

# Agenda

- Welcome Remark- George Price & Anita Campion
- DOS/OSDBU- Information Session- Ideia Sutton
- Acquisition Representatives Panel- Moderator Renee Hill
- Subcontracting Information Session- Stephanie Lewis
- Break
- Large Business Panel- Moderator Rich Vinnacombe
- Industry Liaison 101- Jaime Gracia
- Role of a PCR Justice Fitzia
- Matchmaking Prep
- Matchmaking



12/8/2023 Annual Review 2

## Who We Are:

(OSDBU) ensures our prime contracts and subcontracts are including small business to the maximum extent possible. OSDBU conducts several annual outreach activities, including a subcontracting workshop/networking session; we also participate in in small business procurement fairs, conferences, workshops, and seminars. Additionally, OSDBU conducts internal training with the DoS contracting workforce to ensure awareness of, and compliance with, small business requirements.



12/8/2023 Annual Review



**Small Business Association for International Companies** 

www.SBAIC.org

Anita Campion, Chair, SBAIC General Overview

#### **SBAIC Overview**

- ➤ Membership organization promoting meaningful utilization of US small business at USG agencies providing foreign assistance
- ➤ 140+ members 50%+ SDBs, all other SB categories represented (WOSB, Hub Zone, Veteran-owned, 8(a), etc.)
- ➤ Work in all sectors and geographies including conflict-zones
- ➤ Work with full range of USG agencies: USAID, MCC, DoD, HHS, USTDA, DFC, etc.
- ➤ Member companies average 15 years of USG experience
- ➤ Member contracts range from \$100,000 to \$70+M

#### **Services for Members**

- Advocate to increase small business utilization in foreign assistance programs
- Provide matchmaking opportunities with large businesses
- Champion and support USG policies that support small business growth
- Create mentorship relationships for newer small businesses
- Organize speaker series and learning events with leaders and policymakers in the industry
- Secure valuable discounts with sponsors
- Compile and disseminate educational resources

# Key ways SBAIC helps meet USG SB targets and deliver good development

- ➤ Make market research easy for USG agencies and primes via website with easily searchable member information!
- Successful outreach and dialogue with USG agencies and the Hill to urge higher SB targets, expanded opportunities, fewer barriers
- Newsletter featuring member innovations in international development and SBAIC activity highlights, including success stories
- Informative membership meetings with speaker series to pass critical information for penetrating the international market



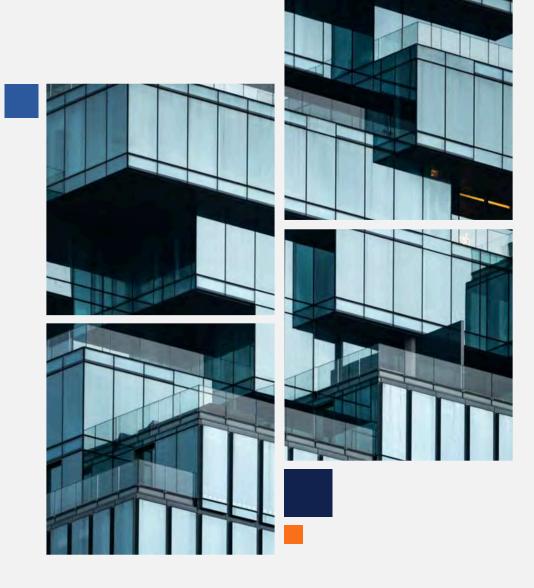
## **Thank You!**

## **SBAIC**

Small Business Association for International Companies
<a href="mailto:www.SBAIC.org">www.SBAIC.org</a>
<a href="mailto:MemberServices@sbaic.org">MemberServices@sbaic.org</a>

# **OSDBU Mission**

The Office of Small and Disadvantaged Business Utilization (OSDBU) works with industry partners, the acquisition corps, and program offices to maximize prime and subcontracting opportunities for U.S. Small Businesses. Our efforts help maintain a viable and innovative industrial base, promote worldwide economic development, and support mission critical functions for every bureau within the Department of State.



