

AGENDA

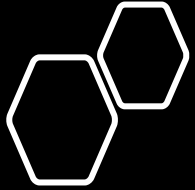
Project:	Business Planning RFP #6100056881	Meeting Date:	11/4/2022 1:30 pm
Facilitator:	Donna Leitzel/Audrey Smith	Place/Room:	MS Teams

- Introductions
Project Overview
Donna Leitzel

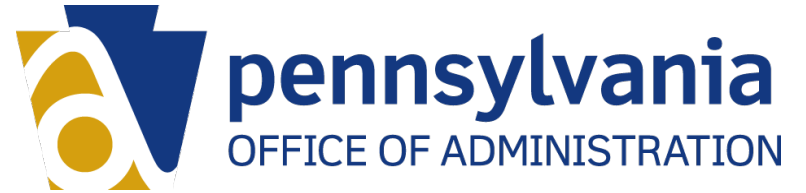
- BDISBO Slide Presentation
Goal Setting
Audrey Smith

- Vendor Questions & Answers
Audrey Smith
Donna Leitzel

- Closing
Thank you
Donna Leitzel



Business
Planning
Services
RFP Overview



Business Planning Services

The Governor's Office of Administration (OA) is requesting technical submittals for services to support the OA Information Technology Office (OIT) by providing business planning services such as:

- planning
- strategic roadmapping
- business relationship management
- project management
- technology consulting
- and business analysis

The services in this RFP are split into two categories, Core Services and On-Demand services.

Business Planning Services

Core Services

The core services provide **IT strategy consulting services** such as, business planning and architecture consulting services in support of OA OIT and align with OA OIT's strategic plan.

The selected Offeror will support and provide consulting services to OA OIT's Technology Business Office's project intake, review, and approval process. This process involves project review and approvals for all projects for Delivery Centers and OA Enterprise projects.

The selected Offeror shall perform the Core Services as described in **Section I-5. A. Core Services** of the RFP.

Business Planning Services

On-Demand Services

OA OIT may have the need to **augment staff** in support of approved projects where the Commonwealth does not have enough resources to support.

On demand positions include:

- **Business Analyst(s)**
- **Project Manager(s)**
- **Scrum Master**
- **Technical Expert(s)**
- **Business Architect(s)**
- **Quality Assurance Specialist(s)**
- **TBM Business Management (TBM) Analyst(s)**
- **Trainer(s)**

The selected Offeror shall have the capacity to scale resources to perform the on-demand services as described in **Section I-5. B. On-Demand Services** of the RFP.



pennsylvania

BUREAU OF DIVERSITY, INCLUSION
AND SMALL BUSINESS OPPORTUNITIES

6100056881 Business
Planning RFP

Issuing Officer –
Jodi Wilson
jodwilson@pa.gov

November 4 ,2022 1:30 PM

What's the Point?



	Equality is everyone getting a pair of shoes.
	Diversity is everyone getting a different type of shoe.
	Equity is everyone getting a pair of shoes that fits.
	Acceptance is understanding we all wear different kinds of shoes.
	Belonging is wearing the shoes you want without fear of judgment.

Engaging Vendors that are representative of the communities served



Small Diverse Business Enterprise (SDB) and Veteran Business Enterprise (VBE) Jaggaer References

Description

- #6. Small Diverse Business (“SDB”) and Veteran Business Enterprise (“VBE”) Participation
- #7. New SDB and VBE Goal Information Session and Pre-Proposal Conference
- #14. Proposal Format
- #15. Mandatory Responsiveness Requirements

Questions – RFP Questions

- Group 1.2 – Small Diverse Business Participation
- Group 1.3 – Veteran Business Enterprise Participation

A Bidder/Offeror’s failure to meet the SDB participation goal in full and the VBE participation goal in full, or their failure to receive an approved Good Faith Efforts waiver for any unmet portion of either the SDB or VBE participation goal will result in the rejection of the Bid or Proposal as nonresponsive



Solicitation Specific Goals



6100056881	SDB	VBE
	15%	3%

- Available subcontracting opportunities across the entire state for the applicable services,
- Availability of DGS-verified SDB/VBEs to perform commercially useful functions, and
- Historical analysis of similar projects within the last 3 years.

Primes are welcome to exceed the goal!



SDB and VBE Classification

Vendors must self-certify as a Small Business (SB) prior to SDB/VBE validation.

SB Eligibility Requirements

- The business must be a for-profit, United States business.
- The business must be independently owned.
- The business may not be dominant in its field of operation.
- The business may not employ more than 100 full-time equivalent employees.
- The business may not exceed three-year average gross revenues of \$38.5 Million, regardless of business type (effective 11/1/2018).

Small Diverse Business (SDB)

Goal oriented

- Woman Business Enterprise (WBE)
- Service-Disabled Veteran Business Enterprise (SDVBE)
- Minority Business Enterprise (MBE)
- LGBT Business Enterprise (LGBTBE)
- Disability-Owned Business Enterprise (DOBE)

Veteran Business Enterprise (VBE)

Goal oriented

- Veteran Business Enterprise (VBE)
- Service-Disabled Veteran Business Enterprise (SDVBE)

SDBs and VBEs must be certified/valid as of bid close due date and time.



Finding SDB/VBE vendors

- <http://www.dgs.internet.state.pa.us/suppliersearch>
- Access Search Guide - <https://www.dgs.pa.gov/Small%20Diverse%20Business%20Program/Documents/Finding%20SBs%20and%20SDBs.pdf>
- Supplier Search assistance available from Issuing Officer or Bureau of Diversity Procurement Liaison



Finding SDBs and VBEs

Utilization Compliance will be closely monitored and enforced

The screenshot shows the 'Supplier Search' page on the Pennsylvania Department of General Services website. The page includes a navigation bar with 'Home', 'PA eMarketplace', and 'Search Contracts'. A note explains that searches will include suppliers qualified for ITQ contracts and registered with the Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO). There are two search sections: 'Quick Search' with a text input for 'Supplier Name or SAP Number' and 'Search'/'Reset' buttons; and 'Advanced Search'. At the bottom, there is a table header with columns: 'Supplier (click on name to display full record)', 'Contact', 'Address', 'SB Exp Date', 'SDB', and 'COSTARS'. Utility buttons for 'Export to Excel' and 'Reset Search Criteria' are also present.

