

UCDAVIS

Supply Chain
Management

Small Business First

August 23, 2021

Welcome!

- We'll get started shortly.
- This webinar will be recorded.
- If you have questions along the way, please place them in the chat. Jim Hewlett will be monitoring the chat. You can also send him a direct message using the chat feature.



Agenda

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



Introductions

- Tim Maguire, Assistant Vice Chancellor for Supply Chain Management & Chief Procurement Officer
- Mike Morgan, Director of Procurement
- Steven Kobayashi, Associate Director, Procurement and Business Contracts & Small Business Program Officer



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Small Business First



Overview

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 reach the 25% Small Business Utilization goal set by former UC President Janet Napolitano.



Requirements

- Whenever possible, non-construction, UC contracts and procurements 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.



Exempt Transactions

- Strategically sourced agreements
- Construction
- Concessions
- Interagency agreements
- Local/federal gov't agreements
- Higher education institution agreements
- Medical and patient care

No Waiver Required

- Research sub-awards
- Revenue/reimbursement agreements
- Federally-funded purchases
- Sole source / unique professional services / emergency purchases*

*Documentation and Approval from Procurement is required

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)

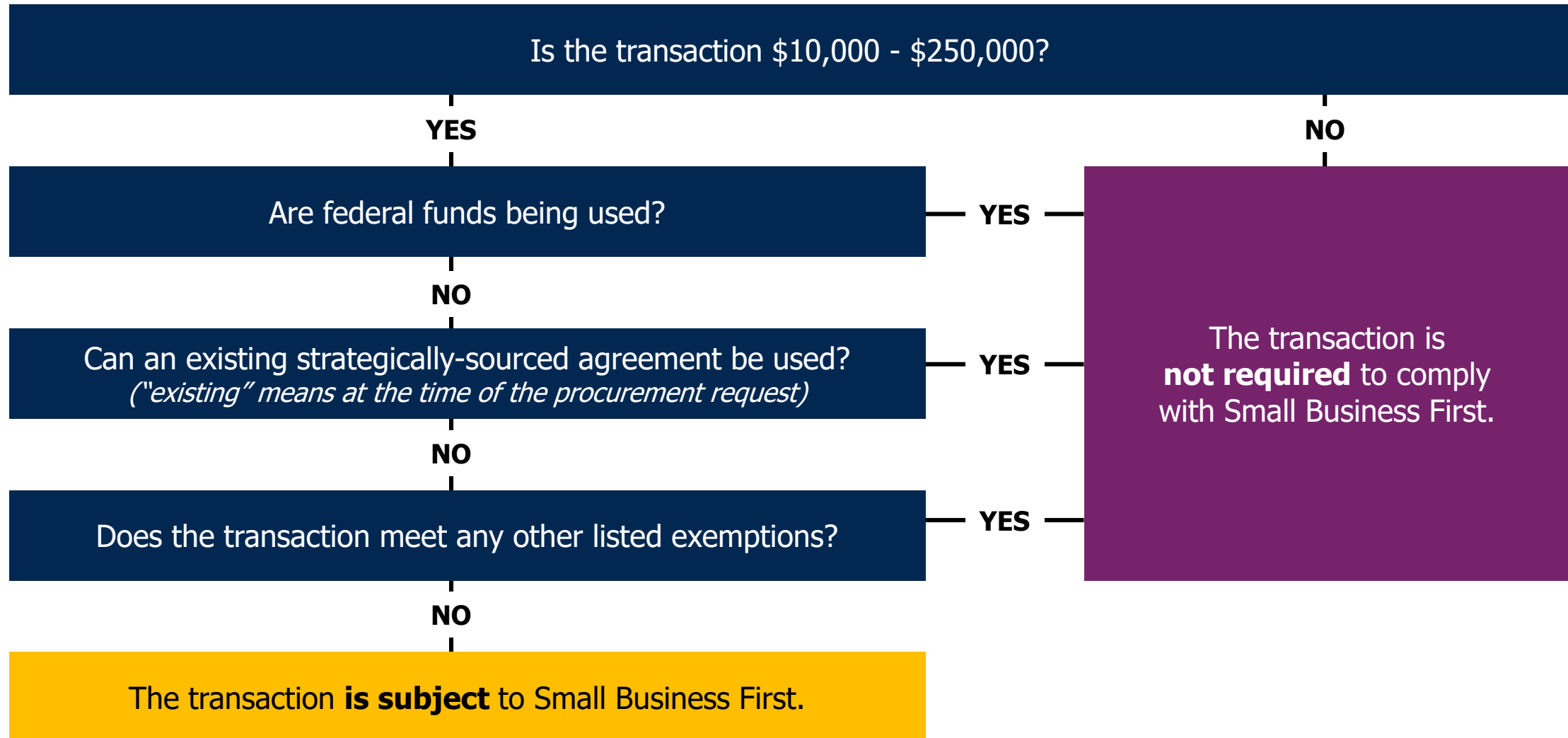


Preparing a Requisition

What you need to know to help us process your requisitions efficiently and without delay.



Is Transaction Subject to SBF?



Exempt Transactions

