

## The Power of Artificial Intelligence: Your Business Enhancement Guide

Practical strategies for small business owners to harness AI technology for operational excellence and competitive advantage.

# Presented by CLAUDIA SHAH Los Angeles Regional SBDC 866-588-7232



THE LONG BEACH SBDC IS HOSTED BY LONG BEACH COMMUNITY COLLEGE DISTRICT AND IS PART OF THE LOS ANGELES REGIONAL SMALL BUSINESS DEVELOPMENT CENTER NETWORK.

FUNDED IN PART THROUGH A COOPERATIVE AGREEMENT WITH THE J.S. SMALL BUSINESS ADMINISTRATION (SBA) AND A GRANT THROUGH THE CALIFORNIA OFFICE OF THE SMALL BUSINESS ADVOCATE (CALOSBA).





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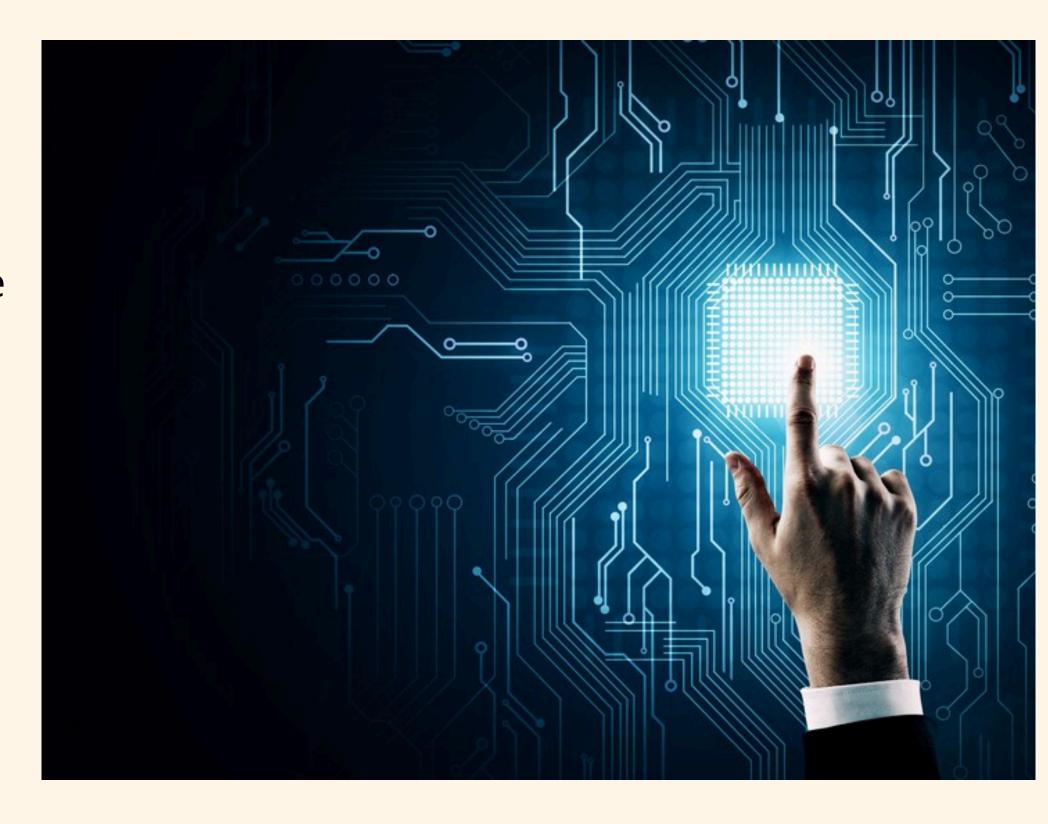


#### **Outcomes**

At the end of this Al Training, you will understand how Al can help you grow & scale your Small Business.

You will have at least 3 AI tools that you can use regularly to increase sales.

You will be actively using AI and discovering all the ways it can grow and scale your small business.



#### AI is Transforming Small Business



- Predict inventory
- Writing product descriptions
- Help create customer personas
- Business valuations
- Marketing plans
- Write your business plan
- Review a book you wrote
- Write an ebook
- Analyzing Financial statements
- Presentations
- Pitch Decks

#### AI is Transforming Small Business



- Copywriting for Blogs,
- eBooks, Articles, Letters,
   Press Releases
- Content creation
- RFP and certification assistance
- Government Contracting
- Podcast production
- Scheduling clients
- Customer Service
- Financial analysis
- Writing Job Descriptions

#### Why AI Matters for Your Business

#### **Opportunity Identification and Qualification**

AI can act as a 24/7 opportunity scout, ensuring you don't miss relevant bids.

- AI-Powered Search and Matching: AI tools can scan thousands of federal, state, and local procurement portals (like SAM.gov) daily to find solicitations that perfectly match your company's capabilities, past performance, and certifications (e.g., small business, veteran-owned, etc.).
- Predictive Analytics: Use AI to analyze historical contract data, agency spending patterns, and legislative changes to predict upcoming opportunities or contract renewals 6-12 months in advance, giving you a major advantage in capture planning.
- Bid/No-Bid Analysis: AI can rapidly assess an RFP's complexity, compliance requirements, competitive landscape, and historical win rates for similar contracts. This provides a data-driven "go/no-go" score to help your team decide quickly and strategically where to invest your resources.



**Implementation Tip:** Start with simple tasks and gradually expand AI use. Focus on data privacy and ethics when utilizing AI technology.

#### Essential AI Applications For RFP's



#### **RFP Requirement Extraction**

Al uses Natural Language
Processing (NLP) to read lengthy,
complex RFPs (often hundreds of
pages) in minutes, automatically
identifying, extracting, and
summarizing all key
requirements, deadlines,
formatting rules, and evaluation
criteria.



## **Automated Compliance Matrix Generation**

The extracted requirements can be instantly converted into a dynamic compliance matrix, eliminating the need for manual spreadsheet creation. The matrix ensures every mandatory clause (like those from the FAR) and requirement is tracked, assigned to a team member, and addressed in the final proposal.



#### Real-Time Compliance Checking

As your team writes, AI can cross-reference your proposal content against the compliance matrix, flagging any missing responses, inconsistent terminology, or deviations from mandated formatting rules before you submit.



#### **Addressing Common AI Concerns**

**Ethical Considerations** 

Address bias, privacy, and accountability through careful vendor selection and clear policies

Implementation Strategy

Begin with low-risk applications, train your team, and measure results before scaling Cost Management

Many AI tools offer affordable monthly subscriptions that quickly pay for themselves



#### **Mastering AI Communication**

The Four-Part Prompt Structure

#### 1. Context

Provide all necessary background details to enrich the task and set the scene for the AI. This includes defining the AI's persona, the target audience for the output, and any specific environmental or format constraints. The more context you provide, the better the AI can tailor its response to your exact needs.

#### 2. Instruction

Clearly state the specific action or task you want the AI to accomplish. Use strong, concise verbs and avoid ambiguity. This part should leave no doubt about the primary goal of your prompt, whether it's to generate text, summarize information, or brainstorm ideas.

#### 3. Input

Supply any data, examples, or comparative information that the AI needs to process or learn from. This could be raw text, a list of items, a table of figures, or even an example of the desired output style. Providing concrete input helps guide the AI towards a more accurate and relevant result.

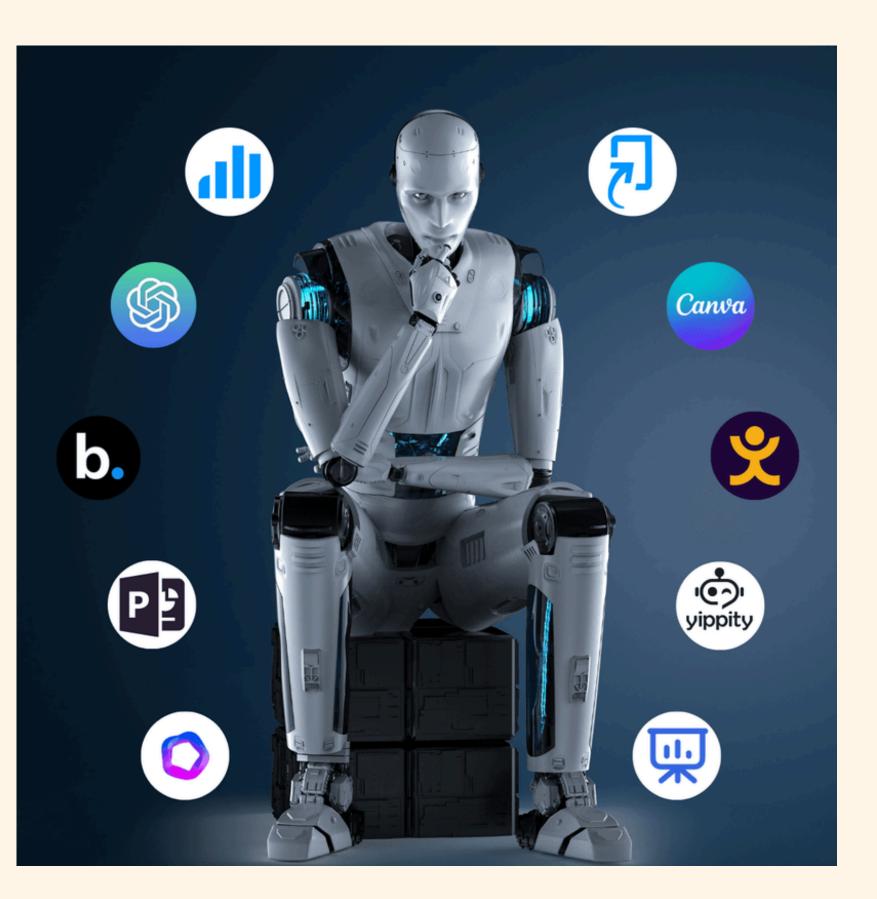
#### 4. Output

Specify the desired format, length, and style of the AI's response. Be precise: do you want bullet points, numbered lists, paragraphs, a specific word count, or a particular tone? Clearly defining the output ensures you receive content that is immediately usable and fits your requirements.

**Pro Tip:** Don't worry about perfect spelling or typos – AI understands context and intent! Focus on providing clear, comprehensive information. Iteration is key; refine your prompts based on initial AI responses to achieve optimal results.

Effective AI communication goes beyond just structuring prompts. It involves understanding the AI's capabilities and limitations, and refining your approach over time. Always aim for clarity and specificity in your requests. Avoid vague language that could lead to generic or irrelevant outputs.

Remember that AI models learn from the data they're trained on. Experiment with different phrasings and detail levels to discover what yields the best results for your specific tasks. The goal is to make your intent as transparent as possible to the AI, enabling it to deliver high-quality, targeted content efficiently.



You are an Al video storyboard creator. The target audience is the internal communications department of a mid-size organization. The goal is to visually explain how communication channels flow, interact, and connect across the company in a clear and engaging way.

#### Task:

Create a short explainer video concept (60–90 seconds) that:

- 1. Shows how different elements of the communications department (email, intranet, social media, press, events, internal newsletters, etc.) flow together.
- 2. Highlights the interconnections visually with smooth transitions.
- 3. Features a humanoid robot character standing at the center, using its hands to point, gesture, and showcase the different options as they appear around it.
- 4. Ends with a unifying shot that reinforces the idea of synergy and collaboration.

#### Input / Inspiration:

- Robot = futuristic guide/host.
- Visuals = connected lines, arrows, icons, and animated paths to represent flow.
- Tone = professional, modern, and innovative.
- Platform = internal use (not public), so clarity and professionalism are key.

#### **Output Format:**

#### **Provide:**

- 1. A scene-by-scene breakdown of the video.
- 2. Suggested visual metaphors (e.g., network lines, glowing nodes, info "streams").
- 3. Camera directions (robot center stage, options floating around, zoom outs).
- 4. Suggested music/sound design (uplifting, futuristic, corporate).
- 5. Closing tagline suggestion.



#### AI Prompts for RFP's

#### First Draft Generation

Trained on your company's secure internal knowledge base (past winning proposals, technical documents, case studies, and résumés), AI can generate high-quality, compliant first drafts of non-strategic proposal sections (e.g., technical approach, management plans, past performance summaries, boilerplate text).

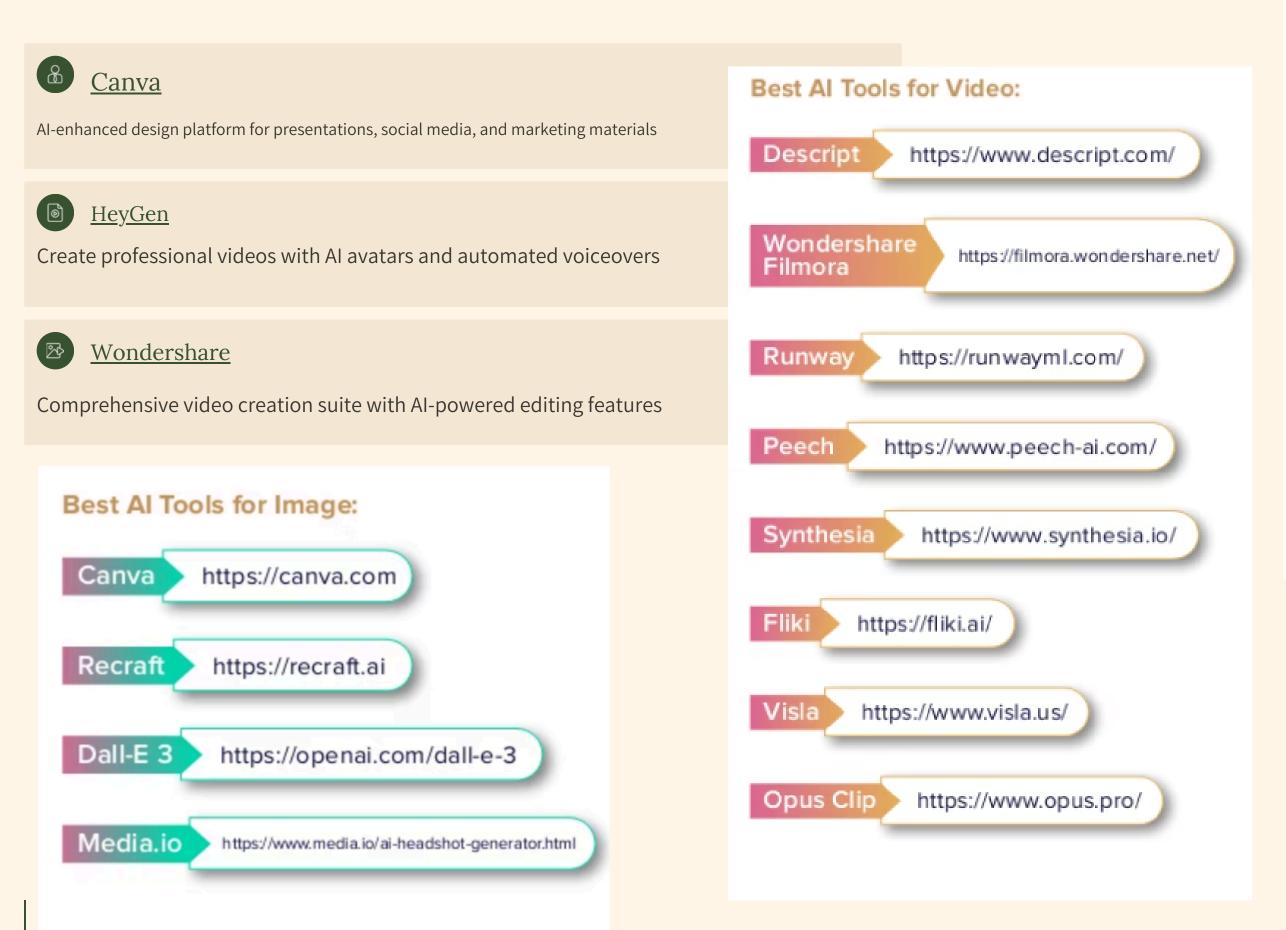
### **Content Optimization and Customization**

