Today’s Speakers

**UC Procurement – Systemwide**

**William (Bill) Cooper** – AVP & Chief Procurement Officer

**Small Business First Program:**

**Stephanie Lopez** – UC Procurement Special Programs Manager

**CalUsource:**

**Karen Rhee** – UC Associate Director, Sourcing & Contracts Technology

**Cal eProcure:**

**Jermaine Carter-Gibson** – CA DGS Business Outreach Liaison
Webinar Agenda

• UC commitment to Small & Diverse Business
• Small Business First program overview
• How to prepare to work with UC
• How to find business opportunities
• Questions & Answers
• Resources
Purpose of this Webinar

• Create common and foundational understanding of how to engage with the UC system and campuses

• How UC is working to address procurement equity and supplier diversity, with a focus on our newest opportunity: **Small Business First**

• High-level review – not specific instructions for doing business with each site – this is just Step 1!
UC can make a difference...
What is the University of California?

• 2M alumni and +285k students enrolled annually
• UC campuses spend $9.5B annually on goods and services
Engagement with Small & Diverse Business

• UC Goal by 2023: 25% Economically & Socially Responsible (EaSR) spend with small & diverse businesses
• UC Small & Diverse Business Advisory Council
• UC Small Business First program
• Local Small Business Fairs
• Federal Subcontracting Plans
UC Impact

Every one job directly supported by UC-related spending supports roughly 0.7 indirect and induced jobs in California (an employment multiplier of about 1.7).

Every $1 in direct economic output produced by UC-related spending generates about $1.0 in additional indirect and induced economic output (an economic output multiplier of about 2.0).

From UC SYSTEMWIDE ECONOMIC, FISCAL, AND SOCIAL IMPACT ANALYSIS – Jan. 2021
Why is UC doing Small Business First?

• UC procures billions in dollars of goods and services annually

• Leverage UC’s vast purchasing power to support inclusive economic recovery

• Provide opportunity and access to businesses facing systemic barriers

• Help small businesses that have been harmed due to pandemic
What is the Small Business First program?

UC commits to providing contracting and procurement opportunities to certified:

• **Small Businesses (SB)** – includes DBEs, WOSBs, HUBZone, etc.

• **Disabled Veteran Business Enterprises (DVBE)**
What are the program details?

Wherever practicable, UC contracts and procurements between $10,000 - $250,000 must be awarded to a SB or DVBE

Informal solicitation process requires only:

• **One** (1) quote for purchases below $100,000
• **Two** (2) quotes for purchases above $100,000

• Quotes must be responsive/responsible for UC to make an award.
• Small Business firm must perform at least 30% of total work on contract.
What are the Exemptions?

Key exempt spend categories*

• Purchases that are sole sourced, unique professional services, and emergency purchases
• Purchases through existing strategically-sourced agreements
• Design and construction procurements
• Medical and patient care contracts
• Concessions
• Federally-funded purchases

*see full list on the UC Small Business First webpage.
What are benefits of Small Business First?

Increased Time & Cost Savings – fast, easy, flexible, convenient:
- Only 1 or 2 bids needed
- Competition with like-size businesses
- Potential 1-day awards

Supports UC Mission and Goals
- Helps campuses reach EaSR goals
- Increases engagement with small businesses
- Incentivizes businesses to get certified
- Targeted programs help mitigate small business challenges
So, how do I work with UC?

Do your homework!

1. Understand what UC buys (and how)
2. Ensure you meet all UC requirements
3. Let us know you want to do business
4. Be persistent
1. Understand **what** UC buys

**Systemwide opportunities**

- Review UC-wide publicly posted opportunities on our [CalUsource](#) website
- Review the Systemwide Planned Pipeline and Contract Expiry reports on UC’s [Supplier Diversity](#) webpage

**Campus-specific opportunities**

- Visit the Supplier Diversity and Supply Chain websites for each campus you’re interested in working with
1. Understand what UC buys

**Primary Sub-Category Buys**

- Facility Services & Supplies
- Office Equipment, Supplies & Services
- Laboratory Equipment & Supplies
- Books & Subscriptions
- Lab Services
- IT Software and support
- IT Services
- Consulting
- Legal Services
- Media & Advertising
- Medical & Surgical
- Temporary Personnel Services
1. Understand how UC buys

