SMALL BUSINESS DAY NEAR THE BAY Tuesday, March 14, 2017

Sponsored by UC Berkeley & UC San Francisco
Supplier Diversity Program and Campus, Government
& Local Partners





Welcome

Campus Representatives joining us today

Supply Chain Management UC Berkeley

Stacey Templeman, UC Berkeley Acting Chief Procurement Officer, Jen Uy, Campus Buyer, Alex Butler, Commodity Manager, Carla Prado, Business Systems Analyst

Supply Chain Management UCSF

Jim Hine, UCSF Chief Procurement Officer, Paul Mulligan, UCSF Procurement Manager, Nathan Mosley, UCSF Construction Commodity Manager

UC Berkeley Local Government and Community Relations

Ruben Lizardo, Director, Jen Loy, Assistant Director

UCSF Community Engagement

Lydia Bell, Center for Community Engagement





Welcome

- Full agenda, so please hold questions until the end of each session's presentation. Slide deck will be published on <u>UC</u> <u>Berkeley Supplier Diversity website</u> after today's event. http://supplychain.berkeley.edu/campus/supplier-diversity
- We will have a timekeeper to keep us on schedule
- Tables located around the room materials from our agencies & partners
- Thank you to Deborah Moss, Quiche and Carry for the breakfast
- Tastings later in the morning. Audrey Emmer & Representatives from America To Go will be here.





Our Agenda

9-9:10am (10 min)	Welcome/ Intro to the Day	Roesia Gerstein, UC Berkeley & San Francisco
9:10-9:25am (15 min)	Meet & Greet	Roesia
9:25-9:50am (25 min)	Resources – SBA, SBDC	Benny Gutierrez, SBA Oscar Dominguez, SBDC
9:50am-10:30am (40 min)	Why Certify? Federal, State of CA, University of CA	Mark McComas, SBA Wayne Gross, DGS Roesia Gerstein
10:30-10:40am (10 min)	Break	
10:40-11:25am (45 min)	Meet the Borrowers Panel	Oscar, Walter Allen, Acumen Building Enterprise, Patrick Madden, Kerex Engineering, tba, Surplus Service
11:25am-11:55pm (30 min)	Working the System: Bay Systems Inc	Roesia, Jasmine Ali, Hanh Kent
11:55-12:15pm (20 min)	Next Steps/Callouts, Thank You's & Wrap-up	Participants
12:15-1:00pm (45 min)	Meet our partners/network	Participants & Partners





Today's Assignment

- 1. One New Fact- something you did not know before you came (which is true not fake!)
- 2. Three Contacts names, emails, phone numbers: can be business cards, written down, or?
- 3. One Step/Action which you are going to take once you leave here





Meet & Greet 9:10am

- Turn to someone you do not know
- Each of you has 5 min. to introduce yourself & describe your business (feel free to take notes!)
- Be ready to tell the group about the person you have just met, their business name, and what goods and/or services it provides

9:20am (5 min) Call out – what did you learn?





SBA Resources – Benny Gutierrez 9:25am (10 min)

TRANSLATE LOGIN REGISTER CONTACT US FOR LENDERS NEWSROOM



Starting & Managing Loans & Grants Contracting Learning Center Local Assistance About SBA



About the SBA		
Video: An Introduction to SBA ►	Jobs at SBA ▶	Contact SBA ►
SBA.gov » About the U.S. Small Business Administration		
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What We Do SBA Team SBA Locations





SBA Resources (continued)

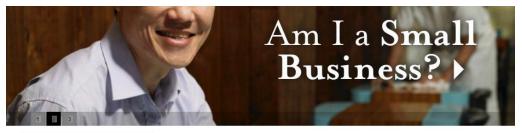
San Francisco District Office Three Main Functions

- 1. Free business consulting and free/low-cost business workshops.
- 2. Lending. Bank partners and micro loan.
- 3. 8(a) Business Development Program





8(a) Business Development Program





Contracting

- What is Government Contracting?
- ▶ Getting Started as a Contractor
- Finding Government Customers
- ▶ Resources for Small Businesses
- **▼** Government Contracting Programs

What is a Small Business Set Aside?

- Women-Owned Small Businesses
- 8(a) Business Development Program
- HUBZone Program

Service-Disabled Veteran-Owned Businesses

Small Disadvantaged

8(a) Business Development Program

Learn how SBA's 8(a) Business Development Program helps small, disadvantaged businesses compete in the marketplace.

