Instructions for Planning Bench Registration

Planning Bench Program Qualifications
You may qualify for the San Diego Association of Governments (SANDAG) Planning Bench Program if you meet the following requirements:

1. Must be a planning firm that can provide one or more of the On-Call Planning services listed in the procurement(s)

2. Must be certified as one or both of the following:
   - Disadvantaged Business Enterprise (DBE) firm certified by the California Unified Certification Program (CUCP)
   - Small Business (SB) firm certified by the California Department of General Services (DGS)

*IF YOU MEET BOTH REQUIREMENTS, PLEASE CONTINUE WITH THE INSTRUCTIONS BELOW FOR REGISTRATION*

Registration for Current SANDAG Bench Firms
If you are currently registered as a SANDAG Architecture and Engineering (A&E) and/or Construction Management (CM) Bench firm and would like to also be a part of the Planning Bench, please follow the steps below to register:

1. Go to the SANDAG Vendor Database and click on “Log In” to access your account using your current username and password. If you are unable to access your account with your username and password, please submit a request to the PlanetBids Vendor Support.

2. After signing in, click on “Vendor Profile” and navigate to the “Bench Firm Certification” tab.

3. Click on “RE-APPLY” and under the “Bench Certifications” section, check the box for “Planning Bench Certification.” If you are already approved for the A&E and/or CM Bench, please leave these boxes checked. Undecking these boxes will remove your prior Bench certifications.

4. Follow Steps 4 – 6 in the instructions below under “Registration for New SANDAG Bench Firms.”

5. Once you have filled out all the required information and provided the appropriate attachments, click on the “Certify” check box and “Submit” to send your application to SANDAG for review.

Registration for New SANDAG Bench Firms
If you are not a SANDAG Bench firm, but would like to register as a Planning Bench firm, please follow the steps below:

1. Go to the SANDAG Vendor Database and click on “New Vendor Registration” to create a new vendor record for SANDAG.

2. Since this is a new vendor registration, you will need to complete the required fields in the following tabs:
   a. Company Info
   b. Additional Addresses
   c. Classifications/Licenses
   d. Other Business Info
   e. Category/Description

3. Then, navigate to the “Bench Firm Certification” tab to start your Bench registration and select “Yes” to the question “Would you like to be certified as a Bench Firm?” to generate the Bench application on the bottom of the screen.

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4. Be sure to select the “Planning Bench Certification” under the “Bench Certifications” section of the application. Please note if your firm also provides A&E and CM services you are able to submit one application for all three certifications.

5. Once you have decided what certifications you are applying for, begin filling out the required information on the following sections:
   a. Gross Annual Receipts for 3 Years
   b. Competitive Range and Professional Liability Insurance Limits
   c. Clients/References
   d. Key Staff
   e. Attachments

6. For the “Attachments” section, you will need to provide the following documents:
   a. **Small Business Certificate**: Upload a copy or screenshot of your Disadvantaged Business Enterprise (DBE) certification from the California Unified Certification Program (CUCP) and/or your Small Business (SB) certification from the California Department of General Services (DGS). If you have both certifications, we recommend that you combine the two certifications into one (1) PDF file to upload.
   b. **Firm Qualification & Summary Statement**: Upload a capabilities statement on your firm’s qualifications and services tailored specifically for the SANDAG On-Call Planning Contracts. If you are also applying for the A&E and CM Benches, please be sure to include these services in your capabilities statement.
   c. **Planning Bench Rate Schedule Sheet**: You are only required to complete a rate schedule for the Planning Bench. Click on “Download Rate Schedule Sheet” to get the template of the rate sheet you will need to complete with your firm’s rates. Please note that your rate schedule must reflect 5 years. Years 1 and 2 will be frozen and Years 3, 4, and 5 will have a fixed escalation rate of up to 2.5%.

   *Note: For the “Title” field, enter the name of the document you are providing on your application. When you click on the “File Name” field, this will enable you to locate the documents you need to upload from your computer files.*

7. Once you have filled out all the required information and provided the appropriate attachments, click on the “Certify” check box and “Register” to submit your application for SANDAG review.

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**Questions**

If you have questions about the status of your Planning Bench Registration or general questions about the SANDAG Bench Program, please contact the Small Business Coordinator at sb.coordinator@sandag.org.