

Veterans Services Division

Date: November 4, 2014		Time: 1:00 pm to 4:00 pm	Meeting Location: Auditorium, DGS
Type of meeting	Small Business(SB)/Disabled Veteran Business Enterprise (DVBE) Advocates Meeting		
Attendees	<p>Participants Advocates – 32 Advocates on Teleconference – 16</p> <p>California Department of Veterans Affairs (CalVet) Keith Boylan, Deputy Secretary Veterans Services Division Stewart Mackenzie, Manager Special Programs, Veterans Services Division</p> <p>California Department of General Services (DGS) Angel Carrera, Chief, Certification and Outreach, Procurement Division Tanya Little, Manager, Business Development Bernie Quinn, Research Writer, Procurement Division Brittney Heth-Tran, Reports Coordinator, Procurement Division</p>		
Topics Covered In Meeting			
<u>Initial Briefing</u>			
DGS purchased a new microphone system that insures individuals on the teleconference can hear all of the participants. Michael Aguilio explained how the system worked. He also explained how the individuals on the teleconference could send comments to the teleconference and that they could now call in if they wanted.			
<u>Welcome</u>			
Robert Beamer opened the meeting and asked everyone to introduce him or herself. The computer specialist read the list of individuals online to the workshop participants.			
<u>Mentor Program</u>			
Maureen Moss presented an update on the Mentor program. There are currently 10 mentors working with 18 Advocates. Maureen presented two training topics:			
1) What outreach materials might you want to consider having for your next event regardless if it is in San Diego or Sacramento?			
2) How to use the website: www.leginfo.ca.gov			
<ul style="list-style-type: none"> • Today's Events at the Legislature • Bill Information • California Law • Your Legislature • Legislative Publications • New Laws 			
Maureen then demonstrated how a SB/DVBE Advocate would locate the Military and Veterans Codes. To everyone's surprise, Maureen ended her presentation by announcing that she is retiring from state service effective November 14, 2014			
<u>Keith Boylan, Deputy Secretary Veterans Services Division, CalVet</u>			
Keith made the following points:			
<ul style="list-style-type: none"> • CalVet will use the SB/DVBE Advocates survey to find ways to assist Advocates in their daily work. • CalVet is dedicated to the delivery of the SB/DVBE Advocates Boot Camp as a way of training Advocates. • CalVet will research the possibility of conducting Veterans Business Forums, SB/DVBE Advocates Workshops and Advocates training in Southern California for FY 2015/16. 			
<u>Bernie Quinn, Title, Research Writer, Procurement Division DGS</u>			
A business must meet ALL of the following CUF requirements for Contract/Purchase Order (PO) award consideration: A certified small business or microbusiness is deemed to perform a commercially useful function if the business does all of the following:			
1. Is responsible for the execution of a distinct element of the work of the contract.			
2. Carries out its obligation by actually performing, managing, or supervising the work involved.			
3. Business performs work that is normal for its business services and functions.			
4. Is responsible, with respect to products, inventories, materials, and supplies required for the contract, for negotiating price, determining quality and quantity, ordering, installing, if applicable, and making payment.			
5. The business is not subcontracting a portion of the work that is greater than subcontracting according to normal industry practices.			
<u>CUF Analysis</u>			
The buyers perform CUF analysis with assistance from the Department's SB/DVBE Advocate, as needed. CUF is determined during the bid evaluation process for each SB, MB and DVBE prime or subcontractor listed in the solicitation, bid, or quote. CUF reevaluation occurs after contract award when circumstances require it. Non-small businesses or DVBE businesses submitting bid responses that identify SB/MB or DVBE subcontractors also require CUF evaluation. The GSPD-05-105 or GSPD-05-106 forms require submission in response to a solicitation when identifying a small or micro-business. DVBE primes or subcontractors must also include the Std. 843 DVBE Declaration. In order to complete the CUF evaluation, use the Commercially Useful Function (CUF) Evaluation and Determination Worksheet.			

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Bernie Quinn, Title, Research Writer, Procurement Division DGS (cont.)

