

SMALL BUSINESS FIRST

Policy Quick Reference Guide

Small Business First makes a difference.

With [Small Business First](#) (SB First), the University of California (UC) is committing to providing more easily accessible business opportunities for [certified Small Businesses \(SB\) and Disabled Veteran Business Enterprises \(DVBE\)](#). This policy helps UC invest in and enrich our local communities while furthering our sustainability goals and mission of teaching, research and public service.



Streamlined process...

Small Business First makes purchasing faster:

- requires only **informal quotes**
- **go directly from quote to award**: no RFP, no advertising, make instant awards, no protests
- **assisted search** for small businesses using tools and resources below.

Only one or two quotes needed...



SB First calls for all non-construction UC procurements **between \$10,000 – \$250,000** to be awarded to an SB/DVBE, wherever practicable.

Only one (1) informal quote is required for purchases from \$10,000 up to \$100,000.
Only two (2) informal quotes are required for procurements between \$100,000 – \$250,000.



How to find small business & disabled veteran suppliers:

- Use these [supplier search resources and job aids](#)
- [SIO Explorer Professional](#) – supplier search database by Supplier.io
- [Cal eProcure](#) – State of California supplier search database
- Work with your [campus Small Business Officer/Supplier Diversity Coordinator](#); some campuses may have lists of pre-approved SB/DVBE suppliers.

SB First does NOT APPLY* to these categories:

- Sole source / unique professional services / emergency purchases
- Purchases through existing strategically sourced agreements — either [systemwide](#) or [campus-sourced](#)
- Federally funded purchases
- Design and construction purchases
- Interagency agreement acquisitions
- Federal / local government agreement acquisitions
- Research sub-award acquisitions
- Higher education institution agreement acquisitions
- Concessions purchases
- Revenue / reimbursement contract acquisitions
- Medical and patient care contract acquisitions



* NO WAIVER REQUIRED

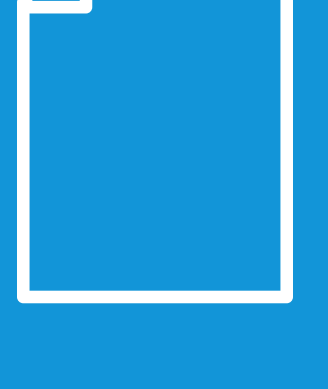


When you might need a waiver...

Sometimes, circumstances may justify not complying with **SB First**, though it would otherwise apply. Examples include:

- Where at least two SB/DVBE suppliers are not available
- Business needs cannot be met by a SB/DVBE supplier
- Unique specifications only certain suppliers can meet

How to request a waiver...



- Complete a [Small Business First Waiver](#) form
- Use these [Waiver Completion Instructions](#)
- Contact your [campus procurement/supply chain management office](#) to process the Waiver

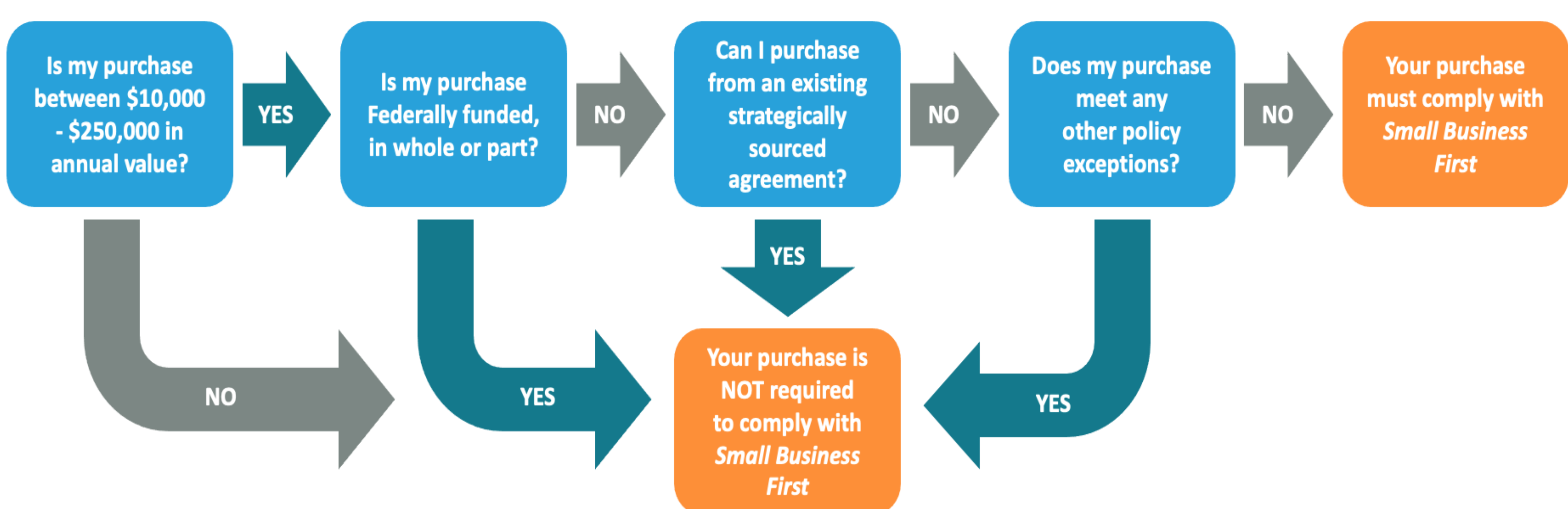
(Waivers need approval by the appropriate Policy Exception Authority or designee prior to purchasing outside of SB First)



Tips to accelerate purchasing and maintain compliance:

- Purchase from [existing strategically sourced agreements](#), if possible.
- Review exempt purchase categories in advance to confirm that SB First does / does not apply.
- Identify and pre-screen SB/DVBE suppliers in frequent purchase categories to expedite the quotation process.
- If a waiver is justified, submit it early with clear documentation to speed waiver approval.
- Get the informal quotes needed to make an immediate award to the best value supplier.

Small Business First – Decision Tree



Website Resources:

- [UC Procurement Website](#): Home page
- [Small Business First webpage](#): UC Staff
- [Small Business First webpage](#): Suppliers
- [Small Business First FAQ](#)
- [Small Business First Waiver](#)
- [Small Business First Waiver Instructions](#)
- [Small Business First Job Aids/Trainings](#)
- [Small Business First Accepted Certification Shortlist](#)
- [UC Procurement Forms & Policies](#)
- [SharePoint site](#) (use SSO to access)
- [UC Systemwide Contract Listings](#)

Supplier Search Resources:



- [SIO Explorer Professional](#): UC supplier database search tool
- [Cal eProcure](#): State of California supplier search database
- [Search Tools & Resources](#)

Contacts:

- [Campus Small Business Officers / Supplier Diversity Coordinators](#)
- [Linda Kimsey](#): UC Procurement Policy
- [Bara Waters](#): UC Procurement Communications & Training



UC is taking care of small businesses by putting them first in our procurement process.