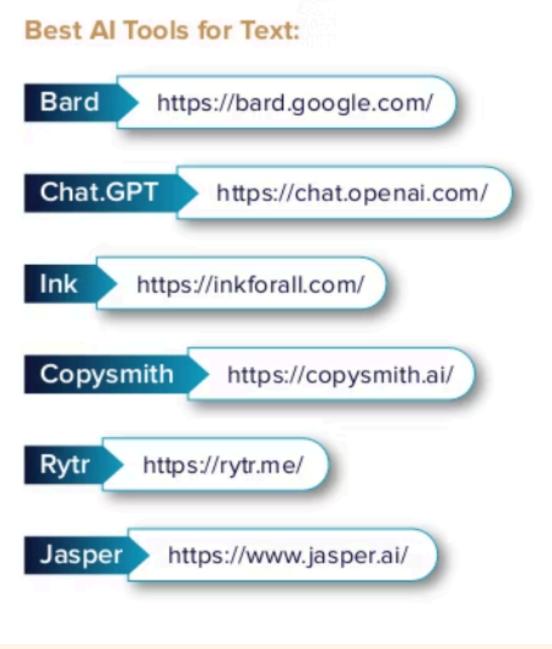
Al can suggest revisions to make the writing clearer, more persuasive, and directly aligned with the agency's specific mission and evaluation criteria. It can also refine the tone and style to match your company's established voice.

#### **Knowledge Management**

You can use a chatbot-like interface to instantly find and retrieve the best-fit paragraphs, project descriptions, or security policy explanations from past proposals to reuse in a new bid.

#### AI APPS





Ready to transform your business with AI? Start small, think big, and let technology amplify your success.

#### Top AI Resources for Small Business

#### • <u>AllThingsAI.com</u>

Comprehensive directory of AI tools and services across all business categories

#### • Writecream

Suite of AI writing applications for marketing content and business communications

#### Future AI Lab

Curated collection of cutting-edge AI tools for business innovation

#### • <u>Copy.ai</u>

Al-powered copywriting assistant for marketing materials and creative content

#### Grammarly

Advanced writing assistant that checks grammar, tone, and professional clarity

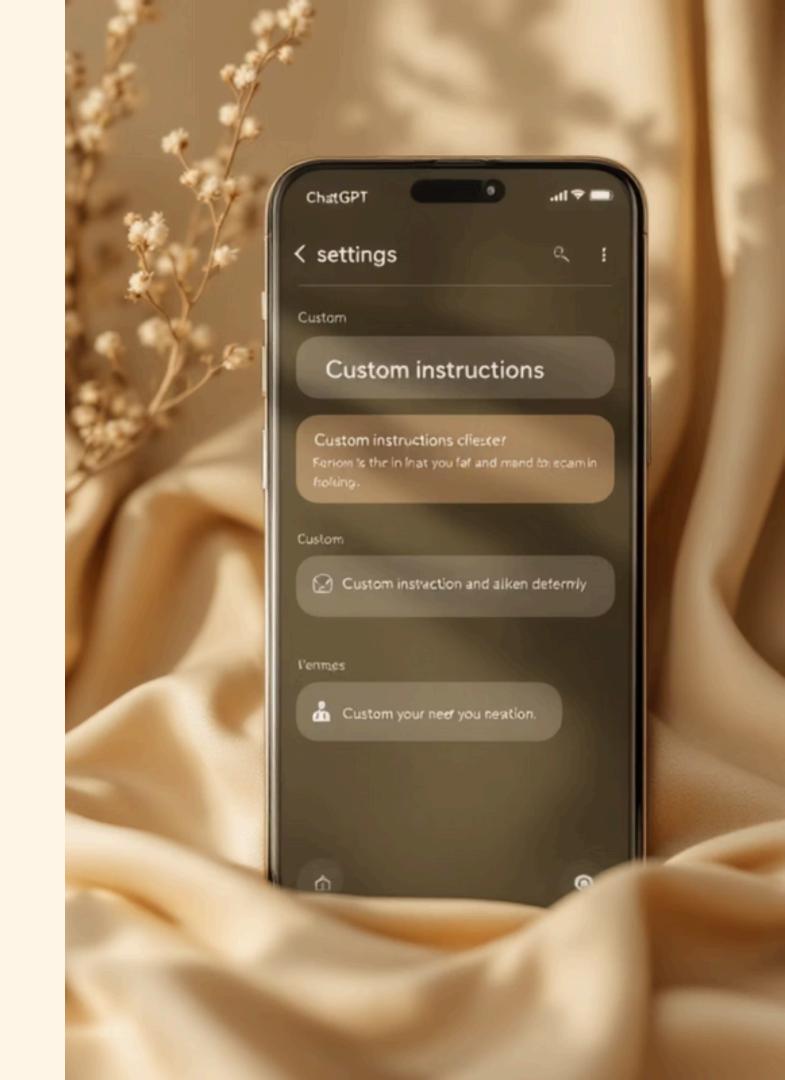




https://centrosbdc.wordpress.com

## Setting Up Custom Instructions in ChatGPT

Setting up Custom Instructions is surprisingly simple, although it's buried in ChatGPT's settings where most people never venture. This revolutionary feature allows every conversation to automatically include your personal context, completely transforming the quality of the responses you receive.



#### Step-by-Step Process

Find "Custom Instructions" and activate it if it is not already

enabled.

01 02 03 Customization **Access Profile** Settings Open ChatGPT and look for your profile Click on "Settings" from the dropdown Select "Customization" from the available picture in the bottom left corner of the menu that appears. settings menu. screen. 04 05 **Enable Feature** Fill in Forms

preferences.

Fill in the text boxes that appear with your personal information and

#### **Essential Configuration Fields**

#### What should ChatGPT call you?

Define your preferred name or professional title to personalize the interaction and create a more familiar environment in each conversation.

#### What characteristics should ChatGPT have?

Specify the tone, communication style, and focus you prefer in responses to optimize the experience.

#### What do you do for a living?

Describe your profession, industry, or area of expertise so ChatGPT understands your work context and specific needs.

#### Anything else ChatGPT should know?

Include any additional relevant information about your preferences, limitations, or specific use context.

#### Availability and Benefits

Once you save these settings, every conversation you have with ChatGPT will automatically include this context. The feature is available for both free and paid ChatGPT users, although paid users can write longer and more detailed instructions than free users.

This difference can be significant if you have complex requirements or multiple use cases. The ability to provide more extensive context allows for more precise and personalized responses, especially for professionals with specific needs or complex workflows.





#### Principles for Effective Instructions

#### **Share Generously**

My advice: share as much as you feel comfortable sharing. The more context you give ChatGPT, the better the output becomes. Transparency in your needs and preferences results in more useful and relevant responses.

#### **Deep Customization**

As for what you want to add in your Custom Instructions, it's highly personal. Each user has unique needs, specific contexts, and particular goals that should be reflected in the settings.

#### **Proven Experience**

I've tested dozens of instructions over the past year, and these are three simple ones that might be useful. You can copy them directly or modify them for your specific needs.

#### Continuous Maintenance and Optimization

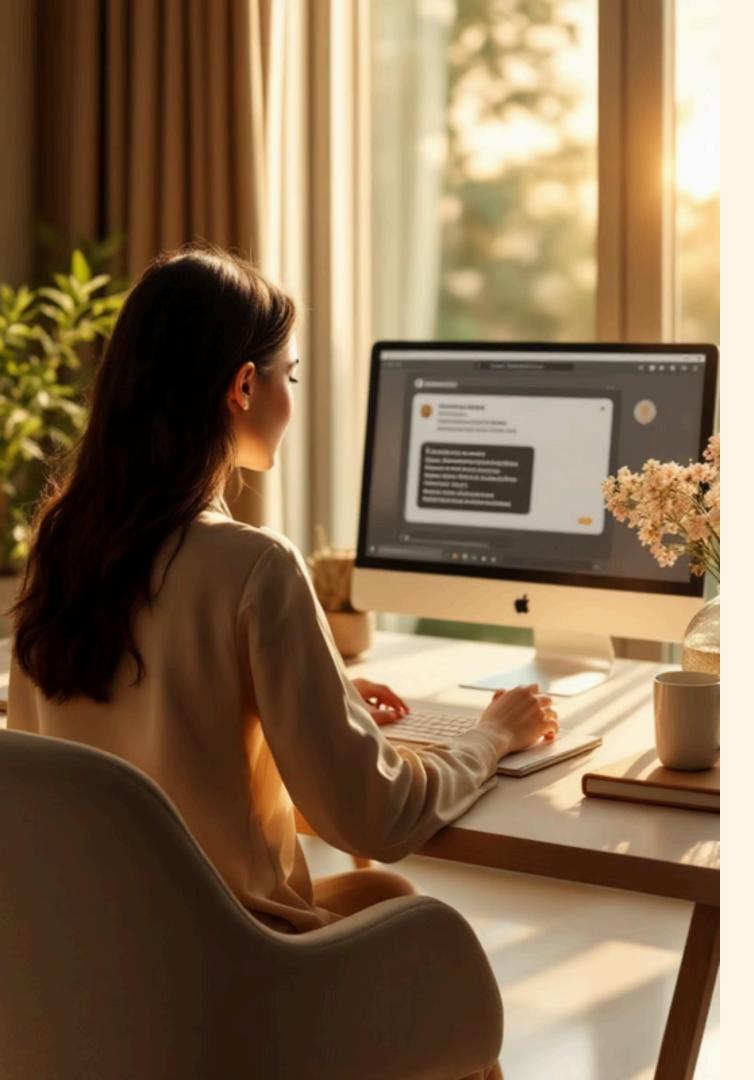
#### **Regular Review**

Reminder: you can always go back and modify your Custom Instructions as your needs change. I typically review and update mine every couple of months based on what's working well and what's not.

This practice of regular maintenance ensures that your instructions evolve with your changing needs and remain relevant to your current goals.



Constant Adaptation



#### Transform Your ChatGPT Experience



#### **Immediate Implementation**

Start today by configuring your custom instructions. The process takes less than 10 minutes but will permanently transform the quality of your ChatGPT interactions.



#### **Personalized Results**

Every response will be more relevant, useful, and aligned with your specific needs. The initial investment in setup pays off exponentially in every future conversation.



#### **Continuous Improvement**

Experiment with different approaches, refine your instructions regularly, and observe how the quality of responses you receive from ChatGPT progressively improves.

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### THANK YOU





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## California Public Utilities Commission Small and Diverse Business Expo

October 7, 2025



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October 7, 2025

Stephanie Green
Supplier Diversity Program Manager



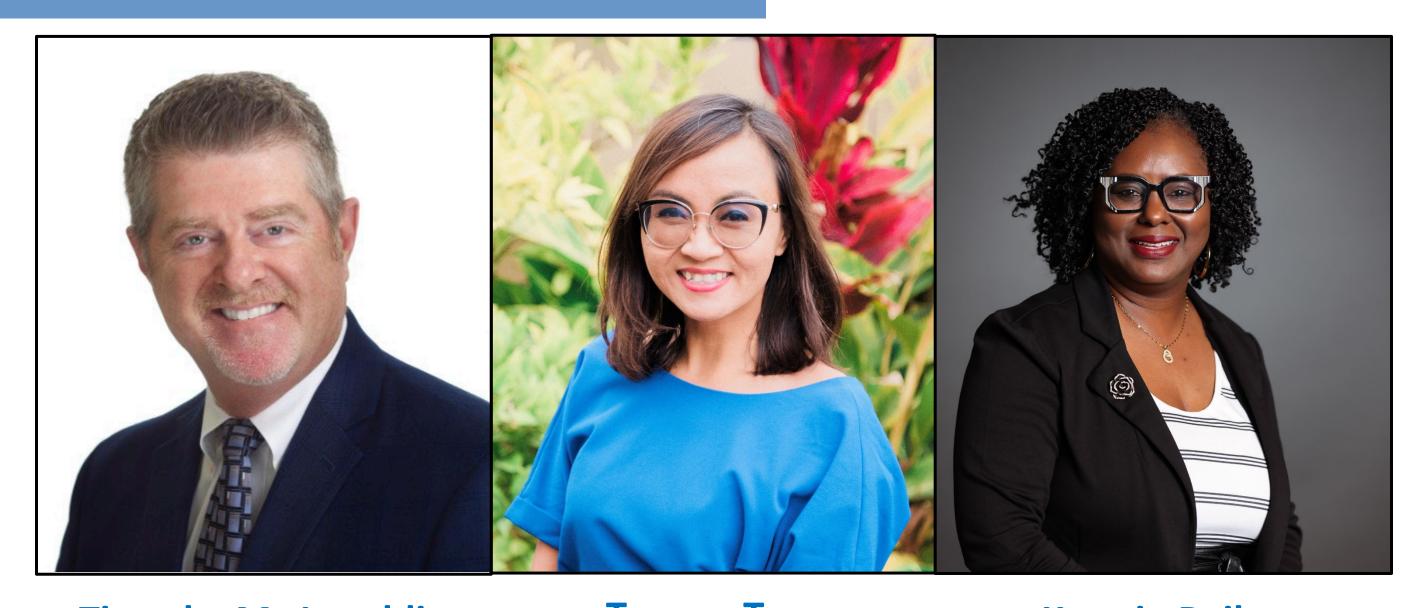
## Procurement Insights for Savvy Vendors

### California Public Utilities Commission Small and Diverse Business Expo

October 7, 2025



## Presenters



Timothy Mc Laughlin
Director, Supplier
Diversity
San Jose Water

Tammy Tran
Supplier Diversity
Principal Manger
Southern California
Edison

Karmin Bailey
Supplier Diversity
Manager
Southwest Gas

## Topics for Today

- What can you gain?
- What is the value?
- What am I viewing?
- How do you strategize?
- What are the challenges?
- Questions

