

CALIFORNIA DEPARTMENT OF GENERAL SERVICES



Office of Small Business  
and Disabled Veteran  
Business Enterprise Services

# Contracting with California State Government





*Our Mission is to Advocate, Promote, and Facilitate  
the Success of Businesses in the Southern  
California Region and its Trade Areas.*





***Our Goal is Simple...***

**To Expand Procurement  
Opportunities for SoCal  
Businesses!**



***The RHCC Champions Economic  
Development and Quality of Life  
for the Southern California Region  
by being the Voice of Businesses.***



*Today, we are proud to partner  
with **DGS***

*Office of Small Business and Disabled Veteran  
Business Enterprise Services.*

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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





# 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 \$388,000.00 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)





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FAQs

QUESTIONS

ASK



# 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](http://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](mailto: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](mailto: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](#)

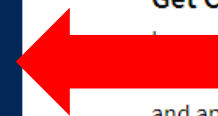
## How do I...


### 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 (DBE) certification program and apply for SB/DBE certifications. 


### Find Public Procurement Information



Access records on what state agencies have purchased. Search for SB/DBE 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

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# Non-Advertised Solicitations

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

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# 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.



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# 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



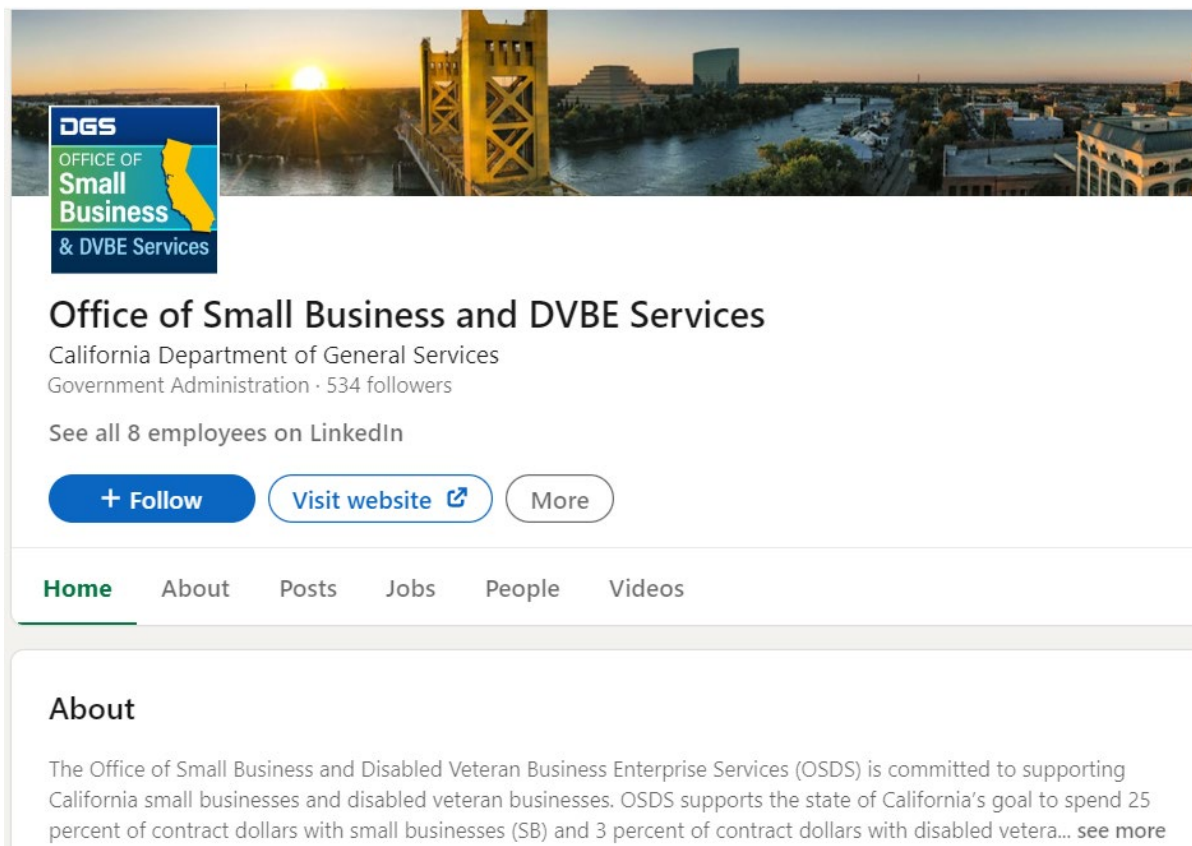
# Review

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



# Stay Updated on LinkedIn

Follow us at [linkedin.com/company/dgs-osds](https://linkedin.com/company/dgs-osds)



The image is a screenshot of a LinkedIn company profile. At the top is a banner image showing 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' next to a map of California. The company name 'Office of Small Business and DVBE Services' is displayed in bold, followed by 'California Department of General Services' and 'Government Administration · 534 followers'. A link to 'See all 8 employees on LinkedIn' is present. Below this are three buttons: '+ Follow', 'Visit website' with an external link icon, and 'More'. A navigation bar shows 'Home' as the selected tab, with other options being 'About', 'Posts', 'Jobs', 'People', and 'Videos'. The 'About' section is expanded, showing a paragraph about the office's mission to support small and disabled veteran businesses in California, with a 'see more' link at the end.

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OFFICE OF  
Small Business  
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See all 8 employees on LinkedIn

+ Follow Visit website More

Home About Posts Jobs People Videos

**About**

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](#)





# Book an Appointment

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



*Thank You  
for Participating*





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