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**Disable Veterans Procurement Program
Simplified Purchasing Vehicle**

DGS
GENERAL SERVICES

HOW TO DO
BUSINESS
WITH
CALIFORNIA
GOVERNMENT



A Road Map to
State Contracting



Service-Disabled Veteran Owned
Business Search



LOGIN



Download Handouts



Post Bids



Aug. 18 Monthly Meeting
Small Contracts



Agricultural Technology
implementer
ILB
shall provide contractor



Agricultural Technology Vendor
PG&E
will partner with PG skdfj

CALIFORNIA DEPARTMENT OF GENERAL SERVICES



Office of Small Business
and Disabled Veteran
Business Enterprise Services

Contracting with California State Government

CALIFORNIA DEPARTMENT OF GENERAL SERVICES



Office of Small Business
and Disabled Veteran
Business Enterprise Services

Instructor

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Overview

- ◆ How the state buys
- ◆ Acquisition Methods
- ◆ Leveraged Procurement Agreements
- ◆ Solicitation Formats
- ◆ Commercially Useful Function
- ◆ Resources



How the state buys

- ◆ Expend public funds
- ◆ Follows rules, regulations, and laws
- ◆ Results in specific processes for purchasing: "Procurement Process"
- ◆ "It depends..."



Procurement Process

Buyers must determine

- ◆ Authority and Need
- ◆ Acquisition Method
- ◆ Solicitation Format



A person's hand is pointing at a laptop screen. The screen displays several document icons, with one icon in the center showing a checklist with three checkmarks. The background is a blurred image of a person working at a desk. A large green and white curved graphic element is on the right side of the image.

Acquisition Methods

- ◆ Formal/Informal Competitive
- ◆ SB/DVBE Option
- ◆ Fair and Reasonable
- ◆ Emergency Contracting
- ◆ Leveraged Procurement Agreements

Formal/Informal Competitive

- ◆ Competitive bidding
- ◆ *Typically* a written solicitation
- ◆ *May* allow phone quotes
- ◆ *Usually* advertised
- ◆ Low cost or best value evaluation





SB/DVBE Option

- ◆ Procurements \$5,000.01 – 249,999.99 (up to \$461,000.00 for public works)
- ◆ Only certified SBs and DVBEs are eligible
- ◆ Requires two quotes from two SBs or two DVBEs (can't mix and match)
- ◆ *May* be awarded to lowest bidder
- ◆ *May* be advertised

Fair and Reasonable

- ◆ Less than \$10,000
- ◆ Commonly used for minor procurements with a short timeline
- ◆ Buyers need only one quote
- ◆ Various methods determine fair and reasonable pricing
- ◆ Awarded to lowest bidder
- ◆ Not advertised



Emergency Contracting

- ◆ Response to natural disasters and other emergencies
- ◆ State acts quickly
- ◆ Not advertised
- ◆ Purchase many different goods and services
- ◆ SB/DVBE Emergency Registry



Emergency Registry Categories

- ◆ Base camp operations
- ◆ Debris removal
- ◆ Facilities maintenance/repair
- ◆ Fire protection
- ◆ Information technology
- ◆ Logistics/Transportation
- ◆ Medical
- ◆ Roadway maintenance
- ◆ Traffic control
- ◆ And more!



SB/DVBE Emergency Registry

To register you will need:

- ◆ Certification number
- ◆ Emergency categories
- ◆ Description of products/services
- ◆ Business address
- ◆ Contact information – both primary and emergency (after hours)
- ◆ <https://www.dgs.ca.gov/PD/News/Page-Content/Procurement-Division-News-List-Folder/SBDVBE-ER-State-Department-Information?search=emergency%20registry>





FAQs

QUESTIONS

ASK

Q
&
A

Leveraged Procurement Agreements (LPA)

- ◆ Agreement between the state and businesses
- ◆ Specific goods or services
- ◆ Used by state departments
- ◆ *May* be available to counties, cities, schools, etc.
- ◆ Awarded for \$0
- ◆ Last multiple years



Leveraged Procurement Agreement Types

- ◆ Master Agreements (MA)
- ◆ Statewide Contracts (SC)
- ◆ Software Licensing Program (SLP)
- ◆ Cooperative Agreements
- ◆ California Multiple Awards Schedules (CMAS)
- ◆ www.caleprocure.ca.gov – Public Procurement Information





