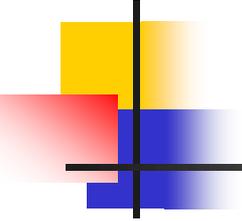




**Procurement Division  
Customer Forum  
January 22, 2014**



# Information for Webcast attendees

---

**Please go to the following link for copies of:**

- **Agenda**
- **Feedback Form**
- **PowerPoint Presentation**

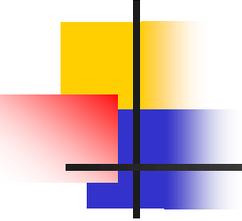
<http://www.dgs.ca.gov/pd/Programs/OSDS/CommunicationsOutreach.aspx>

- **Email Questions for speakers to:**

[PDCustomerForum@dgs.ca.gov](mailto:PDCustomerForum@dgs.ca.gov)

READY TO START 2014





# Introductions

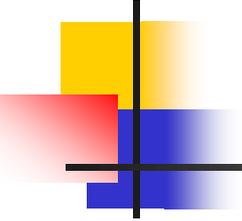
---

**Danetta Jackson**  
**Program Manager**

**Office of SB and DVBE**  
**Services/Outreach Branch**

**[Danetta.Jackson@dgs.ca.gov](mailto:Danetta.Jackson@dgs.ca.gov)**

**(916) 375-4483**



# Survey Results

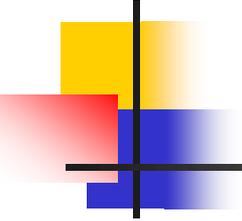
---

**Danetta Jackson**  
**Program Manager**

**Office of SB and DVBE**  
**Services/Outreach Branch**

**[Danetta.Jackson@dgs.ca.gov](mailto:Danetta.Jackson@dgs.ca.gov)**

**(916) 375-4483**



# **SARA RECAP**

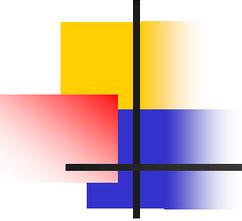
---

**Wayne Gross**  
**Customer Service Liaison**

**Office of SB and DVBE**  
**Services/Outreach Branch**

**[Wayne.Gross@dgs.ca.gov](mailto:Wayne.Gross@dgs.ca.gov)**

**916-375-4339**

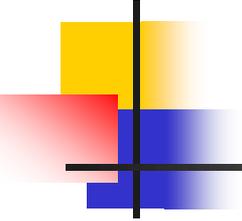


# SARA RECAP

---

## ADVOCATE:

- **Gold** Lisa Tackett – Kern Valley State Prison
- **Gold** Liza Whitmore – Caltrans District 3
- **Silver** Linda Fergurson – Board of Equalization
- **Bronze** Linda Langley – Wasco State Prison

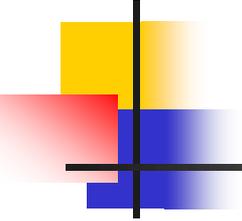


# SARA RECAP

---

## **SARA, State Agencies:**

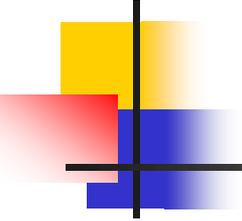
- **Gold** Department of Corporations
- **Silver** CDCR - CA Institution of Men
- **Silver** CDCR - Kern Valley State Prison
- **Bronze** Department of Consumer Affairs:  
Contractor State License Board



# SARA RECAP

---

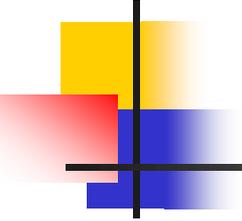
- **SECRETARY'S SPECIAL ACHIEVEMENT AWARD** Board of Equalization
- **SB ADVOCATE INNOVATION AWARD (SBAIA)** First 5 CA
- **GOVERNOR'S AWARD** Military Department



# SARA RECAP

---

- **MOST IMPROVED SMALL BUSINESS PARTICIPATION:**
- **Small**      Employment Training Panel
- **Medium** CA State Library
- **Large**      Office of Systems Integration



# SARA RECAP

---

- **MOST IMPROVED DVBE PARTICIPATION:**
- **Small** CA Tahoe Conservancy
- **Medium** Student Aid Commission
- **Large** Board of Equalization