About the 8(a) Business Development

Program Learn how SBA's 8(a)

Learn how SBA's 8(a) Business Development Program helps small, disadvantaged businesses compete in the marketplace.

Mentor-Protégé Program

The SBA's Mentor-Protege program enhances the capability of 8(a) participants to compete more successfully for federal government contracts.

Eligibility Requirements

Find out about what the requirements are for the 8(a) Business Development program.

8(a) BD Program

Points of Contact for 8(a) Program Headquarters Offices

How To Apply

Learn about the application process for the 8(a) Business Development program.





Northern California (NorCal) Small Business Development Centers Oscar Dominquez 9:35am (10 min)



ABOUT US - SERVICES - CALENDAR RESULTS - RESOURCES -







Questions on Resources 9:45am (10 min)







Why Certify? Roesia

- Businesses are encouraged to get certified by organizations doing business with the federal government
- Good way to market to the federal government, State of CA, and private sector companies
- University of CA system verifies status of certification through its data cleansing process twice per year
- You can register your company in the <u>federal System</u> for Award Management (sam.gov) and in the <u>State of</u> <u>CA system</u>- note slides Wayne just discussed





Why Certify? Mark McComas 9:50am (10 min)



Translate SBA en español For Lenders Newsroom Contact Us Register Log In Q

Starting & Managing Loans & Grants Contracting Learning Center Local Assistance About SBA





What is Government Contracting?

Overview

SBA's Role in Contracting

Your Responsibilities as a Contractor

Contracting Regulations

Getting Started as a Contractor

Qualifying as a Small Business

Make Sure You Meet SBA Size Standards

Get a D-U-N-S Number

Determine Your NAICS code

Register as a Government Contractor





Wayne Gross 10:00am (10 min)

How to do Business with California State Government







Small Business/ Disabled Veteran Business Enterprise







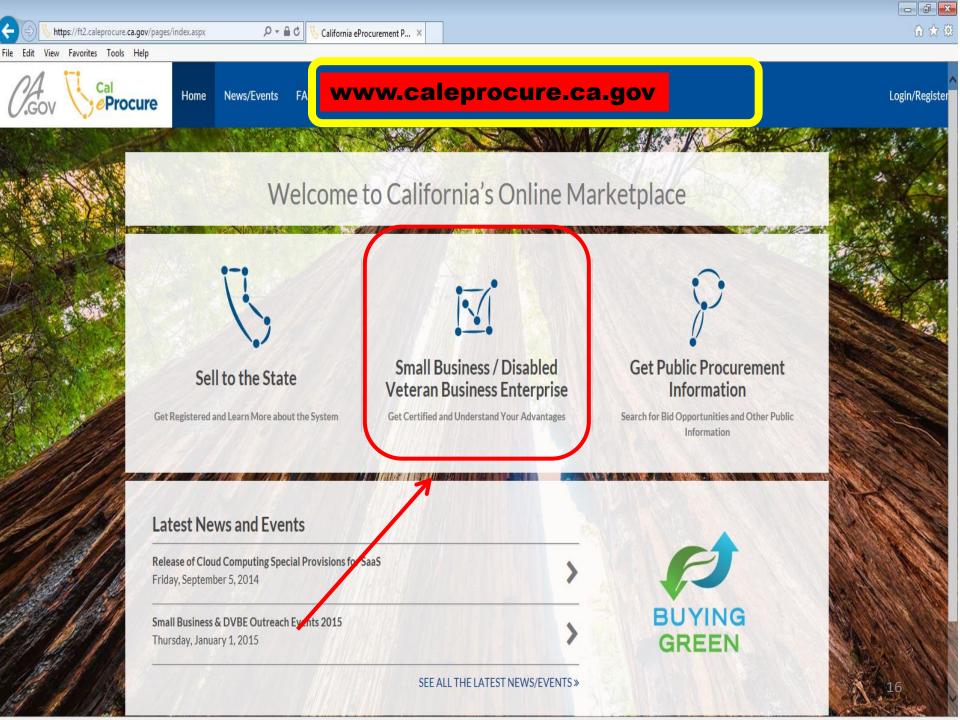
How to do Business with California State Government

Outreach Liaison

Department of General Services
Procurement Division
Certification and Outreach Branch
707 3rd Street
West Sacramento, CA 95605