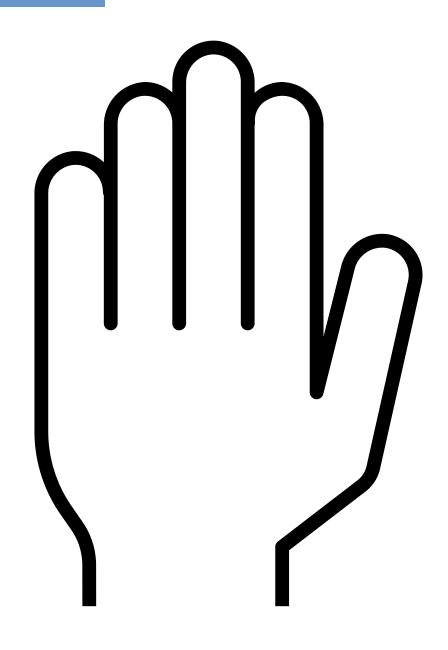
#### California utilities file:

- CPUC Annual Reports
- General Rate Case
- Supplier Diversity Annual Reports

## Audience Poll: About You

#### Tell us about yourself:

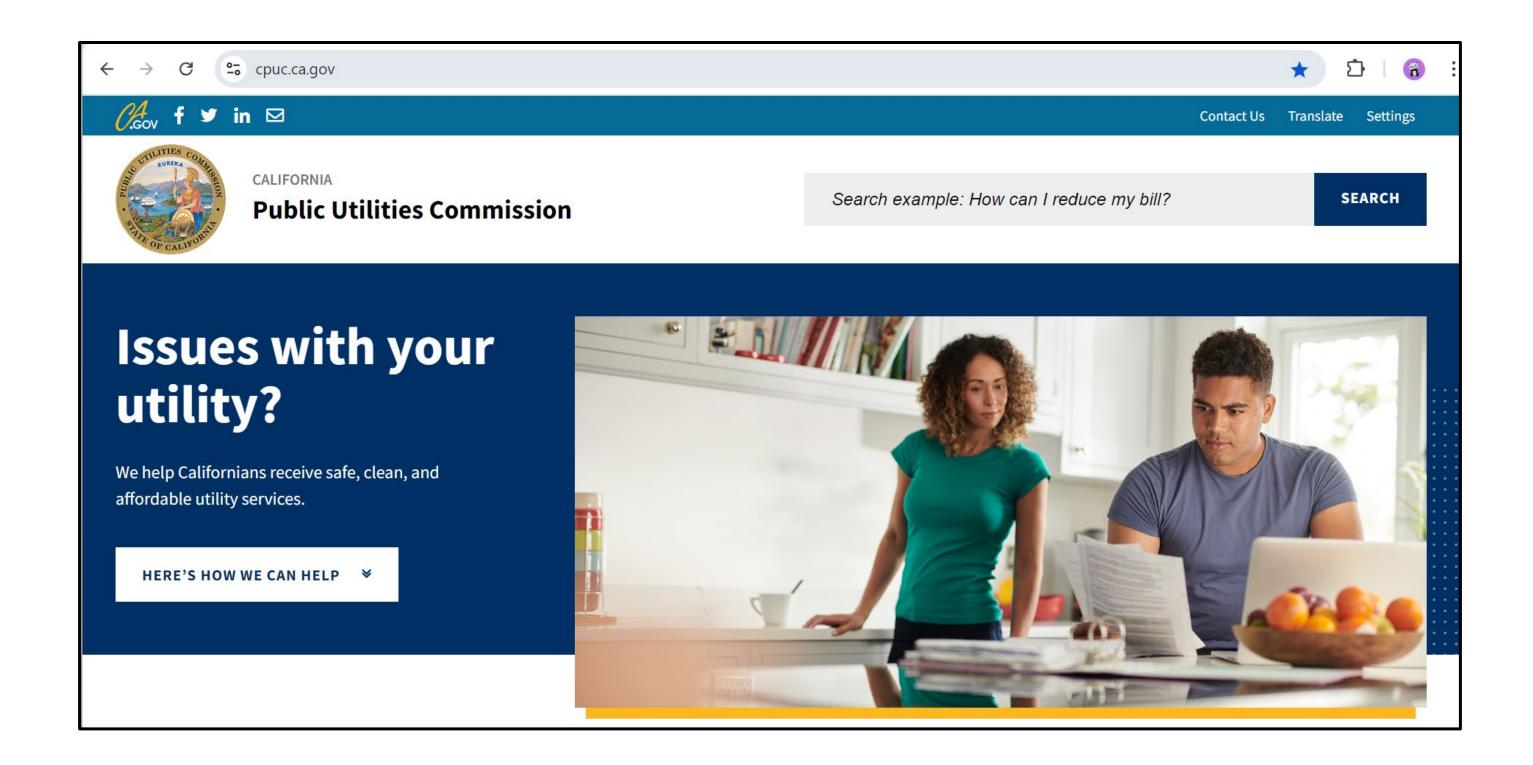
- a) Currently a supplier to utilities
- b) Like to become a supplier
- c) In Supplier Diversity
- d) PUC member or staff
- e) None of the above, but interested in this topic



## CPUC Annual Reports

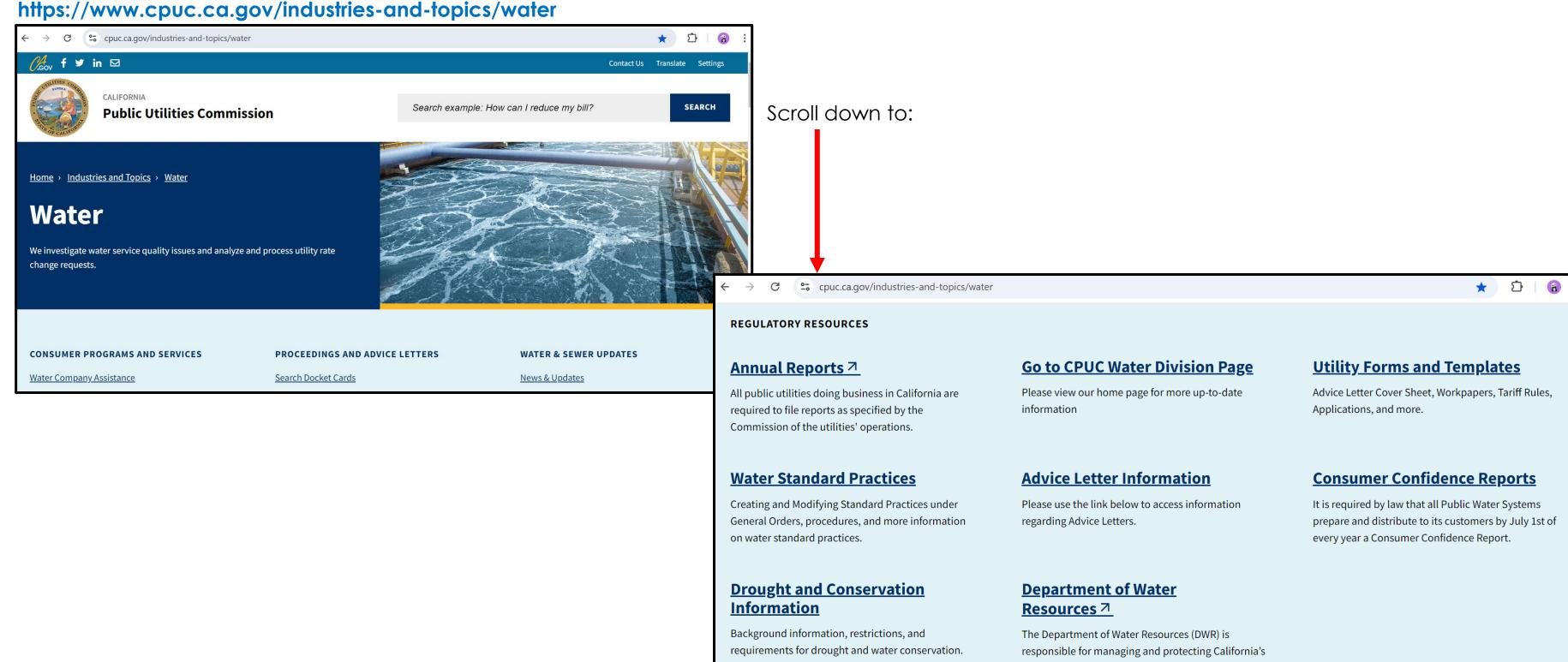
An annual report is a comprehensive report on a company's activities throughout the preceding year. Annual reports are intended to give the CPUC and other interested people information about the company's activities and finances.

## CPUC Website



## CPUC-Water Division Website

#### https://www.cpuc.ca.gov/industries-and-topics/water

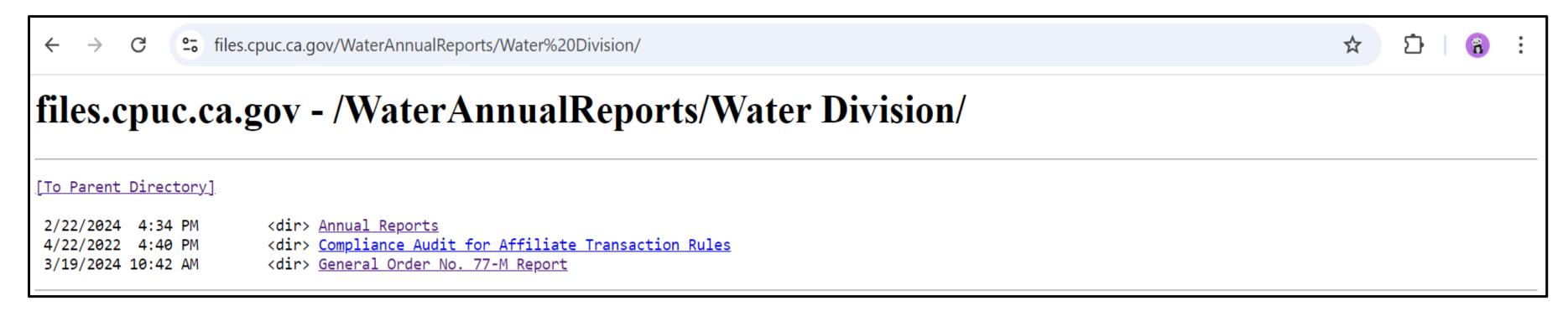


water.

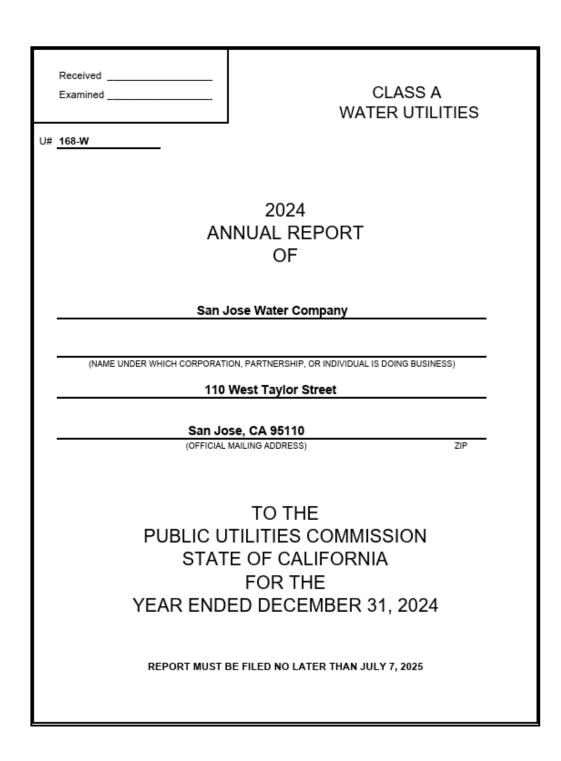
California Public Utilities Commission

## Water Division —Annual Reports





## Water Division -Annual Reports



#### SCHEDULE A-1a Account 100.1 - Utility Plant in Service (Continued)

			Balance	Additions	(Retirements)	Other Debits	Balance
Line		Title of Account	Beg of Year	During Year	During Year	or (Credits)	End of Year
No.	Acct	(a)	(b)	(c)	(d)	(e)	(f)
32		VI. TRANSMISSION AND DIST. PLANT					
33	341	Structures and Improvements	38,827,098	(780,475)	(35,739)	(16,699)	\$ 37,994,185
34	342	Reservoirs and Tanks	185,811,869	3,682,360	5,943	-	\$ 189,500,173
35	343	Transmission and Distribution Mains	1,001,485,922	71,566,643	(1,371,135)	-	\$ 1,071,681,431
36	344	Fire Mains	-				\$ -
37	345	Services	324,183,177	21,217,103	(167,695)	-	\$ 345,232,585
38	346	Meters	31,644,962	12,571,083	(1,673,241)	-	\$ 42,542,804
39	347	Meter Installations	23,496,526	2,414,554	(1,520,757)	-	\$ 24,390,323
40	348	Hydrants	112,824,525	9,130,292	(209,362)	-	\$ 121,745,455
41	349	Other Transmission and Distribution Plant	1,446,274	-	(4,866)	937	\$ 1,442,345
42		Total Transmission and Distribution Plant	\$ 1,719,720,353	\$ 119,801,561	\$ (4,976,852)	\$ (15,762)	\$ 1,834,529,300
43							
44		VII. GENERAL PLANT					
45	371	Structures and Improvements	48,223,991	6,158,118	(316,794)	-	\$ 54,065,315
46	372	Office Furniture and Equipment	54,521,030	5,758,988	(19,036,303)	111,571	\$ 41,355,287
47	373	Transportation Equipment	23,149,569	1,310,538	(1,800)	-	\$ 24,458,306
48	374	Stores Equipment	1,378,293	316,376	(27,395)	-	\$ 1,667,274
49	375	Laboratory Equipment	-				\$ -
50	376	Communication Equipment	22,115,824	91,598	(1,116,149)	-	\$ 21,091,273
51	377	Power Operated Equipment	4,903,653	40,983	(68,301)	-	\$ 4,876,335
52	378	Tools, Shop and Garage Equipment	3,047,951	14,977,252	(1,056,970)	-	\$ 16,968,233
53	379	Other General Plant	903,618	1,078,204	(464,802)	-	\$ 1,517,019
54		Total General Plant	\$ 158,243,929	\$ 29,732,058	\$ (22,088,513)	\$ 111,571	\$ 165,999,044
55							
56		VIII. UNDISTRIBUTED ITEMS					
57	390	Other - Pension NSC	(1,404,717)	(205,230)	2,486		\$ (1,607,461)
58	391	Utility Plant Purchased	-				\$ -
59	392	Utility Plant Sold	-				\$ -
60		Total Undistributed Items	\$ (1,404,717)			\$ -	\$ (1,607,461)
61		Total Utility Plant in Service	\$ 2,289,301,681	\$ 170,462,516	\$ (29,381,043)	\$ 291,029	\$ 2,430,674,183

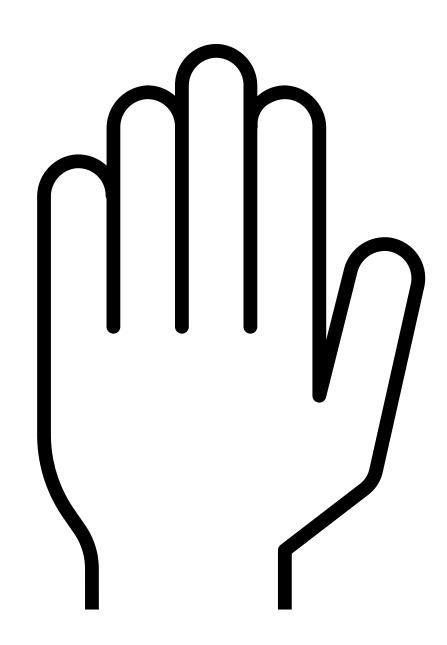
## Audience Poll: Use of Reports

Have you ever used a utility report to help with procurement:

- a) Yes
- b) No

Have you ever used a utility general rate case to help with procurement

- a) Yes
- b) No



### CPUC General Rate Case

The General Rate Case is a process that examines the costs of operating and maintaining a utility system. The CPUC uses GRCs to review a utility's revenues and expenses, and to determine reasonable rates for customers.

