Introduction

The concept of a district Procurement Fair was born from discussions held by members of the Statewide Small Business Council,[1] Commodities Committee. Committee members, Stephan McGlover and Ezekiel Patten, Jr., proposed the idea to increase small business[2] participation in the actual procurement of commodities and services by Caltrans buyers with on-the-spot buying.

The first Procurement Fair was held April 2004 in District 7 (Los Angeles). The net outcome of the event was over $375,000 in on-the-spot procurements. Four years later, the net outcome of Procurement Fairs held in the year is $1 million annually.

On March 29, 2006, Governor Arnold Schwarzenegger signed Executive Order S-2-06, which states:

> *"Each agency secretary, department director, and executive officer shall ensure that the State's procurement and contracting processes are administered in order to meet or exceed the 25 percent small business participation goal, and identify a Small Business Advocate at the agency, department, board, or commission level encouraging them to develop and share innovative procurement and contracting practices from the public and private sectors to increase opportunities for small businesses."*

To view the entire Executive Order, go to: http://gov.ca.gov/executive-order/556.

On July 21, 2006, Governor Arnold Schwarzenegger signed Executive Order S-11-06, which states in part:

> *"...The Department shall provide marketing tools to the Department's district offices to promote participation by small businesses, including Disadvantaged Business Enterprises, which are ready, willing, and able to participate in contracts; develop and schedule Procurement Fairs that match small businesses with prime contractors and introduce these businesses to departmental contracting officials."*

To view the entire Executive Order, go to: http://gov.ca.gov/index.php/executive-order/2528.

The two Executive Orders provide additional support to continually expand the Procurement Fairs. The objectives of the Procurement Fair are to:

- Promote the Caltrans Small Business Program.
- Provide on the spot procurement and service contracts.
- Increase the number of small businesses in the procurement process.

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[1] The Statewide Small Business Council meets monthly at the Caltrans Office of Civil Rights, Sacramento: http://www.dot.ca.gov/hq/bep.

[2] Unless otherwise noted, "small business (es)" refers to state-certified Small Businesses and Disabled Veteran Business Enterprises and federally-certified Disadvantaged Business Enterprises.

- Increase small business participation in Caltrans contracts.
- Meet the 25 percent Small Business Enterprise (SBE), 3 percent Disabled Veteran Business Enterprise (DVBE), and the 13.5 percent Disadvantaged Business Enterprise (DBE) goals.
- Provide knowledge and experience to small businesses on how to do business with Caltrans.
- Develop relationships between small businesses and Caltrans buyers.
- Promote partnerships with local agencies and other state departments in buying goods and services from small businesses.

This *Guide* provides instruction in three sections: Pre-Event Planning and Preparation, Day of Event, and Post Event Activities. Each section contains essential activities and procedures designed to host a successful Procurement Fair and provide suggestions in the form of *Tips*, which are activities that have been proven helpful.

I. Pre-Event Planning and Preparation

A successful Procurement Fair starts with a three-month work plan.

A. District Director Memo

Submit a request to the District Director requesting support and approval to host a Procurement Fair. The request should provide a summary explanation of the Procurement Fair, benefits, and request their support of the event by allowing CAL-Card holders to participate. Once approval has been secured, prepare a memo for HQ and District Director signature to the Chief Deputy Director, Deputy Directors, Division Chiefs, and District Deputy Directors. This memo will be the first official internal communication about the Procurement Fair and establishes Caltrans commitment to, and support of, the Procurement Fair. See Attachment A.

B. Approval Process

Prepare a work plan for the District Director's approval. Include the purpose, proposed event date, location, tasks, task timelines, number of Caltrans staff needed, local government partners to be invited to participate, Caltrans buyers, and the target number of vendors. Meet with the District Director and present the work plan. Request approval to proceed and obtain commitment from the District Director to deliver the Welcome remarks at the Procurement Fair.

C. Procurement Fair Steering Committee Structure

Form a Steering Committee (Committee). The DSBL is the Committee Chair who, as the single point-of-contact, manages the work plan and facilitates the Committee meetings to ensure all work plan tasks are completed. The Chair

prepares the meeting agendas, maintains the work plan and milestones; and provides leadership and direction to the Committee.