Master Agreements

- ◆ Competitively bid when established
- ◆ Advertised
- ◆ *May* have multiple awards
- ◆ Establishes a pre-qualified list of vendors
- ◆ *May* require offers



Master Agreements

Examples include

- ◆ On-Site confidential destruction services
- ◆ PPE waste removal services
- ◆ Technology, digital and data consulting services
- ◆ Temporary medical staffing services
- ◆ Transit processor services
- ◆ Unarmed security guard services

Statewide Contracts

- ◆ Commonly purchased goods
- ◆ Competitively bid
- ◆ Single awards (some multiple awards)
- ◆ Usually mandatory, SB/DVBE off-ramp may be offered



Statewide Contracts

Examples include

- ◆ Asphalt
- ◆ Food items (rice, flour, grains, sugar, etc.)
- ◆ Herbicides and insecticides
- ◆ Rainwear
- ◆ Roadway signs
- ◆ Tablets
- ◆ Tires
- ◆ Traffic cones





Software Licensing Program (SLP)

- ◆ Agreements are negotiated, not bid
- ◆ Agreements are with software publishers
- ◆ Publishers identify authorized resellers
- ◆ Must solicit offers from 3 businesses
- ◆ Contact SLP to get involved as a publisher at slp@dgs.ca.gov or (916) 375-4365

Software Licensing Program (SLP)

Available on SLP agreements

- ◆ Software
- ◆ Maintenance and Support
- ◆ Implementation
- ◆ Training
- ◆ Installation
- ◆ SaaS (Software as a Service)



Software Licensing Program (SLP)

Not available

- ❖ Standalone hardware
- ❖ Consulting
- ❖ Telecommunications



Cooperative Agreements

- ◆ Multi-state agreements for goods and services
- ◆ Established from competitively bid master agreements
- ◆ Advertised
- ◆ Has resellers
- ◆ *May* require offers
- ◆ Used by states and local entities



Cooperative Agreements

Agreements include

- ◆ Laboratory equipment and supplies
- ◆ Cloud solutions
- ◆ Copiers and managed print services
- ◆ Data communications
- ◆ Construction equipment
- ◆ Public safety communications products, services and solutions
- ◆ On-demand remote interpreting and document translation
- ◆ Facilities maintenance and repair and operations



California Multiple Award Schedules (CMAS)

- ◆ Apply for a schedule
- ◆ A “Schedule” is a list of goods and services
- ◆ Schedules are based on the federal GSA
- ◆ Pre-established pricing and terms and conditions
- ◆ Creates a pool of suppliers
- ◆ Contact the CMAS Unit for information at cmas@dgs.ca.gov



California Multiple Award Schedules (CMAS)

Schedules include

- ◆ IT consultant services
- ◆ Written translation services
- ◆ Software maintenance and support
- ◆ Computer hardware/technology
- ◆ Office supplies
- ◆ Strategic planning consultation services
- ◆ Actuarial consulting services
- ◆ Automotive repair
- ◆ Business administration services



California Multiple Award Schedules (CMAS)

Not included

- ◆ Facility planning
- ◆ Medical services
- ◆ Registered nursing
- ◆ Human resources
- ◆ Security guard services
- ◆ Legal services
- ◆ Public works projects
- ◆ Engineering and architectural services



California Multiple Award Schedules (CMAS)

To Apply

- ◆ Go to the CMAS portal at <https://dgs.service-now.com/cmas>
- ◆ Click "Create an Account"
- ◆ Click "New Company Registration Only"
- ◆ Click "Apply for new CMAS"



California Multiple Award Schedules (CMAS)

Information to have ready

- ◆ The schedule you want
- ◆ Business Name
- ◆ FI\$Cal Vendor ID
- ◆ Contact Information
- ◆ CA Secretary of State Registration (not for Sole Props or Partnerships)
- ◆ Certification Information (SB, DVBE)
- ◆ Contractor's license, if applicable
- ◆ Seller's permit, if applicable
- ◆ Customer references, if applicable



California State Government Marketplace

Your home for California's State Procurement and Certification Programs

California State Contracts Register (CSCR)

Search Bid Opportunities

 START SEARCH

How do I...

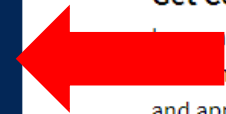
Sell to the State



Register in Cal eProcure to receive bid notifications. Search for bid opportunities in the California State Contracts Register (CSCR).