## Rate Making Formula

### Revenue Requirement = Expenses + Financing Cost

- Revenue Requirement: amount utilities need to charge to remain financially viable
- **Expenses:** water, labor, power, gasoline, outside consultants, asset depreciation, taxes, etc.
- Financing Cost (rate base x cost of capital):
  - Rate Base Net book value of utility assets (pipes, pumps, etc.)
  - Cost of Capital Weighted cost of debt and equity
  - Weighted capital structure ratio of equity and debt (example: 65% equity:35% debt)
  - **Debt** bond financing interest
  - Equity return on shareholder equity

## General Rate Case (GRC)

Utility Application: request to change rates to collect revenue required to maintain financial viability and pay financing costs (includes written testimony, forecasted expenses and capital investment, historical results, etc.)

Data Requests: Cal
Advocates formally asks
thousands of questions of
utilities to better
understand the request

Cal Advocates Report:
detailed report listing
counter arguments
and alternative
positions on the utilities
request

Rebuttal: Utility
addresses
arguments raised in
Cal Advocate's
report

**Briefing:** Parties summarize final positions, and address arguments in the other party's briefing

Hearings: Party attorneys cross examination witnesses about disputed items to add to the record of evidence

Settlement: Opportunity for Utility and CalAdvocates to negotiate and agree on some or all disputed items

Public Participation
Hearing (PPH): ALJ hosts
forum to receive
comments from the
public

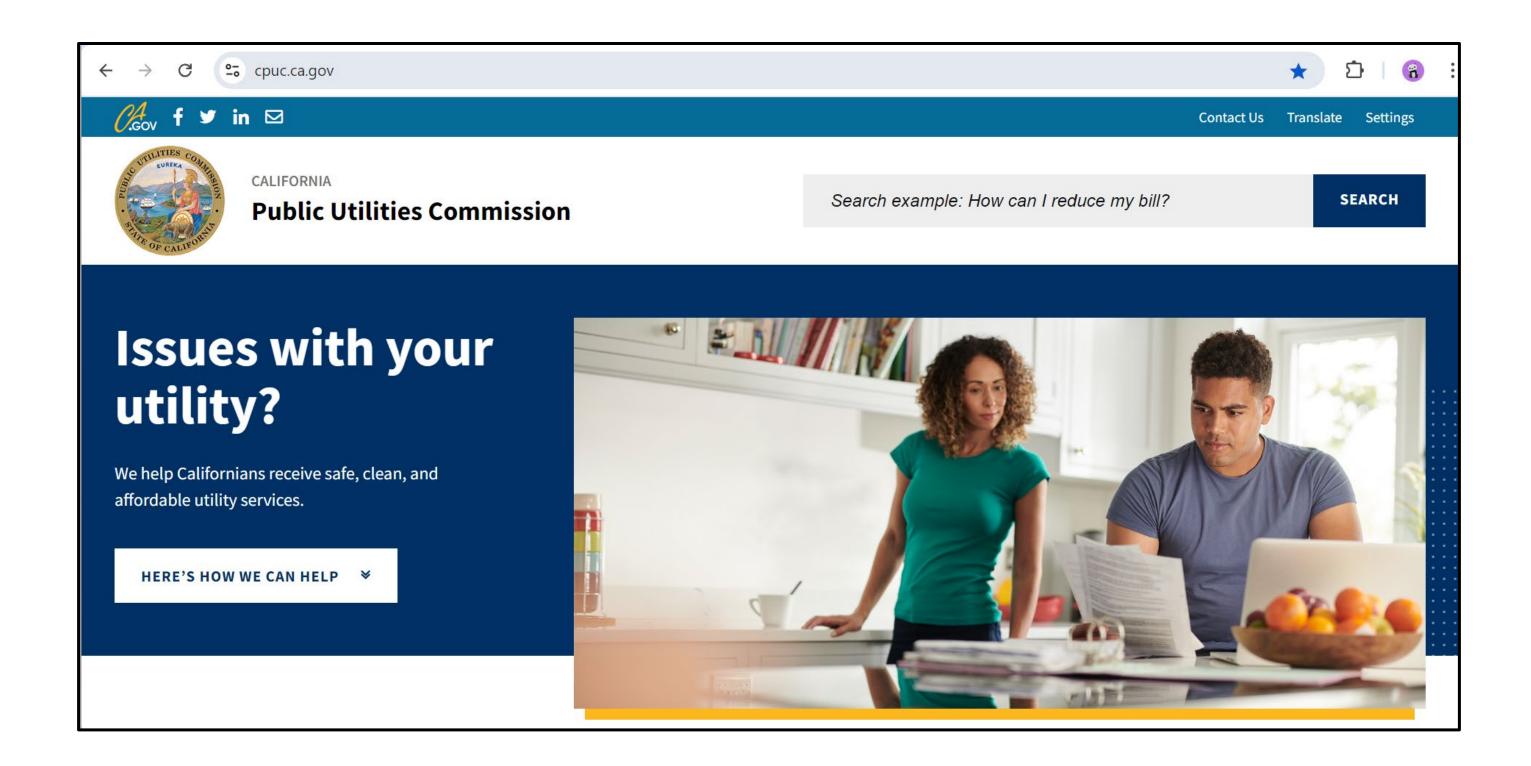
Proposed Decision: ALJ prepares written proposed decision that accepts or denies the parties settled items, and recommends resolution for disputed items

### **Decision:**

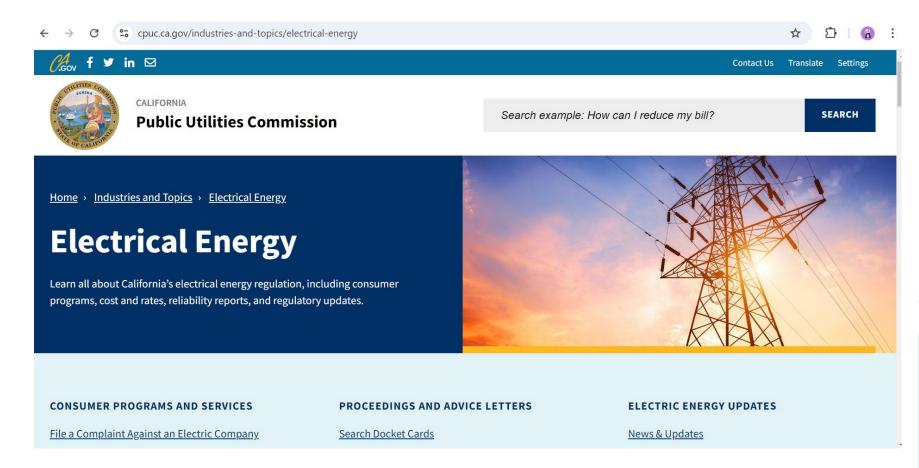
Commissioners review and then vote to accept or reject the proposed decision

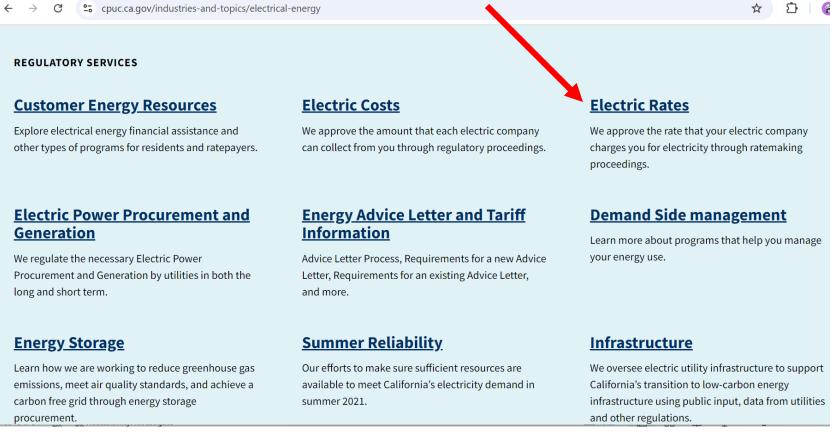
GRC PROCESS

## CPUC Website

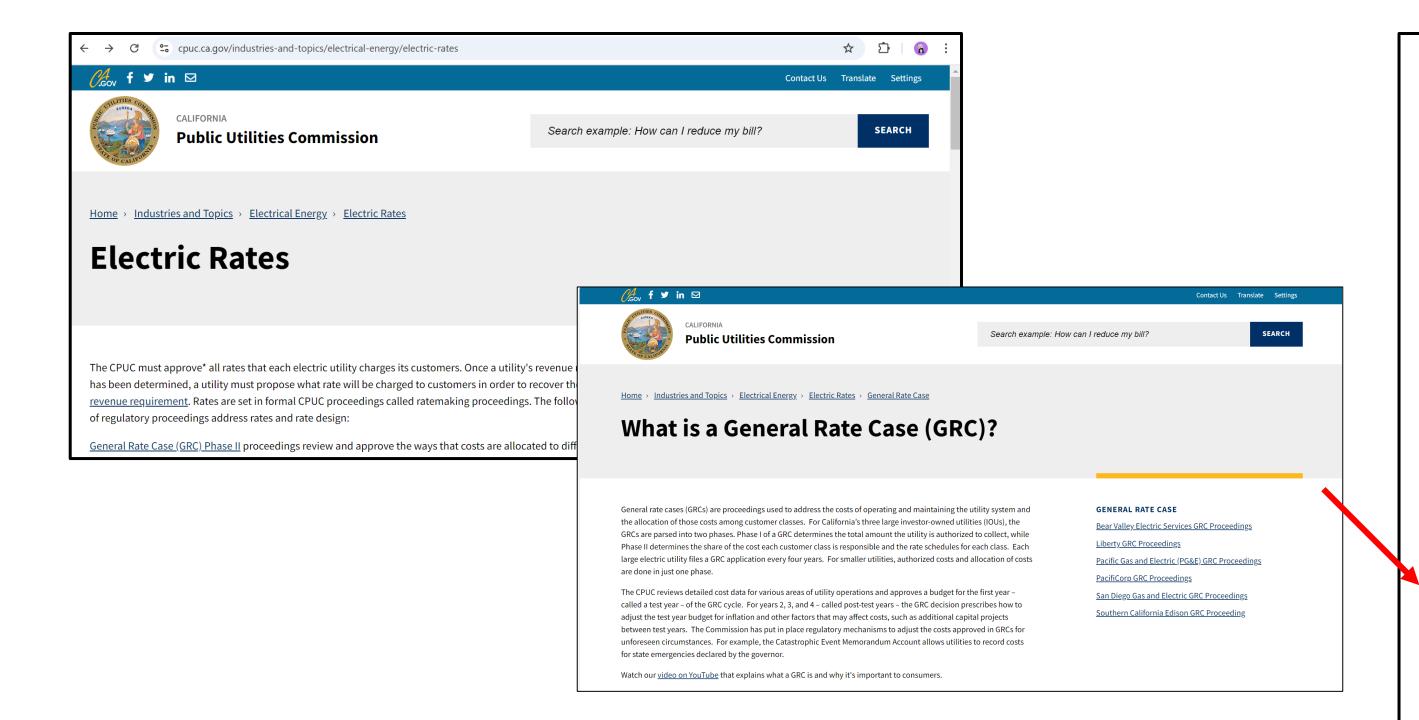


# CPUC—Energy Division Website





### Electric Rates/General Rate Cases



### **ELECTRIC RATES**

Actions to Limit Utility Cost and Rates Annual Report to the Governor and Legislature May 2016

Actions to Limit Utility Cost and Rates Annual Report to the Governor and Legislature May 2017

Actions to Limit Utility Cost and Rates Annual Report to the Governor and Legislature May 2018

Actions to Limit Utility Cost and Rates Annual Report to the Governor and Legislature May 2019

Actions to Limit Utility Cost and Rates Annual Report to the Governor and Legislature May 2020

Actions to Limit Utility Cost and Rates Annual Report to the Governor and Legislature May 2021

Actions-to-Limit-Utility-Cost-and-Rates-Annual-Report-tothe-Governor-and-Legislature-May-2022

Actions to Limit Utility Cost and Rates Annual Report to the Governor and Legislature-May 2023

Actions to Limit Utility Cost and Rates Annual Report to the Governor and Legislature-May 2024

Electric Rate Forum 2017

Energy Disconnections and Reconnections Rulemaking (R.18-07-005)

General Rate Case

General Rate Case GRC Phase II

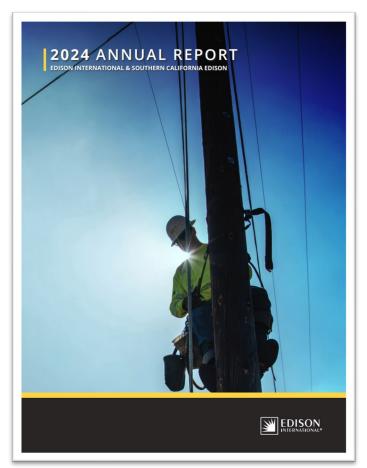
Green Tariff/Shared Renewables Program (GTSR)

Rate Change Advisories

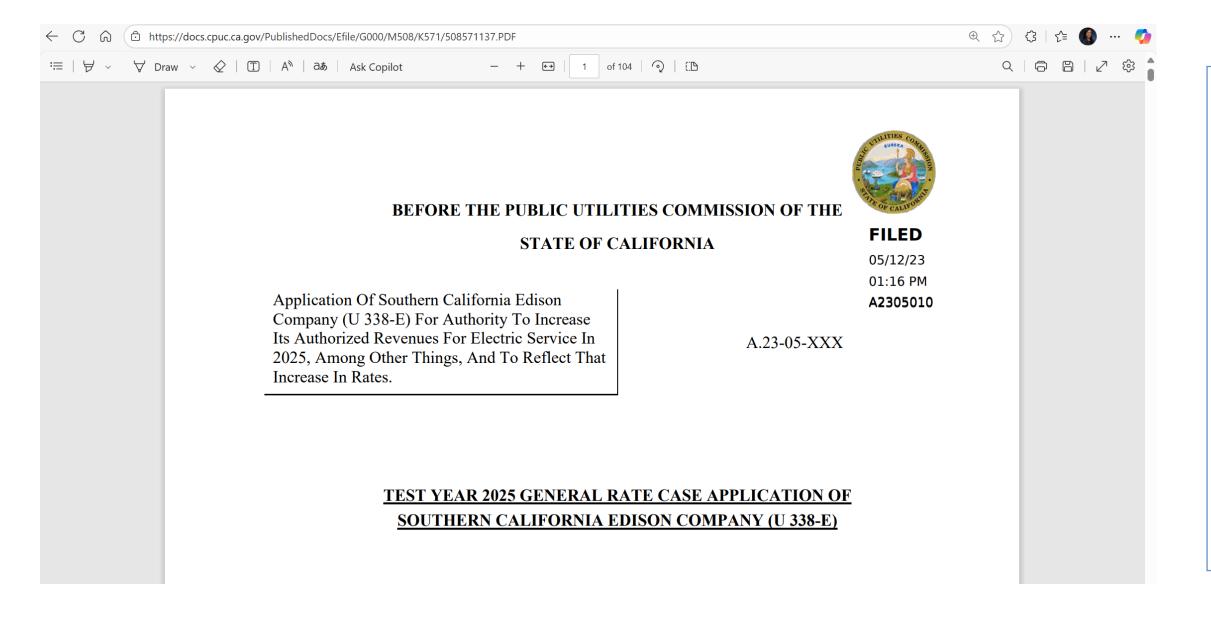
Residential Rate Reform / R.12-06-013

Time of Use Rulemaking R 15-12-012









### The GRC outlines planned infrastructure investments.

- Visibility in future investments
- Understanding procurement priorities
- Forecasting opportunities
- Navigating expectations
- Enhancing strategic partnerships

### Potential "savvy" actions:

- Align offerings with upcoming capital projects
- Anticipate demand for services and technologies
- Emphasize cost-effectiveness, customer impact, and achieving goals.
- Plan capacity and staffing to meet future demands
- Identify windows for engagement
- Proactive approach to partnership and innovation

### TEST YEAR 2025 GENERAL RATE CASE APPLICATION OF SOUTHERN CALIFORNIA EDISON COMPANY (U 338-E)

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	-i-	

change."