<http://www.dgs.internet.state.pa.us/suppliersearch>



Quick Search

Note: The below searches (Quick Search and Advanced Search) will search suppliers who are qualified for one or more Invitation to Qualify (ITQ) Contracts AND suppliers registered with the Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO) as a small business or small diverse business. Use the Quick Search to search by Vendor Name or Vendor Number. Use the Advanced Search to search by Small, Small Diverse, ITQ Contracts, COSTARS and UNSPC codes.

Quick Search

Supplier Name or SAP Number

IMPORTANT: Always click Reset prior to a new search to clear parameters from previous searches

Advanced Search

Show entries

Supplier (click on name to display full record)	Contact	Address	SB Validity Dates	SDB Validity Dates	VBE Validity Dates	COSTARS
21ST CENTURY MEDIA NEWSPAPER LLC	ROBERT BUTKINS sales@nittanyvalley.com					No
22 GROUP, LLC ()	Caroline M. Harper	757 PUBLIC RD	9/23/2019-	9/23/2019-		No

To search or browse ALL Small and Small Diverse Businesses by Name OR 6-digit SAP Number (option also available through Advanced Search)



Advanced Search

Hierarchy	Category Number
Segment	44000000
Family	44120000
Class	44121700
Commodity	44121706

Supplier Classifications

- Minority Business Enterprise
- Woman Business Enterprise
- LGBT Business Enterprise
- Disabled-Owned Business Enterprise
- Service-Disabled Veteran Business Enterprise
- Veteran Business Enterprise
- Small Business
- Stocking Supplier
- Non-Stocking Supplier
- Select all Classifications
- Select all Small Diverse Business Classifications

Find only vendors that have all selected classifications
 Find only vendors that have at least one selected classification

UNSPSC Description

When searching by UNSPSC code, only enter the first 6 digits (UNSPSC Class Level) as the last 2 digits (Commodity Level) are not tracked in this database. Or, type in any part of a UNSPSC code description to find vendors who have a code that matches. ex: Searching for "landscaping" will find vendors who have selected any code that has "landscaping" anywhere in the description. For more information visit [UNSPSC > Home](#)

UNSPSC Codes

- 10000000 - Live Plant and Animal Material and Accessories and Supplies
- 11000000 - Mineral and Textile and Inedible Plant and Animal Materials
- 12000000 - Chemicals including Bio Chemicals and Gas Materials
- 13000000 - Resin and Rosin and Rubber and Foam and Film and Elastomeric Materials
- 14000000 - Paper Materials and Products
- 15000000 - Fuels and Fuel Additives and Lubricants and Anti corrosive Materials
- 20000000 - Mining and Well Drilling Machinery and Accessories
- 21000000 - Farming and Fishing and Forestry and Wildlife Machinery and Accessories
- 22000000 - Building and Construction Machinery and Accessories
- 23000000 - Industrial Manufacturing and Processing Machinery and Accessories
- 24000000 - Material Handling and Conditioning and Storage Machinery and their Accessories and
- 25000000 - Commercial and Military and Private Vehicles and their Accessories and Components

Find only vendors that have all selected UNSPSC codes
 Find only vendors that have at least one selected UNSPSC code

Select one or more classifications. To pull only SDBs, check "Select all Small Diverse Business Classifications" below. To Include SBs, check "Small Business".

Click arrow to expand Segment for additional codes

OR
Browse and select one or more codes. Don't know the codes you want? Search for codes at www.UNSPSC.org.



UNSPSC Commodity Code Search



Find A Partner

Menu

UNv24.0301 of the UNSPSC Codeset is now available. [Access codesets.](#)

Search the Code

Version 24.0301
Code Number: (2-8
digits)

Code Name:

Welcome

The **United Nations Standard Products and Services Code® (UNSPSC®)**, managed by GS1 US® for the UN Development Programme (UNDP), is an open, global, multi-sector standard for efficient, accurate classification of products and services.

The UNSPSC offers a single global classification system that can be used for:

- Company-wide visibility of spend analysis
- Cost-effective procurement optimization
- Full exploitation of electronic commerce capabilities



UNSPSC Commodity Code Search

UNSPSC Code List

Hierarchy	Category Number	Name
Segment	<u>44</u> 000000	Office equipment and accessories & supplies
Family	44 <u>12</u> 0000	Office supplies
Class	4412 <u>17</u> 00	Writing Instruments
Commodity	441217<u>06</u>	Wooden pencils

UNSPSC Codes

- ▶ 43000000 - Information Technology Broadcasting and Telecommunications
- ▶ 44000000 - Office Equipment and Accessories and Supplies
 - ▶ 44100000 - Office machines and their supplies and accessories
 - ▶ 44110000 - Office and desk accessories
 - ▶ 44120000 - Office supplies
 - ▶ 44121500 - Mailing supplies
 - ▶ 44121600 - Desk supplies
 - ▶ 44121700 - Writing instruments
 - ▶ 44121800 - Correction media
 - ▶ 44121900 - Ink and lead refills
 - ▶ 44122000 - Folders and binders and indexes
 - ▶ 44122100 - Fastening supplies



UNSPSC Commodity Code Search

Write down
your code
selections



[HOME](#) [FAQS](#) [SUBSCRIBE](#) [LIBRARY](#) [CODESET-DOWNLOADS](#) [INITIATIVES](#) [EDUCATION](#) [FINDAPARTNER](#)

Version 24.0301

Search Code

Search Title

Code	Title
31211900	Paint applicators and painting accessories
60121001	Paintings
60121225	Watercolor painting mediums
60124101	Multicultural painting products
72151300	Painting and paper hanging services
72151301	Residential painting service
72151302	Commercial painting service
72151303	Industrial painting service
72151304	Aircraft painting service
72151305	Bridge painting service
72151307	Ship painting service
73181104	Painting services
78181501	Vehicle body repair or painting service
78181836	Aircraft fixed wing coating and painting service
86121502	Painting



Advanced Search

Use multiple filters to restrict your search results to exactly what and where you need.

