



State of California Small Business and DVBE Advocate Volunteer Mentor Program

Welcome to the California SB/DVBE Advocate Volunteer Mentor Program. The Volunteer Mentor Program is designed to pair experienced SB/DVBE Advocates with relatively inexperienced or new advocates. As a volunteer mentor you will have the opportunity to share your experiences and your department’s best practices with a new advocate.

The Advocate Mentor program is set up in a checklist format to help the Mentor provide the new advocate with a comprehensive sequential overview of the California Small Business and DVBE program. As an Advocate Mentor you will “walk” the new Advocate through various SB/DVBE program elements and related activities. The end goal is to have a new Advocate with basic knowledge of their department’s program, a better understanding of both the SB and the DVBE program, the related regulations, practices, procedures and how and where to find and use available tools and resources.

As a Mentor, your responsibilities are to:

1. Assess the needs of the new Advocate to determine:
 - a. The level of existing SB/DVBE program understanding of the advocate mentee
 - b. Mentee awareness of existing SB/DVBE Program tools and resources
 - c. Their department’s existing SB/DVBE program? How developed is the program? How familiar is the mentee with that program?
2. Use the Mentor Checklist as a guide to tailor the mentoring needs/activities
3. Set aside designated and scheduled time to meet with the new Advocate. Plan 2 – 4 hours a month or more if time allows. This can be face-to-face; phone or email contact
4. Stay in regular communication with the advocate mentee
5. Respond to mentee questions or requests for assistance as soon as possible
6. Be patient and understanding with the advocate mentee’s inexperience
7. Acknowledge the advocate mentee’s incremental improvements and increased program understanding
8. Obtain the mentee’s assessment of the SB/DVBE Advocate mentoring program using the Mentee Program Assessment Form and forward to the Advocate Steering Committee



MENTOR/MENTEE INFORMATION

MENTOR NAME	MENTEE NAME
DEPARTMENT	DEPARTMENT
PHONE NUMBER	PHONE NUMBER
EMAIL	EMAIL
FAX NUMBER	FAX
DATE:	

Small Business/DVBE Advocate Mentor Program Checklist

Before mentoring begins review the attached checklist with the advocate. Together determine which areas of training or improvement are needed. Once these are identified, use the information checklist as a guideline to begin mentoring for the topics desired. Listed below are topics and related bulleted numbers to assist you.

- SB/DVBE regulations and program mandates (1, 3, 9)
- Program Fundamentals (2, 4, 5, 6)
- SB program policy and practices (2, 8)
- DVBE program policy and practices (2, 4, 5, 6)
- SB/DVBE program training (7)
- Outreach and education (8,10)
- Resolving SB/DVBE program issues/problems (9)
- Best Practices (10)
- Resources (11)

SB/DVBE Program Assessed Needs

	PROGRAM TOPIC	YES	NO	FOCUS ON
1	SB PROGRAM MANDATES			
2	SB PROGRAM OVERVIEW			
3	DVBE PROGRAM MANDATES			
4	DVBE PROGRAM OVERVIEW			
5	SB/DVBE PROGRAM COMMONALITIES			
6	ANNUAL CONTRACT ACTIVITY REPORT			
7	SB/DVBE PROGRAM TRAINING			
8	SB/DVBE PROGRAM OUTREACH, EDUCATION			
9	PROBLEM RESOLUTION			
10	BEST PRACTICES			
11	PROGRAM RESOURCES			

Small Business/DVBE Advocate Mentor Assessment Form

Following the checklist is the Mentor Assessment form. Once mentoring is finished, give the form to the Mentee to complete. Ask them to return the form to you, the Mentor. Forward the completed form to the Advocate Steering Committee.

Small Business/DVBE Advocate Mentor Program Checklist

1) SMALL BUSINESS PROGRAM MANDATES

Provide a high level overview of each of the following so that the advocate becomes familiar with the mandates and where to locate them. Suggest the new advocate set up information links within their internet favorites.

- Executive Order D-43-01
- Executive Order S-02-06
- Government Code 14835 Small Business Contract Act
<http://www.leginfo.ca.gov/cgi-bin/displaycode?section=gov&group=14001-15000&file=14835-14843>
- Infrastructure Bond Acts of 2006 (specifically GC 14838.1)

2) SB PROGRAM OVERVIEW

- Brief overview of program purpose and goals
- SB purchasing/contracting categories
 - IT services/goods
 - Cal Card
 - Construction
 - Personal Services
 - Commodities
- SB Preference Calculation Explanation
 - Sample IFB calculation
 - Sample RFP primary calculation
 - Sample RFP secondary calculation
- Non-Small Business Calculation Preference Explanation
 - Sample IFB calculation
 - Sample RFP primary calculation
 - Sample RFP secondary calculation
- DGS Prompt Payment Program <http://www.dgs.ca.gov/pd/Programs/OSDS/PromptPayment.aspx>
- Prompt Payment Act: <http://www.documents.dgs.ca.gov/pd/smallbus/PromptPaymentAct.pdf>
- SB Department Policy Statements (sample department statements)
 - DWR
 - CHP
 - DMV
 - Parks
 - FTB

