

## SMALL BUSINESS AND DISABLED VETERAN BUSINESS ENTERPRISE CONTRACTING BEST PRACTICES: IMPLEMENTATION PLAN CHECKLIST

**INSTRUCTIONS:** For each best practice listed below, indicate whether your department is currently performing the specified task. Next, explain your department’s current process for each best practice you indicated “yes” for in the “Current Process / Implementation Plan column. For those that are checked “no,” explain how your department plans to implement the practice in the future.

CATEGORY	BEST PRACTICE	CURRENT PRACTICE	CURRENT PROCESS / IMPLEMENTATION PLAN
<b>Bids / Contracts</b>	<p>When drafting a Scope of Work, instruct buyers to query the SB/DVBE database to solicit those vendors first.</p> <ul style="list-style-type: none"> <li>Refer to <a href="#">Cal eProcure</a> database</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
	<p>Create strong bid language focused on outreach and education to acquire SB and/or DVBE awards.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
	<p>Require all bid proposals to be targeted to the SB/DVBE community.</p> <ul style="list-style-type: none"> <li>Refer to <a href="#">SB/DVBE First Policy</a></li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
	<p>Local requirement to contact at least one SB/DVBE in every competitive bid solicitation.</p> <ul style="list-style-type: none"> <li>Refer to <a href="#">Solicitation Language</a></li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
	<p>Unbundle contracts to enhance SB/DVBE participation, i.e. break contracts down into economically feasible units.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	

CATEGORY	BEST PRACTICE	CURRENT PRACTICE	NEXT STEPS: IMPLEMENTATION PLAN
<b>Executive Support</b>	<p>Executive management supports the efforts of the SB/DVBE Advocate's outreach efforts to attend DGS sponsored events.</p> <ul style="list-style-type: none"> <li>Refer to Government Code <a href="#">14845</a></li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
	<p>Top management promotes and ensures the attainment of SB/DVBE goals, as part of the department's procurement objectives.</p> <ul style="list-style-type: none"> <li>Refer to <a href="#">SB/DVBE First Policy</a></li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
	<p>Monthly and/or quarterly participation reports provided to Executive staff to make it easier for each unit and branch to monitor their individual impact of the SB/DVBE goals.</p> <ul style="list-style-type: none"> <li>Refer to DGS' <a href="#">Contracting Activity Report form</a></li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
	<p>Executive staff understands the importance of the SB/DVBE Program and the advantages it provides to SB/DVBEs and the economic to the .</p> <ul style="list-style-type: none"> <li>DGS's "<a href="#">How to Do Business with the State of California</a>" Brochure</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>Outreach</b>	<p>Assist prime contractors with locating certified SB/DVBE vendors by utilizing the United Nation Standard Product and Service Codes (UNSPSC) classifications in solicitations.</p> <ul style="list-style-type: none"> <li>Refer to <a href="#">UNSPSC codes</a></li> </ul> <p>NOTE: DGS is currently working on a condensed list of only 5,000 classification codes to be used for solicitations</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	

CATEGORY	BEST PRACTICE	CURRENT PRACTICE	NEXT STEPS: IMPLEMENTATION PLAN
<b>Outreach (continued)</b>	<p>Be consistent and work diligently to build working relationships with SB/DVBE firms who provide diverse services and products.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
	<p>Assist qualifying vendors to be certified to do business with the State of California.</p> <ul style="list-style-type: none"> <li>• DGS's <a href="#">registration and certification process</a></li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
	<p>Explain the benefits of certification; provide links to the DGS website, as well as provide guidance in navigating the certification process.</p> <ul style="list-style-type: none"> <li>• DGS's "<a href="#">How to Do Business with the State of California</a>" Brochure</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
	<p>Continually assist vendors with state services, procurement and contracting processes on how to do business with the State of California.</p> <ul style="list-style-type: none"> <li>• DGS's "<a href="#">Introduction to State Contracting</a>" Workshop</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
	<p>Collectively share innovative ideas with the advocates and management; hold customer forums to provide education and outreach.</p> <ul style="list-style-type: none"> <li>• Attend DGS/CalVet's <a href="#">Advocate Workshops</a></li> <li>• Attend DGS' <a href="#">Customer Forum</a></li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	

CATEGORY	BEST PRACTICE	CURRENT PRACTICE	NEXT STEPS: IMPLEMENTATION PLAN
<b>Outreach (continued)</b>	<p>Departments should consider using focused recruitment activities outlined in Senate Bill 1045 (Polanco) to increase diversity among the underrepresented small businesses.</p> <ul style="list-style-type: none"> <li>Refer to <a href="#">Senate Bill 1045, Section 11139.7</a></li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
	<p>Invite prime bidders, as well as certified SBs and DVBEs to participate in Bidders' Conferences for potential teaming opportunities.</p> <ul style="list-style-type: none"> <li><a href="#">Bidder's Conference Invitation template</a></li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
	<p>Advertise SB/DVBE contract opportunities beyond Cal eProcure solicitations by placing them on your department's web site / homepage, diversity magazines and newspapers.</p> <p>A list of the division's upcoming solicitations:</p> <ul style="list-style-type: none"> <li><a href="#">Procurement Division</a></li> <li><a href="#">Office of Business and Acquisition Services</a></li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>SB/DVBE First Policy / SB/DVBE Option</b>	<p>Adopt a policy to procure all goods and services through SB/DVBEs when possible. Provide documentation that an attempt was made before using the formal bidding process.</p> <ul style="list-style-type: none"> <li>Refer to <a href="#">SB/DVBE First Policy</a></li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>Training</b>	<p>Acquisition staff are required to complete Cal-PCA Basic Acquisition and SB/DVBE Option training.</p> <ul style="list-style-type: none"> <li><a href="#">California Procurement &amp; Contracting Academy</a> web page</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
	<p>Cross-train staff in reporting requirements and processes.</p> <ul style="list-style-type: none"> <li><a href="#">DGS SB/DVBE Contract Reporting</a> web page</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	

CATEGORY	BEST PRACTICE	CURRENT PRACTICE	NEXT STEPS: IMPLEMENTATION PLAN
<b>Training</b> <i>(continued)</i>	<p>Continuous training of staff on how to utilize the SB/DVBE supplier community, use of the SB/DVE off-ramp for statewide contracts; and using Cal eProcure to search for and contact SB/DVBEs within the community.</p> <ul style="list-style-type: none"> <li>• <a href="#">Sample Contracting Presentation</a></li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>Other</b>	<p>Establish a vendor management tool to track products a SB/DVBE firm is authorized to resell – request quotes electronically.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	