Discussion Points

- Office of Legal Services and DGS Procurement are still discussing how much detail is need in the CUF regulations to meet the needs of the contracting and procurement officers, and protect the state at the same time. No decision is pending.
- The certification officers cannot review every contract for CUF. That is why CUF is the responsibility of the procurement and contracting officials on every transaction. Procurement and contracting officials may request assistance from the SB/DVBE Advocates.

Tanya Little, Business Development Manager, DGS

Ms. Little she requested advocates bring the specific webpage addresses for their department's commodity & service needs. She also requested including the webpage address for solicitations if advertised on your department's website. Agencies that did not have the information available may email this information to tanya.little@dgs.ca.gov. The subject line should read: Webpage Addresses for [Department Name]. Please also include your telephone number should Ms. Little have any questions.

Ms. Little asked the advocates what they want the Vendors to know about their agencies.

- Many state agencies have decentralized procurement and contract services, which means they have offices across the state.
- Agencies request companies register thru their webpage. Agencies check their webpage registrations first when looking for potential bidders.
- Vendors should respond immediately to an Advocate's inquiry even if they are unable to provide the requested goods and services.
- Vendors need to use the California State Contract Register

Susan Sudmann, Manager DGS/FI\$Cal

As of July 1, 2015, Wave 1 and 2 Agencies/Departments will be using FI\$Cal for all of their procurement functions

As of July 1, 2015, the following organizations will be using the FI\$Cal for the following functions

Future Wave Agencies/Departments

- Purchase Document Registration in State Contract and Procurement Registration System (SCPRS)
- Advertise Bidding opportunities on the California State Contracts Register (CSCR)
- Post Progress Payments
- Vendor Entry and Maintenance

Bidders

- Self-Registration as Bidders
- Self-Service Maintenance of Bidder Profile
- View/Receive Solicitations
- Submit Bid Responses

SB/DVBEs Certified Firms

- Online Certification Application
- Self-Service Maintenance for Certification and Bidder or Vendor Profile
- View/Receive Solicitations
- Submit Bid Responses

Vendors

- Self-Registration as eVendors
- Self Service Inquiry of Purchase Documents, Receipts, Vouchers and Payment Information
- View/receive Solicitations
- Submit Bid Responses

Future Wave Agencies/Departments, Bidders, SB/DVBEs, Vendors, Public, and Local Governments

- Search for Bid Opportunities on CSCR
- Post or View Contractor Ads
- Search for Progress Payments
- Search for Leverage Procurement Agreements (LPA)

Future User Education

- Road Shows, October, 2014
- Joint FI\$Cal/DGS Forums - February - March 2015

Steering Committee Updates

Robert Beamer stated the two objectives for the Steering Committee in FY 2014/2015:

- Double the number of Advocate Mentors from 9 to 18
- Conduct an Advocate Boot Camp by May 2015

The SB/DVBE Workshop talked about the challenges of meeting the first goal. The current mentors will train all of mentees to a level where they can become a mentor. In addition, the Steering Committee will continue to discuss mentorship with seasoned SB/DVBE Advocates.

Robert Beamer and Michael Aguillo meet with Joseph Watkins of the California Procurement and Contracting Academy (CAL-PCA) to discuss their involvement in the Advocates Boot Camp. The next steering committee meeting will develop the Advocates Boot Camp.

Upcoming SB/DVBE Events

November 13 - San Diego Elite Chapter Networking Event, San Diego

November 13 - Southwestern Business Resource Center 4th Annual Expo, Perris

November 14 - California Disabled Veterans Business Alliance, Veterans Breakfast, Los Angeles

November 19 - Connecting Points sponsored by the California Public Utilities Commission and the Sacramento Public Agencies Consortium, Sacramento, Sacramento

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Next Meeting: January 28, 2015, DGS, Executive Dining Room		
Discussion	The following topics will be discussed at the next meeting	
Bob Beamer	Mentor Program	
Jason Kennedy	Agency Report State Hospitals	
Tanya Little	Vendors	
Brittany Heth-Tran	SB/DVBE Reporting by Primes	
Date and time:	January 28, 2015 - 1:00 pm to 4:00 pm	
Action Items	Person Responsible	Deadline
Advocates will review the Advocates Toolkit on the DGS Webpage and be prepared to make recommendations for the Advocates Boot Camp	All	January 28, 2015