The members should have experience in organizing small business events, or have general event planning knowledge, computer skills, and commodities procurement knowledge.

The following list identifies potential Committee members that should be considered, however, there may be others who may be invited that are unique to the District:

Steering Committee Members and Roles

- Chair – Ensures project delivery and develops and monitors work plan.
- Deputy District Director of Administration – represents the District Director and ensures District divisions are supportive and provide on-the-spot buyers.
- District Resource Manager – ensures the purchasing authority.
- Division of Procurement and Contracts (DPAC) – provides contract guidance with respect to commodity procurements, CAL-Card, and service contracts.
- District Public Information Office – provides guidance on the media outreach and prepares talking points for District Director's welcoming remarks.
- Local Small Business Development Center (SBDC) – provides outreach to small business communities, assists small businesses obtain Department of General Services (DGS) small business certification prior to the event, hosts an exhibit space with informational material, and assist as needed. (Refer to the SBDC website at http://buildcalifornia.org/).
- DGS, Office of Small and Disabled Veteran Business Enterprise Office – provides an outreach representative to distribute event information to small businesses and hosts an exhibit space with informational material.
- District Maintenance and other large Divisions – provides buyers with CAL-Cards and service contract authority.
- Local government partners – provides a forum for local governments to make procurements and meet small business owners.
- Local State governments, such as the California Highway Patrol, Department of Motor Vehicles and local State prison - provides a forum for State government to make procurements and meet small business owners.
- Local utility company (PG&E, AT&T) Diversity Supplier Councils – provides a forum for the utility companies to make procurements and meet small business owners.

Tips: First Committee meeting: Schedule an initial 90-minute Committee meeting with invited members. Prepare an agenda with topics for discussion. Subsequent meetings may be held weekly via teleconference as a cost saving strategy. During the month preceding the Procurement Fair, it may be necessary to convene weekly Committee meetings to ensure all tasks are on schedule for completion.

Each Committee member should be delegated tasks with a practical and achievable timeline in the form of a Task Timeline. See Attachment B. Note that committee members may complete tasks at different times and their completion of these tasks may not necessarily follow the sequence of the steps as prescribed in the *Guide*. All tasks should be monitored for timeliness and satisfactory completion.

D. Communication Strategy/Plan

The Communication Plan is an essential element in obtaining vendor and buyer support to the event. The Communication Plan is a document created by the DSBL that logically identifies:

- Event flyer – besides the common information of date and location, identify the event is free.
- District personnel that need to know of the event, i.e., District Director, Deputy District Director of Administration, Public Information Officer, Facility and Safety Officer.
- Headquarter personnel that need to know, i.e., Director, DPAC, Accounting Division, Public Information Officer.
- Civil Rights, Business Enterprise Unit (BEU) – contact staff at (916) 324-0784, regarding the planned Procurement Fair. Staff will update the Civil Rights online events calendar, in-office planning calendars, and the Small Business Council calendars. The BEU is also the liaison to DGS Communication and Outreach staff (916) 375-4339 and will work to secure the Procurement Fair date on the DGS Events calendar, and will ensure the event date does not conflict with scheduled Procurement Fairs in other districts.
- Media – radio and newspapers to advertise the event under a Public Service Announcement.
- Business, Transportation and Housing Agency – prepare the Week Ahead notice of the District event at minimum two weeks prior to the event.
- Local Assembly and Senate members.
- State and Local government partners – to recruit an event partner and/or to distribute event information to small businesses on their web page and/or to create a link directly to the online registration.
- E-Blast Procurement Fair information to known small businesses.

Create a small business mailing list that consists of:

- Business card information - collected during outreach events.
- Small business organizations, local branches of federal and state agencies, small business development centers, and small business publications.
- Small business public information Website addresses. The websites will assist you in advertising the Procurement Fair.

Tips: Create the sign-in sheet using Excel. It will allow you to sort according to your needs and create more detailed reports, if needed.

When using the Small Business Mailing list, request that small business organizations forward a notice of the Procurement Fair to their members and ask that they post the notice on their respective websites.

Keep the notices electronic to minimize postage expense.