# BEST PRACTICES FROM STATE AGENCY RECOGNITION AWARD CEREMONIES

NAME OF DEPARTMENT	SARA AWARD	BEST PRACTICES
Board of Equalization	Bronze 2009	<ul style="list-style-type: none"> <li>Identify SB/DVBE vendors within leveraged procurement agreements</li> <li>Utilize the off-ramp to increase business with SB/DVBEs, when possible</li> <li>Acquisition staff are required to complete Cal-PCA certification training</li> <li>Cross-train staff in reporting requirements and processes</li> <li>Inform management on year-end reporting results</li> </ul>
Employment Development Department	Bronze 2009	<ul style="list-style-type: none"> <li>Executive management support the efforts of the SB/DVBE Advocate's outreach efforts while traveling to DGS sponsored events</li> <li>Adopt a policy to procure all goods and services through SB/DVBEs when possible or provide documentation that an attempt was made before using the formal contracting process</li> </ul>
First 5 California	Silver 2009	<ul style="list-style-type: none"> <li>Designate ½ of total procurement staff as SB/DVBE advocates and participate in Advocate meetings</li> <li>Keep management informed of challenges affecting SB/DVBEs.</li> <li>Set-up strategies to meet or exceed the legislative established goals</li> </ul>
California Highway Patrol	Silver 2009	<ul style="list-style-type: none"> <li>Implement procurement training for staff and increase advocate participation in outreach activities</li> <li>Obtain executive management support to provide training and outreach for field offices</li> <li>Assist prime contractors with locating certified SB/DVBE vendors by utilizing the UNSPSC classifications in solicitations</li> </ul>
CDCR – Substance Abuse Treatment Facility and State Prison, Corcoran	Gold 2009	<ul style="list-style-type: none"> <li>Utilize electronic databases and encourage staff to seek out SB/DVBE vendors for greater efficiency and proficiency levels</li> <li>Incorporate a one-on-one assessment and training service to procurement staff</li> </ul>
CDCR – Kern Valley State Prison	Bronze 2010	<ul style="list-style-type: none"> <li>Utilize the SB/DVBE Option</li> <li>Each procurement must have at least one SB and one DVBE bid</li> </ul>
CDCR – Corcoran	Bronze 2010	<ul style="list-style-type: none"> <li>All bid proposals target the SB/DVBE communities</li> <li>Procurement staff train institution staff on the importance of contracting with SB and DVBE firms on a quarterly basis</li> <li>Executive staff fully support the efforts of the SB/DVBE advocates</li> </ul>
DGS – Office of State Publishing	Silver 2010	<ul style="list-style-type: none"> <li>Work diligently to build working relationships with SB/DVBE firms who provide diverse services and products</li> </ul>

NAME OF DEPARTMENT	SARA AWARD	BEST PRACTICES
Department of Aging	Gold 2010	<ul style="list-style-type: none"> <li>Utilize the SB/DVBE Option</li> <li>Utilize businesses certified as both SB and DVBE</li> <li>Advocate work with buyers to develop their solicitations</li> <li>Advocate active in conducting outreach to SB and DVBE firms</li> </ul>
Department of Corporations	Bronze 2011	<ul style="list-style-type: none"> <li>Executive staff support, diligent managers, hard-working staff and a great advocate</li> <li>Implement procedures to award as many certified vendors, as possible</li> <li>Top management promote and ensure the attainment of SB/DVBE goals as part of the department's procurement objectives</li> <li>Advocate work with department to aggressively reach out to California businesses and create the model for all future department advocates</li> </ul>
DGS – Office of State Publishing, Procurement Team	Bronze 2011	<ul style="list-style-type: none"> <li>Support of the overall SB/DVBE program</li> <li>Products are required to provide the essential mission critical operations and services of the State of California departments and public health and safety</li> <li>Consistently reach out to SB/DVBE firms and diligently work to build working relationships with these firms</li> <li>Assist qualifying vendors to be certified to do business with the State of California and focus bid/quote opportunities with the SB/DVBE firms</li> </ul>
DGS – Real Estate Services Division	Silver 2011	<ul style="list-style-type: none"> <li>Fine-tune SB/DVBE reporting process into a more efficient mechanism to provide more consistent reportable data</li> <li>Collaborative effort of monthly and quarterly participation tracking among branches and numerous statewide operations</li> <li>Continued communication and training opportunities to receive valuable input from individuals across the division, which increase the visibility and consistency of reported data</li> <li>Monthly and quarterly participation reports provided by Executive staff to make it easier for each unit and branch to monitor their individual impact of the division's goal.</li> <li>Program-specific monitoring allows for real-time changes to be made on solicitations, as needed to keep on track</li> </ul>
CDCR – Commodities Acquisition Unit	Gold 2011	<ul style="list-style-type: none"> <li>Develop an extensive training program for department customers on the utilization of SB/DVBES when obtaining quotes</li> <li>Standard practice to use the SB/DVBE off-ramp for all statewide contracts that allow for the use of an off-ramp – increases use of SB/DVBE suppliers while lowering overall procurement costs to the department</li> </ul>