3) DVBE PROGRAM MANDATES

- Executive Order D-43-01
- Military and Veterans Code 999
<http://www.leginfo.ca.gov/cgi-bin/displaycode?section=mvc&group=00001-01000&file=999-999.13>
- California Code of Regulations (Title II California Code of Regulations, Section 1896.61; Sect. 1869 et seq.)
- Public Contract Code 10115
<http://www.leginfo.ca.gov/cgi-bin/displaycode?section=pcc&group=10001-11000&file=10115-10115.15>
- State Contract Manual, Vol. 1, Chapter 8
<http://www.dgs.ca.gov/ols/Resources/StateContractManual.aspx>
- State Contract Manual, Vol. 2,

<http://www.dgs.ca.gov/pd/Resources/publications/SCM2.aspx>

- State Contract Manual, Vol. 3 (Information Technology)

<http://www.dgs.ca.gov/pd/Resources/publications/SCM3.aspx>

4) DVBE PROGRAM OVERVIEW

- DVBE Bid Requirements (Resources: <http://www.dgs.ca.gov/pd/Resources.aspx> SCM Vol. 1 Chapter 8; SCM Vol. 2 Chapter 3.2-3.8; SCM Vol.3 Chapter)
- DGS PAC Broadcast Feb 16, 2006 – DVBE Program Requirements information and forms:
<http://www.documents.dgs.ca.gov/pd/delegations/pac021606.htm>
- Sample DVBE Bid forms
- Pre-Bid Conferences (overview of value of discussing SB and DVBE contract requirements; assist firms locate DVBE opportunities)
- DVBE Incentive
 - DVBE Incentive Regulations
 - Sample IFB calculation
 - Sample RFP primary calculation
 - Sample RFP secondary calculation
- Waiving DVBE program requirements
 - Internal exemption/waiver process
 - Internal exemption policy
- Resources include SCM Vol. 1, Chapter 8, Vol. 2, Chapter 3 Socio-Economic Programs
- DVBE Department Policy Statements (sample department statements)
 - DWR
 - CHP
 - DMV
 - Parks
 - FTB

5) COMMONALITIES BETWEEN SB AND DVBE PROGRAMS

- SB or DVBE Option
 - Advertising Requirements
 - Evaluation/Selection Process
 - Monetary Thresholds
 - Sample Bid Option Template
- Commercially Useful Function
 - California Code of Regulations:
 - Title II California Code of Regulations, Section 1896.61; Sect. 1869 et seq.
 - Government Code 14837, Section 4. (A)/(B)
 - DGS PAC Broadcast Feb 16 2006 - CUF Requirement information and forms:
<http://www.documents.dgs.ca.gov/pd/delegations/pac021606.htm>
 - Sample CUF Forms:
 - Bidder Declarations GSPD 105/GSPD 106
 - DVBE Declaration Std. 843
- SB/DVBE Payment Certification
- SB/DVBE Program Participation Monitoring

6) SB/DVBE ANNUAL CONTRACT ACTIVITY REPORT

Provide a general overview of the Annual Contract Activity reporting requirements

- Due to whom/when?
- Required annual report information:
 - Commodities
 - IT Goods
 - Contracts
 - Personal Services
 - IT Services
- SB/DVBE Bid Option Awards
- DVBE Incentive Awards
- Ethnicity Race and Gender
- Infrastructure Bonds of 2006 Small Business Participation
- DGS Procurement Division, Small Business/DVBE Contract Activity Report Web link:
<http://www.dgs.ca.gov/pd/Programs/OSDS/ContractReporting.aspx>
- Report Cover letter
- Sample Std. 810 Contract Activity Report Form
 - Supplemental Report
 - DVBE Bid Option Report
 - DVBE Incentive
 - Ethnicity Race and Gender Report
 - Consulting Services Report
 - Infrastructure Bonds Report
- SB or DVBE Improvement Plan
 - Sample SB Improvement Plan
 - Sample DVBE Improvement Plan
- Sample Report Package with attached Improvement Plan(s)

7) PROVIDING SB/DVBE PROGRAM TRAINING

Training for Advocates

- Mentoring Program
- DGS SB/DVBE Program Workshops
 - o CUF
 - o SB/DVBE Program
 - o Annual Report Training
- Quarterly Advocate Meeting/Workshops
- Attend DGS Customer Forums

