



Small Business Advisory Council Workshop

March 7, 2012

Department of General Services
Executive Dining Room



Welcome & Opening Remarks

Jim Butler

Chair



eProcurement

How to do Business with California State Government

Outreach Liaison

Department of General Services

Procurement Division

Communication & Outreach

707 3rd Street

West Sacramento, CA 95605

Michael.aguillio@dgs.ca.gov

Wayne.gross@dgs.ca.gov

State's SB/DVBE Goals

- Requires state agencies to award at least **25%** of their annual contracting dollars to certified Small Businesses
- MVC Section 999 requires agencies to award at least **3%** to certified Disabled Veteran Business Enterprises (DVBE)

Small Business Eligibility Requirements

- o To be eligible for SB Certification, the business must meet the following criteria:
 - o Must be independently owned and operated;
 - o Cannot be dominant in their field of operation;
 - o Must have its principal office located in California

Small Business Eligibility Requirements

- o The business must also:
 - o Have its owners (or officers in the case of a corporation domiciled in California;
 - o And, together with the affiliates be either:
 - o A business with 100 or fewer employees, and have an average annual gross receipts of \$14 million or less over the previous 3 tax years, or
 - o A manufacturer with 100 or fewer employees

DVBE Definition

For DVBE certification purposes, a “disabled veteran” is a veteran of the U.S. military, naval, or air service; and has a service connected disability of at least 10% or more as certified by the United States Department of Veteran Affairs and must be domiciled in the State of California.

DVBE Eligibility Requirements

- o Most DVBEs can also be certified SBs
- o To be eligible for DVBE Certification, the business must meet the following criteria:
 - o Be at least 51% owned by one or more disabled veterans (defined on next slide)
 - o Limited Liability Companies (LLCs) must be wholly owned by one or more disabled veterans

DVBE Eligibility Requirements

- o Daily business operations must be managed and controlled by one or more disabled veterans. The disabled veteran(s) who manages and controls the business is not required to be the disabled veteran business owner(s).
- o The home office must be located in the United States. The home office cannot be a branch or subsidiary of a foreign corporation, foreign firm, or other foreign based business.

DVBE Eligibility Requirements

- o More information about DVBE eligibility requirements:
 - o Visit the web site:
www.dgs.ca.gov/pd/Programs/OSDS.aspx
 - o Email: OSDSHelp@dgs.ca.gov
 - o Phone: (916) 375-4940

Benefits of Certification

- o Increases opportunities for the SB & DVBE community and stimulates the economy
- o Levels the playing field when competing for state contracts and purchases
- o 5% Bid Preference for SBs
- o The State may offer up to a 5% incentive to DVBEs in the formal bid process

Benefits of Certification

(continued)

- As a California certified SB/DVBE, your firm is added to the Department of General Services' certified firm database
- State agencies use this database to find suppliers

CAL-Card VISA

- o Accept the State's CAL-Card VISA and you can receive payment in two to three days
- o If your business currently accepts VISA cards for payment, you can accept the CAL-Card VISA
- o If not, contact your bank to determine how you can do this

SB/DVBE Option

- o Certified SB *or* DVBE
- o Goods, Services, and IT goods and services - \$5,000.01 to \$249,999.99
- o Public Works - \$5,000.01 to \$270,000.00
- o At least two price quotes
- o Market your company to state agencies (see Step 5)
- o Authorized by Government Code 14838.5

SB/DVBE First Policy

- o Certified SB or DVBE
- o Goods, Services, and IT goods and services - \$0.00 to \$249,999.99
- o Public Works - \$0.00 to \$270,000.00
- o At least two price quotes
- o Market your company to state agencies
- o Authorized by Government Code 14838.5
- o DGS, FTB and DCA have First Policy in place



How to do Business with the State of California

A FIVE-STEP PROCESS

What is eProcurement?

