

**UCDAVIS**

Supply Chain  
Management

# Small Business First

Diverse Supplier Expo

April 25, 2022



# Today's Presenter and Moderator

## ■ Presenter:

- Steven Kobayashi, UC Davis Small Business Program Officer and Supplier Diversity Coordinator, UC Davis Supply Chain Management

## ■ Moderator:

- Kay Gallinger is a Commercial Services Sourcing Manager in Strategic Sourcing, UC Davis Supply Management.
- Please send any questions in chat to Kay, and they will be addressed as appropriate. There will also be time for questions at the end of the presentation.



# Agenda

- Background on Small Business First
- How To on Small Business First
- Questions/Comments



# Why Supplier Diversity?

- Mission of UC Davis:
  - Teaching
  - Research
  - **Public Service:** The university has a commitment to benefit the communities that surround the campuses
- A Diverse Supplier Base
  - Widens the pool of potential suppliers
  - Promotes competition, which can improve costs and quality of goods/services
  - Strengthens the supply chain



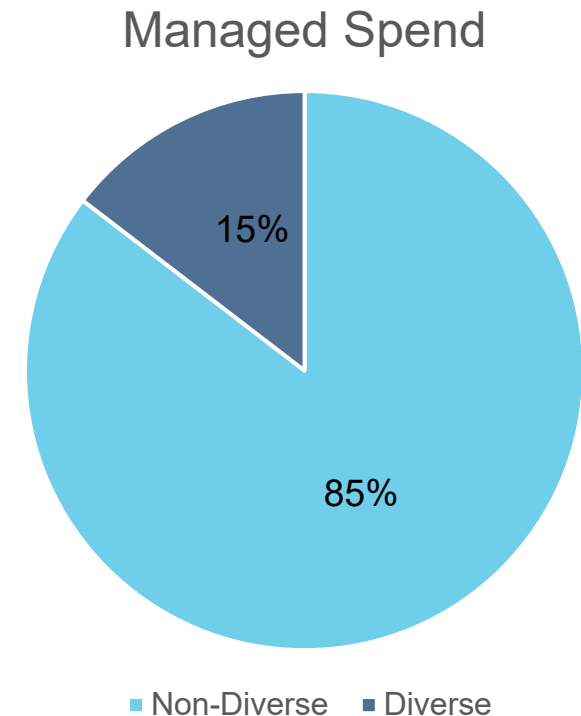
The UC Small Business First Program (SBF):

- Is a UC Systemwide program, mandated by UCOP Policy BUS-43.
  - Became part of policy in June 2021; effective as of March 2021.
  - Aligned with the State of California Small Business Procurement Contract Act (GC sections 14835 through 14843) and Military and Veterans Code (M&VC) section 999 et seq.
- Helps UC systemwide reach the 25% Small Business Utilization goal set by former UC President Janet Napolitano.

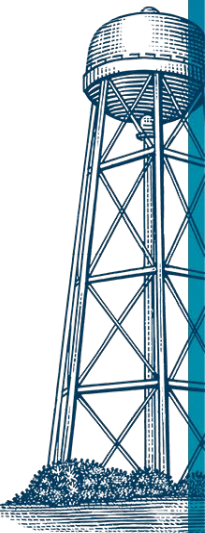


# UC Davis Diverse Managed Spend FY 20-21

- Total campus spend: \$655,762,787
- Campus managed spend: \$287,340,830
- Diversity spend\*: \$44,332,746
- Diversity percent: 15%
- **Our Goal is: 25%**



\*Diversity spend includes a number of classifications such as Small Businesses, HUBZone Businesses, Women-Owned Businesses, Veteran-Owned Businesses and others.



# Requirements

- Whenever possible, non-construction, UC contracts and procurement between \$10,000 to \$250,000 must be awarded to a certified Small Business.
- All non-exempt requisitions must include informal quotes from Small Businesses.



# Certification

- Businesses must be certified in order to participate in the Small Business First program
  - Self-certification is not acceptable
- Accepted certifications:
  - Small Business (State of California/Federal Government)
  - Disabled Veteran Business Enterprise (State of California)





# Getting Certified

- In California, the Department of General Services certifies Small Businesses and DVBEs.
- Federal certification is conducted through the System for Award Management.
  - SAM.gov



# Exempt Transactions

- Strategically sourced agreements
- Construction (orders processed through Design & Construction Management)
- Concessions
- Interagency agreements
- Local/federal gov't agreements
- Medical and patient care
- Research sub-awards
- Higher education institution agreements
- Revenue/reimbursement agreements
- Federally-funded purchases