NAME OF DEPARTMENT	SARA AWARD	BEST PRACTICES
Kern Valley State Prison Procurement	Bronze 2012	<ul style="list-style-type: none"> <li>• Create a tutorial on how to utilize the local area network of suppliers from the onset of the purchase process</li> <li>• Offer drop-in consultation to prospective suppliers and assist internal staff with training, when necessary</li> <li>• Utilize Local Area Network capabilities with computer services in maintaining an intranet procurement folder, filled with all the forms and information any staff would need to start a purchasing task (includes local processes, access to the statewide procurement handbook, the standard forms to start a purchase process and helpful tips)</li> <li>• Local requirement of contacting at least one certified SB/DVBE vendor in the competitive bid process</li> <li>• Staff always be available by phone or drop-in consultations to assist in locating certified vendor information on BidSync</li> <li>• Act as guest trainers for other department's training and/or safety meetings</li> </ul>
Department of Insurance	Bronze 2012	<ul style="list-style-type: none"> <li>• Continue to be proactive and innovative in providing outreach to the SB/DVBE community</li> <li>• Implement policies and procedures to improve procurement opportunities for certified SB/DVBE firms</li> <li>• Establish a vendor management tool to track products a SB/DVBE firm is authorized to resell – request quotes electronically</li> <li>• Explain benefits of certification, provide links to the DGS website, as well as provide guidance in navigating the certification process</li> <li>• Implement policies and procedures to improve procurement opportunities for certified SB/DVBE firms</li> <li>• Ensure every effort is made to seek out and include SB/DVBE vendors when conducting any procurement activity with approved delegated purchasing authority and contracting through utilizing the SB/DVBE Option</li> </ul>
Department of Aging	Silver 2012	<ul style="list-style-type: none"> <li>• Give preference to the SB/DVBE community, whenever possible</li> <li>• When drafting a Scope of Work, instruct buyers to query the SB/DVBE database to solicit those vendors first</li> <li>• Utilize the SB/DVBE off-ramp when using the Leveraged Procurement Agreements</li> <li>• When the advocate is off, management finds other staff to cover the tasks</li> <li>• Management ensures Advocate has the resources needed to perform job</li> </ul>

NAME OF DEPARTMENT	SARA AWARD	BEST PRACTICES
Department of Water Resources	Gold 2012	<ul style="list-style-type: none"> <li>• Collaborative effort between the advocate and staff result in a consistent, continual improvement to the SB/DVBE program's performance</li> <li>• Develop, implement and create innovative processes and procedures, templates, workshops and training</li> <li>• Create strong bid language focused on outreach and education to acquire SB awards</li> <li>• Program staff, buyers and contract analysts routinely contact the advocate for assistance early in the process</li> </ul>
Franchise Tax Board	Gold 2012	<ul style="list-style-type: none"> <li>• Provide education and outreach to staff and attend various program forums</li> <li>• Provide guidance on project challenges and participation goals; provide exemplary customer service</li> <li>• Brainstorm new ideas; consistently update the internal program by updating solicitation templates; convene roundtable discussions</li> <li>• Encourage awarding directly to SB/DVBEs whenever possible and promote subcontracting opportunities in Leveraged Procurement Agreements, whenever feasible</li> <li>• Executive staff's understanding of importance of the SB/DVBE Program and the advantages it provides to SB/DVBEs and the State financially</li> <li>• Continuously strive to improve areas of responsibility and tackle the difficult job of balancing between cost, mandated contracts and the Program</li> <li>• Collectively share innovative ideas with the advocates and management; hold customer forums to provide education and outreach and focus on the enterprise while continuing their efforts to meet participation goals</li> <li>• Utilize the SB/DVBE First Policy</li> </ul>
Department of Consumer Affairs – Contractor State Licensing Board	Bronze 2013	<ul style="list-style-type: none"> <li>• Increase participation by seeking DVBEs first for all procurements</li> <li>• Utilize the SB/DVBE Option, when possible</li> <li>• Utilize DVBE vendors listed on WSCA contracts</li> <li>• Seek help to locate SB/DVBE vendors by utilizing the department advocate, the Contractor State Licensing Board (CSLB) Program and/or eProcurement</li> <li>• Take personal responsibility of the SB/DVBE program</li> <li>• Attend training</li> </ul>

