



COME IN
WE ARE
OPEN

Small Business First

HOW TO DO BUSINESS WITH UC | WEBINAR

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



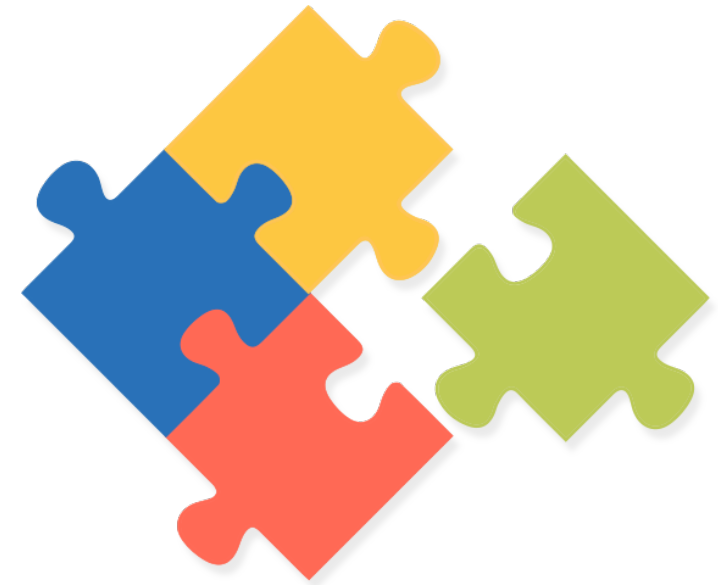
Cal eProcure:

Jermaine Carter-Gibson – CA DGS Business Outreach Liaison



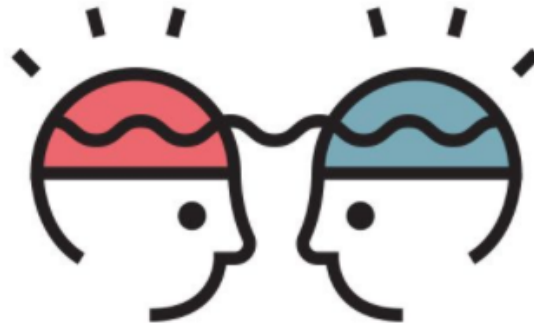
Webinar Agenda

- 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!



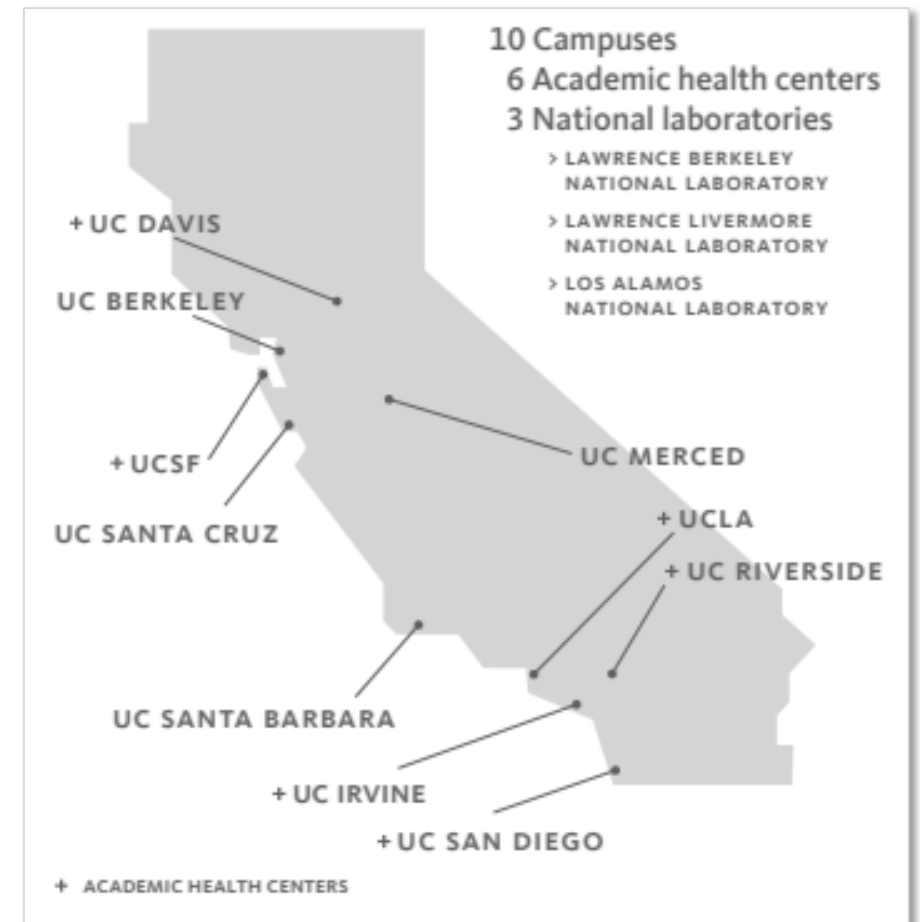
UC can make a difference...