PA Counties

- Grant County
- Clearfield County
- Clinton County
- Columbia County
- Crawford County
- Cumberland County
- Dauphin County
- Delaware County
- Elk County
- Erie County

Select all Counties

Find only vendors that s

Find only vendors that s

Supplier Classifications

- Minority Business Enterprise
- Woman Business Enterprise
- LGBT Business Enterprise
- Disabled-Owned Business Enterprise
- Service-Disabled Veteran-Owned Business Enterprise
- Veteran Business Enterprise
- Small Business
- Stocking Supplier
- Non-Stocking Supplier

UNSPSC Codes

- 30100000 - Structural components and basic shapes
- 30110000 - Concrete and cement and plaster
- 30120000 - Roads and landscape
- 30130000 - Structural building products
- 30140000 - Insulation
- 30150000 - Exterior finishing materials
 - 30151500 - Roofing materials
 - 30151600 - Roofing accessories
 - 30151700 - Rain gutters and accessories
 - 30151800 - Siding and exterior wall materials
 - 30151900 - Finishing materials and products
 - 30152000 - Fencing

Find only vendors that have all selected UNSPSC codes

Find only vendors that have at least one selected UNSPSC code



Search Results

Advanced Search

Show 25 entries

Export to Excel Reset Search Criteria

Supplier (click on name to display full record)	Contact	Address	SB Validity Dates	SDB Validity Dates	VBE Validity Dates	COSTARS
ADVANCED AUDIO VISUAL SALES INC	JOHN GREENE DIRECTOR OF SALES John.Green@advancedav.com (Phone) 610-719-6194 (Fax) 610-692-8421	208 CARTER DRIVE SUITE 7 WEST CHESTER, PENNSYLVANIA 19382 (Phone) 610-719-6194				No
ADVANCED BUILDING CONTROLS LLC (DBA ADVANCED BUILDING CONTROLS LLC)	Craig Connelly CCONNELLY@ADVANCEDBLDGCNTOLS.COM (Phone) 215-520-9964	PO BOX 303 HOLICONG, PENNSYLVANIA 18928 (Phone) 215-520-9964	2/11/2019-2/28/2021			No
ADVANCED BUILDING PERFORMANCE INC ()	Pei Pei Cavalier PEIPEI@ABPCX.COM (Phone) 301-760-9989	11225 HURDLE HILL DR POTOMAC, MARYLAND 20854 (Phone) 301-760-9989 abpcx.com	12/20/2019-12/20/2021	12/20/2019-12/20/2021		No
ADVANCED CLEANING SOLUTIONS LLC (ADVANCED CLEANING SOLUTIONS LLC)	Nicholas Ward cleanteam@advancedsolutionsPA.com (Phone) 610-597-0012	PO BOX 3223 ALLENTOWN, PENNSYLVANIA 18106	2/27/2018-3/21/2020	2/27/2018-3/31/2020	2/27/2018-3/31/2020	No

Certified Small Businesses

- Advanced Building Controls LLC
- Advanced Building Performance Inc
- Advanced Cleaning Solutions LLC

Small Diverse Businesses

- Advanced Building Performance Inc
- Advanced Cleaning Solutions LLC

Veteran Business Enterprise

- Advanced Cleaning Solutions LLC



Supplier Profile

Name:	ADVANCED CLEANING SOLUTIONS LLC
SAP Number:	511377
Doing Business As:	ADVANCED CLEANING SOLUTIONS LLC
Other Names:	
Keywords:	
Web site:	
SB Validity Dates:	02/27/2018 - 03/31/2020
SDB Validity Dates:	02/27/2018 - 03/31/2020
VBE Validity Dates:	02/27/2018 - 03/31/2020
COSTARS Participant:	No

← SB, SDB & VBE Expiration Dates

Supplier Classifications

- Small Business
- Service-Disabled Veteran Business Enterprise
- Veteran Business Enterprise

← SB, SDB & VBE Classifications

Contact Information

Contacts

Contact Type	Contact Details	Phone
CORPORATE	Email: CLEANTEAM@ADVANCEDSOLUTIONSPA.COM	
SB MAIN	Nicholas Ward Title: Email: cleanteam@advancedsolutionsPA.com	610-597-0012



Search Results

Advanced Search						
Show <input type="text" value="25"/> entries <input type="button" value="Export to Excel"/> <input type="button" value="Reset Search Criteria"/> 						
Supplier (click on name to display full record)	Contact	Address	SB Validity Dates	DB Validity Dates	VBE Validity Dates	COSTARS
ADVANCED AUDIO VISUAL SALES INC	JOHN GREENE DIRECTOR OF SALES John.Green@advancedav.com (Phone) 610-719-6194 (Fax) 610-692-8421	208 CARTER DRIVE SUITE 7 WEST CHESTER, PENNSYLVANIA 19382 (Phone) 610-719-6194				No
ADVANCED BUILDING CONTROLS LLC (DBA ADVANCED BUILDING CONTROLS LLC)	Craig Connelly CCONNELLY@ADVANCEDBLDGCNTOLS.COM (Phone) 215-520-9964	PO BOX 303 HOLICONG, PENNSYLVANIA 18928 (Phone) 215-520-9964	2/11/2019-2/28/2021			No
ADVANCED BUILDING PERFORMANCE INC ()	Pei Pei Cavalier PEIPEI@ABPCX.COM (Phone) 301-760-9989	11225 HURDLE HILL DR POTOMAC, MARYLAND 20854 (Phone) 301-760-9989 abpcx.com	12/20/2019-12/20/2021	12/20/2019-12/20/2021		No
ADVANCED CLEANING SOLUTIONS LLC (ADVANCED CLEANING SOLUTIONS LLC)	Nicholas Ward cleanteam@advancedsolutionsPA.com (Phone) 610-597-0012	PO BOX 3223 ALLENTOWN, PENNSYLVANIA 18106	2/27/2018-3/31/2020	2/27/2018-3/31/2020	2/27/2018-3/31/2020	No

