

State of California

Department of Veterans Affairs  
1227 O Street, Suite 105  
Sacramento, CA 95814

**Memorandum:** November 26, 2013

**To:** Distribution

**From:** CalVet Veterans Services - John Anderson/Bob Beamer

**Subject:** SB/DVBE Advocate's Workshop Minutes October 23, 2013

1. 30 people in attendance
2. Robert Fuller - Dept. of Consumers Affairs (DCA)  
DCA has a DVBE First Policy in place that requires the procurement staff to look for a Certified DVBE first and use them as it helps to meet their participation goals. Since most DVBEs are also SBs, then they are meeting both goals. If they cannot find a DVBE, then they look for a Certified SB.

Exemptions: Procurement staff is encouraged to find DVBE/SBs first. If they cannot find a vendor, then they submit an exemption form to Robert Fuller.

Robert keeps track of monthly expenditures to keep a handle on how the department is spending and if they are on track to meet participation goals. Robert uses the eProcurement report that is available from the eProcurement page to keep track of department expenses.

Robert explained about looking at your expenditures, and determining which ones can be removed from your books (i.e. Vehicle redemption costs; purchases from other state agencies like PIA, court costs).

By reducing your departments spend, you can increase your participation goals. DCA always gives the DVBE incentive on contracts.

Robert explained that as an advocate, his job is to help the procurement staff with SB/DVBE suppliers. New suppliers are showing up all the time.

Robert was asked how his department handles mandatory contracts. Not all mandatory contracts are the same. You have to read each one to see if

there is a SB/DVBE off ramp. For example, the ink and toner contract has a list of SB/DVBEs, you can use.

**3. Robert Beamer - CalVet, Announcements**

If your department doesn't like the mandatory SB/DVBE First Policy, the Advocate should recommend it as a "Best Practice". Large departments such as the Department of Motor Vehicles and the Department of Corrections have had great results using the SB/DVBE First Policy as a best practice.

New Steering Committee Chair is Nina Martinez. New members were introduced: Maureen Moss; California Highway Patrol, Lynette Hall; CalPers and Robert Turner, Department of Consumer Affairs.

The purpose of the Steering Committee is to bring new ideas to the Advocate Workshop. John Anderson will be doing the Steering Committee meetings minutes and will send a copy to all Advocates. The Steering Committee will be working to improve the quality of the meetings by reviewing the problems and concerns from the workshops and finding the best way to address these concerns.

The annual Advocate Christmas gathering will take place in the first or second week of December 2013. Time and date will be emailed soon.

**4. Michael Aguilio - DGS, Advocate's List**

Michael emphasized that DGS is trying to keep the Advocate list up to date. DGS needs the help of each Advocate. If you are leaving the Advocate's position, please have the new Advocate go to the Advocate's page at [www.dgs.ca.gov/pd](http://www.dgs.ca.gov/pd) and fill in their contact information.

**5. Nina Martinez - Department of Corrections, Cal-PCA**

Nina talked about the great classes offered by the DGS Cal-PCA Academy. She recently went to the SB/DVBE Option class and learned a great deal. She also mentioned that if you have not taken the Basic Acquisition Course in the last three years, you may take it again because it has been completely updated. If the class you want is currently not being offered, the website allows you to sign up for it and it will notify you when it is rescheduled. One final tip, make sure everyone in your department is signed up for DGS Procurement Division Broadcasts. They are a great way to learn of changes.

**6. Michael Aguilio - DGS, Events**

The last two major events of the year will be the SARA Awards on November 13th and the Connecting Points event on November 14<sup>th</sup>. Both

will be held at the Citrus Heights Community Center. Some Advocates mentioned the fact that it was two consecutive days out of the office and wondered if it could be combined again. Michael stated that DGS is looking at several different options for next year and he will add this comment to his after action report.

**7. Colleen Rubens – Cal Recycling, Special Report**

Colleen wanted to talk to the Advocates about special issues, concerns or problems that they think the Steering Committee should address.

The first issue mentioned was Commercially Useful Function. They would like more information on step 5 which was recently added and an update from the special committee reviewing this issue.

The second area was program abuse: Specifically when the primes did not report spending or use the SB/DVBEs stated on their bid. It was recommended that everyone review this process with their contract managers and insure that the primes were doing the correct paperwork to include monthly reporting. This will be covered in detail at the next workshop.

One Advocate was having problems with a Small Business needing to get recertified so that they could award the contract. Michael Agullio mentioned that by notifying the Office of Small Business and Disabled Veteran Business Enterprises (OSDS), recertification could be expedited.

There was also a discussion about attendance, the possibilities of increased Webinar use, Southern California meetings and a special two day event. These items were passed to the Steering Committee for further review.

**8. Dale Clack – California State University Sacramento, List Serve.**

Dale has set up a special list serve for SB/DVBE Advocates only. It is a great management tool and would improve communication between the Advocates for problem solving. There were several discussions and there was general consensus that its use should be encouraged. This will become a regular Agenda item to check on how it is working.

**9. Meeting Adjourned. No date was announced for the next meeting.**