Supplier Diversity Officer Onboarding

SSDO/ASDO Responsibilities



As the **Secretariat or Agency Supplier Diversity Officer**, you play a key role in meeting agency benchmarks, increasing small and diverse vendor spending, and growing small and diverse business engagement.

1. **Primary point of contact.** The SSDO/ASDO is the primary point of contact for all supplier diversity questions from the SDO, colleagues, and departmental vendors.

2. **Subject matter expert.** The SSDO/ASDO should be knowledgeable about:
    a. SDO programs, resources, policies, and benchmarks
    b. Your agency's purchasing and spending

3. **Change Maker.** The SSDO/ASDO:
    a. Works with all the departments, regional offices, bureaus, branches, or other groups within their agency to coordinate supplier diversity activities
    b. Enlists appropriate agency staff members to accomplish supplier diversity goals

4. **Tracking and reporting.** The SSDO/ASDO understands the agency's current and projected benchmark performance:
    a. The agency's discretionary budget
    b. Tracking agency diverse and small business spending in the Supplier Diversity Hub (Hub)
    c. Direct (MMARS) spending
    d. Indirect (subcontracting and ancillary) spending

5. **Planning.** The SSDO/ASDO keeps in touch with procurement personnel across the agency to identify planned procurements and assist in:
    a. Identifying appropriate program language
    b. Removing barriers for small/diverse bidder participation
    c. Posting notices of upcoming procurements in the Hub
    d. Working with the SDO to promote the procurement to diverse/small vendors

6. **Monitoring compliance.** The SSDO/ASDO ensures that all RFRs, RFQs, evaluations, awards and contracts follow SDO policies. For example:
    a. Appropriate language is included in RFRs/RFQs
    b. At least two small/diverse businesses are notified when conducting RFQs
    c. SBPP evaluation preference is applied when appropriate
    d. Supplier diversity spending reports are recorded in the Hub

7. **Education** The SSDO/ASDO ensures that:
    a. Procurement personnel across the agency are trained on SDO programs, RFQ evaluation, using the SDO Hub, and all other relevant topics.
    b. Departmental bidders and contractors are trained on SDO programs, completing the SDP Plan Form, and reporting SDP spend in the Hub.

Secretariat Supplier Diversity Officers are responsible for the spending within their organization first with the added role of coordinating agencies under the secretariat's umbrella to share best practices, identify and resolve shared issues, and work with the SDO collectively.

Your Agency's Path to Success



1. **Know your status and goals.** Understand your agency benchmarks, and current and past spending. Be familiar with the Hub dashboards and reporting capabilities.

2. **Understand how your agency spends money.** Look at your agency's discretionary spending and identify:
    a. What counts toward your agency's discretionary spending?
    b. What are the most significant products/services purchased?
    c. How does the agency buy those products/services (e.g. Does it conduct small or large departmental procurements? Does it issue RFQs against existing contracts?)

How do we define success?

1. Meet agency benchmarks.
2. Increase small/diverse vendor spending compared to the previous year.
3. Do business with more small/diverse vendors than the previous year.

3. **Know your decision-makers.** Understand who on your staff procures or buys specific products/services. Ensure that these team members understand SDO policies and/or attend SDO training.
    a. Which of your business units are responsible for contracting and spending? (e.g. Is it the central office, program units, or regional offices?)
    b. Who are the specific decision-makers responsible for spending? (e.g. Do all team members understand SDO policies and/or attend SDO training? Do all staff members know and comply with the small business award preference requirements? Do all staff members know how to identify divers/small businesses at the point of purchase in COMMBUYS? Who is responsible for collecting supplier reports?)

4. **Identify ways to increase small/diverse business participation.** Match the SDO policies and tools to the way your agency spends money:
    a. **Direct ordering** from existing statewide and departmental contracts:
        i. Are there small/diverse vendors available for direct buying (punchout or release PO)?
        ii. Which primes have high SDP commitments?
    b. Conducting RFQs
        i. Are small/diverse vendors notified of RFQs?
        ii. Do all SBPP RFQs comply with the small business award preference requirements?
    c. **New departmental procurements**
        i. Are small/diverse vendors sent pre-bid notices in the Hub about upcoming RFRs?
        ii. Are small/diverse vendors notified of RFRs posted in COMMBUYS?
        iii. Do all SBPP RFQs comply with the small business award preference requirements?
    d. Existing departmental contracts
        i. Do all contractors submit SDP spending reports?
        ii. Do all contractors meet their SDP commitments?
        iii. Are any contractors eligible for SDO-certification or SBPP-verification?

Tools for Departmental Procurements

Research and Planning	Conducting the Procurement	Managing Contract and Vendor Relations
• **Make a list** of potential small and diverse vendors • Include small and diverse vendors in industry and **vendor research** • Consider **regional and category-based awards** to create options for small and diverse businesses	• **Revise terms and conditions** that affect small and diverse bidder participation* • Contact the SDO to **promote** the opportunity • **Direct** potential small and diverse bidders to COMMBUYS, vendor training, and other resources • Train all vendors on **SDP requirements** • Use **clarification, BAFO and negotiation** • Conduct **debriefings** and give other types of feedback	• **Ensure agency buyers** are aware of small and diverse contractors available for ordering/RFQs • Ensure submission of SDP **reports**** • Ensure compliance with SDP **commitments**** • Conduct a small business/supplier diversity **certification drive** for existing contractors

* Note that the Commonwealth Terms and Conditions and Standard Contract Form may not be modified, nor may required solicitation language be modified.

** Procurements with estimated values exceeding $250,000 annually.

Final Thoughts

1. **Your role is key to agency success.** The SSDO/ASDO is not just a point of contact but a change agent knowledgeable about both SDO programs and agency spending.
2. **Focus on spending**. The goal is to not only increase spend with small and diverse businesses, but also increase the number of diverse and small businesses agencies spend with. Agencies accomplish this by engaging small and diverse businesses at every step of the procurement cycle – from research to ordering.
3. **Be proactive**. The SSDO/ASDO can't just act as the "final check" before the procurement is posted. Meet with the SDO as soon as procurement planning begins, and the SDO will identify potential bidders or partnership options for your primes. Attracting more small and diverse bidders is likely to result in more diverse awards – and more potential to spend with diverse and small vendors.
4. **Give a fair shot**. The goal of the SBPP notification policy and the SDP and SBPP evaluation guidance is to ensure that small and diverse businesses have a fair opportunity to gain your business. Use them to your advantage.
5. **Close the loop on reporting**. It is not enough to include the SDP language in your RFR and evaluate the SDP forms. Agencies must also ensure that awarded contractors meets their SDP spending obligations.
6. **Choose primes that are SDO certified**. Purchase from and/or seek quotes from diverse and/or small businesses that are on statewide or department contracts in order to get 100% credit of such spend toward your respective agency benchmarks.
7. **Choose primes with higher SDP commitments**. If diverse and/or small businesses are not a buying option choose companies with higher SDP commitments. Your agency will receive a share of the SDP spending reported by the prime.
8. **Engage more agency staff**. The SSDO/ASDO checks in regularly with their team to determine what procurements are upcoming, posts notice of such upcoming procurement in the Hub and determines how small and diverse businesses can be included as bidders or partners. A successful SSDO/ASDO enlists support from colleagues (e.g. someone with CIW knowledge) and ensures that supplier diversity initiatives receive support from the top.
9. **Use SDO resources**. It is our mission to help you succeed. We can help you identify potential bidders, promote upcoming procurements, meet with your team, conduct SDP training at your prebid conference, or discuss contract language in detail.