- Publicly bid opportunities are posted on CalUsource.
- Most procurements are done at lower dollar amounts and are not publicly posted.
- Buying decisions are decentralized and most are made at the individual department level.
2. Ensure you meet all UC requirements

Understand key requirements for doing business
• Review UC’s Terms & Conditions
• Ensure you carry proper Insurance
• Ensure you can meet all relevant sustainability requirements

Get certified as a Small, DVBE or diverse-owned business
• Certification increases your visibility with UC buyers
• Qualifies you automatically to participate in Small Business First and other targeted small business opportunities
Cal eProcure – How to get certified

- Cal eProcure is the State of CA system marketplace and certification systems as an SB or DVBE
- UC encourages all eligible suppliers to register and get certified with DGS
- UC also accepts many certifications offered by national, state and local agencies
3. Let us know you want to do business

Register and sign up at the System level

- Register in CalUsource – UC’s primary sourcing website
- Sign up to learn more about UC-wide events and resources

Register or engage with the campus(es) you wish to work with

- Each campus has its own procurement/supply chain department
- Each campus offers suppliers direct resources to engage locally – contact lists, business fairs, etc.
CalUsource – How to register

• UC’s procurement bid software
• Used by all campuses to source products and services
CalUsource – Registration Benefits

• Access to all current bids and future bids across UC system

• Ease of response to bids

• Existing profile makes your company easily searched for and invited to future bids
CalUsource – How to Register

• Go to http://calusource.net/
### CalUsource – Public Bid Site

- Click “Register”
- To view open bids, check the “Active Events” tab

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<tr>
<th>#</th>
<th>RFP</th>
<th>Contact</th>
<th>Details</th>
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<tbody>
<tr>
<td>1</td>
<td>UC Davis Consolidation Press for model tests on clayey soils</td>
<td>DAISY TOM (<a href="mailto:dltom@ucdavis.edu">dltom@ucdavis.edu</a>)</td>
<td>Start: 12/4/2020 Pacific Standard Time</td>
</tr>
<tr>
<td>2</td>
<td>UC San Diego Branding and Advertising Agency of Record</td>
<td>Lynda Ta (<a href="mailto:l2ta@ucsd.edu">l2ta@ucsd.edu</a>)</td>
<td>Start: 12/15/2020 Pacific Standard Time</td>
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CalUsource – Registration Form

• Fill out required fields (*) and then submit
CalUsourse – Supplier Resources

• Training and reference materials: http://calusourse.net/
4. Be persistent

Success takes persistence

- Check CalUsource regularly for relevant opportunities
- Reach out to campus Small Business Officers
- Check local campus sites regularly for news and events
- Keep your information and offerings up-to-date
- Sign up for UC-wide news, opportunities, events and resources
Contact your Local Small Business Officers

UC Berkeley
Loren House (loren1@berkeley.edu)
Supplier Diversity Program Manager

UC Davis
Steven Kobayashi (stkobayashi@ucdavis.edu)
Procurement Manager

UC Irvine
Shauna Niswonger (shauna.n@uci.edu)
Training & Support Assistant

UC Los Angeles
Marina Zdobnova (mzdobnova@finance.ucla.edu)
Small Business Officer

UC Merced
Theresa Mason (tmas4n@ucmerced.edu)
Senior Contract Manager

UC Riverside
Dana Allen (dana.allen@ucr.edu)
Procurement Card and Small Business Administrator

UC San Diego
Anthony Singleton (asingleton@ucsd.edu)
Chief Small Business Officer

UC Santa Barbara
Heather Perry (heather.perry@ucsb.edu)
Sustainable Procurement Program Manager & Small Business Officer

UC Santa Cruz
Jen Neal (superfish@ucsc.edu)
Associate Director

UC Office of the President
Rick Greene (Richard.greene@ucop.edu)
Local Procurement Manager
Small Business First Resources

Online Resources

• UC Small Business First webpage: https://www.ucop.edu/procurement-services/for-suppliers/small-business-first-supplier/small-business-first-supplier.html

• UC Supplier Diversity webpage: https://www.ucop.edu/procurement-services/for-suppliers/supplier-diversity.html

UC Campus Procurement Sites

• https://www.ucop.edu/procurement-services/for-ucstaff/campus-procurement-sites/index.html