<u>Wayne.Gross@dgs.ca.gov</u> 916-375-4339





Home News / Events **FAQ**

Help -

Quicklinks -

Login / Register



Small Business/ **Disabled Veteran Business Enterprise**

Click here to Get Certified

SB/DVBE Certification

- Find out about SB/DVBE Certification
- Search for Certified SB/DVBE Firms

Office of Small Business & Disabled Veteran **Business Enterprises (OSDS) Resources**

- Learn about Nonprofit Veteran Service Agency (NVSA) certification and Nonprofit (NP) recognition
- Find SB/DVBE Forms
- Obtain assistance on prompt payment penalties
- File a complaint
- Find resources for how to start and develop a business (Business Development Program)
- Caltrans' Disadvantaged Business Enterprise (DBE) certification

Outreach Resources

Resource Page

ith the State

- · View Upcoming SB/DVBE Outreach Events
- · Find Reciprocity Partners that accept DGS's certified firms
- Find a SB/DVBE Advocate
- Find agencies that have delegated purchasing authority
- Learn about the benefits of the SB/DVBE Option
- Apply to become a California Multiple Award Schedules (CMAS) Contractor









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About Us Programs & Services Home Forms Resources What's New Programs & Services > Office of Small Business & Disabled Veteran Business Enterprise Services (OSDS) > Outreach. Training, and Advocacy Cale Procure Outreach, Training and Advocacy California's Online Marketplace Testimonials of the State of California's DVBE The Outreach section is committed to expanding statewide outreach for Disabled Veteran Business Enterprises and small Certification Program businesses through education and business opportunity enhancements. Small Business & DVBE Outreach Events 2017 O Cal eProcure is now open for business Upcoming Outreach Events and Mobile App Small Business and DVBE Outreach Events Mobile App Resources DGS Emergency Acquisitions Guide SB/DVBE Training, Webinars, and Videos View All news and events items Find a SB/DVBE Advocate PD Quick Links Reciprocity Program State Agency Recognition Awards SB/DVBE Advocates 2016 SARA Awards Contact the Outreach Section 2015 SARA Awards 2014 SARA Awards 2013 SARA Awards 2012 SARA Awards Accessibility Conditions of Use Privacy Policy Disclaimer Download Free Readers Employee Corner Report a Web problem Copyright @ 2016 State of California

Upcoming Outreach Events and Mobile App

Resources

Brochures and Handouts

- How to do Business with the State Brochure English (PDF)
- How to do Business with the State Brochure Spanish (PDF)
- DVBE Brochure (PDF)
- I'm Certified, Now What? English (PDF)
- I'm Certified, Now What? Spanish (PDF)

Registration and Certification Instructions

- New Users English (PDF)
- New Users Spanish (PDF) For Suppliers (PDF)
- Users Transitioning from BidSync (PDF)
- Small Business (SB) and/or Disabled Veteran Business Enterprise (DVBE) certification process
- How to Introduce Yourself to a SB/DVBE Advocate (PDF)

SB/DVBE Presentations

- How to do Business with the State English (PDF)
- How to do Business with the State Spanish (PDF)
- I'm Certified, Now What? (PDF)
- Leveling the Playing Field (PDF)
- Updating Your Profile Instructions (PDF) Getting a List of Prospective Bidders (PDF)
- Bidder List Instructions (PDF)
- Introduction to State Government Contracting (PDF)
- Increasing SB & DVBE Contracting Participation (PDF)

SB/DVBE Participation in State Contracting

SB/DVBE Participation in State Contracting FY 2015-16 (PDF)

Consolidated Annual Report

Fiscal Year 2015-16 Consolidated Annual Report (Full Report)

Upcoming Solicitations for DGS

PD Upcoming Solicitations

- Siliali Dusilless & DVDL Oulleach Events 2017
- Cal eProcure is now open for business
- Small Business and DVBE Outreach Events Mobile App
- DGS Emergency Acquisitions Guide

View All news and events items

PD Quick Links

- SB/DVBE Advocates
- 2016 SARA Awards
- 2015 SARA Awards 2014 SARA Awards
- 2013 SARA Awards
- 2012 SARA Awards

