

Statewide SB/DVBE Advocate Toolkit

OUTREACH

Chapter VIII



February 2012

CHAPTER VIII ADVOCATE OUTREACH

OUTREACH

In terms of the SB/DVBE program, outreach is “to seek out, educate, encourage, and assist small businesses and disabled veteran business enterprises with opportunities for economic growth in the business community” through the state’s competitive bid process.



As the SB/DVBE Advocate you will be involved in various levels of outreach activity. These may be wide-ranging activities – such as traveling to remote regions and locations, when permissible, to participate in business conferences and expositions, trade shows and focused events. Or, it could be attending local smaller outreach events held at your department or another department site. Whatever the case, you want to be prepared when you meet the small and DVBE business owner to provide them with a means to find out how to do business with your department. On the other hand, outreach also includes internal education to raise SB/DVBE program awareness within your department to gain the support necessary to achieve program mandates.

In each instance, you are raising the visibility of your department’s SB/DVBE program activities. The following information provides gives an overview of “outreach” program implementation – who and what it is; outreach goals; implementation strategy, outreach activities, outreach materials, and monitoring outreach your activities.

OVERVIEW

The responsibility for providing small business and disabled veteran business enterprises (DVBE) with outreach programs designed to raise awareness and access to contracting opportunities lies with three primary agencies: Department of General Services, State and Consumer Affairs, and California Department of Veterans Affairs (CDVA).

In addition, the Business, Transportation and Housing Agency (BTH) has also developed its own comprehensive business outreach program to assist small and DVBE businesses, and the Governor’s Office of Business and Economic Development (GoBiz) serves as the State’s principal catalyst for innovation, investment and economic opportunities, enhancing the quality of life and free enterprise business opportunity for all Californians.

Within DGS/ Procurement Division under the Office of Small Business and DVBE Services, the SB/DVBE program oversight is multi-faceted and includes administering the small business and DVBE certification programs; publishing statewide solicitations in the California State Contracts Register/BidSync and provides bidders with the Subscription Outreach Service while the Outreach and Education Section provides advocacy and promotes contract participation and informational awareness to the small business and DVBE community.

Moreover, each state agency has its own responsibility for identifying and implementing innovative processes and strategies for small and DVBE business participation, both internally and externally. Each department’s small business/DVBE Advocate is tasked with responsibility for developing and implementing outreach activities geared toward increasing small business/DVBE awareness, education, and participation in state contracting and procurement activities.

CHAPTER VIII ADVOCATE OUTREACH



OUTREACH GOALS

Outreach activities increase SB/DVBE program visibility and opportunities for both the business community and within state agencies and departments. More specifically, outreach accomplishes the following:

- Encourages prime contractors to utilize SB/DVBE businesses as subcontractors
- Educates SB/DVBE businesses of the benefits of state certification
- Provides focused outreach activities for traditionally underserved communities
- Increases employee awareness of the value-added benefits of utilizing small and disabled veteran businesses

IMPLEMENTING AN OUTREACH STRATEGY

What is an “outreach strategy”? How does one go about implementation of an “outreach strategy”? Here are some fundamental steps to assist you formulate your department’s strategy for increasing the visibility of the SB/DVBE program internally and externally.

1. Identify your target audiences – both inside and outside your department
2. Develop communication channels and materials that are the most effective and appropriate for the target audience
3. Communicate consistent, easily understandable messages
4. Assess the effectiveness of the outreach activity:
 - a. Is it hitting target audiences
 - b. Is it increasing SB or DVBE participation
5. Modify the outreach program based on the assessment

As you implement an outreach strategy, keep the above in mind to help you along. You will likely discover additional strategies specific to your department’s needs and network with other advocates for bright ideas.

CONTROLABLE VS UNCONTROLABLE FACTORS

There are numerous factors one could consider when implementing an Outreach Program. Successful program implementation depends upon a variety of factors, only some of which can be controlled by the Advocate. Highlighted below are various controllable and uncontrollable factors that may affect the implementation of your department’s outreach activities.