- o eProcurement's goal is to provide suppliers with a more streamlined and efficient approach to doing business with the State of California

Benefits

- **Consolidation:** Apply for SB/DVBE certification, respond to solicitations and more
- **Accessibility:** Wherever you have Internet access
- **Transparency:** View public information regarding procurement and contracting activities

STEP 1 – Register with BidSync

- o Go to www.eprocure.dgs.ca.gov
- o Open Access eProcurement (eP)
- o Click on *Registration Instructions* and follow them completely to ensure a free subscription

eProcurement

—how to get started
for FREE!

Register to do business with the State*

Step 1: Log on to www.eprocure.dgs.ca.gov—In the *Access eProcurement (eP)* box click on *Register* to create a new eP supplier profile. On the next page, click on the *California Supplier Registration* button on the left-hand side of the page. This is a Free Registration.

Step 2: Your Information—Enter your *Main Contact* and *Company Information*, including *Time Zone*. Create your *User Name* and *Password*. Write these down and keep them in a secure location. Enter your *Business ID Number* if you have it. Click *Next Step*.

Step 3: Goods and Services—Select *Primary Industry*, enter at least three keywords and click *Search*. Check the box next to the matching classifications and click *Add*. Under *Where do you do business* select *California Only*. UNCHECK *Include BidSync Links PLUS Bids (Recommended)*—this is BidSync's fee-based service. Click *Complete My Registration*.

Step 4: Supplier Registration Complete—Congratulations, you have successfully registered. You will receive an email within one business day informing you that your account has been activated. Or you may call BidSync Support at 1-800-990-9339 to activate your account immediately.

** Note: The DGS eProcurement website is hosted by BidSync which also maintains a fee paying site called BidLync. You do not have to sign on to BidLync to view contracting opportunities with the State of California.*

(See other side for further information.)

www.eprocure.dgs.ca.gov

DGS www.dgs.ca.gov/pd
California Department of General Services • Procurement Division
707 Third Street, 2nd Floor • West Sacramento, CA 95605

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Complete the California Profile and get Certified with the State of California:

Step 1: Log on to www.eprocure.dgs.ca.gov—In the *Access eProcurement (eP)* box, click *Login*. Enter your user name and password.

Step 2: Accept the *BidSync User Agreement*.

Step 3: Click *My account*.

Step 4: Under *Profile Setup, Notifications*, click *Edit* and change "*Send me exclusive special offers and promotions*" to *Never*.

Step 5: Under *Profile Setup, Agency*, click *Edit* and deselect everything except *State*.

Step 6: Under *Optional Profile Setup*, click *Edit* and enter a keyword in the first box and click *Search*. Search results appear in the section below. Check at least one UNSPSC classification code and save at bottom.

Step 7: Under *Company Keyword Search Terms*, click *Edit* and enter a few keywords describing what your company does. Click *Confirm*.

Step 8: At the bottom of *Account Profile Page*, under *Agency Profile Registrations*, click *The State of California*.

Step 9: Under *Profile Information*, click *Edit for Identification Number*. Enter either your social security number or your Federal Employer Identification Number (FEIN). Do NOT use hyphens.

Step 10: Under *Profile Information*, click *Edit for The State of California Use Policy* and enter your password and *Accept*.

Step 11: Under *Registration Status*, click *Submit Registration*. (You should get *Registered* in your status block.)

Step 12: Under *Certifications*, click *Register your business*. This takes you to the on-line application for California Small Business and DVBE certification.

Gather these documents, then follow the application process:

- Applicant/Affiliate Federal Tax Returns for three most recent tax years
- Federal Employer Identification Number (FEIN)
- Secretary of State Number
- Home address of Officers, Member/Manager and Partners
- Dunn & Bradstreet Number (if applicable)
- Contractors State License Board Number (if applicable)
- Keywords (Since you are limited to 255 characters, do NOT use periods or commas and do NOT repeat words.)

www.eprocure.dgs.ca.gov

STEP 2 – Get Certified

- o Complete Step 12 – Online Certification
- o 20 minute process

STEP 3 - CSCR

- Use the California State Contracts Register (CSCR)

What is the CSCCR?