What is the University of California?

- 2M alumni and +285k students enrolled annually
- UC campuses spend \$9.5B annually on goods and services

ECONOMIC IMPACT	
CA jobs supported by UC operations	529,000 (1 in 45)
Economic impact of UC activities	\$82.0 B
Gross state product	\$55.8 B
UC RESEARCH IN NANOTECHNOLOGY, CLEAN ENERGY, NEUROSCIENCE, GENOMICS AND MEDICINE IS HELPING DRIVE THE NEXT WAVE OF CALIFORNIA ECONOMIC GROWTH.	



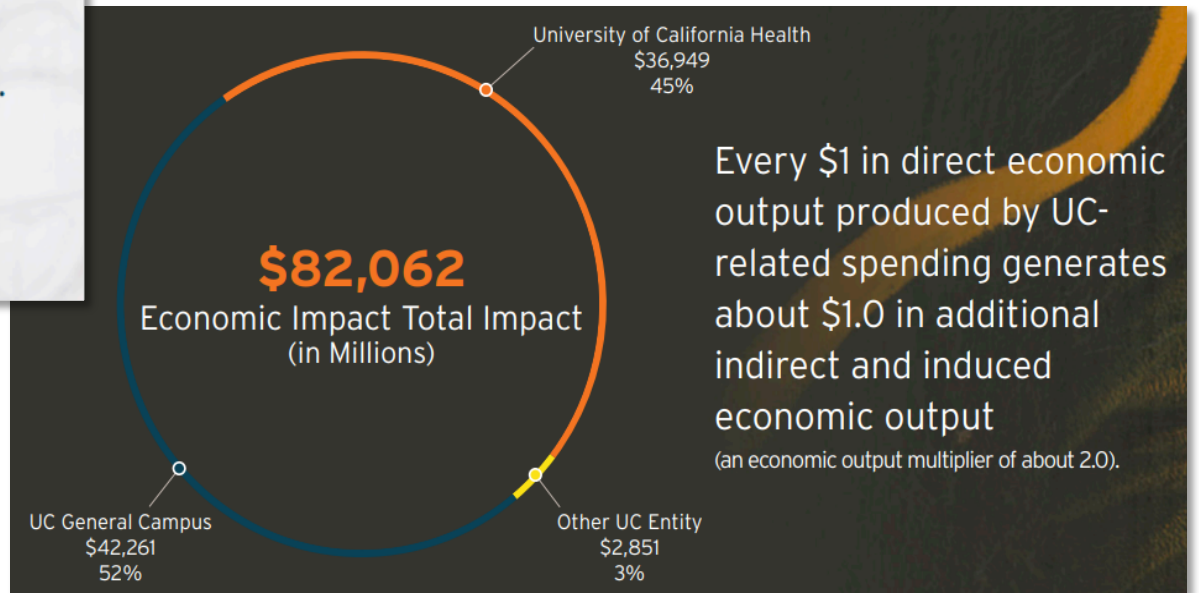
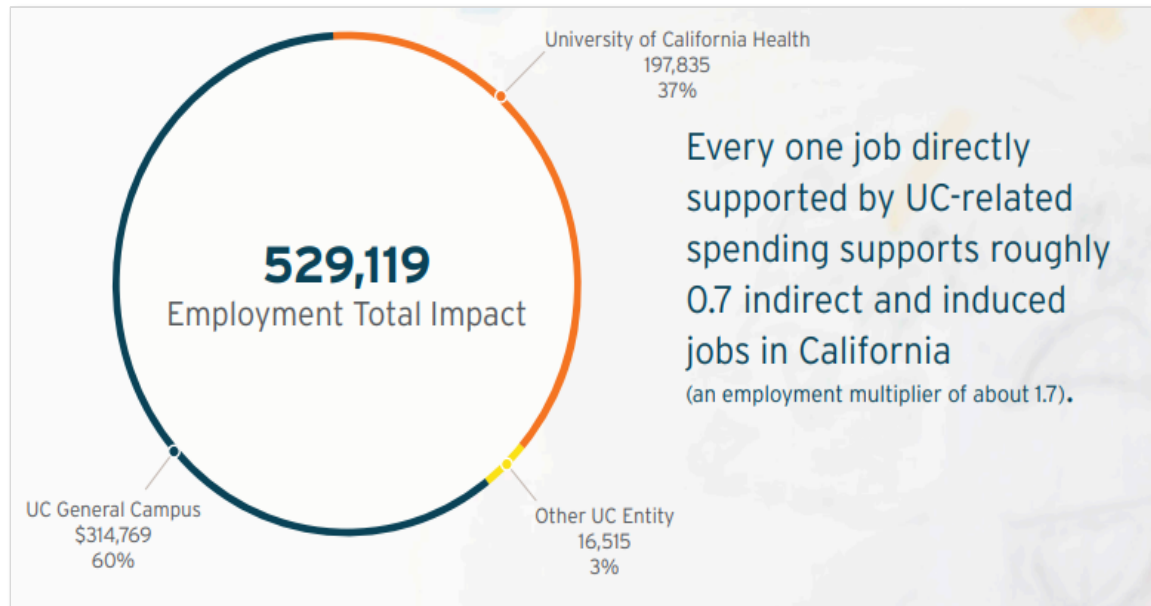
From [UC At A Glance](#)

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



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?

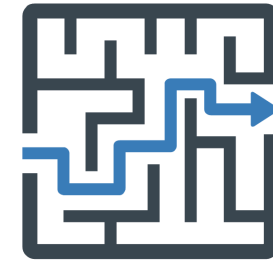
Increased Time & Cost Savings – fast, easy, flexible, convenient:

- 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

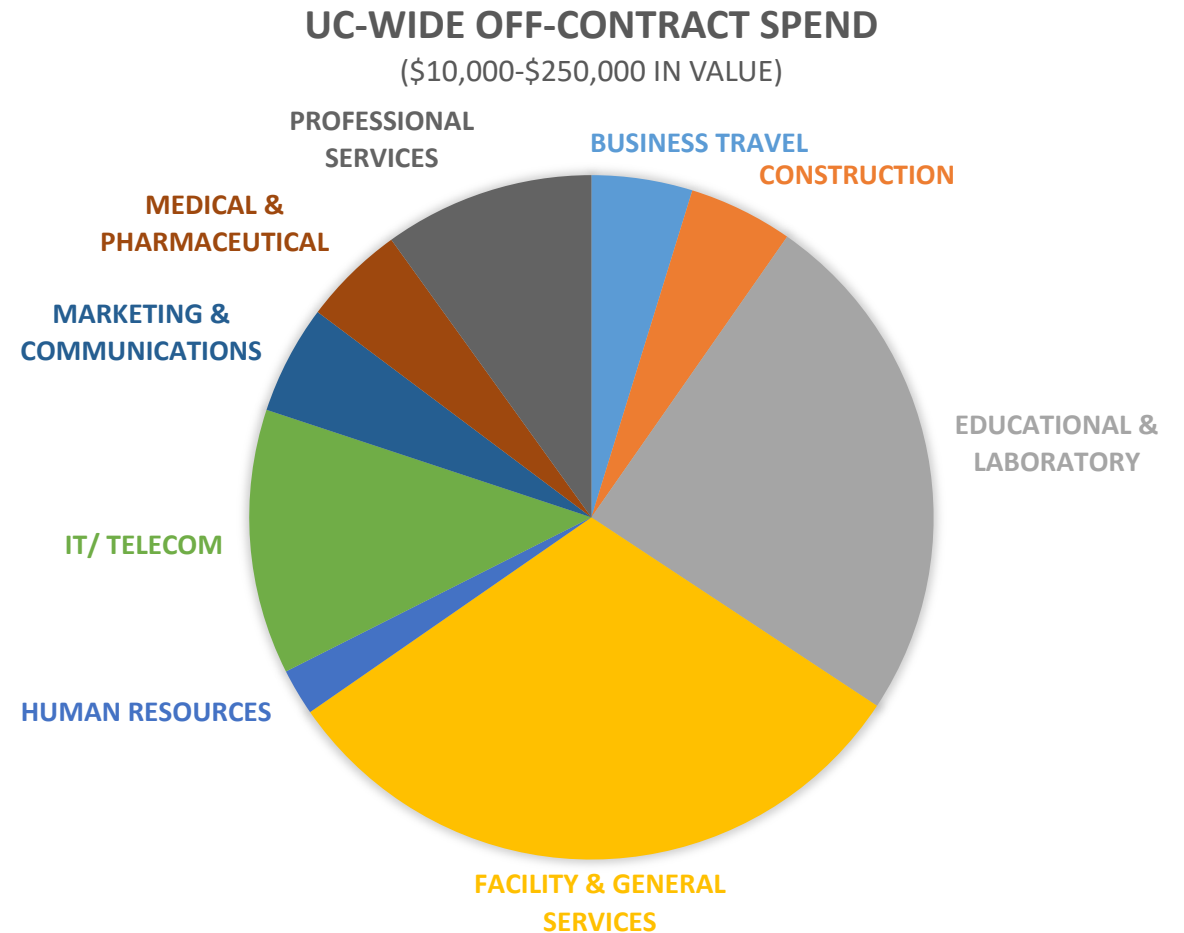
- Visit the Supplier Diversity and Supply Chain websites for each campus you're interested in working with



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

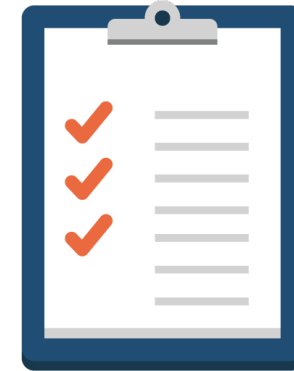
- Publicly bid opportunities are posted on [CalUsource](#)
- Most procurements are done at lower dollar amounts and are not publicly posted
- Buying decisions are decentralized and most are made at the individual department level