12/8/2023 Annual Review 9

# **Team**



**George Price** Director



**Rich Vinnacombe** Deputy Director

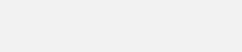


Sr. Procurement Analyst

**James Josey** 

Tilynn Colman

**Executive Assistant** 



**Martina William** Sr. Procurement Analyst



Sr. Procurement Analyst



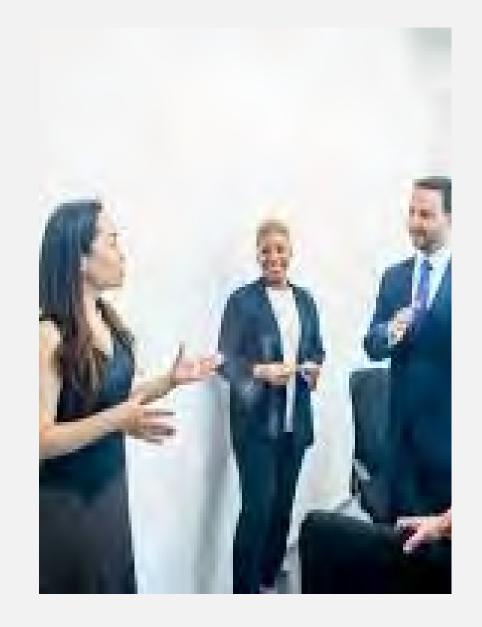
Sr. Procurement Analyst

**Julio Chavez** 

Procurement Analyst

# What we do?

- Manage diplomatic relations with other countries and international institutions.
- Promote peace and stability in regions of vital interests.
- Bring nations together to address global challenges.
- Create jobs at home by opening markets abroad.
- Help developing nations establish economic environments that provide investment and export opportunities



12/8/2023 Annual Review 11

# Procurement Forecast

Public Law 100-656, the Business Opportunity Development Reform Act of 1988, amended the Small Business Act to place new emphasis on acquisition planning. The law requires agencies to compile and make available projections of contracting opportunities small and small disadvantaged firms may be able to perform.

Link: https://www.state.gov/procurement-forecast

The Forecast of Contract Opportunities is updated annually, in the first quarter of the fiscal year.

Department of State Procurement Forecast Fiscal Year 2024 (Revised 11/2/2023)

Department of State Procurement Forecast Fiscal Year 2023 (Revised 01/09/2023)

Department of State Procurement Forecast Fiscal Year 2022 (Revised 03/30/2022)

Department of State Procurement Forecast Fiscal Year 2021

Department of State Procurement Forecast Fiscal Year 2020

Department of State Procurement Forecast Fiscal Year 2019

**Bureau Names and Acronyms List** 

# Small Business Goals By the Numbers

Federal small business procurement goals are set by Congress, which state that the Federal government shall direct a percentage of spending dollars to small business, and certain categories of small businesses. Congress first enacted a procurement goal in prime contracting for small business in 1988. Since then, goals have been increased, extended to include some subcontracting, and applied to certain sectors of small businesses such as socially and economically disadvantaged small business, service-disabled veteran-owned small businesses, woman-owned small businesses, and Historically Underutilized Business Zones



12/8/2023 Annual Review 13

## Small Business Goal 2024

#### FY 2024 Goal / Order of Preference

	Criteria	% Goal
	Small Business	26%
2	Small Disadvantaged Business	21%
0	Women-Owned Small Business	5%
(3)	Service-Disabled Veteran-Owned Business	3%
4	HUBZone Small Business	3%

LIS DENARTMENT OF STATE

## **OSDBU Point of Contacts**

OSDBU <u>www.state.gov/smallbusiness/</u>

James "Anthony" Josey JoseyJA@State.Gov

Martina WilliamsWilliamsMA2@state.gov

Thelma EdmundsEdmundsTD@state.gov

Ideia SuttonSuttoni@state.gov

12/8/2023 Annual Review 15





U.S. Small Business Administration

## **Presented By**

Stephanie Lewis
Subcontracting Program Manager
SBA Office of Government Contracting





#### **District Offices**



District Offices provide Federal contracting assistance to businesses owned and controlled by socially and economically disadvantaged individuals through the 8(a) Business Development Program.