Accordingly, SCE in this rate case has proposed investments that will ready the grid to support the widespread electrification and decarbonization needed to meet California's ambitious greenhouse gas (GHG) reduction goals. These GHG-reduction goals are not just "stretch targets" – they are deeply embedded in the fabric of California's most important legislative and policy frameworks. To help ensure that SCE fulfills its role to help the State meet these requirements, there is simply no time left to waste. Mindful of the longer-term costs of inaction when confronting the global climate crisis, SCE's GRC request reflects that urgent need for the State to expeditiously electrify vast swaths of the economy.

As described in Mr. Takayesu's testimony and in more detail in SCE-02, Volume 07 (Load Growth, Transmission Projects, and Engineering), SCE is facing the fastest electricity demand growth in decades. With long lead times for construction of critical facilities like new substations, SCE must invest in California's electrified future *now* rather than trying to implement a "just in time solution" to meet the new customer demand later. Simply put, customers will be more likely to embrace electrification solutions necessary to meet the State's GHG reduction objectives when they have confidence that the grid can meet their demand reliably.

### 4. Operational and Service Excellence

### Key Investments

Load Growth & Grid Modernization
Distribution Infrastructure Replacement
New Service Connections
Transmission Projects
- Riverside Transmission Reliability Project
Cybersecurity & IT Services
Customer Solutions & Energy Programs
Facilities & Emergency Response
Sustainability & Emissions Reporting

### **Key Investments**

Wildfire Mitigation & Grid Hardening Targeted Undergrounding Vegetation Management

further simplify and streamline the customer experience, honing communications so that customers are provided with information that matters to them in a timely manner, and leveraging advanced predictive analytics capabilities to enable more effective communications.

### 5. Affordability and Equity

SCE recognizes that the necessary investments it has proposed to make the grid reliable, resilient, and ready carry costs that are borne by customers. SCE attentively and continuously looks for ways to save customers' money, avoid cost increases, and gain efficiencies. This includes a move to a pure self-insurance model for wildfire liability risk, the Inspection Redesign Initiative, and SCE's recent Operational Excellence Catalyst, which is an employee-led continuous improvement effort to deploy innovative ideas and drive process improvements across the enterprise. These efforts have helped SCE partially mitigate the cost impact of the significant amount of work that is needed. Additionally, the work that SCE must perform during this rate case cycle to help electrify the economy and support the adoption of clean technologies is vital to facilitate future reductions in overall energy costs for its customers. As electric costs are spread more broadly over increased usage and customers reduce their reliance on expensive fossil fuel alternatives, customers can expect to see a reduced energy share of wallet in the future.

SCE also remains focused on low-income customers who face barriers to widespread adoption of

2006.4 In addition, as discussed in detail below, SCE has already excluded from its rate base the ongoing revenue requirement associated with certain recorded wildfire mitigation-related capital expenditures pursuant to Assembly Bill No. 1054.

Section VII contains the full summary of SCE's requests for relief.

### List Of Testimony Exhibits

This Application is supported by the following Exhibits, which are being served contemporaneously with this Application.

### 2025 General Rate Case Exhibit List

### SCE-01 - Policy

SCE-01 Vol. 01 - Policy

SCE-01 Vol. 02 - Risk Policy, Climate Change Policy, and Environmental & Social Justice Goals

### SCE-02 - Grid Activities

SCE-02 Vol. 01 Pt. 1 - Grid Policy

SCE-02 Vol. 01 Pt. 2 - Distribution Infrastructure Replacement

SCE-02 Vol. 02 - Distribution Inspections & Maintenance and Capital-Related

SCE-02 Vol. 03 - Meter Activities

SCE-02 Vol. 04 - Transmission Grid

SCE-02 Vol. 05 - Substation

SCE-02 Vol. 06 - Grid Modernization, Grid Technology, and Energy Storage

SCE-02 Vol. 07 - Load Growth, Transmission Projects, and Engineering

SCE-02 Vol. 08 - New Service Connections and Customer Requested System Modifications

SCE-02 Vol. 09 - Poles

SCE-02 Vol. 10 - Vegetation Management

SCE-02 Vol. 11 - Other Costs & OOR

SCE-03 – Customer Interactions

SCE-03 Vol. 01 – Customer Service Operations

See D.06-05-016, D.09-03-025, D.12-11-051, D.15-11-021, D.19-05-020, D. 21-08-036.

### 2025 General Rate Case Exhibit List

SCE-03 Vol. 02 - Business Customer Services

SCE-03 Vol. 03 - Customer Programs and Services

### SCE-04 - Resiliency

SCE-04 Vol. 01 - Business Continuation

SCE-04 Vol. 02 - Emergency Management

SCE-04 Vol. 03 - Cybersecurity

SCE-04 Vol. 04 - Physical Security

SCE-04 Vol. 05 Pt. 1 - Wildfire Management Overview

SCE-04 Vol. 05 Pt. 2 - Wildfire Management Grid Hardening

SCE-04 Vol. 05 Pt. 3 - Wildfire Management Emergent Technology and Inspections and Remediations

SCE-04 Vol. 05 Pt. 4 - Wildfire Management PSPS and Other Wildfire Activities

### SCE-05 - Generation and Energy Procurement

SCE-05 Vol. 01 - Generation

SCE-05 Vol. 02 - Energy Procurement

### SCE-06 - Enterprise Support

SCE-06 Vol. 01 - Enterprise Technology

SCE-06 Vol. 02 - Enterprise Technology - OU Capitalized Software

SCE-06 Vol. 03 - Enterprise Planning & Governance

SCE-06 Vol. 04 – Employee Benefits, Training & Support

SCE-06 Vol. 05 - Total Compensation Study

SCE-06 Vol. 06 - Environmental Services, Audit, Ethics & Compliance, and Safety Programs

SCE-06 Vol. 07 – Enterprise Operations

SCE-06 Vol. 08 - Policy, External Engagement and Ratemaking

### SCE-07 - Results of Operations

SCE-07 Vol. 01 - Results of Operations5

SCE-07 Vol. 02 - Rate Base, Depreciation Expense, and Taxes

SCE-07 Vol. 03 - SCE Asset Depreciation Study

5 This volume includes GRC balancing account and memorandum account proposals, among other items.

### SCE'S RATEMAKING PROPOSALS TO ESTABLISH, MODIFY, OR ELIMINATE VARIOUS BALANCING/MEMORANDUM ACCOUNTS AND RECOVER CERTAIN MEMORANDUM ACCOUNT BALANCES

In addition to SCE's requests described above, SCE is also making several other ratemaking requests, which are summarized below and explained in detail in Exhibit SCE-07, Volume 01, Results of Operations. Table 3 lists a summary of SCE's proposals to establish, modify, or eliminate various memorandum and balancing accounts.

### Table 3 Proposals for Balancing and Memorandum Accounts

### New Accounts

General Liability Insurance Balancing Account

Next Gen ERP SAP Memorandum Account

Advanced Metering Infrastructure 2.0 Memorandum Account Historic Sporting Events Cost Tracking Memorandum Account

Cybersecurity Compliance Memorandum Account

Renewable Transmission Projects Memorandum Account

Wildfire Risk Mitigation Balancing Account/ Grid Hardening Balancing Account

Vegetation Management Balancing Account

Risk Management Balancing Account

Z-Factor Memorandum Account

Medical Programs Balancing Account Pension Cost Balancing Account

Post-Employment Benefits Other Than Pensions Balancing Account

Service Center Modernization Projects Memorandum Account

Catalina Repower Memorandum Account

Electric Vehicle Infrastructure Memorandum Account

### Eliminated Accounts

Underground Structures Replacement Balancing Account Pole Loading and Deteriorated Pole Programs Balancing Account

Customer Service Re-Platform Memorandum Account

Seismic Retrofit of Non-Electric Facilities Memorandum Account

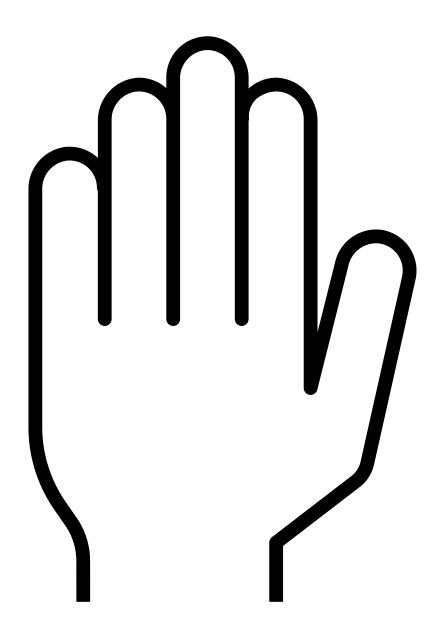
NEM Online Application System Memorandum Account

22

## Audience Poll: Business Development

# What tools do you use to gather intelligence about potential clients?

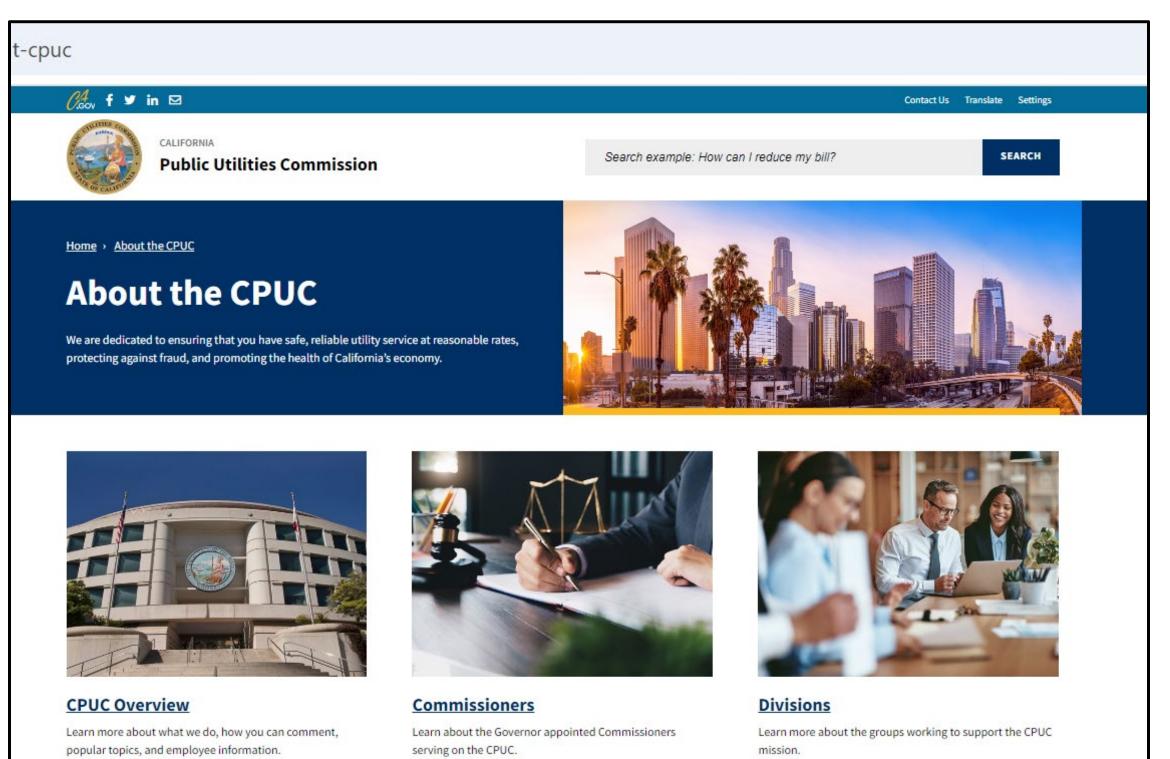
- a) Social media
- b) Industry reports
- c) Word of mouth
- d) Other



# Supplier Diversity Annual Report

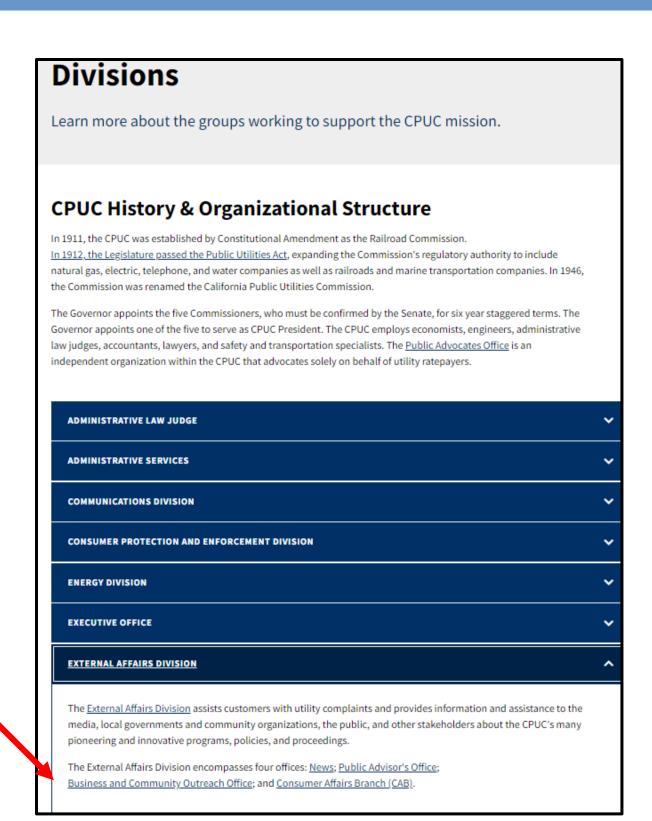
Utilities are required to submit an Annual Report to the CPUC by March 1 of each year. The report provides details on the utilities' programs created to comply with the Supplier Diversity Program

## CPUC Website



https://www.cpuc.ca.gov/about-cpuc

## CPUC-External Affairs Division





The CPUC's Business and Community Outreach (BCO) program focuses on outreach to local stakeholders, the Supplier Diversity Program, and the Small Business Program. The BCO team plays an integral role in the CPUC's efforts to assure Californians maintain access to safe and reliable utility infrastructure and services by engaging with Communities and fostering relationships. It is involved in the development of policies and programs that serve all ratepayers so that the work of the CPUC remains transparent, and the final product reflects the diverse views of California communities.