Certified Small Businesses

- Advanced Building Controls LLC
- Advanced Building Performance Inc
- Advanced Cleaning Solutions LLC

Small Diverse Businesses

- Advanced Building Performance Inc
- Advanced Cleaning Solutions LLC

Veteran Business Enterprise

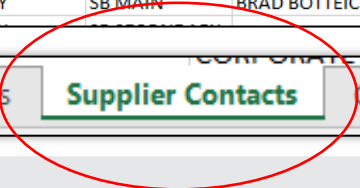
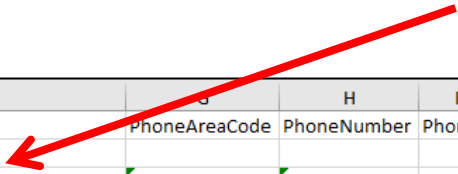
- Advanced Cleaning Solutions LLC



Excel Export Results – Supplier Contacts

Excel Export Results includes Vendor ID, Supplier Name, Contact Name, Email, Phone, Fax

	A	B	C	D	E	F	G	H	I	J	K
1	SAP Number	Supplier Name	Contact Name	Name	Title	Email	PhoneAreaCode	PhoneNumber	PhoneEx	FaxAreaCo	FaxNumber
2	104279	CA WEISS SALES LLC	CORPORATE			caweiss@comcast.net					
3	104279	CA WEISS SALES LLC	SB MAIN	KRISTY ZARICHNIAK		kristyz@comcast.net	610	4588864		610	4588875
4	119565	DUFF SUPPLY COMPANY	CORPORATE	ALEX DUFFINE	VP	DFRANK@DUFFCOMPANY.COM	610	2754453	147	610	2796299
5	119565	DUFF SUPPLY COMPANY	REMITTO	BARB COHEN		bcohen@duffco.com	610	2754453	149	610	2756761
6	119565	DUFF SUPPLY COMPANY	SB MAIN	ALEX DUFFINE		aduffine@duffco.com	610	2754453			
7	119565	DUFF SUPPLY COMPANY	SB SECONDARY			info@duffco.com					
8	122594	HOUCK SERVICES INC	CORPORATE			jherrold@houcks.com					
9	122594	HOUCK SERVICES INC	SB MAIN	JARROD HERROLD		jherrold@houcks.com	717	6573302		717	6579805
10	122594	HOUCK SERVICES INC	SB SECONDARY			kgussler@houcks.com					
11	134717	PENN STATE ELECTRIC MECHANICAL	CORPORATE			razmataz33@aol.com					
12	134717	PENN STATE ELECTRIC MECHANICAL	SB MAIN	RAZ SUGARWALA		razmataz33@aol.com	717	2992090		717	2992297
13	134717	PENN STATE ELECTRIC MECHANICAL	SB SECONDARY			ksing6027@yahoo.com					
14	135270	BARBARA J SALES ASSOC INC	CORPORATE			barb@barbarajsles.com					
15	135270	BARBARA J SALES ASSOC INC	SB MAIN	BARBARA SMITH		barb@barbarajsales.com	412	5233398		800	8137122
16	135270	BARBARA J SALES ASSOC INC	SB SECONDARY			willsmith@willjservices.com					
17	137893	IDA YEAGER SALES INC	CORPORATE			idayeagersales@zoominternet.net					
18	137893	IDA YEAGER SALES INC	SB MAIN	IDA LAQUATRAYEAGER		idayeagersales@zoominternet.net	724	4525260		724	4521072
19	144061	CONSTRUCTION TOOL SERVICE INC	CORPORATE			ehuss@constructiontoolservice.com					
20	144061	CONSTRUCTION TOOL SERVICE INC	SB MAIN	BETTY CONNELLY		bconnelly@constructiontoolservice.com	412	6816673		412	6819185
21	144061	CONSTRUCTION TOOL SERVICE INC	SB SECONDARY			bcgoodwork@aol.com					
22	145576	BURKE & MICHAEL INC	CORPORATE			MARYFRANCES@BURKEANDMICHAEL.COM					
23	145576	BURKE & MICHAEL INC	SB MAIN	MARY FRANCES HOGAN		maryfrances@burkeandmichael.com	412	3212301		412	3214582
24	153927	COOPER TRADING INC	CORPORATE			cti@ctipa.com					
25	153927	COOPER TRADING INC	SB MAIN	PETER COOPER		pete@ctipa.com	724	8618830		724	8618832
26	153927	COOPER TRADING INC	SB SECONDARY			debbie@ctipa.com					
27	157009	CONTRACT HARDWARE AND SUPPLY	CORPORATE			cristil@chsupplyinc.com					
28	157009	CONTRACT HARDWARE AND SUPPLY	SB MAIN	BRAD BOTTEICHER		bradb@chsupplyinc.com	814	9412340		814	9412342



Suppliers	Supplier Addresses	Supplier Contacts	Counties	Supplier Classifications	ITQs	ITQ Contracts	UNSPSC Codes
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Upcoming Supplier Search Training

The training will focus on the basics of the supplier search process including recognizing the UNSPSC Codes Structure, accessing the DGS Supplier Search Database and Searching for Small, Small Diverse and Small Veteran Owned Businesses to gain a better understanding of supplier search results.

The 30-minute sessions will be offered via Teams on-line presentations on the following dates in 2022: **(No RSVP Required)**

Targeted Audience (External): Potential prime contractors that conduct business with the commonwealth who want to learn the basics of finding DGS certified small diverse and veteran owned businesses.

- Thursday, October 13th, 10:00 am -10:30am
- Thursday, October 27th, 10:00 am -10:30am

Microsoft Teams meeting

Join on your computer or mobile app

[Click here to join the meeting](#)

Meeting ID: 293 754 842 172

Passcode: Uhqm2D

[Download Teams](#) | [Join on the web](#)

Or call in (audio only)

[+1 267-332-8737,,690952530#](#) United States, Philadelphia

Phone Conference ID: 690 952 530#

[Find a local number](#) | [Reset PIN](#)

Recording or transcription of this meeting may not occur without consent of all participants, as required by law, and must adhere to Commonwealth policies. For more information click the legal link.