Internal Staff SB/DVBE Program Training for Department Buyers/Contract Analysts

- Sample SB Power Point Training Presentation
- Sample DVBE Power Point Training Presentation
- Sample DVBE Incentive Power Point Presentation
- Sample Commercially Useful Function Power Point Presentation

8) PUBLIC OUTREACH, EDUCATION AND NETWORKING

- Disseminate SB and DVBE certification opportunities to prime firms
- Meet with the SB/DVBE vendor community

- Educate the prime contractor about SB/DVBE opportunities/requirements
- Attend SB/DVBE Advocate State and Business sponsored functions: *(tour DGS/OSDS Events page)*
 - Small Business Conferences
 - DVBE Conferences
 - Collaborative Conferences
 - Connecting Point Events
- Dissemination and program information using department flyers and brochures
- Attend IFB/RFP pre-bids and RFQ SOQ conferences
- Conduct outreach and education within a department
- Access the DGS Statewide Advocate Listing for networking

9) SB/DVBE PROGRAM PROBLEM RESOLUTIONS

- Prompt payment
- Prime/DVBE firm problem resolution
- DVBE firm substitution
- Fraud

10) BEST PRACTICES

(Below are just a few of the best practices – add to the list as appropriate)

- Participate in local and regional conferences and connecting point events
- Create a Department Website
 - CalFire: http://www.calfire.ca.gov/about/about_dobusiness.php
 - Dept. of Corrections <http://www.cdcr.ca.gov/DoingBusiness/SBDVBE/index.html>
 - Dept. of Water Resources <http://www.water.ca.gov/sbe/>
 - California Highway patrol <http://www.chp.ca.gov/certifiedbusiness/opportunities.html>
<http://www.chp.ca.gov/certifiedbusiness/opportunities.html>
 - Parks http://www.parks.ca.gov/default.asp?page_id=22199
- Attending Customer Forums/Advocate Quarterly workshops
- Develop firm/service/commodity lists for use with the SB/DVBE Option Bid
- Conduct internal department staff training
- Conduct upper management and executive SB/DVBE program briefings
- Prepare Department SB/DVBE program flyer, newsletter or information flashes
- Develop stated department SB/DVBE policy and procedures

11) RESOURCES

Internet Sites *(Use the link below as the primary access to SB/DVBE program related links)*

DGS Procurement Homepage: <http://www.dgs.ca.gov/pd/Home.aspx>

- Office of Small Business/DVBE Services Link
 - Small Business Program
 - DVBE Program
 - Statewide Advocate Listing
 - SB/DVBE program local, regional and state sponsored events
 - Communication and Outreach
 - Reporting
- DGS PD eProcurement Link to BidSync

- Create a Login
- Monitor BidSync contract advertisements/bid opportunities
- Search BidSync for SB/DVBE Certified Firms
- Assist SB/DVBE certification application
- California Department of Veterans Affairs
 - Tour the Advocate Toolkit
- California DVBE Alliance
 - Access Alliance DVBE firm search tool: <http://search.cadvbe.org/>
- Teaming USA (Free Subcontracting/Matchmaking) www.teamingusa.com.

DRAFT

**STATE OF CALIFORNIA
SMALL BUSINESS/DVBE ADVOCATE MENTOR PROGRAM
ASSESSMENT FORM**

ASSESSMENT INSTRUCTIONS

The SB/DVBE Advocate Mentor Assessment Form is filled out by the advocate mentee upon completion of the mentoring activity. As the mentee, please provide the information requested and return the form to your mentor. Your mentor will forward the information to the Statewide Advocate Steering Committee for their review. Information provided will greatly assist the Committee make enhancements and improvements to the Advocate Mentoring Program.

The Committee hopes the SB/DVBE Advocate Mentoring Program was a positive experience that has provided you with the resources, tools and program information to help you become an effective advocate. We look forward to receiving your assessment and comments or suggestions for program improvement.

MENTORING START DATE:	/	/	DATE OF ASSESSMENT:	/	/
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MENTOR NAME:	DEPARTMENT:
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MENTOR EMAIL:	MENTOR PHONE:
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MENTEE NAME:	MENTEE DEPARTMENT:
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MENTEE EMAIL:	MENTEE PHONE:
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SB/DVBE MENTOR PROGRAM ASSESSMENT

Rate your mentoring experience: Poor Good Very Good Excellent

1) Did the mentoring program meet your expectations?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
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2) Were program topics sufficiently covered?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
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3) Did you receive the help you needed?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
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(access to mentor, resources, feedback etc)

If no, please explain.

4) Please tell us the positive aspects of your mentoring experience?

Please explain:

5) What improvements to the program would you recommend?

Please explain:

Thank you for completing the SB/DVBE Mentor Program Assessment. Please return the completed form to your Mentor.