### Show All Steps



The <u>Local Government and Community Affairs</u> team is composed of dedicated Liaisons who serve as key partners to local governments and community-based organizations. Their mission is to inform, engage, and address concerns related to the CPUC's programs, decisions, and initiatives. Liaisons work to elevate diverse perspectives in the CPUC's decision-making process, helping ensure inclusive and representative outcomes for all Californians. With a commitment to transparency and collaboration, CPUC Liaisons are available to assist stakeholders across every regulated industry.

### Supplier Diversity Program

The <u>Supplier Diversity</u> program promotes and monitors supplier diversity in procurement by utilities, electric service providers, community choice aggregators, and other entities and oversees a certification clearinghouse. The CPUC encourages participating entities to purchase goods and services from diverse suppliers: 15 percent from minority, 5 percent from women, 1.5 percent from disabled veteran business enterprises, and 1.5 percent for lesbian, gay, bisexual and transgender (LGBT) business enterprises.

### 3 Small Business Program

The <u>Small Business</u> program focuses on two areas:

- 1. Promoting procurement opportunities with the state and utilities;
- Providing education and outreach necessary to raise internal and external awareness of various regulatory and legislative policy issues impacting the small business community.

The CPUC also assists small businesses with utility related complaints, issues, and informs small businesses of CPUC contracting opportunities.

### **USEFUL LINKS**

Public Participation Hearings

Remote Access Report

Small Business Program

Supplier Diversity Program

SB 512 Research Project Report on Outreach

Office of the Tribal Advisor

Electric Rate Comparison Website

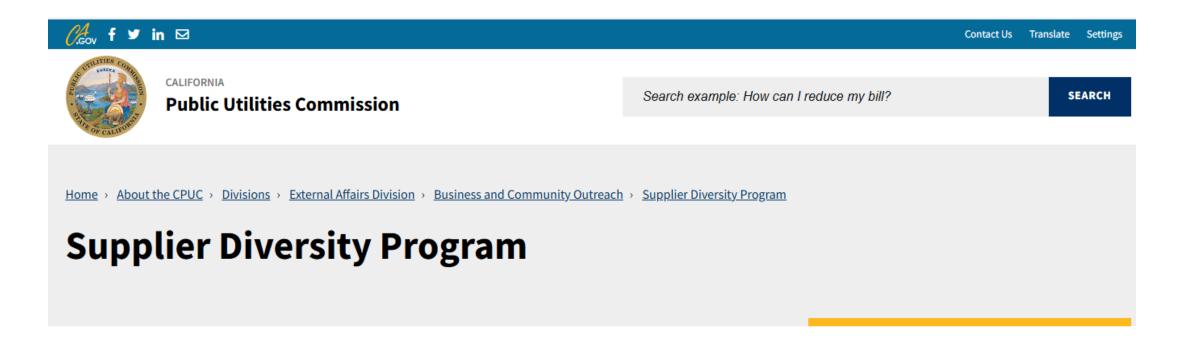
Infrastructure Safety Inspection Schedule

### CONTACT

Questions about Outreach, Supplier Diversity or Small Business Programs?

If you have any questions about Business and Community
Outreach's Programs, please contact Stephanie Green,
Program and Project Supervisor, at 415-703-5245 or
stephanie.green@cpuc.ca.gov.

# Supplier Diversity Program



The California Public Utilities Commission's (CPUC) General Order (GO) 156 fosters a competitive marketplace by encouraging investor-owned utilities, community choice aggregators, energy service providers and prime contractors to include diverse firms: women; minority; lesbian, gay, bisexual and transgender (LGBT); disabled veteran and persons with disabilities business enterprises in procurement activities. Currently, more than 30 investor-owned utilities such as AT&T, California Water Association, Comcast, Frontier, PG&E, SDG&E, Southern California Edison, SoCalGas, and Verizon participate in this program. In October 2019, Senate Bill (SB) 255 (Bradford, Chapter 407, 2019) added Community Choice Aggregators, energy service providers, distributed energy resource contractors, and energy storage system companies.

The Supplier Diversity Program has existed for almost 40 years with the fundamental and ongoing goal of advancing the American and Californian private enterprise marketplace through free, open and transparent competition. This can only be fully realized by harnessing the actual and potential capacity of all persons. Advancing competitive procurement opportunities for everyone by having voluntary inclusionary programs assists utilities into reaching new markets, increasing shareholder value, and controlling costs – while making us stronger together.

Our <u>clearinghouse operator</u> verifies the status of suppliers seeking <u>certification</u> as women, minority, LGBT, and/or persons with disabilities business. Disabled veteran businesses are certified by the <u>Office of Small Business and Disabled Veteran Business Enterprise Services (OSDS)</u>, a unit of the <u>Department of General Services</u>. View the most recent update to the public version of our <u>supplier database</u>. Certification facilitates tracking of supplier procurement participation.

### SUPPLIER DIVERSITY PROGRAM

Clearinghouse

Certification

Supplier Diversity Contacts

Supplier Database

GO 156 Reporting Templates

GO 156 Procurement Reports and Plans

Community Choice Aggregators Supplier Diversity Reports

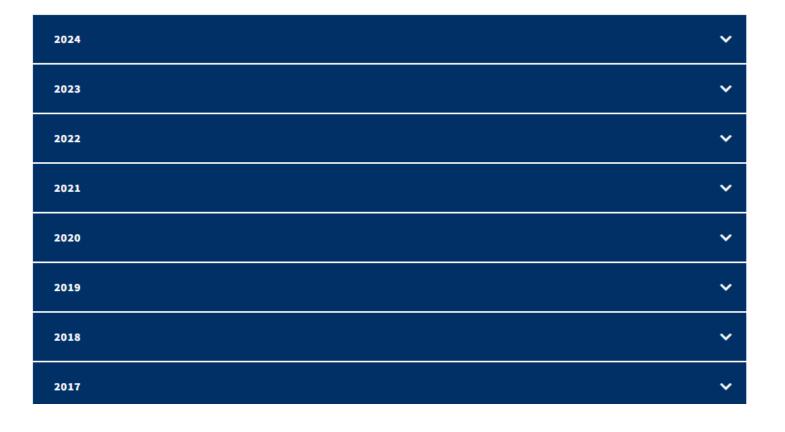
Energy Service Providers Supplier Diversity Reports

GO 156 Reports to the Legislature

Annual Supplier Diversity En Banc

**Utilities Contracting Opportunities** 





### CONTACTING THE CPUC ABOUT SUPPLIER DIVERSITY

Contact us about supplier diversity via email at <a href="mailto:supplierdiversity@cpuc.ca.gov">supplierdiversity@cpuc.ca.gov</a> or standard mail:

Supplier Diversity Program
California Public Utilities Commission
505 Van Ness Avenue
San Francisco, CA 94102-3298

### RELATED PROGRAMS

Business Opportunities, Contracting, and Procurements

Business and Community Outreach

### RELATED DIVISIONS

News and Outreach Office

### **A LOOK INSIDE**

### **2024 ANNUAL REPORT**

9.1.1	Supplier Diversity Program Activities	0
	Internal Activities	0
	External Outreach Activities	0
	Regulatory Participation	O.
	New Supplier Registration Portal	0
9.1.2	Supplier Diversity Procurement 2024 Annual Results	0
	Table 9.1.2 (A): Annual Results by Ethnicity	0
	Table 9.1.2 (B): Annual Results by Product and Service Categories  —Direct Procurement	0
	Table 9.1.2 (C): Annual Results by Product and Service Categories  –Subcontracting Procurement	0
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	Graph 9.1.5 (B): Diverse Subcontracting 5-Year Program Results	2
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	Financial Services	2
	Legal Services	2
	Small Business Owner Testimonial	2
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**9.1.1**---

### EXTERNAL ACTIVITIES

Throughout 2024, Southwest Gas remained committed to strengthening relationships with partner organizations and chambers of commerce that share its vision of supporting diverse businesses, expanding economic opportunities, and promoting supplier diversity. Southwest Gas actively participated in or sponsored the following outreach activities:

March 28 California African American Indian Chamber Western Regional Minority Supplier of Commerce State of California African Development Council (WRMSDC) American Economy Summit Panel Multi-Industry Meet & Greets California Public Utilities Commission Los Angeles LGBTQ Chamber of (CPUC) Small & Diverse Commerce (LAGLCC) Gala Luncheon Business Expo May 10 WRMSDC Excellence Diversity Professional Department of Energy Minority in Supplier Women of Excellence **Business Enterprise Summit** Diversity Awards Diversity Professional and AEG Hispanic Coalition of Small Chingona Community Awards **Business Unity Summit** Event-LA Live June 27 \* Women's Business Enterprise Council (WBEC) California Hispanic Chamber West Unconventional Women's Conference Diversity Awards July 14-16 American Indian August 8 July 30-August 2 Chamber of Commerce CalAsian Minority Women National LGBT Chamber of Annual Conference Pitch Competition Commerce (NGLCC) Conference



August 14 WBEC Pacific Utilities/Energy Industry Day



November 7

August 23 WRMSDC Multi-Industry Supplier Diversity Expo October 4 WRMSDC Empowerment Meet & Greets

November 13-14 Veterans In Business (VIB) Conference

Long Beach Gay & Lesbian Chamber of Commerce Matchmaking Event; Southern California Minority Supplier Development Council (SCMSDC) Excellence Awards October 9 CPUC Small & Diverse Business Expo

Pacific Southwest Minority Supplier Development Council (PSWMSDC) Small Business Summit December 5
Long Beach Gay & Lesbian
Chamber of Commerce
Networking Event

December 6
American Indian Chamber of
Commerce (AICC) Native American
Heritage Month Luncheon

9.1.2

TABLE 9.1.2 (D)
ANNUAL RESULTS BY
PRODUCTS AND SERVICE
CATEGORIES PRIME
CONTRACTOR BY SIC CODES

### PRODUCTS AND SERVICES—STANDARD INDUSTRIAL CLASSIFICATION CODE REPORTING

SIC Category	African American		Asian Pacific American		Hispanic American		Native American	
	Male	Female	Male	Female	Male	Female	Male	Female
07. A = i = i   b = =   C = -i = =	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
07 - Agricultural Services	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
15 - Building Construction General	\$0	\$15,536	\$0	\$0	\$0	\$0	\$0	\$0
Contractors and Operative Builders	0.00%	0.02%	0.00%	0.00%	0.00%	0.00%	1.13%	0.00%
	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
16 - Underground Utility Contractor	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
47. Constal Tools Control	\$2,377,294	\$0	\$0	\$0	\$0	\$0	\$0	\$0
17 - Special Trade Contractor	2.77%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
23 - Apparel & Other Finished	\$0	\$0	\$0	\$10,843	\$0	\$0	\$0	\$1,388
Products	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%
00.0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
26 - Paper and Allied Products	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
	\$0	\$0	\$0	\$0	\$1,592	\$0	\$0	\$0
34 - Fabricated Metal Products	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
35 - Industrial and Commercial	\$0	\$0	\$0	\$0	\$504	\$0	\$0	\$0
Machinery	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
37 -Transportation Equipment	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
38 - Instruments and Related	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Products	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
42 - Freight Transportation and	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Warehousing	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
	\$0	\$0	\$0	\$502,985	\$0	\$0	\$0	\$0
47 - Transportation Services	0.00%	0.00%	0.00%	0.59%	0.00%	0.00%	0.00%	0.00%
50 - Wholesale Trade Durable	\$15,480	\$0	\$ 2,274,837	\$0	\$0	\$321,709	\$1,075	\$326,814
Goods	0.018%	0.00%	2.648%	0.00%	0.00%	0.374%	0.001%	0.380%
51 - Wholesale Trade NonDurable	\$0	\$0	\$0	\$0	\$3,899	\$0	\$0	\$0
Goods	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
50 8 44 44	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
52 - Building Materials	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
	\$0	\$7,367	\$0	\$0	\$0	\$0	\$0	\$0
73 - Business Services	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
87 - Engineering & Management	\$0	\$0	\$ 300,347	\$0	\$135,513	\$0	\$ 662,837	\$0
Services	0.00%	0.00%	0.35%	0.00%	0.16%	0.00%	0.77%	0.00%
Total	\$2,392,774	\$22,903	\$2,575,185	\$513,828	\$141,509	\$321,709	\$1,637,941	\$328,201
i ciai	2.79%	0.03%	3.00%	0.60%	0.16%	0.37%	1.91%	0.38%