I. Controllable Factors

- a. A developed knowledge and understanding of each audience targeted in the outreach program. It is important to target communications based on the specific audience interests, needs, knowledge levels and capabilities.
- b. Internal and external communication that answers the following questions:
 - Why are you telling me this?
 - What’s in it for me?
 - What am I supposed to do?
 - How do I do “it”?
- c. Outreach activities and efforts listed and ranked in order of priority

CHAPTER VIII ADVOCATE OUTREACH

- d. Design of the outreach effort – it's actions and activities
- e. Budget for individual outreach efforts
- f. Timetables for beginning and completing individual outreach tasks
- g. Success criteria developed to evaluate:
 - External audience attendance at:
 - Training sessions
 - Forums
 - Vendor presentations
 - Increase in number of website hits – has website activity increased as a result of outreach activities?
 - Increase in the number of awards made by department staff to the SB/DVBE community

II. Uncontrollable Factors

- a. Change in administration (i.e. Governor's Office, department executive management) – a shift in Executive priorities that critically impact the program.
- b. Budget Allocations – funding for the program may be cut or delayed.
- c. Reallocation of Department resources.

OUTREACH ACTIVITIES

A myriad of options exist for the advocate who conducts outreach activities. If the funding of activities is an issue restricting advocate outreach activities, there are still many things that can be done that are relatively inexpensive. The following are some of the activities an advocate can undertake to reach both the Small and DVBE business communities and within the department.



Business Community Partnering Opportunities

- a. Partner with other state, local and federal agencies to sponsor outreach and education opportunities for small and disabled veteran business enterprise businesses. Other entities include: other state departments, Metropolitan Water District (MWD), Sacramento Municipal Utility District (SMUD) etc.

As an example of state department partnering efforts, the Business, Transportation and Housing Agency and the Department of Veterans Affairs formerly co-sponsored monthly vendor presentations where vendors had an opportunity to market their goods and services to state and local agencies. DGS does the same through their regularly scheduled Customer Forums.

Through these partnership endeavors, vendors are able to network with other vendors, learn about their competition and form business relationships.

- b. Collaborate with sister departments to conduct, conferences, forums, and training sessions to raise awareness of the business community to the benefits of utilizing small/DVBE businesses. Use the opportunity to discuss what your department needs are and those of the other departments within your agency.

CHAPTER VIII ADVOCATE OUTREACH

- c. Network with other advocates to get insight and bright outreach ideas. Don't re-invent the wheel if it's already rolling.
- d. Offer to speak at small business/DVBE related organization functions/meetings. Organizations are always looking for speakers.
- e. Participate (make presentations, departmental information booth, panel member, etc.) in conferences, conventions, trade shows and expositions sponsored by public/private organizations such as: Sacramento Biz Link; Hispanic Chamber of Commerce, Rainbow Push, California DVBE Alliance, etc.

The above represent excellent opportunities for departments to promote their contracting and procurement opportunities to the SB and DVBE communities.

Outreach Materials

- a. Develop a department SB/DVBE brochure highlighting critical points of the program, department contact information and a list of services and products routinely purchased by the department.
- b. Prepare information articles promoting the small business/DVBE programs and publish them in industry and/or departmental publications and newsletters that are circulated to the public.
- c. Publish small business/DVBE program information on departmental website. Post contract/procurement opportunities, links to related sites, small business/DVBE advocate and small business liaison contact information, etc.
- d. Prepare an informational letter promoting the benefits of certification to mail to current vendors doing business with the department that are not certified with DGS. Many departments did this at the inception of the program, but may not have followed up since the initial mailing.
- e. Use existing outreach materials such as the DGS flyer "Doing Business with the State".

OUTREACH ACTIVITIES WITHIN YOUR DEPARTMENT

In addition to outreach activities targeting SB and DVBE business communities, the Advocate must also reach out inside their department to the executive level, management and supervisory staff and buyers, and contract analysts to raise awareness of the SB/DVBE program and the responsibility and activities each sector has to meet program mandates. The following are some of the activities an advocate can undertake to raise awareness within their department:

- a. Create and tailor an SB/DVBE program presentation for your director, deputy directors, chiefs of staff, managers and purchasing coordinators. This will raise awareness and gain support for the programs from your department.
- b. Present the program in your department's basic Supervisory/Leadership training course. Explain the purpose and the requirements of the SB/DVBE program to those making the decisions of how, what and where purchases will be made.



