



Ventura County Community College District

PURCHASING DEPARTMENT

December 19, 2017

Prospective Bidders,

Attached is a copy of our Request for Proposal, **RFP 548, Ventura County Community College District (VCCCD), Benefits Consultant and JPA** services for the College District. This RFP packet includes the General Instructions to Bidders, General Information, Drug-Free Workplace Certification and Non-Collusion, Affirmative Action and Proposal Certification forms.

The RFP deadline is **Tuesday, January 30, 2018 at 3:00 p.m.** Respondents must submit 8 copies of the proposal to the District. All RFP responses must be clearly marked with RFP 548, VCCCD Benefits Consultant and JPA, and submitted in a sealed envelope to the Purchasing Department, at 761 E. Daily Drive, Suite 200, Camarillo, CA 93010.

No electronic or faxed proposals will be accepted. Proposals that arrive after the time stated will be returned to the Bidder unopened.

Selected finalists may be invited to meet with a District committee to make a presentation and answer questions as part of the evaluation process. Note that the RFP is made up of two specific sections. One involves the Benefit Consultant services, and the other involves the Joint Powers Authority, (JPA) services.

It is the responsibility of the Bidder to verify that they have obtained any and all addenda and that their proposal has been received by the VCCCD Purchasing Department prior to the opening date. Verification of receipt can be made through the listed Purchasing Specialist listed below.

Thank you for your interest in this project.

Janice Kisch

Janice Kisch, Purchasing Specialist
jkisch@vccd.edu
805-652-5561



Ventura County Community College District

PURCHASING DEPARTMENT

TO: Ventura County Star / Legal Ads
FROM: Purchasing Department
DATE: December 13, 2017
RE: Advertising for RFP 548, Employee Health Benefits Consultant & JPA Services

After approval of proof, run the following ad on the publish dates shown below.

VENTURA COUNTY COMMUNITY COLLEGE DISTRICT NOTICE INVITING REQUEST FOR PROPOSALS

The Governing Board of the Ventura County Community College District will receive proposals for **RFP 548, Ventura County Community College District Employee Health Benefits Consultant & JPA Services**, in accordance with specification standards and proposal requirements, copies of which may be obtained in PDF format at <http://www.vcccd.edu/departments/purchasing>; or by contacting the Purchasing Specialist listed below. Each RFP is to be completed on the forms that are included in the RFP documents or issued addenda.

RFPs must be returned sealed and marked with RFP number and title, to Ventura County Community College District, Purchasing Department, 761 E. Daily Drive, Suite 200, Camarillo, CA 93010, on or before **3:00 PM, Tuesday, January 30, 2018**, at which time proposals will be opened.