Upcoming Solicitations for DGS

- PD Upcoming Solicitations
- OBAS Upcoming Solicitations

What other State Departments are buying

- DGS's Office of Business and Acquisition Services (OBAS) Marketing Brochure (PDF)
- How to do Business with CalSTRS (PDF)
- OCHP and the SB/DVBE Option (PDF)
- CALFIRE Purchasing Contracts (PDF)
- Doing Business with CPUC (PDF)
- How to do Business with Caltrans (PDF)
- Caltrans: How to apply for DBE Certification (PDF)
- How to do Business with DCA (PDF)
- CDCR Services and Goods Handout (PDF)
- Construction Firms Wanted (PDF)

Departments with SB/DVBE First Policy

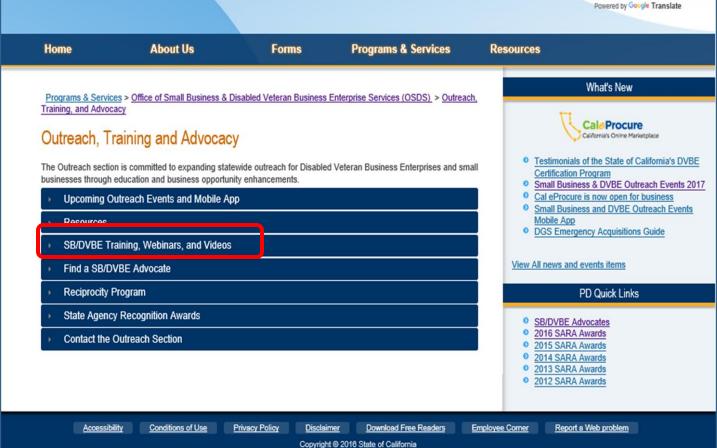
- Department of General Services
- Franchise Tax Board
- Department of Veterans Affairs
- Military Department
- Department of Public Health
- California Highway Patrol
- California Department of Technology
- Department of Education
- California Public Utilities Commission
- Department of Consumer Affairs

- SB/DVBE Training, Webinars, and Videos
- Find a SB/DVBE Advocate
- Reciprocity Program
- State Agency Recognition Awards









Programs & Services > Office of Small Business & Disabled Veteran Business Enterprise Services (OSDS)

> Outreach, Training, and Advocacy

Outreach, Training and Advocacy

The Outreach section is committed to expanding statewide outreach for Disabled Veteran Business Enterprises and small businesses through education and business opportunity enhancements.

- Upcoming Outreach Events and Mobile App
- Resources
- SB/DVBE Training, Webinars, and Videos

Webinars

- Ocal eProcure Overview (YouTube video)
- How to do Business with the State
 - Steps 1 & 2 Register your business and become a certified SB and/or DVBE (YouTube video)
 - Step 3 Use the California State Contracts Register (CSCR) (YouTube video)
 - Step 4 Become a California Multiple Award Schedules (CMAS) Contractor (YouTube video)
 - Step 5 Market your business to State Agencies (YouTube video)

DVBE Testimoniai Videos

- Testimonial #1
- Testimonial #2
- Testimonial #3
- Testimonial #4
- Testimonial #5
- Compilation Video

What's New



- Testimonials of the State of California's DVBE Certification Program
- Small Business & DVBE Outreach Events 2017
- O Cal eProcure is now open for business
- Small Business and DVBE Outreach Events

 Mobile App
- DGS Emergency Acquisitions Guide

View All news and events items

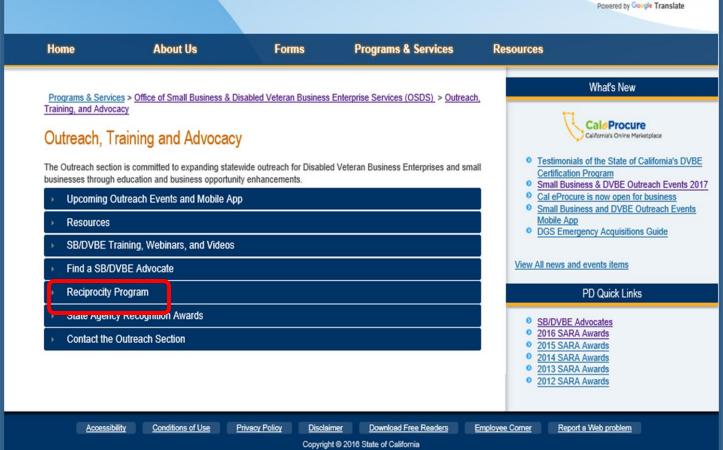
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Updated 12092016

The agencies listed below are current partners that honor the state of California's Small Business and/or Disabled Veteran Business Enterprise (SB/DVBE) certification as acceptance into their individual respective business enterprise programs. Certain partner agencies may also have specific local eligibility requirements that must be met. You may visit each agency's website for more information on their individual programs.