Get Certified



Learn about California's Small Business (SB) and Disabled Business Enterprise (DVBE) certification program and apply for SB/DVBE certifications.



Find Public Procurement Information



Access records on what state agencies have purchased. Search for SB/DVBE suppliers, state contracts and bid opportunities.



Find Training and Resources



Learn how to do business with the state of California. Access training resources, watch instructional videos, attend an outreach event.



Sell to the State

Register in Cal eProcure

Registering your business allows your company to:

- Subscribe to receive bid opportunity notices based on United Nations Standard Products and Services Code ([UNSPSC](#))
- Receive and access your bid opportunity invitations
- Post prime and subcontracting advertisements on bid opportunities
- View your Purchase Order information
- View your Progress Payment status
- Apply and manage California Small Business (SB) and Disabled Veteran Business Enterprise (DVBE) certifications ([learn more](#))

[Learn how to register](#) (video instructions)

REGISTER NOW

Find Bid Opportunities

Bid opportunities are posted in the California State Contracts Register (CSCR).

FIND BID OPPORTUNITIES

SB/DVBE Emergency Contracting

If you are a certified business capable of providing goods and services to the state during an emergency, learn more about the [SB/DVBE Emergency Registry](#).

Additional Resources

- [Search for State Contracts / Leveraged Procurement Agreements \(LPAs\)](#)



State Leveraged Procurement Agreements

Search Contracts

Contract ID

Description

Contract Type

Buyer ID

Supplier ID

Supplier Name

Acquisition Type

Show Expired Contracts

Clear Criteria

Advanced Search Criteria

Search



FAQs

QUESTIONS

ASK

Q
&
A



Non-Advertised Solicitations

- ◆ How do I learn about it?
- ◆ How do I find it?
- ◆ The opportunity finds *you*
- ◆ Must have robust Cal eProcure profiles



Solicitation Formats

- ◆ Request for Quotation (RFQ)
- ◆ Invitation for Bid (IFB)
- ◆ Request for Proposal (RFP)
- ◆ Request for Information (RFI)

Request for Quotation (RFQ)

- ◆ Generally used for straightforward procurements with low risk
- ◆ Lists what is needed by item, quantity, and price
- ◆ IT goods, IT services, non-IT goods
- ◆ Dollar threshold is *generally* \$0 to \$100,000



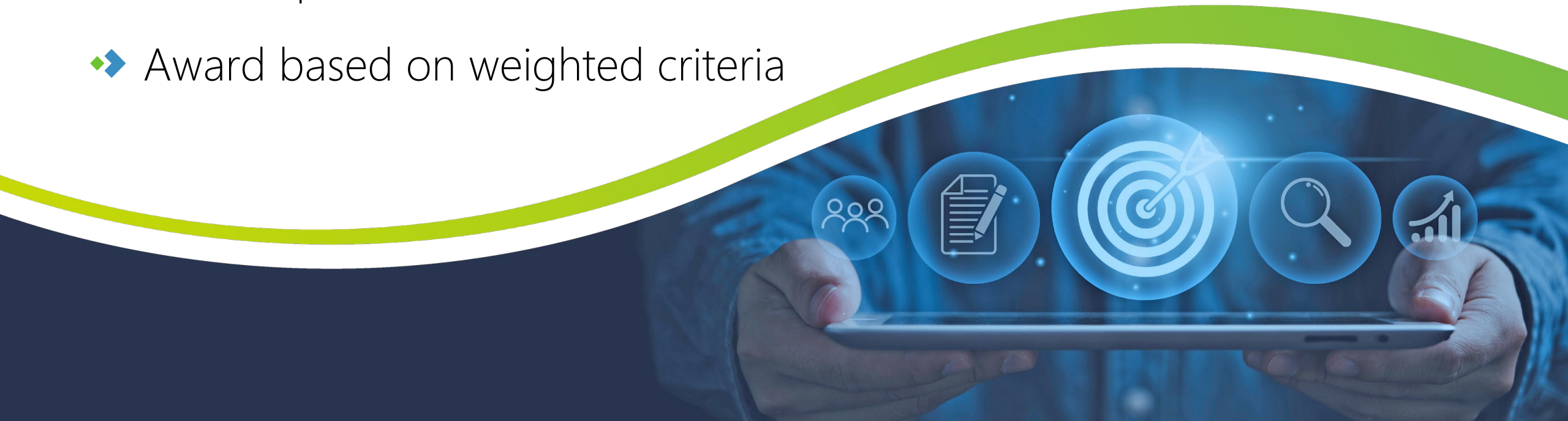


Invitation for Bid (IFB)