Janice Kisch, Purchasing Specialist, 805-652-5561

Published: Dec.19 & 27, 2017

VENTURA COUNTY COMMUNITY COLLEGE DISTRICT

GENERAL INSTRUCTIONS TO BIDDERS

1. **Definitions:** The following terms shall be given the meaning shown, unless context requires otherwise or a unique meaning is otherwise specified.
 - a. "RFP" means an offer, made in response to a solicitation, to perform a contract for services, labor or to supply goods or materials at a specified price.
 - b. "Bidder" means a supplier who submits a RFP to the District in response to a solicitation.
 - c. "Director of General Services," means the Ventura County Community College District authorized contracting official.
 - d. "District" means Ventura County Community College District.
2. **RFP Packet:** This RFP Packet consists of the following: Cover Letter, General Instructions, General Information, Drug Free & Non-Collusion forms.
3. **RFP Proposal:** RFP proposals, to receive consideration, should be made in accordance with the following instructions:
 - a. All items on the Bidder submitted Certification of Proposal Form should be filled out. Any pricing numbers should be stated in figures. Pricing information should be without interlineations, alterations or erasures. Any corrections must be noted by affixing, in the margin immediately opposite the correction, the initials of the person signing the RFP.
 - b. Should a Bidder find discrepancies and/or omissions from the documents, or should be in doubt as to meaning, the Bidder should contact the Purchasing Specialist listed in the RFP Packet. All inquiries will be answered in writing and distributed to all Bidders in the form of addenda to the RFP. Neither the District nor its representative will be responsible for any oral instructions. No addenda will be issued later than Five (5) Days prior to the date set for the opening of RFPs. Inquiries affecting RFPs will be answered in writing and distributed to all Bidders in the form of addenda to the RFP.
 - c. All addenda or bulletins issued during the bidding period are to be considered part of the RFP and be included in the RFP proposal.
 - d. Eight (8) copies of RFP proposals, enclosed in a sealed envelope, shall be addressed and delivered to Ventura County Community College District Service Center, Attn: Purchasing Department, 761 East Daily Drive, Suite 200, Camarillo, CA 93010, before the time stated in the RFP Packet. Each envelope shall bear the Number of the RFP, Title of the RFP and the Name of the Bidder. **No electronic (e-mail) or fax RFPs or amendments to RFPs shall be accepted.** All RFP proposals must include a signed and dated RFP Form to be eligible for consideration. RFP Form must be signed by a responsible officer of the bidding company in order to be considered.

It is the responsibility of the Bidder to verify that their RFP has been received by the District's Purchasing Department prior to the RFP opening. Verification of receipt can be made through the Purchasing Specialist listed in the RFP Packet.

4. **Contract Renewal:** The term of the contract as stated in RFP documents and may be extended for additional periods. Per Education Code § 81644 contracts for goods and materials may not exceed three (3) years, contracts for services may not exceed five (5) years. Bidder and the Director of General Services, representing the District, must mutually agree upon allowances for price increases and decreases, which must be accepted prior to renewal of contract.
5. **Workers Compensation:** Section 3700 of the Labor Code requires every employer to be insured against liability for Worker's Compensation or to undertake self insurance in accordance with provisions of that code. Bidder must comply with such provisions before commencing the performance of the work of this Contract.
6. **References:** Bidder may be required to provide a reference list of current customers using materials, goods or services similar to those specified in the RFP.

7. **Withdrawal of RFP:** RFP proposals may be withdrawn by the Bidder prior to, but not after the scheduled opening by notifying the Purchasing Specialist listed in the RFP packet. It shall be at the sole discretion of the District to allow Bidder to withdraw a RFP. If evaluation and award of the RFP will be based on award of "all or none" of the items or services, the withdrawal must be for the entire RFP. If the evaluation and award of the RFP will be based on line items, sections, combination of items, the District may consider permitting withdrawal of specific line item(s), sections combinations of items or services.
8. **Award or Rejection of RFPs:** The District reserves the right to reject the RFP of any Bidder(s) who have previously failed to perform properly or to complete on-time contracts with the District. The District also reserves the right to reject any or all RFPs or alternates and waive any informality or irregularity in the RFP.

The RFP shall not be construed to create an obligation on the part of the District to enter into a contract with any firm. This request is an information solicitation of proposals only. This proposal is not intended to nor is it to be construed as a request for formal bids pursuant to any statute, policy or regulation.