To locate a DISTRICT Office, visit: https://www.sba.gov/about-sba/sba-locations/sba-district-offices

Special programs are available for servicedisabled veteran-owned and woman-owned small businesses and small businesses involved in international trade.

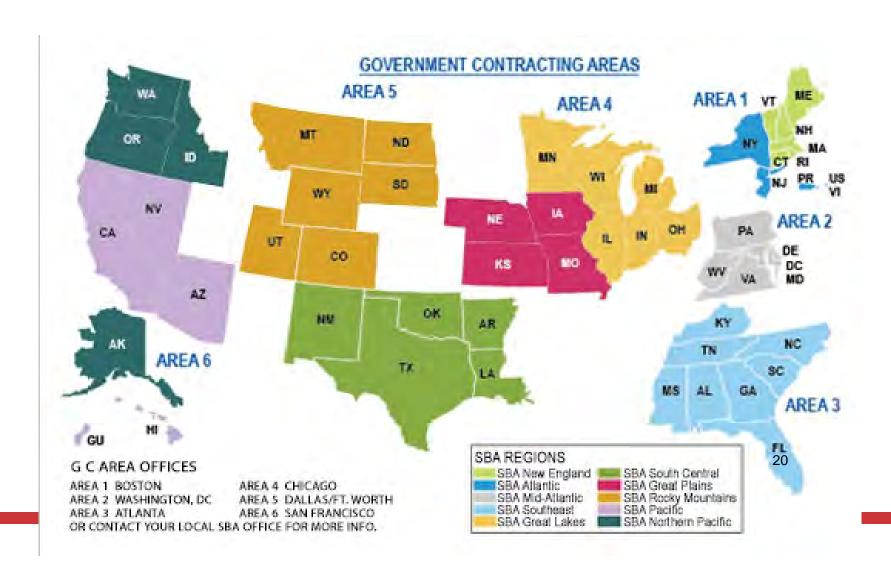
Access to capital for new or existing businesses through guaranteed loans made by area bank and non-bank lenders.

Free counseling, advice and information on starting, better operating or expanding a small business through SCORE, "Counselors to America's Small Business," Small Business Development Centers (SBDC) and Women's Business Centers (WBC).

They also conduct training events throughout the district - some may require a small business pay nominal registration fee.



#### **GC Area Offices**





#### **Prime Contracting Program**

- Procurement Center Representatives (PCRs) are the main component to SBA's Prime Contracting Program. PCRs review Federal acquisition and procurement strategies before they're announced, which enables them to influence opportunities that should be set-aside for small business concerns in all socio-economic categories; i.e., 8(a) BD/WOSB/EDWOSB/HUBZone/SDVOSB/General Small Business.
- PCRs also help carry out SBA policies and programs; conduct market research; assist small businesses with government contracting issues and provide counseling on the Federal government contracting process.

#### **Subcontracting Assistance Program**

- SBA's Subcontracting Assistance Program ensures that domestic small business concerns receive maximum practicable opportunity to compete for and receive subcontracts from other-than-small businesses that have Federal prime contracts.
- This is primarily accomplished by SBA's Commercial Market Representatives (CMRs) conducting compliance reviews to ensure that other-than-small businesses are meeting their small business socio-economic goals and the other elements contained within their small business subcontracting plans.



#### **Size Program**

- SBA's Size Program ensures that only legitimate small business concerns receive Federal contracts that are set-aside for small businesses and that only small business concerns participate in SBA's programs (i.e., 8(a) BD/HUBZone/ED-WOSB programs, Certificate of Competency (COC), SBIR/STTR, financial assistance (i.e., SBA loans)).
- SBA/GC Area Directors issue formal size determinations when an apparent successful contractor's size is challenged by an unsuccessful offeror or another interested party, or when an SBA program office requests a size determination as a component of a firm's eligibility.

