

Contra Costa County Business Outreach Program

Program Goals and Requirements

- The goal of each department is to award 50% of eligible dollars to a small, local, or disadvantaged business enterprise as defined below. Eligible dollars include professional services contracts, construction contracts, and purchase orders under \$100,000, unless exempt.
- Purchase Orders and contracts between \$10,000 and \$25,000 must be solicited to a minimum of 3 vendors unless exempt. At least half of vendors solicited will be a small, local, or disadvantaged business as defined below. Departments will maintain records of vendors solicited for reporting purposes.
- Purchase Orders and contracts exceeding \$25,000 will be solicited electronically through a designated web based bidding platform(s), unless exempt.
- On a commodities bid exceeding \$25,000, if the low bidder is not a local vendor, a local vendor may resubmit their bid if they were within 5%.

Exemptions

Although departments should make every effort to provide opportunities to small, local, and disadvantaged businesses, there are circumstances where it may not be possible. The following categories do not need to be reported and are exempt from solicitation thresholds.

- Interagency agreements, licenses, and utility fees paid to other agencies or special districts
- Contracts with private, non-profit agencies and organizations
- Mail and delivery services (FedEx, UPS, DHL, USPS)
- Dues, memberships, registrations, seminars, trainings
- Utility fees
- Pre-employment and fitness for duty exams and screenings
- Fares, transportation (BART, bus, bridge tolls)
- Legal notices
- Transactions utilizing a Cooperative Purchasing Agreement where a contract was competitively bid or negotiated by another government agency or district
- A sole source situation in which the ability to obtain competition does not exist or only one merchant possesses the unique ability to fulfill the requirements
- Emergency purchases as defined by County Ordinance 1108-2.220
- Federally funded construction and Caltrans projects

Eligibility

Businesses meeting the following definitions may be claimed by departments as Outreach Program participants.

Small Business Enterprise (SBE) – independently owned and operated; cannot be dominant in its field of operation; must have its principal office located in California; must have its owners (or officers in the case of a corporation) domiciled in California; AND together with affiliates, be either: a business with 100 or fewer employees, and an average annual gross receipts of \$14 million or less over the previous three tax years, or a manufacturer with 100 or fewer employees.

Local Business Enterprise (LBE) - principal place of business is located within the boundaries of Contra Costa County.

Minority Business Enterprise (MBE) - at least 51% owned and managed on a daily basis by one or more minorities who are citizens or lawful permanent residents of the United States and member(s) of a recognized ethnic or racial group AND its home office is located in the United States.

Women Business Enterprise (WBE) - at least 51% owned and managed on a daily business by one or more women who are citizens or lawful permanent residents of the United States AND its home office is located in the United States.

Disadvantaged Business Enterprise (DBE) - at least 51% owned and managed on a daily business by socially and economically disadvantaged individuals (pursuant to Section 3 of the Small Business Act). DBE certifications are used only for state or federally-funded projects that have DBE goals or requirements.

Disabled Veteran Business Enterprise (DVBE) - at least 51% owned and managed on a daily basis by one or more disabled veterans of the military, naval, or air service of the United States with a service-connected disability of at least 10 percent, and who is also a resident of California; AND a sole proprietorship corporation or partnership with its home office located in the United States that is not a subsidiary of a foreign firm.

Business Outreach Program Roles

The following describes the roles and responsibilities for the program's administration.

Procurement Services Manager – Overall responsibility for the program includes producing and presenting reports to the Board of Supervisors; meeting with department coordinators to provide direction and training; developing reporting tools and materials; promoting the program to the business community; and updating the program and policy documents as needed.

Department Program Coordinator – Responsible for tracking purchases and contracts of the department for the purposes of reporting; attend program meetings and training sessions; provide reports to the Procurement Services Manager; develop department reporting procedures; provide training and guidance to department purchasing and contracting personnel.

Public Works Program Coordinator – Responsible for tracking construction and public project contracts for the Public Works Department; attend program meetings and training sessions; provide reports to the Procurement Services Manager; develop department reporting procedures; provide training and guidance to department purchasing and contracting personnel.