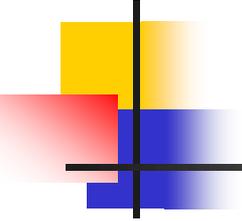
NAME OF DEPARTMENT	SARA AWARD	BEST PRACTICES
CDCR – California Institution of Men	Silver 2013	<ul style="list-style-type: none"> <li>• Require all bid proposals to be targeted to the SB/DVBE community</li> <li>• Continuous training to staff on how to utilize the SB/DVBE community how to use the SB/DVE off-ramp for statewide contracts; and how to search for and contact SB/DVBEs within the community</li> <li>• Continually assist vendors with state services, procurement and contracting processes on how to do business with the State of California</li> <li>• Continually enforce the SB/DVBE rules and regulations</li> <li>• Having the necessary tools and training available to all staff to enhance their knowledge</li> </ul>
Kern Valley State Prison	Silver 2013	<ul style="list-style-type: none"> <li>• Local requirement to contact at least one SB/DVBE in every competitive bid solicitation</li> <li>• Procurement staff team is available to assist staff with research of possible SB/DVBEs to answer questions for consultation during bid process</li> <li>• Act as guest trainers for their department’s training and safety meetings</li> <li>• Utilize Local Area Network capabilities with computer services in maintaining an intranet procurement folder, filled with all the forms and information any staff would need to start a purchasing task (includes local processes, access to the statewide procurement handbook, the standard forms to start a purchase process and helpful tips)</li> </ul>
Department of Corporations	Gold 2013	<ul style="list-style-type: none"> <li>• When possible, purchase goods and services from business with both SB/DVBE certifications</li> <li>• Capture subcontracting dollars for annual report – communicate with vendors to maximize use of certified subcontractors</li> <li>• Develop a PowerPoint presentation on procurement training to include a SB/DVBE component and the importance of using certified vendors</li> <li>• Acquire support and assistance from the Executive Office to help reach goals for SB/DVBE participation</li> <li>• Good customer services skills and contact vendors in advancement of solicitations</li> <li>• Collaborate on large purchases department wide – purchases be reviewed and proofed that all reasonable avenues were pursued to find and use SB/DVBEs</li> <li>• Create environment where all staff are trained to give first consideration to SB/DVBEs, use of the SB/DVBE Option and aggressively search for potential vendors or contact the advocate for assistance</li> </ul>

- Procurement training empowers the requestors with similar ownership of the SB/DVBE goals

#### Additional Best Practices:

- Ensure all SB/DVBE subcontracts with the prime or major subcontractor regardless of tier are counted
- Unbundle contracts to enhance SB/DVBE participation, i.e. break contracts down into economically feasible unit so as to enhance SB/DVBE participation
- Ensure the SB/DVBE Advocate contact information is within two clicks away from the departments home web page
- SB/DVBE Advocates are encouraged to conduct business development by facilitating introductions/meetings with the end user and the prospective SB/DVBEs
- Departments should strongly consider using the focused recruitment activities outlined in SB 1045 [Polanco](#) so as to increase diversity among the underrepresented small businesses.
- Work with your contracting officers to quantify the scope and project requirements for each potential work opportunity you've defined for possible SB and DVBE participation
- Once a contract is awarded, continue to work with the prime contractor to identify opportunities for SB and DVBEs throughout the life of the contract, e.g. suppliers
- Make sure that as many certified SB/DVBE firms as possible know about the contracting opportunities you are offering. Identify the types of contracting opportunities and advertise them beyond BidSync, when possible

|

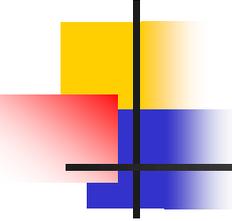


# Upcoming SB/DVBE Events

---

Wayne Gross

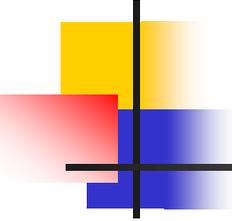
Customer Service Liaison  
Wayne.Gross@dgs.ca.gov  
916-375-4339



# Upcoming SB/DVBE Events

---

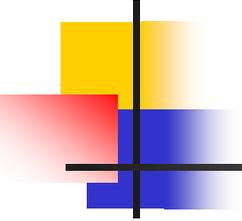
- **March 3** – High-Tech Small Business Industry Day
- **March 27** - California Regional Transportation Summit  
“Fresno/Bakersfield/Palmdale”
- **April 18** – Caltrans/Public Health
- **May 12-13** – Keeping the Promise



# Upcoming SB/DVBE Events

---

- **July 30-31** – CalCon Expo
- **Aug 27** – Get Connected (Stockton PAC)
- **October 1- 1<sup>st</sup>** Annual CalVet DVBE Business Matchmaking Expo



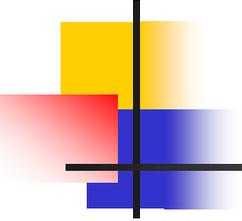
# Questions ?

