types
  - Estimated completion in September or October.
- Contract Administration

- Formerly offered in webinar as Contract Management.
- Currently a part of DGS Office of Business Acquisition Services (OBAS) units required employee training.
- Learning Management System (LMS) course development is in progress with estimated completion in October.

## **5. Acquisitions - Contract Updates**

### **Carol Bangs, Acquisitions Branch, DGS, PD**

#### Recently Awarded

- Mini-Fire Rescue Vehicles - Expanded new models available for state agencies.
- CHP Rainwear – Awarded to SB.
- Alternate Fuel Medium/Heavy Duty Trucks and Vans
- Renewable Diesel
  - Two of the three awards include 25% subcontractor participation.
  - Awarded by area.
    - Review User's Instructions (UI) for area constraints and blanket purchases.
    - Reminder to review UI for any LPA especially if it is a mandatory LPA or offers an SB/DVBE Off-Ramp, etc.
- Paper, Matte, Gloss, and Index – Primarily for Office of State Publishing (OSP)
- Paratransit Vehicles
- Frozen Turkey – Awarded to SB.
- Pudding Mix – Awarded to SB.
- Pudding Ready to Eat – Awarded to SB.
- Waffles – Awarded to SB.
- Frozen Fish – Awarded to SB
- Body Armor - Statewide Contract has been awarded and is listed on PD's [State Contract Index Listing](#) and searchable on [eProcure](#).
  - A Broadcast Bulletin announcement is currently enroute for internal approval and is expected to be sent in the next 24 hours. If the state agency's body armor contract lapses, do not purchase without working with DGS, PD as there are required approvals/processes per State laws and regulations.
- Online Auction Services- Newly awarded cooperative.
- Information Security Services-Newly awarded cooperative.

#### Upcoming Acquisitions Branch Solicitations

- Enterprise Technology
- Electric Vehicle Supply Equipment (EVSE)- currently posted.
- Soup Base
- Grill Oil
- Mayonnaise
- Uniform Laundry Services
- Office Moving Services – currently in evaluation. Estimated to be awarded by the end of August.