9. **Hold Harmless:** The Bidder shall hold the Ventura County Community College District, its officers, agents, servants and employees harmless from liability. The Bidder agrees to protect the District against all claims, suits, or proceedings for patent, trademark, copyright or franchise infringement arising from the purchase, installation or use of services or goods and materials purchased herein. The Bidder further agrees to assume all expenses and damages arising from such claims, suits and proceedings.
10. **Anti-Discrimination:** Bidder hereby certifies that in performing services or providing materials or goods for the District, there shall be no discrimination in hiring or employment practices because of sex, race, color, ancestry age, national origin, disability, disabled veteran status, or religious creed. The Bidder further agrees to comply with all applicable Federal regulations and California Fair Employment Practice Act.
11. **Invoices and Payments:** Unless otherwise specified, the Bidder shall render invoices for materials, goods and services under the contract to the Ventura County Community College District Service Center, Accounts Payable Department, 761 East Daily Drive, Suite 200, Camarillo, CA 93010. Invoices shall be submitted on a form acceptable to the District under the same firm name as shown on contract. All invoices, packing lists, packages, and shipping notices shall contain the applicable purchase order number. The Bidder shall list separately any taxes payable by the District.
12. **Default by Bidder:** The District shall hold the successful Bidder responsible for any damage, which may be sustained because of the failure or neglect of Bidder to comply with any terms or conditions listed herein. In the event of a breach by the Bidder of any of the provisions in the RFP or subsequent contract, the District reserves the right to cancel and terminate this contract forthwith upon giving oral and/or written notice to the Bidder.
13. **Independence of RFP:** Unless the Bidder is furnishing a joint RFP, by submitting this RFP, Bidder swears under penalty of perjury that it did not conspire with any other supplier to set prices in violation of anti-trust laws.
14. **Participation by Other Public Entities:** Other Community Colleges and/or public entities in the State of California may procure items and/or services off this RFP under the same terms and conditions stated in this RFP.
15. **Disputes:** The parties shall deal in good faith and attempt to resolve potential disputes informally. If the dispute persists, the Bidder shall submit to the Purchasing Specialist, the "Bidder Protest" form within five (5) working days after being notified by the Purchasing Department of the proposed award. Protests shall include reasonable and valid concerns as to why the award, as determined by the District, should not go forward. The District will respond to all protests in writing. The Board of Trustees will not consider protests from Bidders and/or their agents during a public meeting if they have not followed this procedure.
16. **Evaluation Criteria:** The District will evaluate the responses to the proposals based on strength of operations, quality, price and service of existing locations.

During the evaluation, validation and selection process, the District may request meetings with the Bidder to obtain answers to any questions or may request specific answers to questions in writing. The District may require that the Bidder make presentations that are pertinent to the evaluation process.



**VENTURA COUNTY COMMUNITY COLLEGE DISTRICT
RFP 548, VCCCD Benefits Consultant and JPA Services**

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SECTION 1 - Background and Scope of Proposal

The Ventura County Community College District (VCCCD) is a part of the 113-college California Community College system. The District is located in Ventura County, about 50 miles north of Los Angeles. The major cities in the county are Ventura, Oxnard, Moorpark, Thousand Oaks, Simi Valley, Camarillo, Ojai, Santa Paula, Port Hueneme and Fillmore.

The District serves more than 48,000 students through three separately-accredited colleges: Ventura College, Moorpark College, and Oxnard College, as well as off-campus sites. The District is governed by a Governing Board of five trustees who are elected by area.

The Chancellor, who is appointed by the Governing Board, administers the District's affairs. The Chancellor, the District's chief executive officer, is responsible for carrying out policies approved by the Board of Trustees. The District has approximately 1,016 insured active employees and approximately 713 insured retired employees. The District has two separate bargaining unit agreements that could result in separate benefit plans. Full time and part time faculty members are represented by the American Federation of Teachers ("AFT"). The classified employees are represented by Service Employees International Union (SEIU).

The purpose of this Request for Proposal, (RFP) is to find a competent benefits consulting firm which can work together with an experienced JPA to pool assets and establish a broad and stable insurance program for the District. For this reason, we are requesting criteria from both a Consultant, and a JPA with the understanding that they are different firms and hold different responsibilities.

In this RFP document, please refer to the section that most concerns your area of expertise. Section A refers to the Consultant Services portion and Section B refers to the JPA portion. Please be sure to state your primary level of expertise in your proposal. The RFP responses will be evaluated similarly to determine the best fit for the college District. Those that most closely meet our requirements may be invited to present their firm to key District personnel.

The District is aware that benefits consulting firms advise and represent multiple clients. Potential joint representation of two clients in the same matter should be disclosed. Joint representation may or may not pose a conflict of interest. In some cases joint representation may be valuable to concurrent clients if the interests of the clients are aligned and both clients waive the potential conflict.