---

Webcast attendees  
Send your questions to

[PDCustomerForum@dgs.ca.gov](mailto:PDCustomerForum@dgs.ca.gov)

# CAL-PCA UPDATE



---

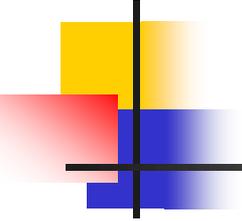
**Joseph Watkins, Manager**

California Procurement & Contracting  
Academy

[joseph.watkins@dgs.ca.gov](mailto:joseph.watkins@dgs.ca.gov)

**(916) 376-4637**

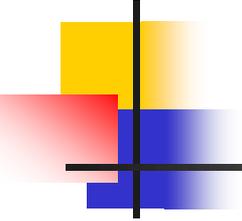
# CAL-PCA UPDATE



---

- 2,000 = 2013/14 Attendance Goal
- 1,289 by 1/22/2014
- 1,380 more =
- 2,669

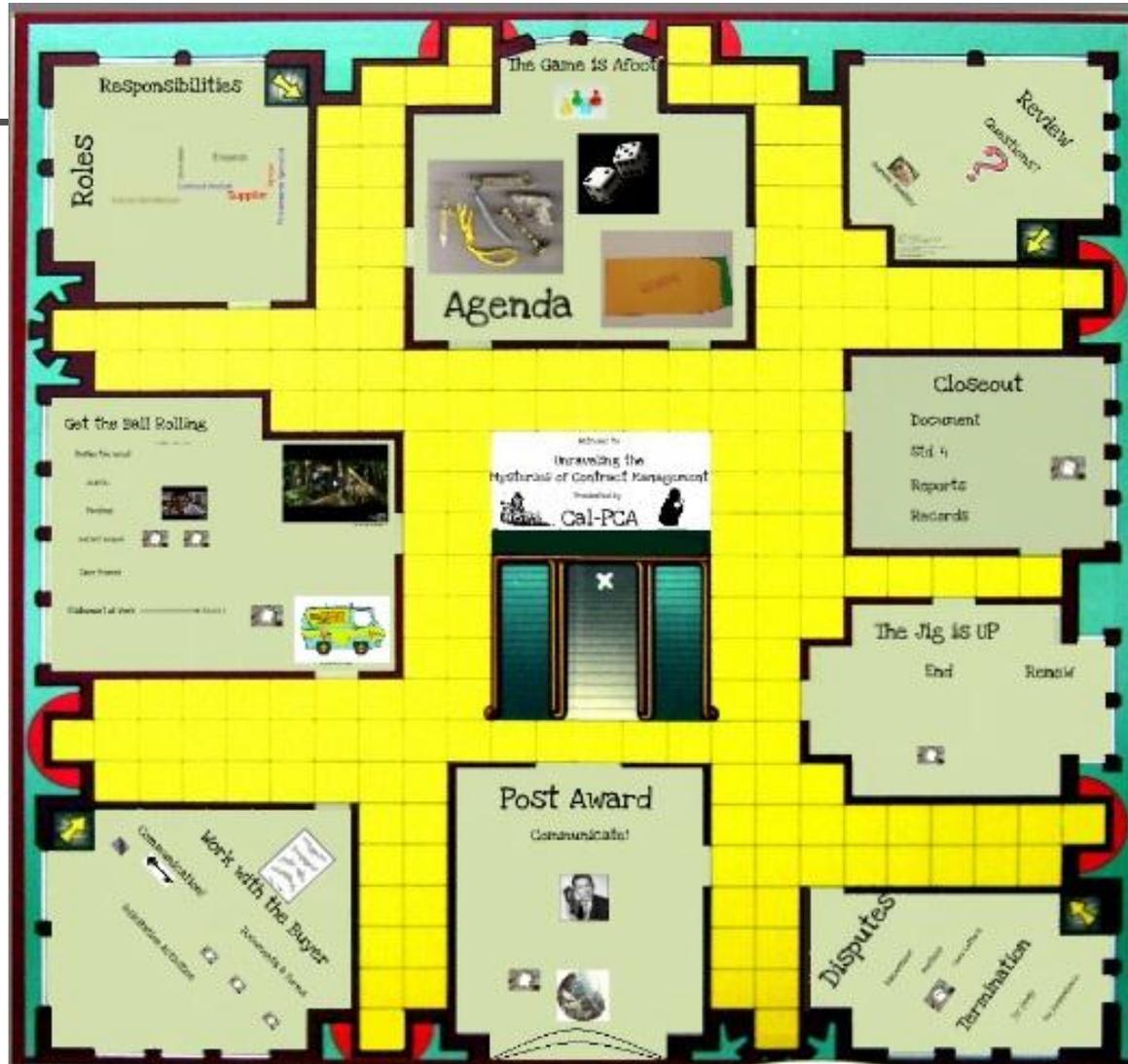
# CAL-PCA UPDATE



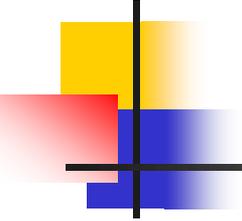
---

- 2 NEW Workshops:
- Contract Management Workshop

# CAL-PCA UPDATE



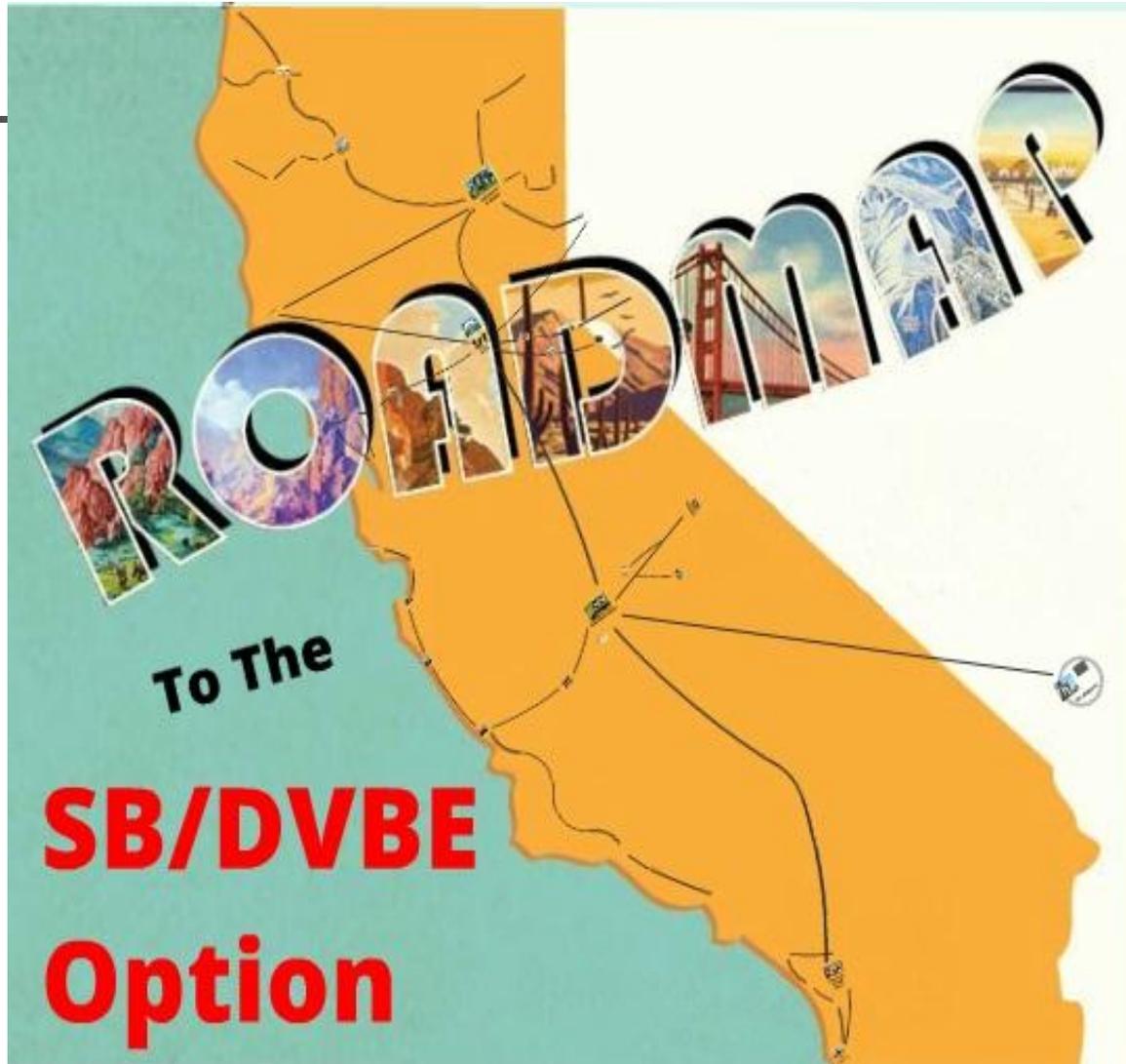
# CAL-PCA UPDATE



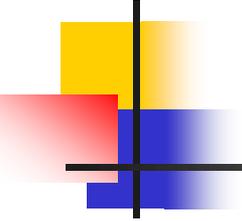
---

- 2 NEW Workshops:
- Contract Management Workshop
- SB/DVBE Option Workshop

# CAL-PCA UPDATE

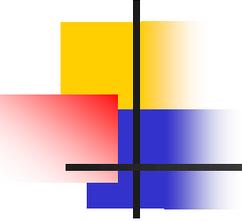


# CAL-PCA UPDATE



---

- Acquisitions Under \$5,000 Webinar
- SB/DVBE Option Webinar
- Contract Management Webinar
- Leveraged Procurement Agreements Webinar

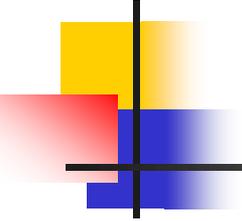


# Questions ?

---

Webcast attendees  
Send your questions to

[PDCustomerForum@dgs.ca.gov](mailto:PDCustomerForum@dgs.ca.gov)