[Learn More](#) | [Meeting options](#) | [Legal](#)

<https://www.dgs.pa.gov/Small%20Diverse%20Business%20Program/Pages/News-Media.aspx>



New Forms and Processes

Attachment A

- SDB/VBE Instructions – *SDB-1/VBE-1 READ*
- SDB/VBE Participation Submittal – *SDB-2/VBE-2*
- SDB/VBE Utilization Schedule – *SDB-3/VBE-3*
- Letter of Commitment – *SDB 3.1/VBE-3.1*
- Guidance for Good Faith Effort (GFE) Waiver – *SDB-4/VBE-4 READ*
- GFE Waiver – *SDB-5/VBE-5*



SDB Submittal Instructions – SDB-1

SDB-1 INSTRUCTIONS FOR COMPLETING THE SMALL DIVERSE BUSINESS (SDB) PARTICIPATION SUBMITTAL AND SDB UTILIZATION SCHEDULE.

PLEASE READ BEFORE COMPLETING THESE DOCUMENTS
Bidders/Offerors do not need to return SDB-1 with their SDB Participation Submittal

The following instructions include details for completing the SDB Participation Submittal (SDB-2) which Bidders or Offerors must submit in order to be considered responsive.

The following instructions also include details for completing the SDB Utilization Schedule (SDB-3), which Bidders or Offerors must submit for any portion of the SDB participation goal the Bidder or Offeror commits to meeting.

A Bidder/Offeror's failure to meet the SDB participation goal in full or their failure to receive an approved Good Faith Efforts waiver for any unmet portion of the SDB participation goal will result in the rejection of the Bid or Proposal as nonresponsive.

- I. **SDB Participation Goal:** The SDB participation goal is set forth in the eMarketplace advertisement and also in the Notice to Bidders. The Bidder/Offeror is encouraged to use a diverse group of subcontractors and suppliers from the SDB classifications to meet the SDB participation goal.
- II. **SDB Eligibility:**
 1. **Finding SDB firms:** Offerors can access the directory of **DGS-verified** SDB firms from the DGS Supplier Search directory at: <http://www.dgs.internet.state.pa.us/suppliersearch>.
 2. **Only SDBs verified by DGS** and as defined herein may be counted for purposes of achieving the SDB participation goal. In order to be counted for purposes of achieving the SDB participation goal, the SDB firm, including an SDB prime, **must be DGS-verified for the services, materials or supplies that it has committed to perform on the SDB Utilization Schedule (SDB-3). A firm whose SDB verification is pending or**



SDB Submittal – SDB-2

SDB-2 SDB PARTICIPATION SUBMITTAL

CRITICAL
✓ Check One, and Only One, Box

CLICK ONE, AND ONLY ONE, BOX. FAILURE TO COMPLY WILL RESULT IN REJECTION OF YOUR BID/PROPOSAL.
Click on bold titles to navigate to that specific page.

I agree to meet the SDB participation goal in full.

participation goal in full.

I have completed and am submitting with my bid or proposal an SDB Utilization Schedule (SDB-3), which is required in order to be considered for award.

I am requesting a partial waiver of the SDB participation goal.

After making good faith outreach efforts as more fully described in the **Guidance for Documenting Good Faith Efforts to Meet the SDB Participation Goal**, I am unable to achieve the total SDB participation goal for this solicitation and am requesting a partial waiver of the SDB participation goal.

I have completed and am submitting with my bid or proposal both of the following, which are required in order to be considered for award:

1. an SDB Utilization Schedule

I am requesting a full waiver of the SDB participation goal.

participation goal

After making good faith outreach efforts as more fully described in the **Guidance for Documenting Good Faith Efforts to Meet the SDB Participation Goal**, I am unable to achieve any part of the SDB participation goal for this solicitation and am requesting a full waiver of the SDB participation goal.

I have completed and am submitting with my bid or proposal a **Good Faith Efforts Waiver Request for**



SDB Utilization Schedule – SDB-3

CRITICAL
 ✓ Verify SDB/VBE validity

SDB-3 SDB UTILIZATION SCHEDULE

Show SDBs (including where applicable a prime bidder or offeror is self-performing a portion of the work) that will meet the SDB participation goal (add additional pages if necessary). Submit a **Letter of Commitment (SDB-3-1)** for each SDB subcontractor, supplier, or manufacturer (add additional Letters of Commitment as necessary).

SDB Name SAP Vendor Number (6-digit number provided by SDB) SDB Verification Number (located on DGS SDB verification)	Type of SDB (check all that apply)	Description of Work to be Performed (Statement of Work/Specification reference)	% Commitment (or % of work to be self-performed by SDB bidder/offeror)	Dollar Value of Commitment (after applying any calculation per SDB-1, Section IV, Calculating SDB participation)
Name: <u>ABC IT Solutions</u> SAP Vendor Number: <u>123456</u> SDB Verification Number: <u>123456-2016-09-SB-M</u>	<input checked="" type="checkbox"/> MBE	IT staffing resources	%	\$
Name: _____ SAP Vendor Number: _____ SDB Verification Number: _____	<input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> LGBTBE <input type="checkbox"/> DOBE <input type="checkbox"/> SDVBE		%	
Name: _____ SAP Vendor Number: _____ SDB Verification Number: _____	<input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> LGBTBE <input type="checkbox"/> DOBE <input type="checkbox"/> SDVBE		%	
Name: _____ SAP Vendor Number: _____ SDB Verification Number: _____	<input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> LGBTBE <input type="checkbox"/> DOBE <input type="checkbox"/> SDVBE		%	
Name: _____ SAP Vendor Number: _____ SDB Verification Number: _____	<input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> LGBTBE <input type="checkbox"/> DOBE <input type="checkbox"/> SDVBE		%	
Attach additional sheets if necessary			Total % SDB commitment: 0	Total \$ amount: \$0



Letter of Commitment SDB-3.1

CRITICAL
 ✓ Complete all shaded areas.