- ❖ Used to obtain simple, common, or routine goods and services
- ❖ No discussions or negotiations
- ❖ *Typically* low cost
- ❖ SB preference and DVBE incentive *may* apply

Request for Proposal (RFP)

- ◆ Used to obtain complex services, professional expertise is needed
- ◆ More rigorous evaluation of bidder qualifications
- ◆ Award based on weighted criteria
- ◆ "Primary RFP" is Low cost
- ◆ "Secondary RFP" is best value



Request for Offer (RFO)

- ◆ Used when purchasing against an LPA
- ◆ Specific Transaction
- ◆ Specific response or offer





Contract Readiness

- ◆ Do you meet the requirements?
- ◆ Do you have the financial capacity?
- ◆ Can you deliver on the contract

Contract Readiness

Determine your eligibility – can you meet the evaluation criteria?

- ◆ Past performance
- ◆ Required experience and skill sets
- ◆ Production capability




Contract Readiness

- ❖ Don't miss out on a business opportunity by letting your SB/DVBE certification lapse.
- ❖ Keep your SB/DVBE profile information up-to-date.
- ❖ Ensure you are certified to perform the category of work
- ❖ Make sure you are properly licensed and insured.



Common Mistakes

- ❖ Forgetting to sign all documents.
 - ❖ Forgetting to return all requested documentation/forms.
 - ❖ Not responding by the deadline.
 - ❖ Ignoring historical information available for pricing, etc.
 - ❖ Incorrect calculations, tax rate, etc. on documents.
 - ❖ Leaving out required permits, licenses, and bonding.
 - ❖ Substituting items without the consent of the issuing department.
 - ❖ Not following all directions on the solicitation.
 - ❖ Not filling out recycled content form.
 - ❖ Submitting cost proposal in same package as technical requirement
- 



Tips for Success

- ◆ Ask questions early on, do not wait until the last minute or after the bid due date.
- ◆ Make sure you read and understand the scope of work and requirements set forth in the solicitation.



Tips for Success

If your business secures a state contract:

- ◆ You are legally bound to deliver as promised.
- ◆ Many contracts do not pay until the job is completed.
- ◆ For example: “lump sum” means that invoice will be paid after the project or phase is complete.



FAQs

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ASK

Q
&
A

Commercially Useful Function

You perform CUF if your business is:

- ❖ Executing a distinct element of the work
- ❖ Performing, managing, or supervising the work
- ❖ Performing work that is normal for the firm's business services and functions
- ❖ Negotiating price, determining quality and quantity, ordering, installing and making payment
- ❖ Not subcontracting a portion of the work greater than expected by industry practices





Commercially Useful Function

Not perform CUF if your business is:

- ❖ Being used as a passthrough to obtain the appearance of SB/DVBE participation
- ❖ Not being used to perform the work as stipulated in the bid.
- ❖ No longer used to provide goods/services listed in the initial bid response.

Resources

Small Business Development Centers (new businesses)

- ◆ Business consulting, planning, marketing and access to capital

Apex Accelerators (established businesses)

- ◆ Government contracting

SCORE (newer businesses)