CHAPTER VIII ADVOCATE OUTREACH

- c. Speak with your training office to determine the feasibility of developing a new employee training video that includes all specific programs within your department especially the SB/DVBE program.
- d. Incorporate your outreach program into your Cal-Card Training Classes. You have an audience, so use it to your advantage. Present your program to those who will actually do the purchases.
- e. Use every opportunity to advertise your program to the public. When sending out IFB's RFP's RFQ's include advocate contact information within the bid package. Ensure appropriate program information is included as an attachment to the solicitation – DVBE program information and requirements; prime bidder small business preference calculation information; and the small business certification and preference calculation information.
- f. Send interested bidders lists of potential DVBE and SB subcontractors culled from the DGS/OSDS Certified Firm Search. This gives the prime bidders a "jump" start for potential subcontracting opportunities.
- g. Use Pre-Bid conferences to inform the prime contractors of departmental requirements, small business regulations, and relevant SB/DVBE program legislation. Remember to include other governmental changes that have occurred or are forthcoming as this is an opportunity to share what we as Advocates know, but is not usually made available to the general public.
- h. Share how you have been tracking all of the information that reports are required for with other state departments and advocates. Share automated systems that you have created so others could use this information to help their own department.



DEVELOPING OUTREACH MATERIALS

There are many creative opportunities for developing departmental outreach material. Items used for outreach include everything from informational bookmarks to website information and everything in between. There may be monetary limitations imposed by the department due to budget constraints, but don't let that limit your imagination. Here are some ideas to get you started:

- a. Create a departmental brochure describing contracting and procurement opportunities (types of goods and services purchased) and include contact information for the department. These could be postcards, tri-fold brochures.
- b. Create one-page information flyers that provide department contact information, and highlight some of the services and commodities routinely purchased.
- c. Create a one page flyer listing regional or district office address and buyer information so vendors can contact each buyer directly.
- d. Create outreach materials that are directly related to the SB/DVBE business services and products to help the SB/DVBEs identify what your department needs are.

CHAPTER VIII ADVOCATE OUTREACH



Create helpful resource guides such as:

- a. How to do business with your department
- b. Small Business Resource Guide
- c. Prompt Payment Made Easy

Extras...

Though more costly, the following have been used by various departments when conducting their outreach activities:

- a. Create a poster to promote the program and place them in field offices, permit offices, boat ramps, recreational facilities, forestry permit offices, camping permit offices that interface with the public.
- b. Create tabletop displays that are informative and effective. Use information and illustrations in ways that convey a message, not only the program in general, but maybe illustrating your department's mission and goals and services that your department provides.

DISSEMINATE YOUR SUCCESSES!

Be sure to share your successes with your department staff. It communicates that they make a difference. A pat on the back for an exceptional or consistent buying practice is recognition that a buyer is contributing to the department's success. Giving buyers and contracting analysts program feedback assures them they are on the right track and what they do, does in fact make a difference. Consider doing the following:

- a. Share success stories – success stories are a particularly powerful technique that can document the effectiveness of your Small Business /DVBE program – post them on your website for all to see.
- b. Set up a department buyers' distribution list – be sure to include supervisors and managers – use it to share an exceptional SB/DVBE procurement effort.
- c. Hold semi-annual buyers meetings – provide statistics for each program and reinforce their strengths, identify weaknesses and offer solutions to improve performance.
- d. Create a SB/DVBE Program Newsletter for your department buyers, contract analysts, and mid and executive management to keep them informed about program updates, achievements and performance.

MONITORING YOUR DEPARTMENT'S OUTREACH ACTIVITIES

In order to ensure the effectiveness of the outreach program, it is necessary to monitor, document and evaluate each specific outreach activity. Using web-based forms, written survey instruments, phone surveys and focus groups are effective techniques that can be utilized to gather feedback and gauge audience reaction. The following are examples of tools that can be employed to monitor outreach activities:

- a. Develop on-line surveys
- b. Include e-mail feedback link on the departmental small business/DVBE web page
- c. Monitor web-site hits
- d. Survey participation rates at training sessions, forums, conferences etc

CHAPTER VIII ADVOCATE OUTREACH

Once you have evaluated the information and you identify the strengths and weaknesses of your program, you can then focus on those areas that need additional support.

Small and DVBE businesses alike rely upon departments to let them know how to do business with them and what that department needs are in terms of services and commodities. Likewise, department's rely on businesses to market to them in order to determine what products and service providers are available. As can be seen, outreach is an essential function of the SB/DVBE Advocate and directly impacts program success.