E. Reserve the Procurement Fair Date and Time

When determining an appropriate date and time for the Procurement Fair, consider such factors as:

- The facility availability.
- Verify potential event conflicts by checking the BEU Outreach Calendar, which can be accessed at http://www.dot.ca.gov/hq/bep/small_business_council/SBC_Calendar_of_Events.htm.
- Beginning and end of fiscal year-end are challenging, (i.e. State budget delay).
- District Director's availability to minimize hosting a Procurement Fair that conflicts with other major events.
- Determine the best times within the fiscal year for CAL-Card holders to make procurements, being mindful that CAL-Card procurements cease mid-June.
- July, August and September are months in which the State budget authority may be delayed and, if delayed, will prevent any procurement transactions until it is passed.

Tips: The best days of the week are: Tuesday, Wednesday or Thursdays. The best months are October through mid-May. The best time to begin and end the event is 9:00 AM to about 2:00 PM, with registration beginning at 8:30 AM.

F. Facility

Reserve a facility with a large room (or rooms) to comfortably hold 100 people or more, and to accommodate tables, chairs and electronics as well as non-electronic equipment. Chairs are required for individuals situated at the various tables, along with a chair(s) for the vendor to negotiate sales. If the district office lacks a facility large enough to accommodate the minimum number of attendees, consider other facilities that may be low- or no-cost, such as a local Workforce Investment Board training center, local community chamber office, non-profit businesses, and local government community centers.

In addition to room size, consider the following:

1. Electrical outlets, telephone service, internet access and WIFI.
2. Access for tables, chairs and other equipment in the quantity and sizes needed.
3. Review the Caltrans Conference Policy, Guidelines and Planning Service online at http://onramp.dot.ca.gov/hq/accounting/conferences/policy.htm, which has information covering workshops and conferences.
4. On site parking or nearby parking structure with no cost or low cost parking fee.
5. Prepare a checklist of equipment items and supplies required for the Procurement Fair facilities. See Attachment C.

Tips: Contact the Small Business Development Center, Chambers of Commerce and other business entities that can assist in locating and securing a facility and advertising the event.

The facility and event room lay-out must meet the American with Disabilities Act (ADA) requirements. A list of ADA requirements, along with Guidelines for logos and web standards, can be found at the "Caltrans Web Guide" at http://it.dot.ca.gov/webGuide/standards/.

The district warehouse may also have items that can be used for the event, such as chairs and tables.

G. Event Flyers

Create two flyers, a "save-the-date" flyer and an E-flyer for online registration. See Attachment D. The save-the-date flyer is a simple, one-page flyer that contains primarily the date, time and location of the Procurement Fair. It should be e-blasted the moment the facility is secured. The E-flyer should mirror the registration page on your website and include details of the Fair. Include a link to online registration. (Refer to topic H "Online Registration" for instructions to set up the online registration).

The Caltrans logo is a trademark and must be used on all Procurement Fair flyers. Consider the target audience when designing both flyers for e-distribution. Keep the message to one page so that it can be easily printed and distributed. It is recommended that use of color photos and graphics be kept to a minimum as these are large documents and may be very slow to open when sent via e-mail.

For additional information concerning the Caltrans logo and its proper usage, refer to Deputy Directive 33-R1 Caltrans Logo (Service Mark) and the *Caltrans Web Guide*. If using logos from partnering agencies, receive approval from the partnering agency and verify the logo is "official."

Tips: Pictures can be placed on the district web page where large files are less cumbersome and more easily opened. If a file is very large, ask the webmaster for assistance in compressing or zipping the file so recipients can access it easily.

In an effort to be "user friendly", the E-flyer should contain the most important information first, for example, date, time and location of the Procurement Fair and it should be e-blasted at least six weeks in advance of the event, but only after the registration links and web pages are available.

H. Online Registration

Contact the district webmaster to assist in creating an online registration link to advertise the event that allows attendees to register in advance. See Attachment E. The link supplies the Committee with an attendance estimate and allows the Committee to generate a registration database, sign-in sheets, and name tags for the event. Completion of this task in advance will expedite the registration process. The registration link should be accessible to the public prior to the distribution of the event flyer.