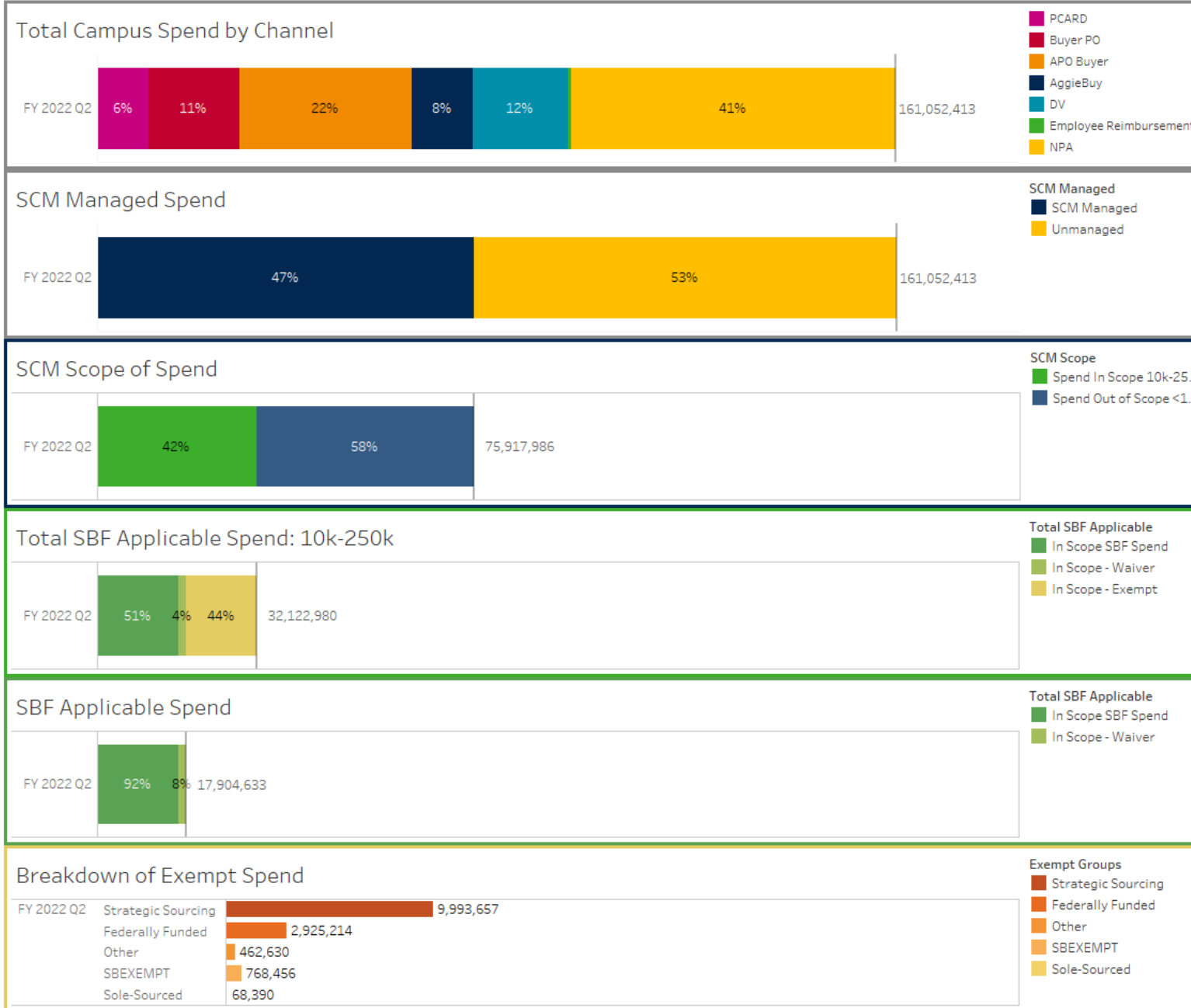
# Other Policy Considerations

- UC's general prohibition against contracting out (Regents Policy 5402, Article 5 of the Collective Bargaining Agreement)
  - Often referred to as “Covered Services” policy
  - Work traditionally performed by SX (service) and EX (patient care technical) bargaining unit employees must not be outsourced
  - Few exceptions to this policy
- SB 820
  - Specifies that work traditionally performed by SX job classifications be conducted exclusively by UC employees at any facility financed with State General Fund monies after January 1, 2017



# Small Business First Spend

All - FY 2022 Q2



Choose measure

Spend

Quarter of Date

- FY 2020 Q1
- FY 2020 Q2
- FY 2020 Q3
- FY 2020 Q4
- FY 2021 Q1
- FY 2021 Q2
- FY 2021 Q3
- FY 2021 Q4
- FY 2022 Q1
- FY 2022 Q2

Dept Name

- Null
- ANR
- Athletics
- Campus Planning
- College of Agriculture ..
- College of Biological S..
- College of Engineering
- College of Letters and ..
- Continuing and Profes..
- Develop/Alumni Relat..
- Finance and Resource ..
- Graduate School of M..
- Graduate Studies
- Info and Educ Technol..
- Library
- Office of Research
- Office of The Chancell..
- Office of The Provost
- School of Education
- School of Law
- School of Medicine
- School of Nursing
- School of Veterinary ..
- Student Affairs

Org Name Level 6

All

# Finding Small Businesses

- UC Davis employees can search for small and diverse businesses in the Kuali Financial System (KFS):
  - On the [Vendor Lookup](#) in KFS, use the **Supplier Diversity** drop-down field to retrieve the desired results.
- Search for Small Businesses using [Cal eProcure](#) or [SAM.gov](#).
- Use supplier.io; log in with your campus user ID and Kerberos passphrase
- In AggieBuy, shop small/diverse business catalogs
- Chambers of Commerce directories are another resource



# More information

- Visit the UCOP Small Business First [website](#).
- Visit our [Purchasing Compliance with Small Business First](#) website for how-to information.
- Searching for Small and Diverse Suppliers LMS [training](#).
- Questions about Small Business First? Email [smallbusiness@ucdavis.edu](mailto:smallbusiness@ucdavis.edu).
- Steven Kobayashi, Associate Director of Procurement and Business Contracts, is the UC Davis Small Business First Program Officer. He can be reached at [stkobayashi@ucdavis.edu](mailto:stkobayashi@ucdavis.edu) or 530-754-1372.



# Questions? Comments