If the transaction is exempt, add a note to your KFS Requisition or Purchase Agreement document in the **Notes and Attachments** section identifying why the purchase is not subject to the Small Business First program.

- Strategically sourced agreements
- Construction
- Concessions
- Interagency agreements
- Local/federal gov't agreements
- Higher education institution agreements
- Research sub-awards
- Medical and patient care
- Revenue/reimbursement agreements
- Federally-funded purchases
- Sole source / unique professional services / emergency purchases*

*Documentation and Approval from Procurement is required

Preparing a Requisition

When amount is for \$10,000 to \$99,999, attach to request:

- 1 quote from certified Small Business or certified DVBE
- That business' Small Business certification

When amount is for \$100,000 to \$250,000, attach to request:

- 2 quotes from certified Small Businesses or 2 quotes from DVBEs
- Those two business' Small Business/DVBE certification



Finding Small Businesses

- Search for small and diverse businesses in the Kuali Financial System
 - 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](#)
- Use supplier.io
 - Email: FOA-UD-SSO-SmallBusiness@ou.ad3.ucdavis.edu to request access



Finding Small Businesses

- (Coming Soon) Search the UC Davis Small and Diverse Supplier [database](#)
 - The database is a searchable spreadsheet of certified small and diverse suppliers
 - Please encourage any businesses you know to join the database by completing the UC Davis Small and Diverse Business [Registration Form](#)
- Refer to the Small and Diverse Chambers of Commerce directories when searching for a supplier

[Sacramento Asian Pacific Chamber of Commerce](#)

[Sacramento Black Chamber of Commerce](#)

[Sacramento Hispanic Chamber of Commerce](#)

[Sacramento Rainbow Chamber of Commerce](#)

[Davis Chamber of Commerce](#)

[Sacramento Metropolitan Chamber of Commerce](#)