In addition to vendor registration, two forms must be completed and submitted, by the small business, prior to the Procurement Fair:

- Payee Data Record, STD 204; and
- Drug-free Workplace Certification, ADM 3026

Per Government Code § 8355, vendors supplying commodities, equipment and services to the state are required to submit the STD 204 and ADM 3026 forms. See Attachments F.

The webmaster can create e-forms that small business owners can download and complete. The forms online are located on the Intranet in the "CEFs" link and samples can be accessed at the following link: http://cefs.dot.ca.gov.

I. Correspondence

CAL-Card Holder Participation Memo

The success of any Procurement Fair is contingent upon CAL-Card holder participation and the amount of commodities and services procured at the event. To ensure buy-in and to maximize card holder participation, prepare a memo for the District Director's signature to be sent to the District Division Chiefs and Division card holders. Provide them benefits of the Procurement Fair, the support of the Department Director and District Director and include an invitation to the instructional meeting. The memo should provide the preliminary event information and explain the role and responsibilities of each buyer. See Attachment G.

Include instruction on completion for the card holder survey. The survey requests the card holder's name, phone number, Division, a list of items to be procured and their intent to participate in the Procurement Fair. See Attachment H. Request that the card holders return the survey during the CAL-Card instructional meeting.

The memo should encourage delaying procurements to the extent possible for the day of the Procurement Fair. This will allow more business to participating vendors.

Tips: The information gathered on the survey will be placed on the flyer to announce the commodities Caltrans is interested in buying at the Procurement Fair.

Additionally, the survey responses will determine if the District has adequate representation of the Divisions and commodities to procure. The commodities and service requests for each Division will be identified on signs above each Division's table.

J. Buyer and Vendor Primary Roles and Responsibilities

Commodity procurements are made with the VISA CAL-Card. As such, a meeting for card holders and volunteers should be scheduled at least two weeks prior to the Procurement Fair. This meeting will respond to any unanswered questions about the CAL-Card purchasing process, and provide detailed written instructions along with copies of the floor plan, restroom locations and other relevant location specific information. *As a safety precaution, provide copies of the facility evacuation procedures as well.*

Remind card holders that all single procurements are limited to $4,999.99 and all multi-procurements have a $15,000 per day limit, but not with the same firm. The following are examples of prohibited Splitting of Orders that has been taken from the CAL-Card Handbook, Chapter 1, Page 3:

1. Making one or more procurements that in total will circumvent the single procurement limit.
2. Using two types of procurements (i.e., Purchase order and CAL-Card) which in total will circumvent the single procurement limit.
3. Multiple card holders in the same unit acquiring the same goods or services needed by the program from one or more vendors.
4. Acquiring like services for different locations.
5. Card holder making procurements of the same type of item from different vendors.
6. Card holders in separate units procuring various aspects of a remodel project.

Tip: The following link to the CAL-Card Resource Center provides card holder instructions: http://admin.dot.ca.gov/pc/CAL-Card_res_cntr.shtml. For additional Cal-Card information and assistance, call (916) 227-6000 or (916) 227-6065.

K. Data Tracking and Collection

Create a database or spreadsheet to track and document the Procurement Fair activities. The district webmaster can assist in setting up the database. While each district may choose to track information differently, there is certain data that must be collected for reporting purposes. Required data for the Closeout Report is as follows:

1. Name of vendor.
2. Type of business.
3. Certification status, i.e., SBE, DVBE, DBE.
4. List of divisions participating and items sought to procure by commodities and service contracts.
5. Dollar amounts expended by commodities and service contracts.
6. Summary of total procurement and the percentage of goal achievement.

L. Photographer

Record the event in digital pictures. Contact district photography staff to assist on the day of the event. Provide the photographer with the event agenda and a clear description of the types of photos to be taken, such as, the District Director addressing the audience or networking with small businesses buyers.

Photographs can be used in publications such as the *Caltrans News*, to record Caltrans activities and showcase the district's successful small business event. Photos can also be used on subsequent Procurement Fair - E-flyers and posted to the district website.

M. Tote Bags

Provide all attendees with a tote bag. At a minimum, the tote bags should contain the following:

- Agenda.
- Staff business cards.
- Evacuation map.
- Floor plan map with buyers' stations.
- Description of items to be procured at each station.
- Ink pen.
- Bid sheets.
- Current DSBL external contact list.
- Anything else deemed useful to the attendees.