# BREAK

---



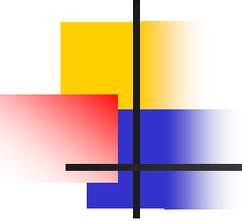
**BREAK TIME**  
10 Minutes

**Network**

Meet someone new

**Restrooms**

Turn left as you exit  
main auditorium doors

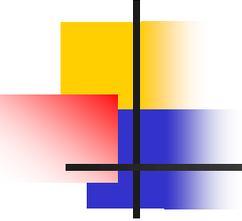


# Legislative Update

---

Chuck Deyoe  
Legislative Liaison

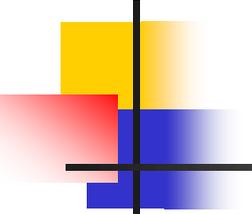
DGS Procurement Division  
[Charles.Deyoe@dgs.ca.gov](mailto:Charles.Deyoe@dgs.ca.gov)  
(916) 375-4341



# Legislative Update

---

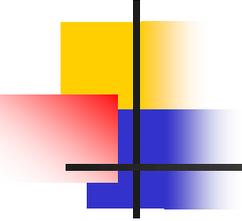
- **AB 172: Microbusiness Preference:** This bill would raise the microbusiness preference to 7% and the preference for a non-small business with microbusiness subcontractor participation to a maximum of 7%. **(Held in Assembly Appropriations)**



# Legislative Update

---

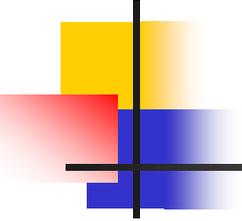
- **AB 173:** This bill authorizes the University of California (UC), the California State University (CSU), and the California Community Colleges (CCC), in awarding contracts up to \$250,000 for goods, services, and information technology, and as an alternative to receiving competitive bids, to instead obtain price quotations from two or more state-certified small businesses, microbusinesses or disabled veteran business enterprises (DVBES). (Chaptered. Chapter 262, Statutes of 2013)



# Legislative Update

---

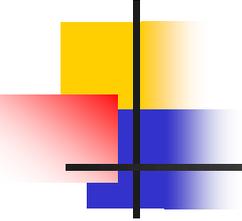
- **AB 550:** This bill establishes procedures and accounting to ensure all state agencies and departments achieve a 25% small business participation rate for state contracts. (Held in Assembly Appropriations)
- **SB 297:** This bill would increase the DVBE participation percentage from 3% to 5%. (Held at Request of Author)



# Legislative Update

---

- **AB 199:** This bill would have required food buyers to give a 5% preference to CA companies who supply food.  
(Vetoed)
- **AB 965:** This bill would require the state to develop a statewide business certificate. (Read 2/25/2013)

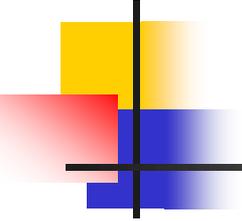


# Questions ?

---

Webcast attendees  
Send your questions to

[PDCustomerForum@dgs.ca.gov](mailto:PDCustomerForum@dgs.ca.gov)



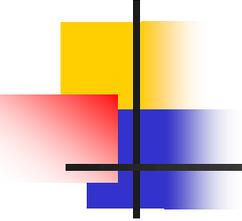
# Update on Contracts

---

Marc Anderson  
Senior EDP Acquisitions Specialist

DGS Procurement Division  
[Marc.anderson@dgs.ca.gov](mailto:Marc.anderson@dgs.ca.gov)

916.375.5955

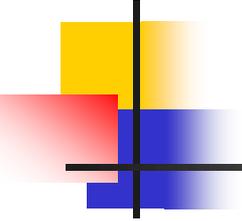


# Update on Contracts

## Statewide Contracts

---

- New Contracts
  - Fleet Vehicles
  - Tires
  - Salt

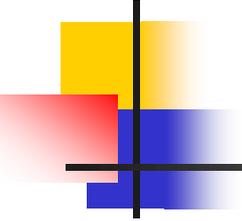


# Update on Contracts

## Statewide Contracts

---

- Contract Extensions
  - Traffic Controllers
  - Fish Feed
  - Open Office Panel Systems

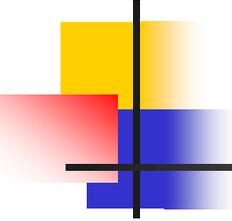


# Update on Contracts

## Statewide Contracts

---

- Active Solicitations
  - Electric Vehicle Supply Equipment
  - Lamps
  - Body Armor