#### **Certificate of Competency Program**

- SBA's Certificate of Competency (COC) Program assists small firms to qualify for specific Federal contracts. The program allows a small business concern to appeal a contracting officer's determination that it is unable to fulfill the requirements of a specific government procurement on which it is otherwise in line to receive.
- SBA will perform an independent assessment, review the circumstances, and determine if the applicant is sufficiently responsible to perform on the contract.
- If SBA finds the firm "Competent", the SBA/GC Area Director will issue a COC on behalf of the contractor to the contracting officer.



#### Non-Manufacturer Rule (NMR) Program

 The Nonmanufacturer Rule Program affords small businesses an opportunity to engage in Federal contracting as resellers or distributors when no small business manufacturer exists for a specific item. Class waivers are listed on the SBA website and apply to a class of products. Individual waivers are issued at the request of a contracting officer for a specific procurement.

#### **Timber Program**

- SBA and other Federal agencies (e.g., U.S. Forest Service (USFS) and Bureau of Land Management (BLM)) jointly set aside timber sales for bidding exclusively by small businesses when they wouldn't otherwise get a fair share under open sales.
  - A portion of set-aside timber sales must go to small business manufacturers, i.e., saw mills.



#### **Women-Owned Small Business Program**

- The Small Business Act authorizes certain procurement mechanisms to ensure that Women-Owned Small Businesses (WOSBs) have an equal opportunity to participate in Federal contracting. SBA's regulatory guidance for implementing this statue can be found at 13 CFR Part 127. The WOSB Program was established to help provide a level playing field for women business owners and the government limits competition for certain contracts to businesses that participate in the program. These contracts are for specific industries where WOSBs are underrepresented. Some contracts are restricted further to economically disadvantaged women-owned small businesses (EDWOSBs). SBA maintains a list of those eligible industries and their NAICS codes.
- In October 2020, SBA launched the new formal certification process firm's seeking to participate in the WOSB Federal Contracting Program. Self-certification is no longer valid. Firms may apply for FREE on <a href="https://beta.certify.sba.gov">https://beta.certify.sba.gov</a> or they may continue to use a Third-Party Certifier, at a cost. The four organizations approved by SBA to provide third-party certification are:
  - o El Paso Hispanic Chamber of Commerce
  - National Women Business Owners Corporation
  - U.S. Women's Chamber of Commerce
  - Women's Business Enterprise National Council





# Federal Small Business Subcontracting Program





# Objectives

- Small Business Subcontracting Plans
- SBA's Role in Federal Subcontracting
- How to Locate Subcontracting Opportunities



### **Federal Small Business Subcontracting Plans**

A Federal contract that exceeds \$750,000 (or \$1.5 million for construction) awarded to an "other than small" business must have a Small Business Subcontracting Plan, if any subcontracting possibilities exist.

In addition to an explanation of the efforts the contractor will take to demonstrate a good faith effort to using small businesses as subcontractors, the Small Business Subcontracting Plan has dollar and percentage goals for subcontracting to:

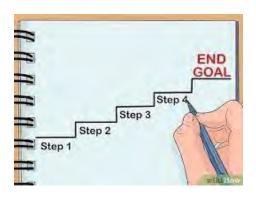
- Small Businesses (SB)
- Women-owned Small Businesses (WOSB)
- Small Disadvantaged Businesses (SDB)
- SBA-<u>certified</u> HUBZone small businesses (HUBZone)
- Veteran-Owned Small Businesses (VOSB)
- Service-Disabled Veteran-Owned Small Businesses (SDVOSB)
  - In VA contracts, VOSB and SDVOSB subcontractors must be certified by SBA

In all categories above (unless otherwise noted), a firm may self-certify their size and socioeconomic status for a Federal subcontract



## **Subcontracting Plan Contents**

- > Total \$ to be subcontracted
- > Types of supplies/services to be subcontracted
- Method used to develop goals
- Method used to identify potential sources
- Indirect costs included/not included
- ➤ Name of individual administering the plan
- > Efforts to ensure small businesses have equitable opportunity to compete





### **Subcontracting Plan Contents**

- > Assurances that required clauses and provisions will flow down to subs
- > Assurances that reporting will be done
- Recordkeeping procedures



