

Business Outreach: Project Process Plan Consistent with 3.13.2018 Board-Approved Outreach Program

Project Title	Date/Response	Notes / Status
Person Completing this Form:		
PROJECT TITLE		
Location of Project		
Date of Anticipated Project Completion		
Date of Determination for Project to Proceed		
Date informed involved parties including Outreach (within one week)		
Date for Meeting with Procurement Planning Group and Outreach (within two weeks of determination and convened by Program Manager) to:		
a. Review procurement needs including: i. timeline, ii. general scope, iii. estimated cost, and iv.		
a.1. Timeline		
a.2. General Scope		
a.3. Estimated Cost		
a.4. Vendor Pool		
b. Identify an appropriate procurement process, taking into consideration: i. schedule goals, ii. legal requirements, and iii. outreach considerations.		
b.1. Schedule Goals		
b.2. Legal Requirements		
b.3. Outreach Considerations		
c. Determine how each project can be unbundled as best as possible for small businesses to participate in the bidding process and have a real chance of winning the project contract (Outreach Program, Pages 12 & 13).		
d. Determine types of businesses (trades, services, products), including required licenses, that can participate as vendors/contractors for each particular project/purchase.		
e. Determine if this project/purchase has an opportunity for joint project proposal between larger and smaller vendors/contractors (Outreach Program, Pages 12 & 13).		
f. Determine how best to create the contact list of prospective vendors/contractors for each particular project/purchase (requiring prospect lists from all involved parties above mentioned).		
f.1. Program Managers' Outreach List including email addresses		
f.2. Construction Managers' Outreach List including email addresses		
f.3. Purchasing Managers' Outreach List including email addresses		
f.4. Project's District/College Managers' Outreach List including email addresses		
f.5. District Outreach List including email addresses		
f.6. Others' Outreach List including email addresses		
g. Determine whether a particular project/purchase would utilize Government Code Section 53060. If yes, document justification. Then, Purchasing will (within 24 business hours) consult with legal counsel, and within 48 business hours report legal counsel's advice/opinion.		
h. Begin designing the RFP/Q incorporating requirements as stated in the Outreach Program including confirmation of having reviewed the Outreach Program and committing to comply with policies stated in the Outreach Program. Complete the RFP/Q as soon as possible within three weeks.		
i. Post the RFP/Q for at least 45 days, as best as possible. During these 45 posting days, form the selection committee as appropriate and convene two selection committee meetings for planning, drafting interview questions and schedule future interview dates; and conduct outreach to identified types of business/purchase vendors/contractors (Outreach Program, Page 8).		
i.1. Specify according to the Outreach Program that once the selection committee is formed, forward the composition to Outreach Coordinator for review to ensure it meets the expectation of the Outreach Program (Outreach Program, Pages 8 & 9).		
j. After the RFP/Q due date, Purchasing will inform involved parties how many applications were received and organize bidders' applications. Outreach Coordinator, Program Manager, and Purchasing will review gathered information to determine whether the applicant pool is sufficient to proceed. If not, identify why and propose next steps as appropriate. Selection committee interviews and recommends selected vendor/contractor(s). Purchasing then will inform selected vendor/contractor and will work with appropriate manager(s) to formulate the contract.		
k. Submit Board agenda item for approval.		
l. Outreach Coordinator, PM and CMs, and others as appropriate will work with contractors and subcontractors to ensure compliance with Outreach Program requirements and expectations.		

First Version: September 26, 2018. Revised Versions: September 6, 2019; October 25, 2019- Yellow Highlights; November 27, 2019- Gray Highlights