- o A one-stop, source for contracting opportunities
- o Connected to government bids, listing:
 - o Services and construction contracts over \$5,000
 - o Commodity contracts over \$50,000
 - o IT goods and services contracts over \$100,000

How the CSCR Works

- o State agencies post their solicitations when they go out to bid
- o Sub-contractors can find contracting opportunities
- o Sub-contractors can place ads seeking work with potential primes
- o Ads are free

STEP 4 - CMAS

- Look into becoming a California Multiple Award Schedules (CMAS) Contractor



CMAS (*continued*)

- DGS Procurement Division establishes agreements with suppliers who offer products and/or services that are currently available through existing multiple award schedules with the Federal General Services Administration (GSA) or other approved multiple award contracts

CMAS (*continued*)

- State and local governmental agencies shop and compare CMAS suppliers for the best value, e.g., best price, product, service, etc., and place orders directly with suppliers

CMAS (*continued*)

- o For more information about CMAS:
- o Visit the website:
<http://www.dgs.ca.gov/pd/Programs/Leveraged/CMAS.aspx>
- o Email: cmas@dgs.ca.gov
- o Phone: (916) 375-4363

STEP 5 - Marketing

- Market your Business to State Agencies

Market Your Business

o Although you are added to our databases, it is important for **you** to market your product to state agencies

o Contact the SB/DVBE Advocate for each agency at:

www.dgs.ca.gov/pd/Programs/OSDS/advocate.aspx

Market Your Business *(continued)*

- o SB/DVBE Advocates can assist you with information regarding contracts with their agency
- o Find a list of state agencies with purchasing authority on our web site at:
www.dgs.ca.gov/pd/Programs/Delegated.aspx

Market Your Business *(continued)*

- o Find out which state agencies purchase goods and services and the amount of the contracts
- o Visit the following website:
www.dgs.ca.gov/pd/Programs/eprocure/SCPRSDData.aspx

Market Your Business *(continued)*

- o Maximize your State certification by contacting our local government and industry partners that honor the State certification at:

www.dgs.ca.gov/pd/Programs/OSDS/Reciprocity.aspx

Market Your Business *(continued)*

- Use the California Online Directory (State Phone Book) at: www.cold.ca.gov

News and Events

- o Keep up-to-date on news and events relevant to the SB/DVBE community
- o Visit our website at:
www.dgs.ca.gov/pd/Programs/OSDS/CommunicationsOutreach.aspx



Procurement Division

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eProcurement

Effective March 16, 2009, eProcurement is the new portal for the California State Contracts Register (CSCR), the State Contracting and Procurement Registration System (SCPRS), the online Small Business and Disabled Veteran Business Enterprise (DVBE) queries and the statewide Leveraged Procurement Agreements (LPAs). These systems have a new look and feel and can only be accessed through the new web-based eProcurement system. For assistance, please contact DGS SA's at eprocure@dgs.ca.gov or (916) 375-2000.

[About eProcurement \(eP\)](#) +

[Access eProcurement \(eP\)](#) +

[Bidding Opportunities](#) +

[Small Business & Disabled Veterans Business Enterprise Services](#) +

[State Contracting & Procurement Registration System \(SCPRS\)](#) +

[View Statewide Contracts](#) +

[eProcurement Resources](#) +

[Print View](#)

What's New

- » [Prompt Payment Legislation SB 856 ...](#)
- » [Small Business & DVBE Outreach Events 2012 ...](#)

[View All](#) ▶

PD Quick Links

» [Leveling the Playing Field \(PowerPoint\)](#)