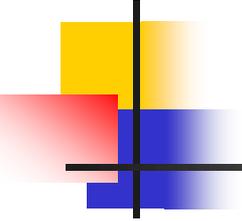


# Update On Contracts

## Statewide Contracts

---

- Statewide Contracts
  - <http://www.documents.dgs.ca.gov/pd/contracts/contractindexlisting.htm>

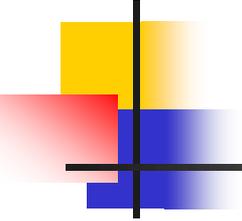


# Questions ?

---

Webcast attendees  
Send your questions to

[PDCustomerForum@dgs.ca.gov](mailto:PDCustomerForum@dgs.ca.gov)



# Update on Contracts

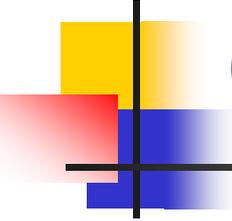
---

Stacy Jarvis  
Staff EDP Acquisitions Specialist

DGS Procurement Division

[Stacy.Jarvis@dgs.ca.gov](mailto:Stacy.Jarvis@dgs.ca.gov)

916.375.4378

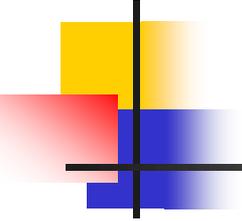


# Update on Contracts

## Cooperative Agreements (WSCA-NASPO)

---

- Contract Extensions
  - Light Duty Automotive Parts
  - Public Safety Communication Equipment
  - Drug Testing Kits
- Rebid in Process
  - Light Duty Automotive Parts
  - Public Safety Communication Equipment

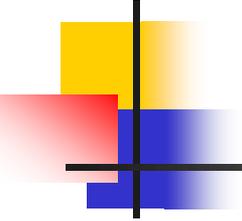


# Update on Contracts

## Master Agreements

---

- Contract Extensions
  - Statewide Commercial Car Rental
- Rebids in Process
  - IT Consulting Services
  - Airline Travel Services

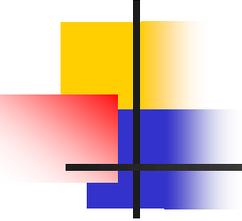


# Update on Contracts

## Current SLP Publishers

---

- IBM
- Oracle
- Microsoft (Premier)
- HP
- McAfee
- Novell
- Trend Micro
- Accela
- CA, Inc.
- Microsoft (Academic)
- Microsoft (MELA)
- Microsoft (GOV)
- Symantec
- Attachmate
- Unify
- CommVault
- Wensense
- SAP
- Kronos

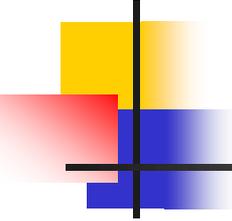


# Update on Contracts

## SLP Publishers In-Process

---

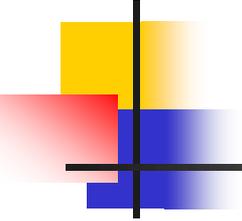
- Adobe
- BMC
- EMC
- Quest
- VMware
- Informatica
- Palantir
- SAS
- ASG
- Accela



# Update on Contracts

---

- Cooperative Agreements
  - [PDWSCA@dgs.ca.gov](mailto:PDWSCA@dgs.ca.gov)
- Master Agreements
  - [Masters@dgs.ca.gov](mailto:Masters@dgs.ca.gov)
- Software License Program (SLP)
  - [SLP@dgs.ca.gov](mailto:SLP@dgs.ca.gov)

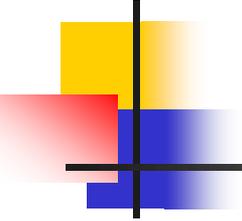


# Questions ?

---

Webcast attendees  
Send your questions to

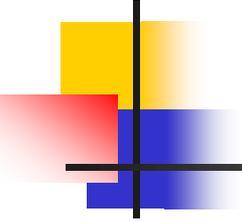
[PDCustomerForum@dgs.ca.gov](mailto:PDCustomerForum@dgs.ca.gov)



# OPEN FORUM

---

**This is your time to  
share or ask more questions.**

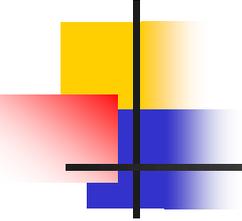


# Feedback

---

**Please fill out the feedback form before you leave. Your input is greatly appreciated!**

**\*\*Mark Your Calendar for the Next Customer Forum May 28 ,2014**



# Closing Remarks

---

**Danetta Jackson**

**Acting Chief**

**Office of SB and DVBE  
Services/Outreach Branch**

**[Danetta.Jackson@dgs.ca.gov](mailto:Danetta.Jackson@dgs.ca.gov)**

**(916) 375-4483**