If your benefits consultant firm advises one or more group purchasing organizations (GPOs), and it is within your scope of services to assist one or more of those GPOs in adding new employer groups, and the District is eligible to join one or more such GPOs, please list the GPOs in your RFP response.

Note that if you have listed a GPO, the District will evaluate whether to waive the potential conflict of interest as part of the selection process of this RFP.

If the District waives the potential conflict of interest, the District will also require that the GPO subject to the potential conflict also waive the potential conflict of interest prior to awarding the contract to your firm.

The listing of services in the following sections to include in your proposal may be formatted as you wish and in the manner that will be most efficient for presenting your qualifications.

Section 2, Part A: Health Benefits Consultant Services

The College District seeks a firm to provide consultant services for our Employee Health Benefits. We are interested in reviewing proposals with the provision that all carrier rates are net of commissions. Proposals for services should include:

- Plan design recommendations
- Rate negotiation and advocacy
- Claim assistance
- Billing and eligibility issues
- Billing audits
- Benefit communication/newsletters
- Loss analysis/underwriting
- Health education
- Legislative issues and compliance
- Self-funding options
- Enrollment/re-enrollment support
- Health Fair coordination
- Technology including on-line eligibility and enrollment
- Responding to day-to-day employee benefit questions
- Carrier renewal support
- Cobra administration
- HIPPA compliance
- Medicare subsidy support
- ERP Support
- Attendance/participation at insurance committee meetings
- Presentations to Board upon request
- General support
- Specific transition plan recommendations for moving retirees to Medicare supplemental plans
- Wellness Plan

Section 2, Part B: JPA (Joint Powers Authority Services)

VCCCD seeks a firm to act as Joint Powers of Authority (or group purchasing organization, GPO) for Health Plan administration services. VCCCD seeks a JPA, (GPO) that will utilize its assets to take advantage of volume purchasing strategies to acquire high-grade insurance coverage that addresses the specific needs of the District. VCCCD would expect this agency to realize savings and efficiencies by aggregating *purchasing* volume and using that leverage to negotiate discounts with manufacturers, distributors and other vendors.

This service may include risk-management segments and loss control experts to assist the District in minimizing claims. This section is not expected to be completed along with the Consultant section; however, it may be completed if the proposing firm possesses this capability without a conflict of interest. Key information to supply with regard to this agency will be:

- Analysis process breakdown and savings
- Rate negotiation and advocacy
- Experience of the team
- Analysis process and breakdown of savings
- Reports and decision making practices
- Participation levels and fees
- Support and Communication
- References and client list
- The extent that one entity provides influence to the plan
- Billing and eligibility issues
- Billing audits
- The specific transition plan recommendations for moving retirees to Medicare supplemental plans
- Wellness Plan

Section 3: Evaluation Criteria

- Firm shall possess the depth and quality of experience in conducting and managing benefits / JPA's for other similar college districts
- Knowledge and experience in conducting efficient analysis and recommendations resulting in a cost effective conclusion
- Proposed rates for services
- Knowledge and experience in health benefits and cooperative GPO policies and practices with similar organizations
- Record of compliance with all applicable ethical and professional conduct rules
- Firm that presents the best overall application may be invited to present their firm and practices to VCCCD personnel after review of the RFP's submitted.

Section 4: Required Information

The proposal requirements listed below should be included with your proposal for a Consultant Services and for a Joint Powers Authority, (JPA). Please be sure to note which of the two services your firm is offering to the District. Also be sure to note or list any GPOs that you may be associated with in your RFP response.