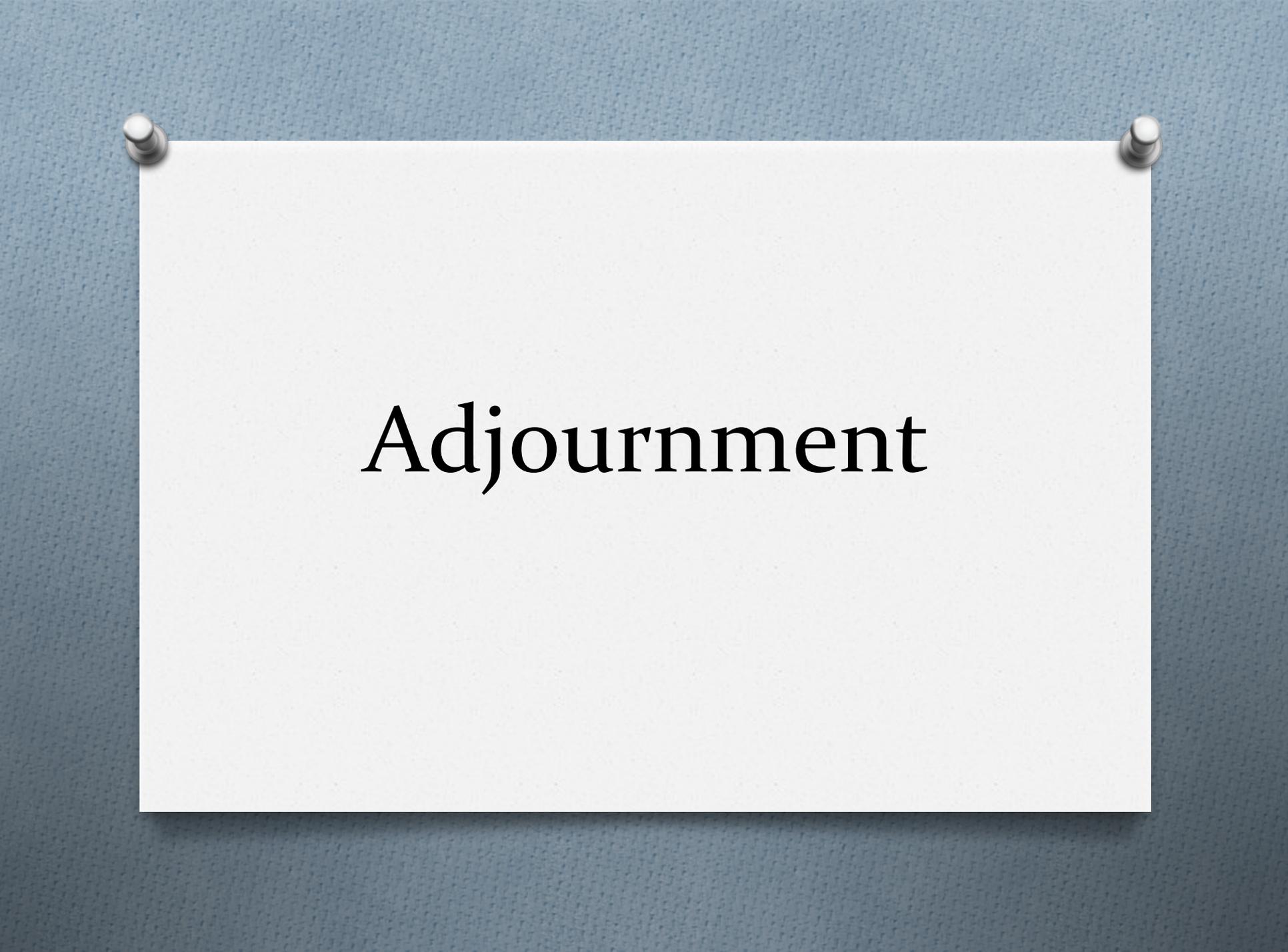
» [Updating Your Profile - Instructions](#)

Questions?

- o Thank you for participating in our presentation
- o We wish you success!
- o Email us at: Advocate@dgs.ca.gov
- o Call us at: (800) 559-5529



Open Discussion



Adjournment