**SDB-3-1
 LETTER OF COMMITMENT**

As confirmation of the commitment by the prime Bidder or Offeror
 (SDB) on the below-referenced Solicitation/Project.

Organization Name: _____

	Bidder/Offeror Information	SDB Information
Address		
Point of Contact		
Telephone number		
Email address		

Services/Supplies and Time Frame. If Bidder/Offeror is the successful vendor, the SDB shall perform or provide the following services or supplies during the term of the prime contract, as more specifically set forth below:

Services or supplies the VBE will provide:	
Specific Time Frame the VBE will provide the services or supplies:	

Dollar Value of Commitment. These services or supplies represent \$ _____ for the term of the contract.

SDB verified. By signing below, the SDB represents that it meets the SDB requirements set forth in the Solicitation and all required documentation has been provided to the Bidder/Offeror for its SDB submission.

Sincerely,	Acknowledged
_____	_____
Printed name	Printed name

SDB to expect a letter and SIGN it!



Guidance to Document GFE SDB-4

READ, READ, READ

- The ability or desire of a prime contractor to perform the work of a contract with its own organization does not relieve the Offeror of the responsibility to make Good Faith Efforts to meet the stated participation goal.
- Prime must complete all components of the GFE paperwork. Details/Evidence are important, proof is required.
- Carefully review SDB and VBE submittal Instructions, specifically Section VI of SDB/VBE-1 which lists pertinent items as Fatal errors.



Good Faith Efforts Packet SDB-5

Good Faith Efforts (GFE) Partial or Full Waiver

- Identified Items of Work Applicant Made Available to SDBs (Part 1)
- Identified SDBs and Record of Solicitations (Part 2)
- SDB Outreach Compliance Statement (Part 3)
- Additional Information Regarding Rejected SDB Quotes (Part 4)
- SDB Subcontractor Unavailability Certificate (Part 5)



SDB GFE Documentation – SDB-5

SDB-5

GOOD FAITH EFFORTS DOCUMENTATION TO SUPPORT WAIVER REQUEST OF SDB PARTICIPATION GOAL

Project Description:	
Commonwealth Agency Name:	
Solicitation #:	
Solicitation Due Date and Time:	
Bidder/Offeror Company Name:	
Bidder/Offeror Contact Name:	
Bidder/Offeror Contact Email:	
Bidder/Offeror Contact Phone Number:	

Complete all five parts

Part 1 – Identified Items of Work Offeror Made Available to SDBs

Identify those items of work that the Offeror made available to SDBs. This includes, where appropriate, those items the Offeror identified and subdivided into economically feasible units to facilitate the SDB participation. For each item listed, show the anticipated percentage of the total contract amount. It is the Offeror's responsibility to demonstrate that enough work to meet the SDB participation goal was made available to SDBs, and the total percentage of the items of work identified for SDB participation met or exceeded the SDB participation goal set for the procurement.

Identified Items of Work	Was this work listed in the solicitation?	Does Offeror normally self-perform this work?	Was this work made available to SDB Firms? If not, explain why.
	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no



GFE Waiver – Part 1

Identify Items of Work Offeror Made Available to SDBs

CRITICAL
 ✓ List all components of work offered for subcontracting.

... that the Offeror made available to SDBs. This includes, where appropriate, those items the Offeror identified ... possible units to facilitate the SDB participation. For each item listed, show the anticipated percentage of the total ... that enough work to meet the SDB participation goal was made available to SDBs, and the total percentage ... of SDB participation met or exceeded the SDB participation goal set for the procurement.

Work	Was this work listed in the solicitation?	Does Offeror normally self-perform this work?	Was this work made available to SDB Firms? If not, explain why.
	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no
	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no
	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no
	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no
	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no

Attach additional sheets if necessary.



GFE Waiver – Part 2

Identified SDBs and Record of Solicitations

CRITICAL
 ✓ Specifics and Details
 are important

Offeror must provide quotes for the Identified Items of Work made available for SDB participation. Include the name of the SDB for which quotes were solicited, date and manner of initial and follow-up solicitations, whether the SDB provided a quote, and whether the SDB was being used toward meeting the SDB participation goal. SDBs used to meet the SDB participation goal must be listed on the Solicitation Schedule (SDB-2).

Copies of all written solicitations and documentation of follow-up calls to SDBs must be attached to this form. For each Identified SDB below, Offeror should submit an SDB Subcontractor Unavailability Certificate signed by the SDB or a statement from the Offeror that the SDB refused to sign the SDB Subcontractor Unavailability Certificate.

Name of Identified SDB and Classification	Describe Item of Work Solicited	Initial Solicitation Date & Method	Follow-up Solicitation Date & Method	Details for Follow-up Calls	Quote Received?	Quote Used?	Reason Quote Rejected
SDB Name: <input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> LGBTBE <input type="checkbox"/> DOBE <input type="checkbox"/> SDVBE		Date: <input type="checkbox"/> mail <input type="checkbox"/> email <input type="checkbox"/> fax	Date: <input type="checkbox"/> mail <input type="checkbox"/> email <input type="checkbox"/> fax	Date and Time of Call: Spoke with: Left Message:	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> Used other SDB <input type="checkbox"/> Used non-SDB <input type="checkbox"/> Self performing
SDB Name: <input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> LGBTBE <input type="checkbox"/> DOBE <input type="checkbox"/> SDVBE		Date: <input type="checkbox"/> mail <input type="checkbox"/> email <input type="checkbox"/> fax	Date: <input type="checkbox"/> mail <input type="checkbox"/> email <input type="checkbox"/> fax	Date and Time of Call: Spoke with: Left Message:	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> Used other SDB <input type="checkbox"/> Used non-SDB <input type="checkbox"/> Self performing

Attach additional sheets as necessary.



GFE Waiver – Part 3

SDB Outreach Compliance Statement

CRITICAL
✓ Documentation for
Part 1

1. List the Identified Items of Work for subcontracting opportunities for the solicitation along with specific work categories:

2. Attach to this form copies of written solicitations (with Bid or Proposal instructions) used to solicit Identified SDBs for these subcontract opportunities.