Finding Small Businesses

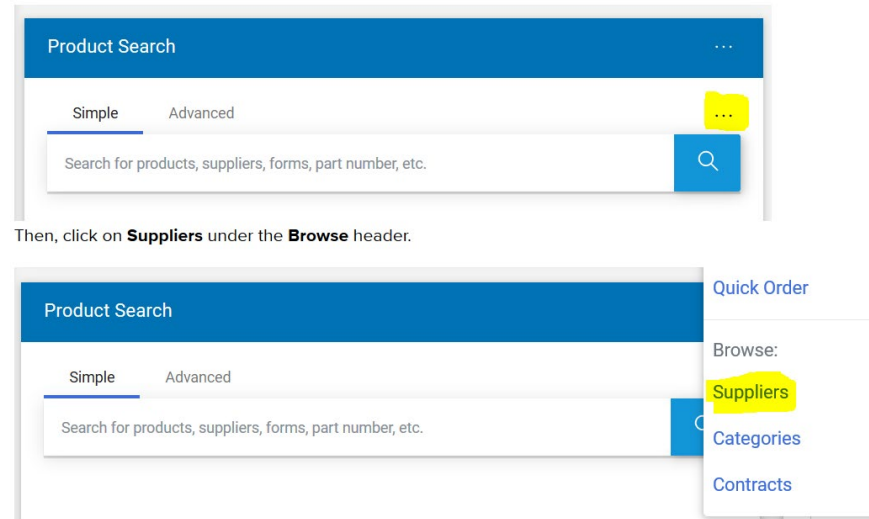


- Items purchased on AggieBuy are exempt from Small Business First because they fall under Strategically-Sourced Agreements.
- However, there are many ways within AggieBuy for you to support small and diverse businesses.



Finding Small Businesses

- To look for small and diverse suppliers in [AggieBuy](#)
 - On the AggieBuy main dashboard, under the **Product Search** section, click on the 3 dots above the search field. Then click on **Suppliers** under the **Browse** header.



- On the AggieBuy Suppliers screen list, there are several indicators under the **Preference** column that indicate if the supplier is a certified small or diverse business.



Finding Small Businesses

- While shopping Amazon in [AggieBuy](#), narrow product searches to one or more small and diverse business types by selecting them from the left menu. These items will then appear in your search results, with the **Organization Preferred** designation.

☐ International Shipping Eligible

Ownership/Diversity Certifications

< Clear

☒ Registered Small Business

☐ Women-Owned Business Enterprise

☐ Women-Owned Small Business

☐ Economically Disadvantaged Woman-Owned Small Business

☐ Veteran-Owned Small Business

☐ Service Disabled Veteran Owned Small Business

☐ Minority-Owned Business

☐ SBA-Certified 8(a) Firm

☐ SBA-Certified HUB Zone Firm


☐ SBA-Certified Small Disadvantaged Business

☐ LGBT Business Enterprise

☐ Disability-Owned Business Enterprise

☐ IEE/ISBEE Indian Economic Enterprise

☐ SBA-Certified Native American Owned Business




☒ Organization preferred

500ml Beaker, Low Form Griffin, Borosilicate 3.3 Glass, Double Scale, Graduated, Karter Scientific 213D26

★★★★★ ~ 304

\$7⁹⁹

✓prime FREE Delivery Mon, May 17



☒ Organization preferred

Pyrex Glass Griffin Beaker, Low Form, Measuring, 1,000 mL

★★★★★ ~ 254

\$20⁴⁹

✓prime FREE Delivery Mon, May 17

Only 4 left in stock - order soon.

Add to Cart

More Buying Choices

\$11.55 (5 used & new offers)



Finding Certifications

- In the Notes and Attachments section of the KFS document, electronically upload documentation indicating that the business is a certified Small Business (SB) or Disabled Veteran Business Enterprise (DVBE).
- You can find certifications using: the State of California [Cal-eProcure website](#), [sam.gov](#), or by requesting access to [supplier.io](#) at [FOA-UD-SSO-SmallBusiness@ou.ad3.ucdavis.edu](#)
- Each allows you to search by business name, certifications, commodities, etc.
- Once you've found the business, select it and print the certification or a screenshot indicating that the business is certified.
- Attach the printed screen certification(s) to your KFS document.



Requesting a Waiver

- There are certain situations, requiring extensive documentation, under which a department may request a waiver.
- The 3-page waiver can be found on the UC Procurement website [here](#) after reading the waiver [instructions](#).
- As the Delegated Exception Authority for UC Davis, our Chief Procurement Officer will be reviewing and approving/disapproving all waiver requests.



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 [us](#).
- 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 or 530-754-1372.



Questions? Comments