Forms:

Interested respondents must include the completed forms with their submittal:

- Certification of Proposal
- Drug Free Workplace Certification
- Non Collusion Affidavit
- Affirmative Action Status

Company Profile:

1. Provide a brief overview of your company, firm or organization and its history, including a brief description the firm's growth, philosophy and number of employees. Please describe any parent/subsidiary/affiliate relationship.
2. Indicate how many years your organization has been active in the employee health benefits field to public entities.
3. Provide a list of school, college districts, and/or public entities for which your organization currently serves as the consultant/broker for employee health benefits.
4. List any potential conflicts of interest that your firm foresees should you be selected, or state affirmatively that you foresee none.
5. If your company is owned, partially or completely, by any insurance company, please describe.

Description of Services:

1. Provide a written description of services you can provide.
2. Provide the address of the office that would be assigned to the District's account. Will the office in charge of the District's account have access to resources and consultants in other offices? If so, please describe these resources.
3. Provide the names of all professionals who will be assigned to work on the District's account team and a brief resume of their background and experience, with emphasis on public sector organizations.
4. Provide a brief description of the specialized consultants or groups your company has in the following areas:
 - Legal
 - Contracts
 - Underwriting/Actuarial
 - Alternative Funding
 - Health Education
 - Cost Containment
 - Carrier Negotiations
 - Other
5. Outline your firm's experience and expertise with:
 - Cost containment
 - Carrier negotiation & renewals
 - Plan designs
 - Loss analysis/underwriting/actuarial

- Legislative issues and compliance
- Alternative funding options
- Marketing/RFPs
- Benefit communication
- Enrollment/Re-enrollment procedures including on-line access portals
- Cobra administration
- HIPPA compliance
- Medicare subsidy program
- ERP
- Technology supporting benefit administration

Note: Indicate what services your company provides and which services must be contracted with an outside agency.

6. The Account Administrator will be required to prepare an Annual Stewardship Report for the District. As a minimum the report shall include:
 - Retrospective summary of the District's coverage
 - Prospective summary of insurance market conditions
 - Noteworthy account accomplishments
 - Objectives and goals for the forthcoming year
 - Trend analysis and report for upcoming year
 - Innovative approaches in health insurance and wellness programs
 - Recommendations for plan design modifications

Please provide specific details of the types of information these reports will contain.

7. Provide samples of benefit communications provided to other public agencies (i.e., training programs, proactive advice provided to clients to reduce medical costs).
8. Describe your ability to provide actuarial services as needed for self-funded employee benefit plans and recommend appropriate premium rates and reserves to maintain the viability of the plans and ensure compliance with mandated benefit offerings.
9. Provide a list of the principal insurance markets utilized by your firm in the order of premium volume placed with each market. This listing should be categorized by line of coverage: medical, dental, life or other.
10. VCCCD seeks to avoid conflicts of interest arising when its health benefits consultant provides recommendations on products for which the consultant receives remuneration from the seller of the product. How does your firm avoid actual and potential conflicts of interest when presenting insurance and other products to clients?

References:

Provide a firm and account team client list from the past three years, specifying the insurance programs you negotiated for those entities, the number of covered employees for each client, the contact person, telephone number and e-mail address for each account.

Compensation:

1. Based on the scope of work outlined in this proposal, provide a description of your preferred remuneration basis and willingness to consider non-commission based arrangements. Based on your experience with similar accounts and services, estimate the annual costs. Price quote provided should be for three years of service.
2. Indicate services to be included in the base remuneration and those that are provided for an additional fee. Indicate any discretionary services outlined in your proposal that are not included in your fees. In addition, indicate the method for determining the cost of any additional or supplemental services.

Section 5: Submitting Proposals

Proposals will be due on Tuesday, January 30, 2018 at 3:00 pm. Interested respondents should submit 8 copies of the proposal to the Ventura County Community College District Office. Proposals should note the RFP name and number and be addressed to: Purchasing Department, 761 E. Daily Drive Suite 200, Camarillo, CA 93010. The proposal must be signed by a person with authority to sign such documents.

Questions regarding the RFP Information will be accepted only in writing by e-mail to the Purchasing Specialist below. **The last date to submit questions about the RFP will be January 12, 2018.** Depending upon questions asked and possibly other information, an addendum may be issued.