Tips: Seek out a partnering agency, Small Business Council member or local retailer, such as Office Max, to donate tote bags. Add Caltrans promotional items, district-specific information to the tote bag that directs the receiver to helpful information in doing business with the Caltrans, such as a schedule of Mandatory Pre-Bid Meetings, District Small Business Council meetings and Look Ahead reports. Include the program agenda and local agency partner information material, as well.

N. Refreshments

Caltrans does not have authority to purchase and furnish refreshments at public events. However, there may be caterers who would be willing to provide this service at no cost to event attendees in exchange for marketing signage. Ask facility staff and local partners for a list of certified small business caterers in the area that could be approached to provide refreshments the day of the event. Final selection of a caterer should include consideration of small business certification.

If the caterer is not a certified small business, strongly encourage the vendor to contact DGS for certification information and offer them assistance with becoming certified.

O. Signs

As a cost-savings measure, contact district maintenance and district graphic services to make arrangements to use any available equipment, sign holders or stanchions.

If new signs must be made, allow sufficient lead time for signs to be printed. Determine if graphic services are available to create professional-looking signs and documents.

Specify the Division name on the sign, such as "Accounting" or "Maintenance". List the items the Division is seeking to procure on an 8-1/2" x 11" sheet. As the day progresses, you may adjustments to the list by adding or deleting items on the list.

Blank signboard with the Caltrans's logo, station number, program name and list of items to be purchased taped onto sign.

Tips: As a cost-savings consideration, obtain blank signs for the holders so that these can be re-used in the future. Affix lists or numbers on the signs with removable tape or Velcro to coordinate with the floor plan map of designated stations. For additional cost savings, contact other districts that have held Procurement Fairs and ask to borrow their signs and/or stanchions. The cost of inter-Caltrans shipping may be significantly less than the purchase and/or creation of new signs and stanchions.

P. Facility Set-Up

Select one of the two table arrangements for buyer stations:

Buyer at Tables: In this arrangement, the buyers are seated at tables and vendors circulate around the room and place bids at appropriate stations. Each table station will have a sign with the district division represented and a list of items expected to be procured.

Vendor at Tables: In this arrangement, vendors are seated at tables and buyers circulate around the room soliciting bids. Each vendor station will have a sign listing the items their business offers.

Tips: Buyer at Tables has proven to be the most effective arrangement because it maximizes the opportunity for vendors to "meet and greet" each buyer. The small business then develops a relationship with the buyer for future procurements.

In setting up the room, first identify the placement of the registration and the caterer, then set-up the remaining tables.

If you have reserved a facility that requires use of multiple rooms, confine all procurement activity to one main area. Neither the buyer nor the vendor should feel isolated.

Q. Electrical Outlets and Audio/Visual Equipment Checklist

Undoubtedly, a division or vendor will need access to an electrical outlet. Ensure adequate electrical resources. The facility should have access to a copier and printer. The registration desk should be equipped with a microphone and lap top computer.

Tip: Ensure a technical support person familiar with the facility is assigned to be present in case there are any problems with the equipment.

R. Purchase Card Accounting and Requisition System (PCARS) Verification

Contact DPAC staff at (916) 227-6000 not less than 3 days prior to the event, to assist in verifying vendors is registered in PCARS. PCARS verification ensures prompt and complete payment to businesses that have submitted invoices for commodities or services sold during the Procurement Fair.

If the vendor is registered in PCARS, nothing further is required. However, if the vendor is not registered in PCARS, you must send the business owner a copy of form STD 204, Payee Data Record. An original, wet-signed form must be returned to you and forwarded to Accounting, in order for the business to be registered in PCARS.

S. Evaluation/Feedback or SurveyMonkey©

Create a survey for card holders and vendors, and an evaluation sheet for volunteers and guests. Distribute the forms during registration and collect them throughout the Fair. See Attachments I.

Tips: Create an e-survey with SurveyMonkey© (http://www.surveymonkey.com/) that can be e-mailed to all attendees with a request they complete and e-mail it back to you. The survey responses can be easily downloaded and summarized for reporting purposes. See Attachment J. The aforementioned sample surveys can be the content basis for the SurveyMonkey and could eliminate the need for paper surveys.