- ◆ Business mentorship



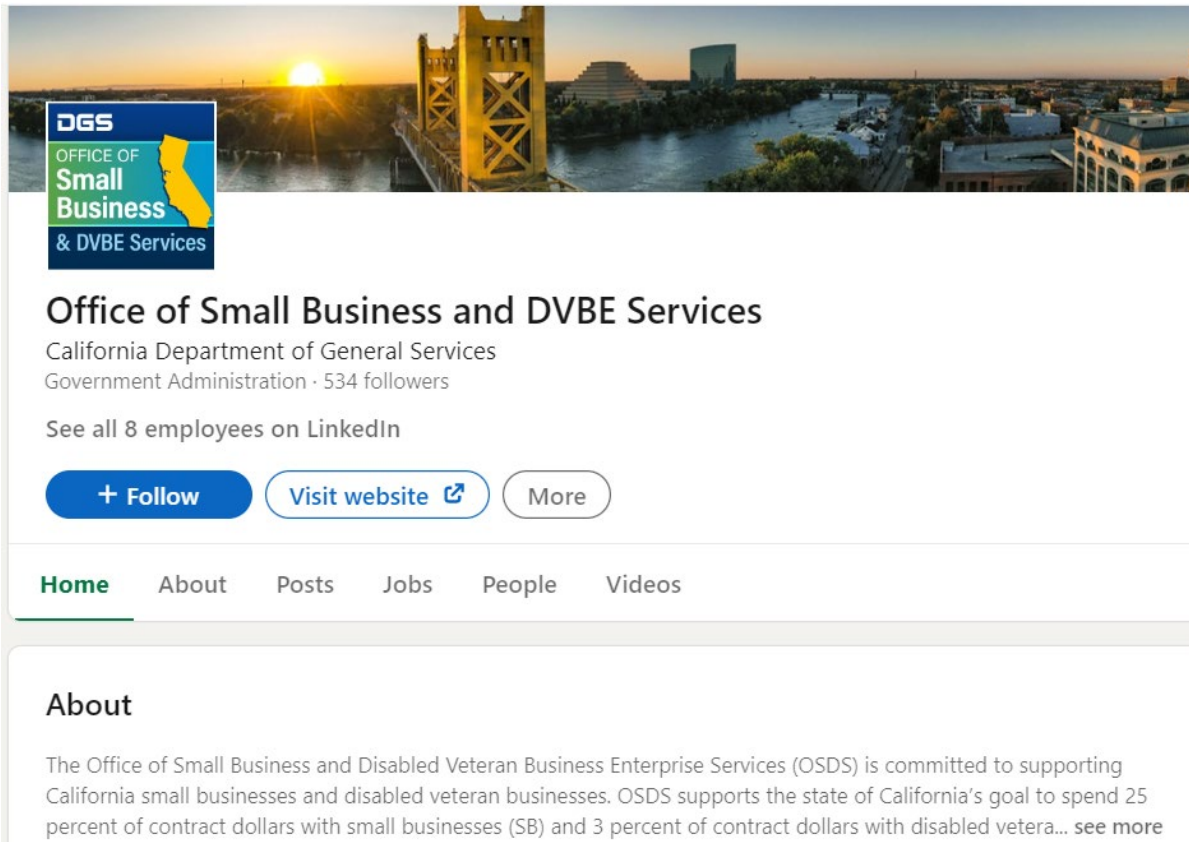
Review

- ◆ How the state buys
- ◆ Acquisition Methods
- ◆ Leveraged Procurement Agreements
- ◆ Solicitation Formats
- ◆ Commercially Useful Function
- ◆ Resources



Stay Updated on LinkedIn

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The image shows a screenshot of a LinkedIn company profile. At the top is a banner image of a bridge over a river at sunset. Below the banner is the company logo, which includes the text 'DGS OFFICE OF Small Business & DVBE Services' and a map of California. The company name 'Office of Small Business and DVBE Services' is prominently displayed, followed by 'California Department of General Services' and 'Government Administration · 534 followers'. There is a link to 'See all 8 employees on LinkedIn' and three buttons: '+ Follow', 'Visit website', and 'More'. Below this is a navigation menu with 'Home', 'About', 'Posts', 'Jobs', 'People', and 'Videos'. The 'About' section is expanded, showing a paragraph of text: 'The Office of Small Business and Disabled Veteran Business Enterprise Services (OSDS) is committed to supporting California small businesses and disabled veteran businesses. OSDS supports the state of California's goal to spend 25 percent of contract dollars with small businesses (SB) and 3 percent of contract dollars with disabled vetera... see more'.

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Government Administration · 534 followers

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About

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Book an Appointment

- Introduction to state contracting
- Cal eProcure registration and certification
- Update Cal eProcure profiles
- Find contract opportunities



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for Participating*



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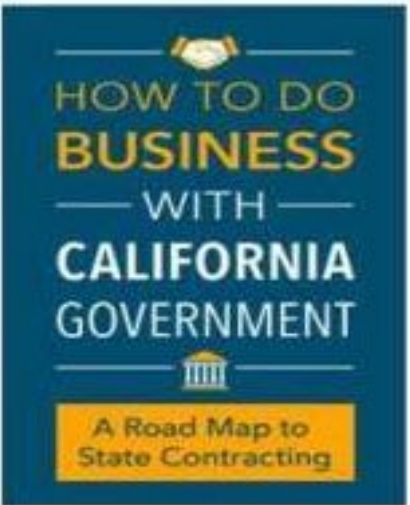


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