3. Offeror made the following attempts to contact the Identified SDBs:

4. Bonding Requirements (Please Check One):

This project does not involve bonding requirements.

Offeror assisted Identified SDBs to fulfill or seek waiver of bonding requirements.
(DESCRIBE EFFORTS):

5. Pre-Bid/Proposal Conference or Supplier Forum (Please Check One):



GFE Waiver – Part 4

Additional Information Regarding Rejected SDB Quotes

CRITICAL
 ✓ Documentation for Part 2

Part 2 indicates that an SDB quote was rejected because the Offeror is using a non-SDB or is self-performing the work. For the Identified Items of Work, state whether the work will be self-performed or performed by a non-SDB, and if performed by a non-SDB, provide the name of the non-SDB firm. Also include the names of all SDBs and non-SDB firms that provided a quote and the amount of

Describe Identified Items of Work not being performed by SDBs (include specific section from bid or proposal)	Self-performing or using non-SDB (provide name of non-SDB if applicable)	Amount of non-SDB quote \$	Name of other firms that provided quotes and whether they are SDB	Amount quoted \$	Reason why SDB quote was rejected along with brief explanation
	<input type="checkbox"/> self-performing <input type="checkbox"/> using Non-SDB Name:		<input type="checkbox"/> SDB <input type="checkbox"/> Non-SDB Name:		<input type="checkbox"/> price <input type="checkbox"/> capabilities <input type="checkbox"/> other
	<input type="checkbox"/> self-performing <input type="checkbox"/> using Non-SDB Name:		<input type="checkbox"/> SDB <input type="checkbox"/> Non-SDB Name:		<input type="checkbox"/> price <input type="checkbox"/> capabilities <input type="checkbox"/> other
	<input type="checkbox"/> self-performing <input type="checkbox"/> using Non-SDB Name:		<input type="checkbox"/> SDB <input type="checkbox"/> Non-SDB Name:		<input type="checkbox"/> price <input type="checkbox"/> capabilities <input type="checkbox"/> other
	<input type="checkbox"/> self-performing <input type="checkbox"/> using Non-SDB Name:		<input type="checkbox"/> SDB <input type="checkbox"/> Non-SDB Name:		<input type="checkbox"/> price <input type="checkbox"/> capabilities <input type="checkbox"/> other



GFE Waiver – Part 5

Subcontractor Unavailability Certificate

CRITICAL
✓ Required for each vendor listed in Part 1

_____ is hereby certified that the firm of _____
(Name of SDB)

located at _____
(Number) (Street)

(City) (State) (Zip)

was offered an opportunity to bid on Solicitation No. _____

by _____
(Name of Prime Contractor's Firm)

2. _____ (SDB), is either unavailable for the work/service or unable to prepare a Proposal for this project for the following reason(s):

(Signature of SDB's Representative) (Title) (Date)



Best Practices

Do's

- Read the solicitation and all instructions completely.
- Submit SEPARATE SDB and VBE submittal forms.
- Validate subcontractor SDB/VBE status in DGS Supplier Database.
- Ensure that all appropriate forms are completed and signed correctly.
- Submit questions early per the solicitation requirements.

Don'ts

- Make any assumptions.
- Copy SDB submittal paperwork. Download and complete the VBE submittal separately, titles and accuracy matter.
- Skip any portion of the GFE request documentation.
- Forget to verify subcontractor status as current SDB/VBE in DGS Supplier Database.

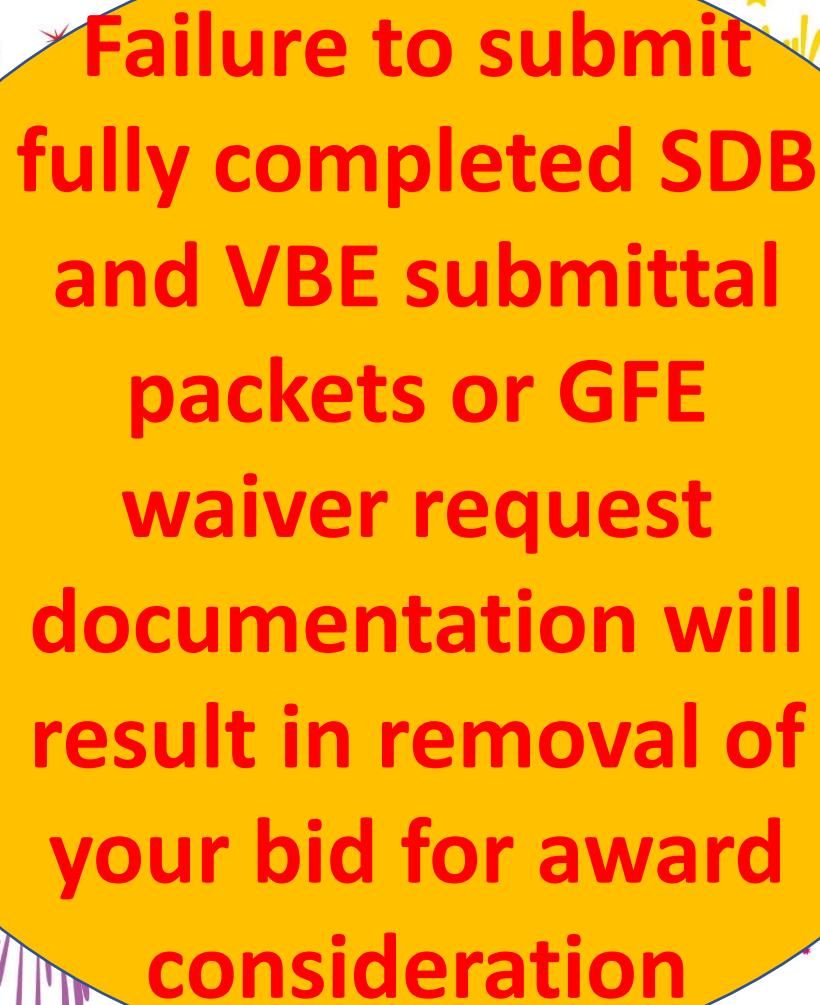


Notes

- READ, READ, READ, solicitation instructions completely.
- Subcontractors identified in SDB-3, Utilization Schedule must be validated as of bid due date and time.
- Model Form SDB/VBE Subcontractor Agreement (1.2.3 & 1.3.3) is provided for informational purposes only. To be completed by award winning vendor only.