9.1.2

TABLE 9.1.2 (D)
ANNUAL RESULTS BY
PRODUCTS AND SERVICE
CATEGORIES PRIME
CONTRACTOR BY SIC CODES

### PRODUCTS AND SERVICES—STANDARD INDUSTRIAL CLASSIFICATION CODE REPORTING

SIC Category	Minority Business Enterprise (MBE)	Women Business Enterprise (WBE)	Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)	Disabled Veteran Business Enterprise (DVBE)	Persons with Disabilities Business Enterprise (PDBE)	Other 8(a)*
O7. And only and Condens	\$0	\$245,471	\$0	\$0	\$0	\$0
07 - Agricultural Services	0.00%	0.29%	0.00%	0.00%	0.00%	0.00%
15 - Building Construction General	\$989,565	\$0	\$0	\$0	\$0	\$0
Contractors and Operative Builders	1.15%	0.00%	0.00%	0.00%	0.00%	0.00%
46 Underwested Hillita Contractor	\$0	\$0	\$0	\$ 27,717,918	\$0	\$0
16 - Underground Utility Contractor	0.00%	0.00%	0.00%	32.26%	0.00%	0.00%
47. Constall Tools Controlled	\$2,377,294	\$1,528,603	\$0	\$0	\$0	\$0
17 - Special Trade Contractor	2.77%	1.78%	0.00%	0.00%	0.00%	0.00%
22. 4	\$12,231	\$4,499	\$0	\$0	\$0	\$0
23 - Apparel & Other Finished Products	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%
20. B	\$0	\$1,051	\$0	\$0	\$0	\$0
26 - Paper and Allied Products	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
	\$1,592	\$120,393	\$0	\$0	\$0	\$0
34 - Fabricated Metal Products	0.00%	0.14%	0.00%	0.00%	0.00%	0.00%
25.1.1.1.1.1.0	\$504	\$0	\$504	\$0	\$0	\$0
35 - Industrial and Commercial Machinery	0.00%	0.00%	0.00%	0.00%		0.00%
07.7	\$0	\$ 30,193	\$0	\$0	\$0	\$0
37 -Transportation Equipment	0.00%	0.04%	0.00%	0.00%	0.00%	0.00%
	\$0	\$17,206	\$0	\$0	\$0	\$0
38 - Instruments and Related Products	0.00%	0.02%	0.00%	0.00%	0.00%	0.00%
42 - Freight Transportation and	\$0	\$1,886,897	\$0	\$0	\$0	\$0
Warehousing	0.00%	2.20%	0.00%	0.00%	0.00%	0.00%
	\$502,985	\$0	\$58,962	\$0	\$0	\$0
47 - Transportation Services	0.59%	0.00%	0.07%	0.00%	0.00%	0.00%
50 111 1 7 1 5 11 0 1	\$2,939,915	\$110,757	\$0	\$1,075	\$0	\$0
50 - Wholesale Trade Durable Goods	3.422	0.129%	0.00%	0.001%	0.00%	0.00%
	\$3,899	\$81,796	\$3,899	\$0	\$0	\$0
51 - Wholesale Trade NonDurable Goods	0.00%	0.10%	0.00%	0.00%	0.00%	0.00%
50 8 44 44 44	\$0	\$37,764	\$0	\$0	\$0	\$0
52 - Building Materials	0.00%	0.04%	0.00%	0.00%	0.00%	0.00%
70.0	\$7,367	\$2,374,798	\$0	\$0	\$5,171,277	\$0
73 - Business Services	0.01%	2.76%	0.00%	0.00%	6.02%	0.00%
07. Fastanatan 9 M	\$1,098,698	\$24,580	\$200	\$3,977	\$0	\$0
87 - Engineering & Management Services	1.28%	0.03%	0.00%	0.00%	0.00%	0.00%
Tatal	\$7,934,051	\$6,464,008	\$59,162	\$27,721,894	\$5,171,277	\$0
Total	9.24%	7.52%	0.07%	32.27%	6.02%	0.00%

Notes: \* Firms classifled as 8(a) by the Small Business Administration include non-WMDVLGBTPDBE

2024 Report | 2025 Plan

Supplier Diversity Program Report

### RENEWABLE ENERGY/ENERGY EFFICIENCY PROJECTS

### RENEWABLE NATURAL GAS (RNG)

In Victorville, California, Southwest Gas continued to partner with Victor Valley Wastewater Reclamation Authority (VVWRA) on a biomethane project commissioned in 2022, with research ongoing for RNG production expansion into the system.

### HYDROGEN

Southwest Gas proposed and submitted to the CPUC for approval (Application 22-09-006) a Hydrogen blending pilot project in Truckee, California. The Application is currently pending.

### **COMPRESSED NATURAL GAS (CNG)**

In Victorville, California, Southwest Gas continued to partner with Burrtec Waste Industries to increase their use of CNG. Additional Southwest facilities are needed to double the size of their CNG fleet and the new facilities will be commissioned in 2024 increasing the use of CNG.

### NATURAL GAS SERVICE TO THE NATIONAL ARMY TRAINING CENTER (NTC) AT FORT IRWIN, CALIFORNIA

Extending natural gas service to the NTC will increase energy independence, security, reliability and resilience through the installation of natural gas facilities together with site-wide energy efficient infrastructure improvements, including non-tariff Energy Conservation Measures (ECMs). In April 2024, the CPUC approved Southwest Gas' application to extend service to NTC.

NTC at Fort Irwin, California

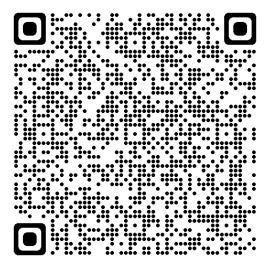




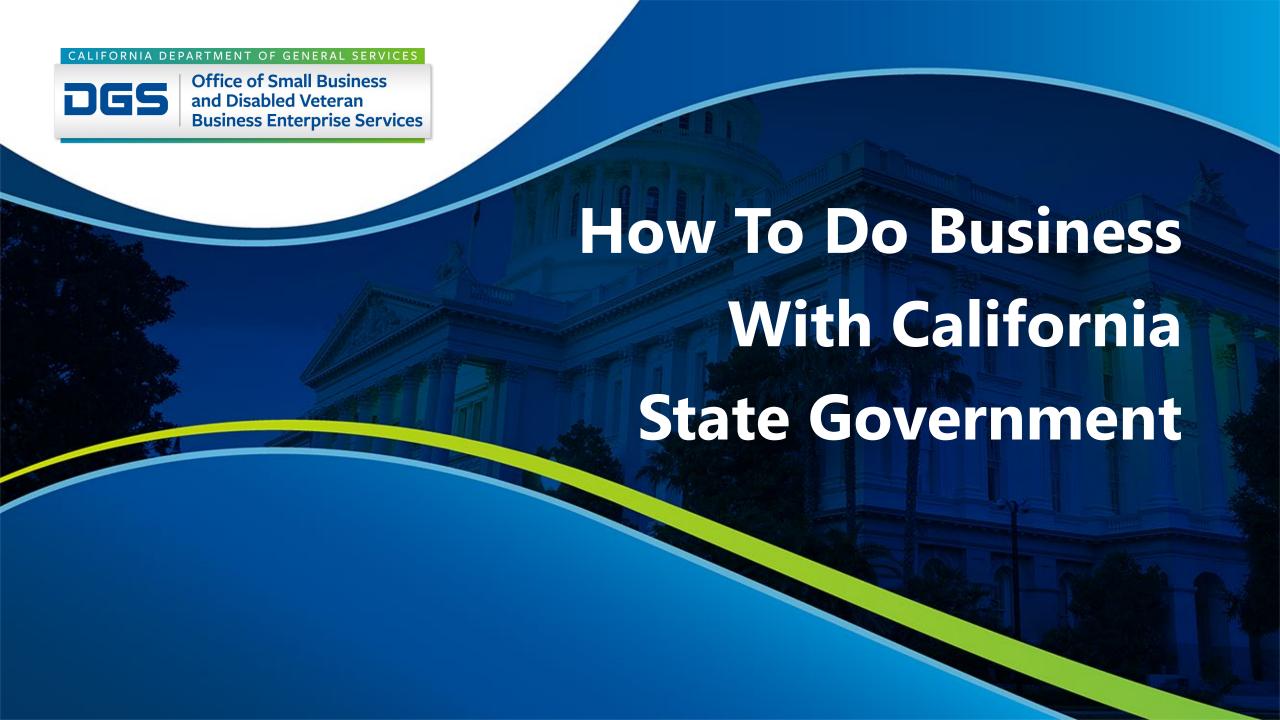
port | 2025 Plan

### California Public Utilities Commission Small and Diverse Business Expo

Supplier Diversity Representatives Contact Information









### **Overview**

- ◆ Introduction to SB/DVBE Program
- Certification Benefits
- Certification Eligibility
- Cal eProcure
- ◆ SB/DVBE Emergency Registry
- Commercially Useful Function

Arribertists



### STATEWIDE PARTICIPATION GOAL

**Small Business** 

**Disabled Veteran Business Enterprise** 

(SB) 25% (DVBE) 3%



2023-24 Fiscal Year



### **State Certifications**

- ◆ Small Business (SB)
- Small Business for the Purposes of Public Works (SB-PW)
- Disabled Veteran Business Enterprise (DVBE)

### **Certification Benefits**

- ◆ 5% bid preference for SBs
- ◆ Up to 5% incentive for DVBEs
- Exclusive contract opportunities
- Prompt Payment

- Reciprocity Partners
- Working with prime contractors



### **Small Business Eligibility Requirements**

- Independently owned and operated
- Not dominant in field of operation
- Principal office located in California
- Owners (or officers for a corporation) domiciled in California
- ◆ 100 or fewer employees

- Gross Annual Receipts (GARs) less than \$18 million (with affiliates)
- \*If a manufacturer, 100 or fewer employees and no GARs cap



### Small Business – Public Works Eligibility Requirements

Same as SB requirements except...

- 200 or fewer employees
- Gross Annual Receipts (GARs)less than \$43 million (with affiliates)

### SB and SB-PW

- Get one certification, not both
- Same benefits
- ◆ SB-PW is *only* for public works
- SB is for everything,including public works





# DVBE Eligibility Requirements

- ◆ At least 10% service disabled
- ◆ Be at least 51% owned by disabled veterans (100% for LLCs)
- Veteran owner(s) must reside in California
- Managed and operated by disabled veterans
- Headquarters in US





### Cal eProcure

- Register your business
- Apply for Certification
- Find solicitations and contracts
- Receive solicitation notifications
- Appear in searches by state buyers

- Post ads seeking prime or subcontracting
- Access public procurement information
- Get training and resources
- No cost



Your home for California's State Procurement and Certification Programs

California State Contracts Register (CSCR)

Search Bid Opportunities

**Q** START SEARCH

#### How do I...

#### Sell to the State

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Learn how to do business with the state of California. Access training resources, watch instructional videos, attend an outreach event.



User ID	
Password	

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# **Supplier Diversity Information**

- Ethnicity, Race, gender, sexual orientation
- Voluntary
- Supports diversity, equity, and inclusion
- Evaluate outreach effectiveness
- Supports targeted outreach efforts
- www.dgs.ca.gov/PD-Supplier-Diversity-Program



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	<b>→</b> ) Login	
♣ New Bidder Registration		& Existing Supplier Registration

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California State Contracts Register (CSCR)

Search Bid Opportunities

Q START SEARCH

#### Welcome to your WorkCenter

Manage your account, certifications, and bid activity

User ID TEST7 Bidder/Supplier ID BID0056770

Show Less -

Cert. ID 2008705

#### Certifications

#### LOUISE KURASHIGE

Outreach Test Co OSDSHELP@DGS.CA.GOV 916/375-4940

Edit Bidder Account

No Certification Record

Get Started

View My Public Certification Profile Manage Certification

#### My Account

A Manage Notification Profile

Manage Diversity Information

#### Certification

Apply For Certification

View My Public Certification Profile

### SB/DVBE Certification

California's Small Business (SB) and Disabled Veteran Business Enterprise (DVBE) **Certification Programs** 

#### **Get Certified**

Procure

How to certify your business on Cal eProcure (video instructions)

Before you begin...

- Read the eligibility requirements for the Small Business and DVBE certifications
- Be prepared to add Keywords and UNSPSCs in the application
- Be prepared to upload the following documents (other documents may be required based on your business structure):
- Complete Federal Tax returns (last 3 years or the number of years the firm has been in business, if less than three) for applicant firm and affiliate(s) which includes all pages, forms, schedules and statements.
- IRS verification of your business's TIN (tax identification number)
- Quarterly Contribution Return & Report of Wages Continuation (Form DE 9C) for business and affiliates for the four most recently completed quarters, if the firm has employees
- Award of Entitlement, eBenefits Service/Benefit Verification, or Retired/Retainer letter (DVBE only)
- · For a full list of required documents:
- o Small Business Document Requirements
- o DVBE Document Requirements

GET CERTIFIED (APPLY OR REAPPLY)



#### **Benefits of Certification**

Inclusion in the state's goal to spend 25 percent of all contract dollars with Small Businesses and 3 percent with DVBEs

# Keywords

- \*\* Keywords describe a good or service, such as *concrete, environmental, or legal*
- Buyers can find your business through keyword searches
- You pick the keywords





# **UNSPSC Example**

Hierarchy	Code	Description
Level 1	14000000	Paper Materials and products
Level 2	14110000	Paper materials and products – Paper products
Level 3	14111500	Paper materials and products – Paper products – Business use print & writing paper
Level 4	14111507	Paper materials and products – Paper products – Business use printing & writing paper – printer or copier paper



# **Find Contract Opportunities**

◆ California State Contracts Register (CSCR)





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Show Less -

#### LOUISE KURASHIGE

Outreach Test Co OSDSHELP@DGS.CA.GOV 916/375-4940

Edit Bidder Account

Certifications cert. ID 2008705					
Certification Type	Application Date	Status	From	То	
DVBE	2021-02-16	Approved	2021-12-27	2023-12-31	
SB-PW	2021-02-16	Approved	2021-12-27	2023-12-31	
SB(Micro)	2018-01-02	Cancelled			
SB(Micro)	2018-01-02	Cancelled			

View My Public Certification Profile Manage Certification

#### My Account

Edit Account

Manage Notification Profile

Manage Diversity Information

#### Certification

Manage Certification

View My Public Certification Profile





Resources -

Quick Links -

Help -

▲ TEST7 -

# **Event Search**

### California State Contracts Register

	=	Posted
vanced Se	arch Criteria	Search
		11.9
~	Manage Saved Searches	Save Search Criteria
		vanced Search Criteria

EVENTS

Showing Results 1-11 of 11



#### California State Contracts Register Department Event Name Event ID **Event Status** water $\equiv$ Posted v End Date From Start Date From Through Through Enter date in the format mm/dd/yyyy Enter date in the format mm/dd/yyyy Item Description water **UNSPSC** codes Service Areas ^ ^ Category Description Service Area ID County = ≡ + Add a new UNSPSC code + Add New Service Area **Contractor License Type** ^ Contractor License Type Description = ♣Add New Contractor License Type

Event ID	Event Name	Department Name	End Date	Status
0000019441	Mammography, Bone Density and Relief Radiology Technician Services PR219008	Dept of Developmental Services	05/10/2021 11:30AM PDT	Posted
0000019215	Grower Liaison for San Bernardino County	Dept of Food & Agriculture	05/10/2021 12:00PM PDT	Posted
0000019435	CHP GOLD RUN AREA OFFICE SHOP CLOTHING SERVICES	Dept of the CA Highway Patrol	05/10/2021 1:15PM PDT	Posted
0000019390	19-27788.FMD.EEC Window Repair/Replacement	Department of General Services	05/10/2021 2:00PM PDT	Posted
0000019214	Grower Liaison for Southern Ventura County	Dept of Food & Agriculture	05/10/2021 2:00PM PDT	Posted
0000018359	20-41049-000 CA Memorial Project	Department of State Hospitals	05/10/2021 2:00PM PDT	Posted
0000019211	Grower Liaison for Fresno and Madera Counties, RFP 21-0001	Dept of Food & Agriculture	05/10/2021 2:00PM PDT	Posted
0000019212	Grower Liaison for Northern Tulare County, RFP 21-0002	Dept of Food &	05/10/2021	Posted

#### **Event Details**

#### Remove & construct concrete bridge, concrete slab, bridge rail & HMA.

#### Details

Event: 05-0L7214

Event ID 05-0L7214

Department of Transportation

Formet/Type: Sell Event / RFx

Event End Date:

Event Version

Published Date: 12/28/2020 12:00AM PST

02/17/2021 2:00PM PST

Description:

040

05-SLO-1-32-8 \*\*\* SAN LUIS OBISPO COUNTY IN MORRO BAY AT TORO CREEK BRIDGE

#### View Event Package

0 8

Post Vendor Ads

View Vendor Ads

#### Contact Information

Maxwell Maurer Phone: 916/227-8224

Email: maxwell.maurer@dot.ca.gov

#### Pre Bid Conference (N/A)

Pre Bid Conference: Non Mandatory

Location: Comments:

UNSPSC Codes		^
UNSPSC Classification	UNSPSC Classification Description	
72141000	Highway and road construction services	
Contractor License Type		^
Contractor License Type	Description	
A	General Engineering Contractor	
C-os	Concrete Contractor	
C-12	Earthwork and Paving Contractors	
D-09	Drilling, Blasting and Oil Field Work	
Service Area		^
Area ID	County	

San Luis Obispo





### **Research Past Purchases**

State Contract and Procurement Registration System (SCPRS)

### **SCPRS**

- Database of state purchasing
- Includes state and non-state dollars
- Public-facing
- Use to conduct market research



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o business with the state of California. Access ces, watch instructional videos, attend an outreach event.