Reporting

The Procurement Services Manager will provide semi-annual reports to the Internal Operations committee and other reports as requested. In addition to a summary of results and description of outreach conducted by the County, the semi-annual Business Outreach Program report will include:

Contract Award Data – All Departments

1. Number of contracts within program limits (including purchase orders, professional services, and construction contracts)
2. Number of contracts meeting program goals
3. Percentage of contracts meeting program goals
4. Dollar value of all contracts
5. Dollar value of contracts meeting program goals
6. Percentage of contracts meeting program goals

Sample Report 1

ACTIVITY TYPE:	Eligible Contracts	Program Awarded Contracts	Program Percentage	Dollar Value of ALL Contracts	\$ Value Program Awarded Contracts	Program Awarded Percentage
Professional/Personal Services	371	241	65%	\$10,277,384	\$6,144,539	59.8%
Purchasing Transactions	1365	441	32.3%	\$10,533,982	\$4,142,575	39.3%
Construction Contracts	7	4	85.7%	\$329,000	\$195,000	59.3%
Total	① 1,743	② 686	③ 39%	④ \$21,140,366	⑤ \$10,452,114	⑥ 49%

Contract Award Data – By Department

1. Number of professional services, purchase orders, and construction contracts combined
2. Number of contracts awarded to program participating businesses
3. Percentage of contracts awarded to program participating businesses
4. Dollar value of all contracts awarded
5. Dollar value of contracts awarded to program participating businesses
6. Percentage of dollar value awarded to program participating businesses

Sample Report 2 - Department Activity Report

Reporting Period: **January - June 2017**

Department: **Sheriff-Coroner**

Contract Type	Total # of ALL	Total # of Program	Program %	Total \$ Value of ALL	\$ Value Program	Program % by \$
Professional Services Contracts	15	8	53.3%	\$325,745	\$169,035	51.9%
Purchasing Transactions	125	60	48.0%	\$420,888	\$325,745	77.4%
Construction Contracts	3	2	66.7%	\$226,968	\$110,846	48.8%
Total	① 143	② 70	③ 49%	④ \$973,601	⑤ \$605,626	⑥ 62%

Solicitations – By Department

1. Number of contracts solicited (quotes, bids, RFP's)
2. Number of contracts awarded to program participating businesses
3. Percentage of contracts awarded to program participating businesses
4. Dollar value of all contracts awarded
5. Dollar value of contracts awarded to program participating businesses
6. Percentage of dollar value awarded to program participating businesses

Department quotes, bids and RFP's	Contracts Solicited	Participants Awarded	Percentage Awarded to Participants	Value of Contracts Solicited	Value Awarded to Participants	Percentage Awarded to Participants
Number of Contracts Solicited	① 7	② 5	③ 71.4%	④ \$258,940	⑤ \$137,238	⑥ 53%

E-Outreach Data

1. Number of bids posted online
2. Number of businesses notified
3. Number and type of program participating businesses notified as a result of online solicitations
4. Dollar value of contracts solicited

5. Number of program participating businesses who viewed to solicitation
6. Number of program participating businesses who responded to the solicitation

Sample Report 3 – Outreach Report

Number of Solicitations	①	25
Notifications Sent	②	85,438
Total Views	③	1,563
Dollar Value	\$ 12,297,933	④
BUSINESS CATEGORY	Viewed	Responded
MBE - Minority Business Enterprise	207	3
WBE - Women Business Enterprise	179	0
SBE - Small Business Enterprise	423	35
LBE - Local Business Enterprise	126	3
DVBE - Disabled Veteran Business Enterprise	61	1
DBE - Disadvantaged Business Enterprise	87	3
TOTAL	⑤ 1,063	⑥ 45

Local Business Impact

1. Number of Purchase Orders Awarded
2. Value of Purchase Orders Awarded

Sample Report 4 – Local Business Report

New Purchase Orders	3,197	①
Value of PO's	\$191,214,974	②
Contra Costa County	Other Bay Area Counties	Outside Bay Area
2,168	685	344
\$22,717,227	\$ 28,937,493	\$139,560,254
12%	15%	73%

Other Information of Value

1. Summary of the types of products and services acquired from program eligible businesses
2. Number of local businesses awarded contracts as a result of the Local Bid Ordinance 1108-2.407
3. Description of outreach actions taken by Purchasing Services
4. Other reports as requested