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



Small Business
First



CALIFORNIA DEPARTMENT OF
GENERAL SERVICES

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



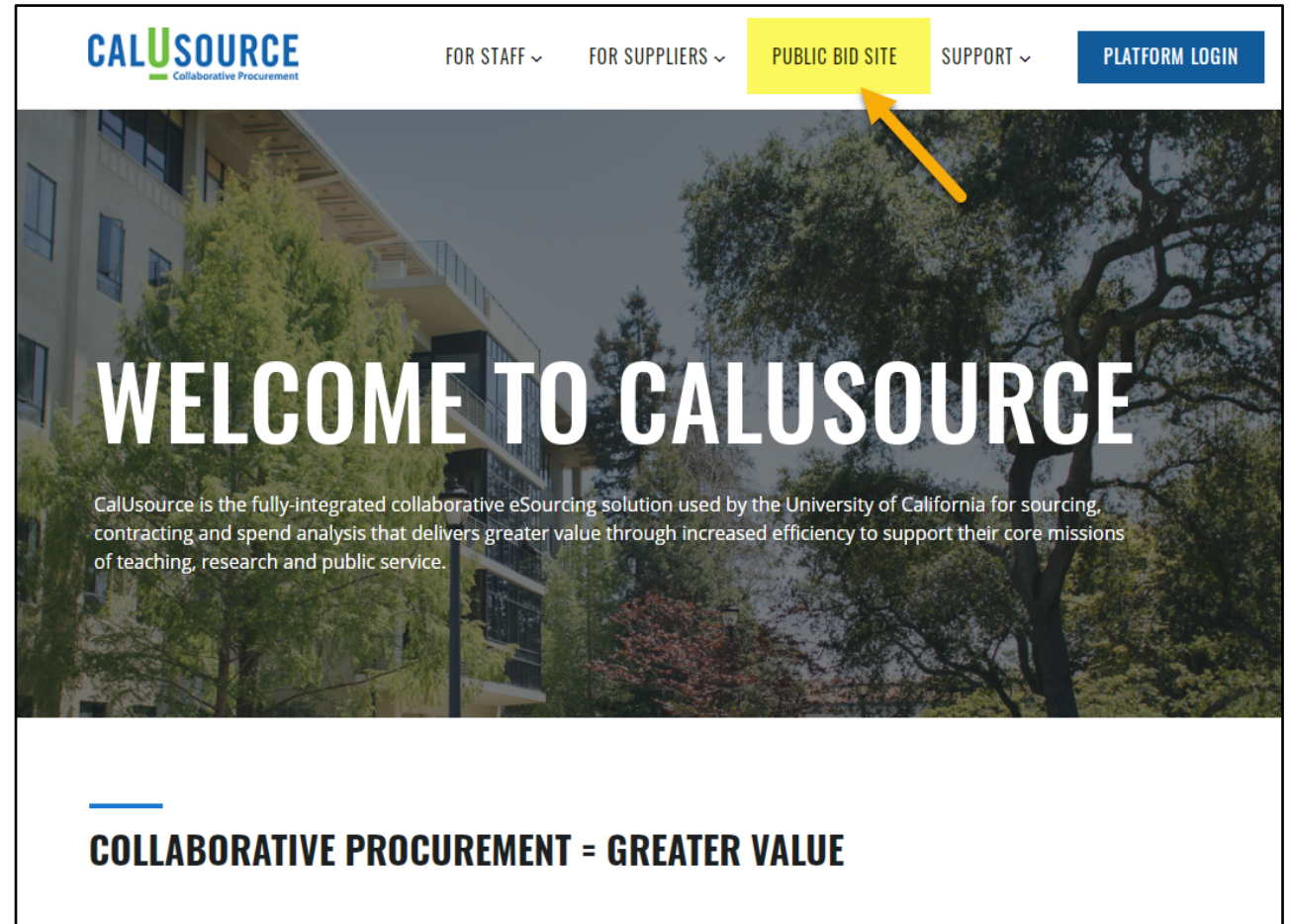
CalUsource – Registration Benefits

- 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



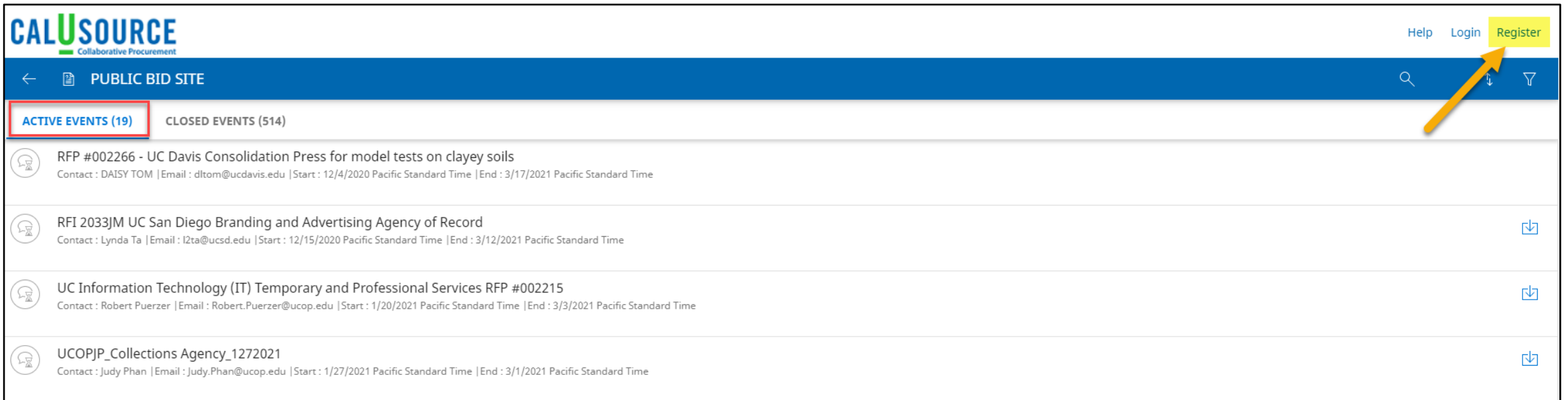
CalUsource – How to Register

- Go to <http://calusource.net/>



CalUsource – Public Bid Site

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










CALUSOURCE
Collaborative Procurement

Help Login **Register**

← PUBLIC BID SITE

ACTIVE EVENTS (19) CLOSED EVENTS (514)

	RFP #002266 - UC Davis Consolidation Press for model tests on clayey soils Contact : DAISY TOM Email : dltom@ucdavis.edu Start : 12/4/2020 Pacific Standard Time End : 3/17/2021 Pacific Standard Time	
	RFI 2033JM UC San Diego Branding and Advertising Agency of Record Contact : Lynda Ta Email : l2ta@ucsd.edu Start : 12/15/2020 Pacific Standard Time End : 3/12/2021 Pacific Standard Time	
	UC Information Technology (IT) Temporary and Professional Services RFP #002215 Contact : Robert Puerzer Email : Robert.Puerzer@ucop.edu Start : 1/20/2021 Pacific Standard Time End : 3/3/2021 Pacific Standard Time	
	UCOPJP_Collections Agency_1272021 Contact : Judy Phan Email : Judy.Phan@ucop.edu Start : 1/27/2021 Pacific Standard Time End : 3/1/2021 Pacific Standard Time	

CalUsource – Registration Form

- Fill out required fields (*) and then submit

CalUsource

Primary Registration Form

Language: English

Basic Details

All fields marked with * are required.

Account Credentials

Username *

User Email *

Password * Password strength: Too short

Confirm Password *

Mobile Number Select ID Code

Company Information

Legal Company Name *

Doing Business As

Company Website

Headquarters Select Country

Address Line 1 * Street, Street, Locality

Address Line 2 Street, Street, Locality

City *

Province

Primary Contact Information

First Name *

Last Name *

Company Email *

Primary Business Phone Number * Extension

Contact's Business Region *

Contact's Category *

Time Zone (UTC-08:00) Pacific Time (US & Canada)

Secondary Contact Information

First Name

Last Name

Company Email

Contact Role

☐ I have read and agree to [Terms & Conditions](#) & [Privacy Policy](#) *

[Reset](#) [Submit](#)

CalUsource – Supplier Resources

- Training and reference materials: <http://calusource.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 (tmason4@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>



Question & Answer