→ Login/Register





Find out more about public purchasing and state agency resources

#### Search For...

- Bid opportunities in the California State Contracts Register (CSCR)
- Past purchases in the State Contracting and Procurement Registration System (SCPRS)



- · Procurement data in the Statewide Procurement Data Dashboards
- State Contracts / Leveraged Procurement Agreements (LPAs)
- · California certified Small Businesses (SB) and Disabled Veteran Business Enterprises (DVBE)
- · Progress Payments View progress payments on Public Works projects
- FI\$Cal Purchase Order Payment History [Instructional Video (2 Mins)] ["How To" Job Aid]

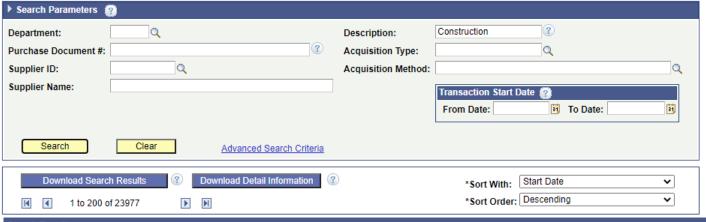
#### **State Agency Resources**

- · Learn about state procurement from the Department of General Services, Procurement Division
- · State Contracting Manuals
- Buying Green Environmentally Preferable Purchasing (EPP)
- · List of State Agencies with Approved Purchasing Authority
- California Procurement and Contracting Academy (CalPCA)

#### FI\$Cal SCPRS Search

The State Contract & Procurement Registration System (SCPRS) tracks overall total contracting dollars and contracts procured by the State of California. The SCPRS data provided is available for informational purposes only. Please contact the awarding department with questions.

System will NOT complete download action without the selection of a single search parameter (e.g., Date, BU, Acquisition Method...) Please be sure to have selected AT LEAST 1 parameter for download execution to complete.



Search Results	Search Results							
Department Name	Purchase Document #	Associated POs	First Item Title	Start Date	End Date	Grand Total	Supplier ID	Supplier Na
Dept of Corrections & Rehab	<u>C5609279</u>		Construction Waste Collection, Removal and Disposal Services	07/01/2020	06/30/2023	\$75,780.00	0000016908	MID STATI RECYCLIN
Department of Motor Vehicles	TA-19280		Autodesk Revit Architecture Engineering Construction Collection IC Government Multi-User Annual Subscription Renewal. Term: 6/20/20 - 6/19/21	06/20/2020	06/19/2021	\$4,237.00	0000028156	BRIDGE N
Dept. Forestry & Fire Protectn	0000149274		2X4X8' STD & BTR DF	06/02/2020	N/A	\$740.71		SCARBOF BLDG SUF
Department of Transportation	CPO-032000001340		Seive 8" Brass with backing cloth:Seive needed for materials testing. Benefits the state by having accurate testing of construction materials.	05/31/2020	05/31/2020	\$282.21	0000085889	GILSON C
Department of Transportation	CPO-032000001347		Cable television services:Benefit to the State, satellite television service needed for summer operations personnel staying on site for the construction season. Purchaser, Joe Lujetic. Commodities, are satellite television se	05/31/2020	05/31/2020	\$198.85	0000002586	DISH NET
Department of Transportation	CPO-032010001585		Plumbing system maintenance or repair:Repair urinal and toilet The reason for this purchase is to provide essential office/business function. These products involve necessary facilities for construction employees. Benefit to the state -	05/31/2020	05/31/2020	\$1,447.88	0000029020	FLETCHE CONTRAC
Department of Transportation	CPO-072000000957		Disinfecting Wipes:	05/31/2020	05/31/2020	\$994.50	0000004906	LOWMARI
Department of Transportation	CPO-072000000953		Purell Refill:	05/31/2020	05/31/2020	\$1,707.51	0000000111	GARZA IN
Department of Transportation	CPO-062000001589		Lab Needs for D05 Lab:120.1000 Auto Rice testing and control system The reason for this purchase is to buy testing equipment to improve quality testing of highway materials used in construction of highways. State will	05/31/2020	05/31/2020	\$7,131.94	0000053202	INSTROTE
Department of	CPO-062000001588		Material testing items for D05 District lab:49DN83- Platform truck with 2500 pound capacity The reason for this purchase is to test HMA	05/31/2020	05/31/2020	\$1 702 04	0000005196	WW GRAI



### **Advocates**

- State employees
- Work in purchasing/procurement
- Manager, analyst, etc.
- Required for departments that spend at least \$100,000/year





### **Advocates**

### **Roles and Responsibilities**

- Help certified business contract with their department
- Assist businesses with prompt payment
- Help buyers use certified businesses
- Seek out new certified businesses

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### Training and Resources

Learn how to pursue contract opportunities with California state government

#### **Getting Started**

Procure

- How to do Business with California State Government an Overview of State Contracting for Small Businesses (SB)
- Como Hacer Negocios con el Gobierno del Estado de California: Una Descripción General de la Contratación Estatal para Pequeñas Empresas (SB)
- . How to do Business with California State Government an Overview of State Contracting for Disabled Veteran Business Enterprises (DVBE)
- Cómo Hacer Negocios con el Gobierno del Estado de California: Una Descripción General de la Contratación Estatal para Empresas de Venteranos Discapacitados (DVBE)
- Commercially Useful Function (video)

#### **Next Steps**

- . I'm Certified, Now What? take next steps to contract with the state (English)
- · Pasos a Seguir Despues de Recibir Certificacion (Español)

#### **Don't Miss Contract Opportunities**

- Learn how to access bid solicitations and place ads (video)
- . Learn how to receive notifications for bid solicitations (video)
- · Learn how to update your certification profile (video)
- · Overview of keywords and UNSPSCs (video)

#### Inside State Contracting

- · Learn about public competitive bidding (video)
- · Learn about acquisition methods
- · Learn about the SB/DVBE Emergency Registry

#### Research and Marketing

- · Learn how to market your business (video)
- Contact a small business and DVBE advocate

#### Resources to Grow Your Business

· Leverage your state certifications for local contract opportunities



HOME » PROCUREMENT DIVISION » RESOURCES » SB, DVBE ADVOCATE DIRECTORY

# Small Business (SB)/Disabled Veteran Business Enterprise (DVBE) Advocate Directory

Search for a small business (SB) and disabled veteran business enterprise (DVBE) advocate to help you pursue contract opportunities with the state.

#### CONTACT

Office of Small Business and DVBE Services

Department of General Services

707 Third Street
West Sacramento, CA 95605
advocate@dgs.ca.gov

#### **DOWNLOAD THE ADVOCATE DIRECTORY**



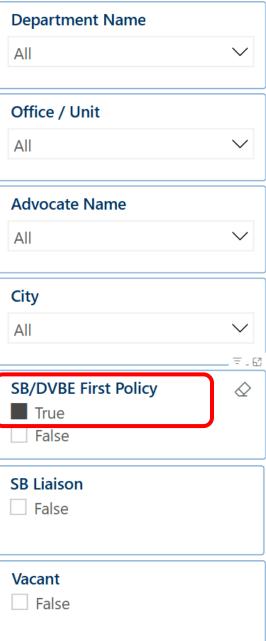
The linked directory above lists the name and contact information of every advocate in the state's departments and agencies.

Almost every agency and department in the state of California has a small business (SB) and disabled veteran business enterprise (DVBE) advocate. The SB/DVBE Advocate is here to help SBs and DVBEs pursue contract opportunities with the department they work for. They work closely with the buyers in their department to include SBs and DVBEs in state procurement.



### **SB/DVBE Advocate Directory**

Department	Unit / Office / Location	Advocate Name	Address	
Air Resources Board	Contracts, Procurement and Grants	Sharon Flores	1001   Street,	
CA Coastal Commission	Business Services	Juanita Evans	455 Market S	
CA Gambling Control Commission		Tammy Helie	2399 Gatewa	
CA Highway Patrol	Business Services	Danielle Gifford	601 North 7t	Ш
CA Natural Resources Agency	Administration and Finance	Danielle Rogers	1416 Ninth S	
CA Natural Resources Agency	Administration and Finance	Kristine Olson	1416 Ninth S	
CA Public Utilities Commission	Executive Division	Luke Wainscott	505 Van Ness	
CA Student Aid Commission	Administration / Business Services	Emilio Martinez	11040 White	Ш
CA Student Aid Commission	Administration / Business Services	Jennifer Donoho	11040 White	
California African American Museum		Jon Lamirault	600 State Dri	
Community Services and Development, Dept of	Business Services	Dan Agpoon	2389 Gatewa	
Consumer Affairs, Dept	Business Services Office	Priscilla F	1625 N. Mark	Ш
Education, Dept of	Technology Services Division	Jessica Spencer	1430 N Stree	
Fair Political Practices Commission	Administration	Carol Bollard	1102 Q Stree	
First 5 California Children and Families Commission. Contracts and Procurement Unit	Contracts and Procurement Unit	Erlynn Cardenas-Jackson	2389 Gatewa	
Franchise Tax Board	Procurement Bureau	Eric Helm-Tillman	P.O. Box 2086	
General Services, Dept of	Office of Business and Acquisition Services	Allison Kenngott	707 3rd Streε	
Health Care Services, Dept of	Administration/Contract Management Unit	Alistair McDuffie	1501 Capitol	
Health Care Services, Dept of	Administration/Contract Management Unit	Christopher Steinwert	1501 Capitol	
Health Care Services, Dept of	Administration/Contract Management Unit	Maksim Lyulkin	1501 Capitol	
Insurance, Dept of	Business Management Bureau	Mark Valim	300 Capitol N	
Insurance, Dept of	Business Management Bureau	Zachery Salvo	300 Capitol N	
Military Department	Procurement Branch	Marcus Delfin	10601 Bear H	
Office of the Inspector General	Business Services	Yishua He	10111 Old Pl	







# SB/DVBE Emergency Registry

- Separate from Cal eProcure
- List of state certified businesses
- Used by state department buyers
- Businesses must be ready for emergency contract work
- Predetermined categories of goods and services

# **Emergency Registry Categories**

- Base camp operations
- Debris removal
- Facilities maintenance/repair
- Fire protection
- Information technology

- Logistics/Transportation
- Medical
- Roadway maintenance
- Traffic control



# **SB/DVBE Emergency Registry**

### To register you will need:

- Certification number
- Emergency categories
- Description of products/services
- Business address
- Contact information both primary and emergency (after hours)



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#### Register in Cal eProcure

Registering your business allows your company to:

- · Subscribe to receive bid opportunity notices based on United Nations Standard Products and Services Code (UNSPSC)
- · Receive and access your bid opportunity invitations
- · Post prime and subcontracting advertisements on bid opportunities
- View your Purchase Order information
- View your Progress Payment status
- Apply and manage California Small Business (SB) and Disabled Veteran Business Enterprise (DVBE) certifications (learn more)

Learn how to register (video instructions)

REGISTER NOW

#### **Find Bid Opportunities**

Bid opportunities are posted in the California State Contracts Register (CSCR).

FIND BID OPPORTUNITIES

#### **SB/DVBE Emergency Contracting**

If you are a certified business capable of providing goods and services to the state during an emergency, learn more about the SB/DVBE Emergency Registry.

#### Additional Resources

## **Commercially Useful Function (CUF)**

You perform CUF if your business is:

- Executing a distinct element of the work
- Performing, managing, or supervising the work
- Performing work that is normal for the firm's business services and functions
- Negotiating price, determining quality and quantity, ordering, installing and making payment
- Not subcontracting a portion of the work greater than expected by industry practices





# **Commercially Useful Function**

- Being used as a passthrough to obtain the appearance of SB/DVBE participation
- Not being used to perform the work as stipulated in the bid
- No longer used to provide goods/services listed in the initial bid response

### Resources

### **Small Business Development Centers (new businesses)**

Business consulting, planning, marketing and access to capital

### **Apex Accelerators (established businesses)**

Government contracting

### **SCORE** (newer businesses)

Business mentorship



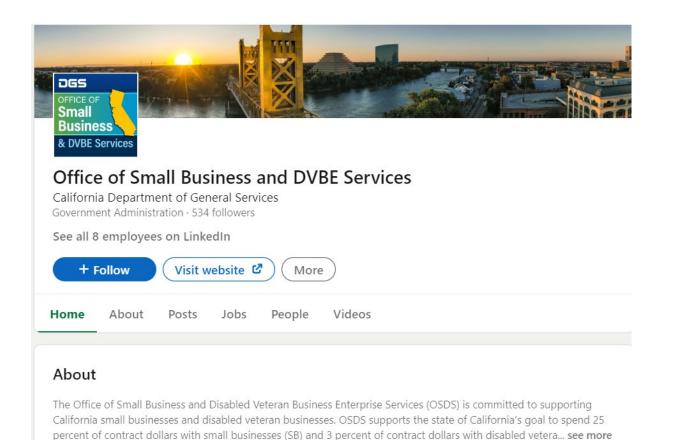
### Review

- ◆ Introduction to SB/DVBE Program
- Certification Benefits
- Certification Eligibility
- Cal eProcure
- ◆ SB/DVBE Emergency Registry
- Commercially Useful Function

Arrive 1888

# Stay Updated on LinkedIn

### Follow us at linkedin.com/company/dgs-osds





### Schedule a Consultation

- Introduction to state contracting
- Cal eProcure registration and certification
- Update Cal eProcure profiles
- Find contract opportunities









# California Public Utilities Commission Small and Diverse Business Expo

Supplier Diversity
Representatives
Contact Information