T. Program Agenda and Talking Points

Program Agenda: Create an event program and/or agenda (See Attachment K) and Welcome and Closing Remarks. See Attachment L.

Tips: Keep to a firm start and end time. Avoid too much detail with timing constraints. Flexibility allows for last-minute changes.

Talking Points: Prepare talking points for scheduled speaker(s). Submit the talking points to the speaker(s) at least one week in advance of the event. See Attachment M.

Tips: The Talking Points should be short and sweet. The keynote speaker should convey the Director's support of the Procurement Fair along with the speaker's support.

II. Day of the Event

All volunteers, buyers, and committee members should arrive at least 90 minutes prior to the start of the event to finalize the following operations:

A. Registration Table

Registration tables should be set up at the main entrance to the Fair and registration materials should include the following:

1. Sign-in sheet of all pre-registered vendors in alphabetical order.
2. Four different color-coded name tags to distinguish between vendors, buyers, pre-registered vendors and pre-registered buyers (see *Tips* below).
3. A supply of blank STD 204 and ADM 3026 forms for walk-in businesses.
4. Tote bags.
5. Bowl or basket to collect business cards.
6. Event surveys to be completed and collected prior to the business exiting the Fair.

At registration, plan to have sufficient tables and staff to accommodate an increase flow of attendees at arrival. A bottleneck at registration causes confusion, delays an on-time start, and gives the general impression of an ill-planned event.

At least three registration tables or stations should be set up; one for the vendors, one for the general public and guests, and one for the buyers. Each table should be clearly identified and have a printed Excel sheet of registered attendees for each group.

The first table should be set up for pre-registered **vendors** and those vendors who will register on-site. For those vendors that are pre-registered, staff will account for attendance, ask for a business card and issue them an appropriately-colored name badge. For those vendors who elect to register on-site, staff will ask they fill out the sign-in sheet, verify certification status, and ask they fill out the STD 204.

During registration, verify that a pre-registered vendor has completed a Payee Data Record (STD 204) and that it is on file with Caltrans (as noted in topic H). If the vendor has never sold a good or provided a service to Caltrans and did not submit a Payee Data Record with their online registration, the vendor <u>must</u> do so during on-site registration before participating in the Fair.

Tips: A representative from DPAC should be available during the event for questions pertaining to PCARS and doing business with Caltrans.

Provide pre-registered vendors and buyers color-coded badges to distinguish pre-registered and on-site registrants. The color-coding indicates whether or not the vendor is entered in the PCARS system. Color-codes can also be used on vendor badges to signify certification status regardless of when they registered. Provide CAL-Card holders and Procurement Fair volunteers with a ledger defining color codes. Since the goal of the Procurement Fair is to support certified small business, and a vendor must be a certified small business to participate in the Procurement Fair and be counted toward the Caltrans small business goal, it is necessary to ensure certification status. Additionally, collecting this information will help when completing the After Action Report and the Closeout Report.

A second table should be set up for the **general public and guests**. For those who have pre-registered, staff should check off their name for attendance purposes and issue them an appropriately-colored name badge. For those who elect to register on-site, staff will ask they fill out the sign-in sheet, collect a business card, and issue an appropriately-colored name badge.

A third registration table should be set up for pre-registered **buyers**, Caltrans staff that should be encouraged to arrive as early as possible to address any unexpected changes or substitutions.

Sign-in sheets should be used to capture the following information:

1. Company name and contact information (including webpage).
2. Name and contact information of company representative attending.
3. Type of business.
4. Certification status and date of certification expiration, if applicable.

Ensure staff is aware and convey to all attendees, that information collected is for reporting purposes only and will not be released to the general public.

Completed Surveys

Designate a response deadline to receive feedback from all attendees and use it to produce a summary of improvements for future Procurement Fairs.

*Tip: Assign a staff person to collect the completed surveys **before** attendees leave the Procurement Fair.*

B. Station Set-Up

Each station should have the following items:

1. Table and three chairs – two for the buyers and one for the vendor.
2. Table signage with a list of items to procure.
3. Bid summary sheets to track purchases.
4. Calculator.
5. Buyers.
6. Extra pens/pencils.
7. Writing pads.
8. CAL-Card holder business cards.