Bay Area

Agency	Accepts SB	Accepts DVBE
Bav Area Rapid Transit (BART)	✓	✓
Contra Costa County	✓	
Santa Clara Valley Transportation Authority (VTA)	✓	✓
Santa Clara Valley Water District	✓	
San Francisco City College	✓	
San Francisco City/County	✓	✓
East Bay Municipal Utility District	✓	

Los Angeles Region

Agency	Accepts SB	Accepts DVBE
City of Long Beach	✓	
Port of Long Beach	✓	
City of Los Angeles	✓	✓
City of Pasadena	✓	
County of Los Angeles	✓	✓
County of Riverside	✓	✓
Los Angeles Community College District		✓
Los Angeles County Metropolitan Transportation Authority (MTA)		✓
Los Angeles Unified School District	✓	✓
Metropolitan Water District of Southern California	1	✓

Northern California Region

Agency	Accepts SB	Accepts DVBE
Yuba County	✓	

Sacramento Region

Agency	Accepts SB	Accepts DVBE
County of Sacramento	✓	
Sacramento Housing and Redevelopment Agency	✓	
Sacramento Municipal Utility District (SMUD)	✓	

San Diego Region

Agency	Accepts SB	Accepts DVBE
City of San Diego	✓	✓
County of San Diego	✓	✓
Port of San Diego	✓	✓
San Diego Association of Governments (SANDAG)	✓	
San Diego County Housing Commission	✓	✓
San Diego County Regional Airport Authority	✓	✓
San Diego County Water Authority	✓	✓
San Diego Unified School District	✓	✓

Utilities

Company (CPUC Supplier Clearinghouse)	Accepts SB	Accepts DVBE
AT&T		✓
California American Water Company		✓
California Water Service Company		✓
Comcast		✓
Cox Communications		✓
Frontier		✓
Golden State Water Company		✓
Level 3 Communications		✓
Liberty Utilities (CalPeco Electric)		✓
Pacific Gas & Electric		✓
San Gabriel Vallev Water Company		✓
San Jose Water Company		✓
San Diego Gas & Electric Company		✓
Southern California Edison		✓
Southwest Gas		✓
Sprint		✓
Suburban Water Systems		✓
<u>T-Mobile</u>		✓
TelePacific Communications		✓
Trans Bav Cable		✓
Verizon Wireless		✓

Utility companies are not reciprocity partners. However, they do honor the DVBE certification. California Public Utilities Commission (CPUC) requires utility companies to provide DVBE usage reports (PUC § 8283-8284). The CPUC Clearinghouse has an aspirational goal of 1.5% versus the State's mandatory goal of 3%. Utility companies listed are for DVBE business development purposes.

QUESTIONS

Thank you for participating in our presentation

We wish you success!

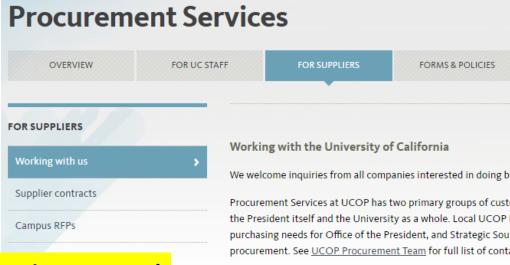
Email us at:

- Wayne.Gross@dgs.ca.gov
- Advocate@dgs.ca.gov or

Phone us at: 916-375-4400



UC Systemwide Bidding – ucop.edu Roesia 10:10am



Documentation you need to provide to register your business

- Tax ID (FEIN)
- **Commodities (NAICS)**
- **DUNS#**

We welcome inquiries from all companies interested in doing business with the University.

Procurement Services at UCOP has two primary groups of customers: the staff of the Office of the President itself and the University as a whole. Local UCOP Procurement Services handles purchasing needs for Office of the President, and Strategic Sourcing manages systemwide procurement. See UCOP Procurement Team for full list of contacts.

In order to provide fair, open and efficient opportunities for all companies interested in doing business with the University of California, we ask all potential suppliers to pre-qualify for any bidding or supplier activity. To view sourcing events or register for bidding click here.

Please explore this page for additional information on how you can work with UC.

Becoming a UC supplier

How to pre-register as an authorized supplier for the University of California.

