



# 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

**Rebecca Ross**

**UCSF Real Estate, Construction Contracts**

Director, Design and Construction Contracts

**Sharon Norwood**

**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

Process begins by submitting a Vendor Profile Form To UCSF	You Will Need
<p>Contractor Profile Form: <a href="http://tiny.ucsf.edu/contractorprofileform">tiny.ucsf.edu/contractorprofileform</a></p> <p>Annual Announcement Form (Design Professionals/Consultants): <a href="http://tiny.ucsf.edu/AnnualAnnouncement">tiny.ucsf.edu/AnnualAnnouncement</a></p> <p>UCOP Annual Announcement – intended to identify persons and firms interested in pursuing contracts to perform various services <a href="http://realestate.ucsf.edu/annual-announcement">realestate.ucsf.edu/annual-announcement</a></p> <p>Contact UCSF Real Estate Outreach with questions: <a href="mailto:REOutreach@ucsf.Edu">REOutreach@ucsf.Edu</a></p>	<ul style="list-style-type: none"><li>• License Classification/Codes (B, C-33)</li><li>• Employer Identification Number (EIN)</li><li>• Contractors State License Board (CSLB #)</li><li>• Architect License</li><li>• Active registration with the Department of Industrial Relations</li><li>• Primary Location (SF/East Bay)</li></ul>

# Participation Requirements

Construction Procurement – Insurance	Construction Procurement – Bonding
<p>Minimum Insurance Requirements</p> <ul style="list-style-type: none"><li>• Commercial General Liability Policy<ul style="list-style-type: none"><li>\$2,000,000 General Aggregate</li><li>\$2,000,000 Products/Completed Operations Aggregate</li><li>\$1,000,000 Personal &amp; Advertising Injury</li><li>\$1,000,000 Each Occurrence-Combined Single Limit for Bodily Injury and Property</li></ul></li><li>• Business Automobile Liability Policy<ul style="list-style-type: none"><li>\$1,000,000 Per Accident</li></ul></li><li>• Worker’s Compensation and Employer’s Liability Policy<ul style="list-style-type: none"><li>As required by Federal and State of California law</li></ul></li></ul>	<p>Bonding – based on Construction Contract Amount:</p> <ul style="list-style-type: none"><li>• \$0 - \$25,000 - N/A</li><li>• \$25,000 - \$50,000 – Payment, File PWC-100</li><li>• \$50,000 and up – Payment &amp; Performance, File PWC-100</li></ul>

# 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.

**UCSF Design & Construction Day**