REMINDER



**Failure to submit
fully completed SDB
and VBE submittal
packets or GFE
waiver request
documentation will
result in removal of
your bid for award
consideration**



Questions?



BDISBO Contact Info

Bureau of Diversity, Inclusion and Small Business Opportunities

North Office Building
401 North Street, Room 611
Harrisburg, PA 17120-0500
717.783.3119

GS-BDISBO@pa.gov



Meeting Summary

Total Number of Participants

24

Meeting Title Pre-Proposal Meeting: TBO Business Planning RFP
 Meeting Start Time 11/4/2022, 1:20:07 PM
 Meeting End Time 11/4/2022, 2:29:45 PM
 Meeting Id bcd738f0-3576-4879-9898-fb8aaaa902ec

Full Name	Join Time	Leave Time	Duration	Email	Role	Participant ID (UPN)
Leitzel, Donna (AAS)	11/4/2022, 1:20:07 PM	11/4/2022, 2:20:33 PM	1h	dleitzel@pa.gov	Presenter	dleitzel@pa.gov
Wilson, Jodi L (AAS)	11/4/2022, 1:23:00 PM	11/4/2022, 2:20:40 PM	57m 40s	jodwilson@pa.gov	Organizer	jodwilson@pa.gov
Smith, Audrey	11/4/2022, 1:26:56 PM	11/4/2022, 2:20:35 PM	53m 38s	audresmith@pa.gov	Presenter	audresmith@pa.gov
Phillips, Matthew (AAS)	11/4/2022, 1:28:20 PM	11/4/2022, 2:20:35 PM	52m 15s	matphillip@pa.gov	Presenter	matphillip@pa.gov
Tom Holloway	11/4/2022, 1:30:51 PM	11/4/2022, 2:29:45 PM	58m 53s	THolloway@M-inc.com	Presenter	THolloway@M-inc.com
Angela Kenno	11/4/2022, 1:30:51 PM	11/4/2022, 2:13:52 PM	43m	AKenno@m-inc.com	Presenter	AKenno@m-inc.com
Woods, C.	11/4/2022, 1:30:52 PM	11/4/2022, 2:20:38 PM	49m 46s	c.woods@accenture.com	Presenter	c.woods@accenture.com
Marc Poole	11/4/2022, 1:30:52 PM	11/4/2022, 2:20:34 PM	49m 41s	Marc.Poole@trigyn.com	Presenter	Marc.Poole@trigyn.com
Noelle Reinhardt	11/4/2022, 1:30:52 PM	11/4/2022, 2:11:23 PM	40m 30s	Noelle.Reinhardt@datacoresystems.com	Presenter	Noelle.Reinhardt@datacoresystems.com
Wendy Starner	11/4/2022, 1:30:52 PM	11/4/2022, 2:20:23 PM	49m 30s	wstarner@info-matrix.com	Presenter	wstarner@info-matrix.com
Cooper, Seth	11/4/2022, 1:30:52 PM	11/4/2022, 2:20:24 PM	49m 32s	Seth.Cooper@bakertilly.com	Presenter	Seth.Cooper@bakertilly.com
Hartman, Scott	11/4/2022, 1:30:53 PM	11/4/2022, 2:15:09 PM	44m 16s	scott.hartman@ttec.com	Presenter	scott.hartman@ttec.com
Vijay Ravichandran	11/4/2022, 1:30:53 PM	11/4/2022, 1:59:53 PM	29m	Vijay_Ravichandran@infosys.com	Presenter	Vijay_Ravichandran@ad.Infosys.com
Wendy Maple	11/4/2022, 1:30:53 PM	11/4/2022, 2:20:34 PM	49m 41s	wmaple@netlogx.onmicrosoft.com	Presenter	wmaple@netlogx.onmicrosoft.com
Tabitha Quigley	11/4/2022, 1:30:53 PM	11/4/2022, 2:20:31 PM	49m 38s	TABITHAQUIGLEY@FNETINC.COM	Presenter	
Robin Milne	11/4/2022, 1:30:57 PM	11/4/2022, 1:37:05 PM	6m 7s	Robin.Milne@plantemoran.com	Presenter	Robin.Milne@plantemoran.com
Shutt, Steven	11/4/2022, 1:31:17 PM	11/4/2022, 2:20:28 PM	49m 10s	Steven.Shutt@bakertilly.com	Presenter	Steven.Shutt@bakertilly.com
Sam (Guest)	11/4/2022, 1:32:42 PM	11/4/2022, 2:20:27 PM	47m 45s	swanderi@menyaltd.com	Presenter	
John Berry	11/4/2022, 1:33:04 PM	11/4/2022, 2:20:27 PM	47m 22s	john@berrysolutionsgroup.com	Presenter	john@berrysolutionsgroup.com
Kun-Hur Chen	11/4/2022, 1:33:32 PM	11/4/2022, 2:14:11 PM	40m 39s	Kun-Hur.Chen@trigyn.com	Presenter	Kun-Hur.Chen@trigyn.com
Jeff Wilson	11/4/2022, 1:34:02 PM	11/4/2022, 2:17:03 PM	43m 1s	jeff@berrysolutionsgroup.com	Presenter	jeff@bsgsupport.com
	15733010519 11/4/2022, 1:39:23 PM	11/4/2022, 2:20:22 PM	40m 58s		Attendee	
Feltner, Todd	11/4/2022, 1:46:33 PM	11/4/2022, 1:51:53 PM	5m 20s	todd.feltner@ttec.com	Presenter	todd.feltner@ttec.com
Chris Rau	11/4/2022, 2:15:58 PM	11/4/2022, 2:20:23 PM	4m 24s	CRau@m-inc.com	Presenter	CRau@M-inc.com