Supplier Reporting

The University of California requires quarterly reporting of sales, incentive and sustainability data from all its strategic suppliers. Data is used for systemwide reporting.

TOOLS & TRAINING





Questions on Certifying 10:25am (5 min) Break 10:30-10:40am







Meet the Borrowers Panel 10:40am (45 min)

Moderator: Oscar Dominguez

Panelists:

- Walter Allen, Acumen Building Enterprise
- Patrick Madden, Kerex Engineering
- tbd, Surplus Service





Walter Allen, Acumen Building Enterprise







Patrick Madden, Kerex Engineering

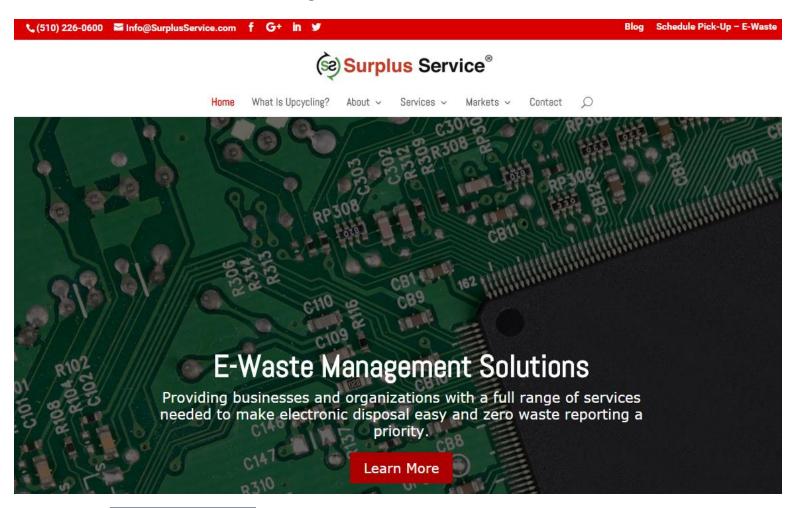








Surplus Service







Questions for the Panel

- 1. Please tell us a little about you and your business.
- 2. When was the first time you capitalized or leveraged your company and would you please share your experience?
- 3. What documentation was required? Any surprises?
- 4. Did you seek assistance in the process and at what point?
- 5. Is your company certified and was that a factor in accessing capital?
- 6. Any last words of wisdom?





Interview with Bay Systems Inc - Roesia 11:25am (30 min)

Jasmine Ali, CEO Hanh Kent, Director of Client Services





About Bay Systems Inc

What Sets Bay Systems Apart

Small, Agile and Flexible with **Big Results**Extreme Federal **Government FOCUS**Unparalleled Commitment to **Customer Service**

- Certified 8(a) SDB, WOSB, Hubzone boutique firm
- Located in East Palo Alto, CA
- 19 years of excellent performance in Federal market
- An award-winning & reputable company
- Community Leader
- Financially Stable Competitive Pricing
- DCAA-audited & Approved Accounting System





Bay Systems' Core Capabilities

Proven performance record in *Cyber Security, Network Operations, Cloud Computing, and Staffing Solutions*

Serving Clients: Federal Agencies, National Laboratories, and University of California Office of the President with 10 campuses

- Project-based and Talent Acquisition Effort
- Focus and Results Orientation
- Commitment to Delivery in everything we do





Interview with Bay Systems Inc

- 1. How did you find out about the SBA 8(a) Business Development Program & describe how the program helped your company?
- 2. What major steps did Bay Systems Inc take to be considered for the UC systemwide bid solicitation?
- 3. If you could give other small businesses one piece of advice what would it be?





Next Step Breakout: 11:55am (20 min) One New Fact/3 Contact Names/Next Step

Remember the assignment?

Pair up with a partner and discuss:

- 1. One fact that you learned
- 2. Whose contact info do you have?
- 3. Talk about your call to action: what is your next step?





Learning Callouts, Thank Yous & Wrap Up 12:15pm

- 1. Let's hear from you: fact, contacts, next step?
- 2. Thanks to all of you who showed up and participated. Best of Luck!
- 3. Meet our partners/network
 We could not have done all of this without our partners:
 SBA, SBDC, State of CA: Department of General Services,
 Berkeley Local Government and Community Relations,
 Richmond Chamber, RichmondBuild, Richmond
 Mainstreet, Quiche and Carry, City of Richmond, America
 To Go Let's give them a hand.