- Assurances that a good faith effort will be made to utilize small businesses used to prepare proposal/bid
- Assurances that an explanation will be made to the contracting officer if those small businesses are not used
- Assurances that a small businesses will not be prohibited from discussing payment with the contracting officer
- > Assurances that small business subcontractors will be paid on time



### What products or services are subcontracted?

- Other-Than-Small Businesses Federal Contractors (commonly called Large Businesses) purchase many products and services to fulfill their Federal contract
- Subcontract a wide variety of products and services in a wide array of areas
- Subcontracting opportunities may exist at many tiers
- Subcontract for complex systems and simple items
- Subcontract both direct and indirect costs



## **Role of SBA Commercial Market Representatives**



Conduct periodic reviews to determine whether prime contractors are in compliance with their small business subcontracting plans



Monitor questions sent to subcontracting@sba.gov



Provide education and training to agencies and large prime contractors regarding subcontracting plan requirements and compliance

**Directory of CMRs:** Commercial Market Representatives (sba.gov) 31



Area 1: Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Rhode Island, Vermont, Commonwealth of Puerto Rico & the U.S. Virgin Islands

MR. CHRISTOPHER SAO christopher.sao@sba.gov



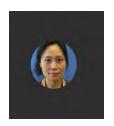
MR. GENE SPILLANE
eugene.spillane@sba.gov



MS. MALINDA CHEN malinda.chen@sba.gov



MS. SANDY LIU sandy.liu@sba.gov



Area 2: District of Columbia, Delaware, Maryland, Pennsylvania, Virginia, West Virginia

MS. RAHEL MOLALIGNE

Rahel.Molaligne@sba.gov



\_\_\_\_\_

Area 3: Alabama, Florida, Georgia, Kentucky, Mississippi, North Carolina, South Carolina, Tennessee

MS. ARNETTE L. MAYHEW arnette.mayhew@sba.gov



MR. GARY W. HEARD, PH.D. gary.heard@sba.gov





#### Area 4

Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, Ohio, Wisconsin

# MS. DEBORAH CRUMITY deborah.crumity@sba.gov



#### Area 5

Arkansas, Colorado, Louisiana, Montana, New Mexico, North Dakota, Oklahoma, South Dakota, Texas, Utah, Wyoming

# MS. SOPHIA CHOU sophia.chou@sba.gov

#### Area 6

Alaska, Arizona, California, Hawaii, Idaho, Nevada, Oregon, Washington, Territories of Guam, and Northern Marianas Islands

