Sheltered Bidding Program

Breakout Room 6, Robertson Auditorium

We go big by starting small.

UCSF Real Estate

4/20/2023
Sheltered Bidding Program

Contracts Up to $640,000

- Program overview and goals
- Application process
- Vendor participation requirements
  - Contractors
  - Design Professionals
  - Consultants
Our Team

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UCSF Real Estate, Construction Contracts
Director, Design and Construction Contracts

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UCSF Real Estate, Construction Contracts
Executive Director of Finance – Health Capital Programs
Program Overview and Goals

The UCSF Sheltered Bidding Program (SBP) will designate a portion of contracts to Small Business Enterprises (SBE) and/or Disabled Veteran Business Enterprises (DVBE).

Projects: Negotiated and Informal Form
- Construction less than $640,000 – Sheltered Bidding
- Professional or Consulting less than $100,000 – Applicant Pool

Goals
- Increase SBE/DVBE participation of 25% by 2025
- Provide greater opportunities for SBE/DVBE in UC Capital Programs
- Build the capacity of small firms
# Application Process

<table>
<thead>
<tr>
<th>Process begins by submitting a Vendor Profile Form To UCSF</th>
<th>You Will Need</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contractor Profile Form: tiny.ucsf.edu/contractorprofileform</td>
<td>• License Classification/Codes (B, C-33)</td>
</tr>
<tr>
<td>Annual Announcement Form (Design Professionals/Consultants): tiny.ucsf.edu/AnnualAnnouncement</td>
<td>• Employer Identification Number (EIN)</td>
</tr>
<tr>
<td>UCOP Annual Announcement – intended to identify persons and firms interested in pursuing contracts to perform various services realestate.ucsf.edu/annual-announcement</td>
<td>• Contractors State License Board (CSLB #)</td>
</tr>
<tr>
<td>Contact UCSF Real Estate Outreach with questions: <a href="mailto:REOutreach@ucsf.edu">REOutreach@ucsf.edu</a></td>
<td>• Architect License</td>
</tr>
<tr>
<td></td>
<td>• Active registration with the Department of Industrial Relations</td>
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<td></td>
<td>• Primary Location (SF/East Bay)</td>
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## Participation Requirements

<table>
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<tr>
<th>Construction Procurement – Insurance</th>
<th>Construction Procurement – Bonding</th>
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<tr>
<td><strong>Minimum Insurance Requirements</strong></td>
<td><strong>Bonding – based on Construction Contract Amount:</strong></td>
</tr>
<tr>
<td>• Commercial General Liability Policy</td>
<td>• $0 - $25,000 - N/A</td>
</tr>
<tr>
<td>$2,000,000 General Aggregate</td>
<td>• $25,000 - $50,000 – Payment, File PWC-100</td>
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<tr>
<td>• Business Automobile Liability Policy</td>
<td>• $50,000 and up – Payment &amp; Performance, File PWC-100</td>
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<tr>
<td>• Worker’s Compensation and Employer’s Liability Policy</td>
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<tr>
<td>As required by Federal and State of California law</td>
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</table>

- **Minimum Insurance Requirements**
  - Commercial General Liability Policy
    - $2,000,000 General Aggregate
    - $2,000,000 Products/Completed Operations Aggregate
    - $1,000,000 Personal & Advertising Injury
    - $1,000,000 Each Occurrence-Combined Single Limit for Bodily Injury and Property
  - Business Automobile Liability Policy
    - $1,000,000 Per Accident
  - Worker’s Compensation and Employer’s Liability Policy
    - As required by Federal and State of California law

- **Bonding – based on Construction Contract Amount:**
  - $0 - $25,000 - N/A
  - $25,000 - $50,000 – Payment, File PWC-100
  - $50,000 and up – Payment & Performance, File PWC-100
Participation Requirements

Professional / Consultant Procurement – Insurance

Minimum Insurance Requirements

• Commercial General Liability Policy
  $2,000,000 General Aggregate
  $2,000,000 Products/Completed Operations Aggregate
  $1,000,000 Personal & Advertising Injury
  $1,000,000 Each Occurrence-Combined Single Limit for Bodily Injury and Property

• Professional Liability Policy
  $1,000,000 Per Claim
  $1,000,000 Aggregate

• Business Automobile Liability Policy
  $1,000,000 Per Accident

• Worker’s Compensation and Employer’s Liability Policy
  As required by Federal and State of California law
Next Steps

Complete Application Process (if applicable)

- Sheltered Bidding Program requires certification from a UCOP approved Agency

SBE/DVBE firms will be scheduled for a monthly introduction session

- Onboarding Orientation will be held on Friday, May 26, 2023
Thank you!

Please continue to the next breakout session.