Please send your questions to Janice Kisch by E-mail to: jkisch@vcccd.edu . For details about submitting the RFP you may contact Janice by phone at 805-652-5561.

**VENTURA COUNTY COMMUNITY COLLEGE DISTRICT
CERTIFICATION OF PROPOSAL**

The undersigned, having carefully examined Notice to Bidders, General Instructions to Bidders and Specifications for **RFP 548, Ventura County Community College District (VCCCD), Benefits Consultant and JPA**, hereby proposes to furnish said materials and services in accordance with pricing as noted within the RFP document submitted.

The undersigned hereby submits its proposal and agrees to furnish services to Ventura County Community College District in accordance with the specifications noted in the RFP 548.

The firm has carefully reviewed its proposal and understands that the District will not be responsible for any errors or omissions on the part of the proposer.

It is understood that the District reserves the right to accept or reject any or all proposals and to waive any informality in any proposal received.

Bid prices must be valid for a minimum of a 6-month period after opening date of bid.

COMPANY NAME: _____

ADDRESS: _____

PHONE NO.: _____ FAX NO. _____

E-MAIL ADDRESS: _____

FEDERAL TAX I.D. NO.: _____

ACKNOWLEDGEMENT OF BID ADDENDA

In submitting this Bid Proposal, the Bidder acknowledges receipt of all Bid Addenda issued. The Bidder confirms that this Bid Proposal incorporates and is inclusive of all items or other matters contained in Bid Addenda.

_____ No Addenda Issued
(Initials)

_____ Addenda Number(s) _____ received acknowledged and incorporated in this Bid Proposal.
(Initials)

PREPARED BY: _____ TITLE: _____

SIGNATURE: _____ DATE: _____

DRUG-FREE WORKPLACE CERTIFICATION

The Bidder certifies the following:

1. I am aware of the provisions and requirements of California Government Code §§8350 et seq., the Drug Free Workplace Act of 1990.
2. I am authorized to certify, and do certify, on behalf of Bidder that a drug free workplace will be provided by Bidder by doing all of the following:
 - A. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensation, possession or use of a controlled substance is prohibited in Contractor's workplace and specifying actions which will be taken against employees for violation of the prohibition;
 - B. Establishing a drug-free awareness program to inform employees about all of the following:
 - (i) The dangers of drug abuse in the workplace;
 - (ii) Bidder's policy of maintaining a drug-free workplace;
 - (iii) The availability of drug counseling, rehabilitation and employee-assistance programs; and
 - (iv) The penalties that may be imposed upon employees for drug abuse violations;
 - C. Requiring that each employee engaged in the performance of the Contract be given a copy of the statement required by subdivision (A), above, and that as a condition of employment by Bidder connection with the Work of the Contract, the employee agrees to abide by the terms of the statement.
3. Contractor agrees to fulfill and discharge all of Contractor's obligations under the terms and requirements of California Government Code §8355 by, inter alia, publishing a statement notifying employees concerning: (a) the prohibition of any controlled substance in the workplace, (b) establishing a drug-free awareness program, and (c) requiring that each employee engaged in the performance of the Work of the Contract be given a copy of the statement required by California Government Code §8355(a) and requiring that the employee agree to abide by the terms of that statement.
4. Contractor and I understand that if the District determines that Contractor has either: (a) made a false certification herein, or (b) violated this certification by failing to carry out and to implement the requirements of California Government Code §8355, the Contract awarded herein is subject to termination, suspension of payments, or both. Contractor and I further understand that, should Contractor violate the terms of the Drug-Free Workplace Act of 1990, Contractor may be subject to debarment in accordance with the provisions of California Government Code §§8350, et seq.
5. Contractor and I acknowledge that Contractor and I are aware of the provisions of California Government Code §§8350, et seq. and hereby certify that Contractor and I will adhere to, fulfill, satisfy and discharge all provisions of and obligations under the Drug-Free Workplace Act of 1990.