Tips: When setting up each station, bear in mind a primary objective of the Procurement Fair is for Caltrans to facilitate on-the-spot buying of goods and services. Set up each station to accommodate efficient foot traffic flow with adequate space in mind: clearly identifying each station and purpose.

C. Equipment Testing

Test all electronic equipment during the final walk through, as well as the morning of the event.

Tip: Avoid equipment malfunction by testing the equipment often and have a back-up or contingency plan.

D. Welcome and Introductory Remarks

The District Director or designee will deliver the Welcoming and Introductory remarks. Most likely, vendors and attendees will be coming in while the welcoming is going on.

Tip: Keep the remarks short and concise, making sure acknowledgements and thank-yous are made to all involved in making the event a success.

E. Procurement and Networking

Procurements commence immediately after the welcoming and continue throughout the duration of the event.

The following describes types of transactions at the Procurement Fair:

1. Commodity purchases made with State of California VISA CAL-Card.
2. Immediate transactions, however, if there is a question about receiving goods on the spot, the transaction can be completed after the Procurement Fair.
3. Services via the Informal Bid (also known as the three-quote bid process) and a contract. Service contracts for less than $100,000 can be started at the Procurement Fair but must be completed within 30

calendar days after the event for the service totals to be included in the reporting.

Tips: As Caltrans buyers participating in the Procurement Fair, be prepared to procure goods or services from vendors on the day of the Procurement Fair. Caltrans discourages having buyers merely solicit information from the vendor with no intent to procure. The buyer may not actually need the goods or service the vendor is selling that day, however, the buyer should remain courteous and professional and accept the solicitation with a response such as, "I may not need your service or product now, however, I will gladly retain your materials and pass on the information to other buyers."

F. Bid Summary Sheets

Throughout the event make copies of all bid summary sheets from each Division's station. Tabulate all procurements made to obtain a preliminary total of the day's activities.

III. Post Event Activities

Prepare a post event report to capture "Best" or "Promising Practices". The post event report includes an After Action Report and a Closeout Report and should be submitted to a designated Civil Rights BEU staff person.

A. Debriefing

- Congratulations, you have facilitated a Procurement Fair!
- Conduct a final Committee meeting within 10 business days of the Procurement Fair to debrief. Provide preliminary Procurement Fair procurement results to the committee.
- Discuss the successes and opportunities for improvement.
- Share the survey results and comments.

Tips: The debriefing is a good time to plan for the next Procurement Fair so it can be placed on the calendar of events for both the district and BEU master planning calendar. Also, the event details are fresh in staff's memory and help add and maintain momentum.

B. After Action Reports

Prepare and submit an After Action Report to Civil Rights within 15 business days after the Procurement Fair. Include any comments collected during the Committee's debriefing. Customize the report template, as needed, to address your specific comments. See Attachment N.

Contact the PCARS/District Budget Officer approximately 21 days after the Procurement Fair for a more accurate and complete accounting of all

transactions that were conducted the day of the Procurement Fair as well as those transactions that were the result of buyer and vendor participation after the Procurement Fair.

C. Closeout Reports

Prepare and submit the standardized closeout report and include a copy of the tally sheets and the overall total of the goods and services procured by card holders. See Attachment O. In instances where a Division's procurement is tentative and requires further approval, encourage the buyer to complete the transaction within the 30-day timeframe and to notify you of the completed transaction at the earliest date possible.

Also include a summary of the survey responses from buyers and vendors. Include with the closeout report, your recommendation for a future Procurement Fair.

D. Thank You Notes

Email a thank you note to all buyers, vendors and partners for their participation and assistance in making the Procurement Fair a success.

E. Procurement Fair Web Page

Remove the Procurement Fair web page, registration and related links within 10 days of the Procurement Fair.

Note: This *Procurement Fair Guide* serves solely as a guide for districts to use as a tool for conducting Procurement Fairs. Not all sections of the Guidelines are ideal for every district. It is important to work with your District Director to determine your district and general community needs. This Guide is subject to change.