PREPARED BY: _____ TITLE: _____

SIGNATURE: _____ DATE: _____

NON-COLLUSION AFFIDAVIT

In connection with the foregoing Bid Proposal, the undersigned declares, states and certifies that:

1. The Bid Proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization or corporation.
2. The Bid Proposal is genuine and not collusive or sham.
3. The bidder has not directly or indirectly induced or solicited any other bidder to put in a false or sham bid, and has not directly or indirectly colluded, conspired, connived, or agreed with any other bidder or anyone else to put in sham bid, or to refrain from bidding.
4. The bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price, or that of any other bidder, or to fix any overhead, profit or cost element of the bid price or that of any other bidder, or to secure any advantage against the public body awarding the contract or of anyone interested in the proposed contract.
5. All statements contained in the Bid Proposal and related documents are true.
6. The bidder has not, directly or indirectly, submitted his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any person, corporation, partnership, company, association, organization, bid depository, or to any member or agent thereof to effectuate a collusive or sham bid.

I hereby acknowledge and agree to all specifications of the Ventura County Community College District bid and will see that our company is responsible for all materials and services as specified.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

PREPARED BY: _____ TITLE: _____

SIGNATURE: _____ DATE: _____

In order to comply with legal requirements, the Ventura County Community College District is gathering and updating the affirmative action status of vendors. Please check your company's appropriate code as indicated below (see definitions).

- ☐ Minority-owned/Disadvantaged business
- ☐ Woman-owned business
- ☐ Small business concern
- ☐ Disabled Veteran enterprise
- ☐ Other
- ☐ None of the above

VENTURA COUNTY COMMUNITY COLLEGE DISTRICT

AFFIRMATIVE ACTION STATUS CODE DEFINITIONS

Minority-Owned/Disadvantaged Business

A small business concern which is at least fifty-one percent unconditionally owned by one or more socially and economically disadvantaged individuals, or, in the case of any publicly owned business, at least fifty-one percent (51% of the stock of which is owned by such individuals, and whose management and daily business operations are controlled by one or more of such individuals).

Business owners who certify that they are members of named groups (African American, Hispanic Americans, Native Americans, Asian-Pacific/Asian Indian Americans) are considered socially and economically disadvantaged.

Woman-Owned Business

A business concern that is at least fifty-one percent (51%) owned by a woman or women who also control and operate it. "Control" in this context means exercising the power to make policy decisions. "Operate" in this context means being actively involved in the day-to-day management.

Small Business Concern

An independently owned and operated concern certified, or certifiable, as a small business by the Federal Small Business Administration (SBA). Standard Industrial Classification (SIC) codes may be found in the Federal Acquisition Regulations, Section 19.01 or in the Federal Procurement Regulations, Section 1-1.701.

Disabled Veteran Enterprise

"Disabled Veteran" means a veteran of the military, naval or air service of the United States with a service-connected disability who is a resident of the State of California. To qualify under this category, certification must be obtained from the Office of Small & Minority Business (OSMB) by completing Form OSMB11 and receiving an approved certification letter from that office. Contact the OSMB at (916) 322-5478 for specific assistance. The District must receive this certification with the bid response.

Ethnic Groups Key

African Americans: United States citizens whose origins are in any of the Black racial groups of Africa.

Hispanic Americans: United States citizens whose origins are in Mexico, Puerto Rico, Cuba, Spain, Portugal, Central or South America.

Native Americans: United States citizens whose origins are in any of the original peoples of North America, i.e., American Indians, Eskimos, Aleuts, and Native Hawaiians.

Asian Pacific/Asian Indian Americans: United States citizens whose origins are in Japan, China, Korea, Okinawa, Thailand, Taiwan, Cambodia, Laos, Vietnam, the Philippines, Samoa, Guam, the U.S. Trust Territories of the Pacific, the Northern Marianas, India, Pakistan, Bangladesh, Sri Lanka, Bhutan, or Nepal.