# MS. JANICE NIETES <a href="mailto:janice.nietes@sba.gov">janice.nietes@sba.gov</a>

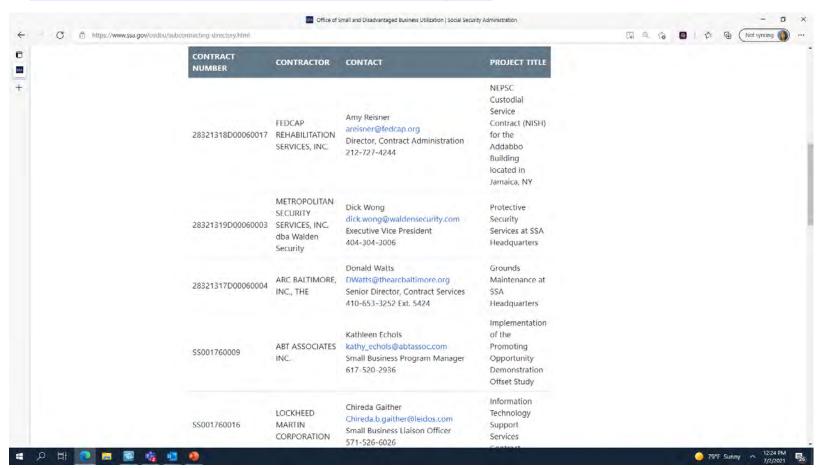


### Finding subcontracting opportunities

- View directories of prime contractors that are posted by Federal Agencies.
   These can generally be found on agencies' or OSDBU offices' websites. SBA also lists a few on its Prime and Subcontracting Assistance website at <a href="Prime and subcontracting (sba.gov">Prime and subcontracting (sba.gov)</a>.
- Research prime contracts recently awarded in beta.sam.gov.
- Reach out to your local Procurement Technical Assistance Center (PTAC) some have a low-cost bid matching service and a "data mining" workshop and some provide prime contractor-small business matchmaking events.
- View current subcontracting opportunities in SBA's SUBNet website to (<u>SBA SubNet</u>).
- Attend procurement trade fairs. Small businesses can become aware of these from their local SBA district offices, Apex Accelerators, OSDBU offices, and local trade associations.

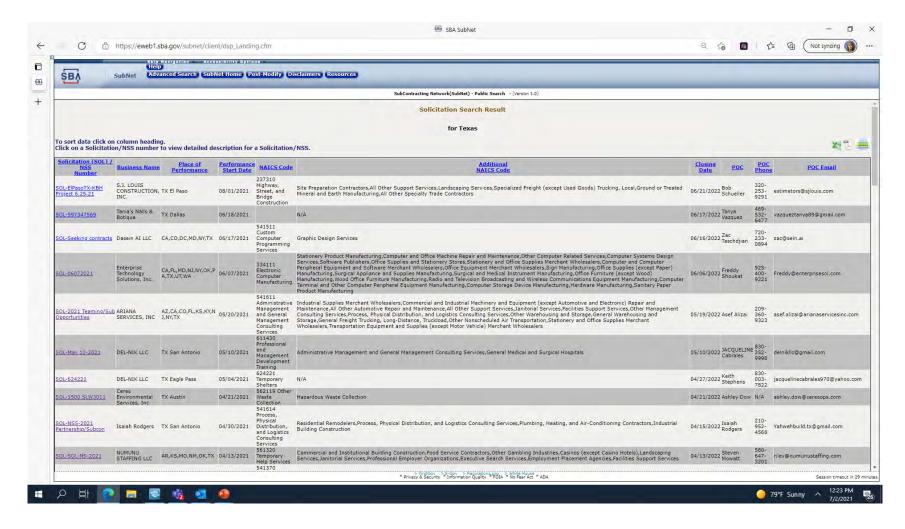


# Example - Social Security Administration Prime Contracting Directory (Office of Small and Disadvantaged Business Utilization | Social Security Administration (ssa.gov))



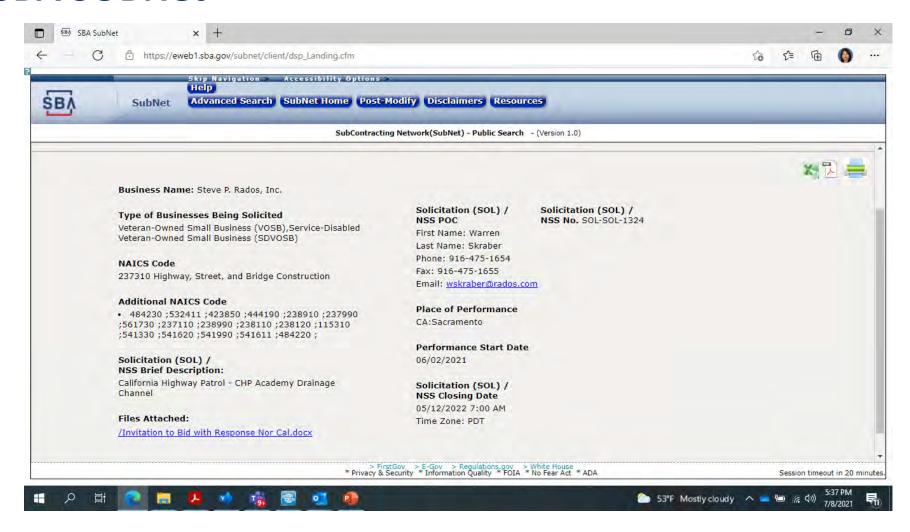


#### **SBA SUBNet**





#### **SBA SUBNet**





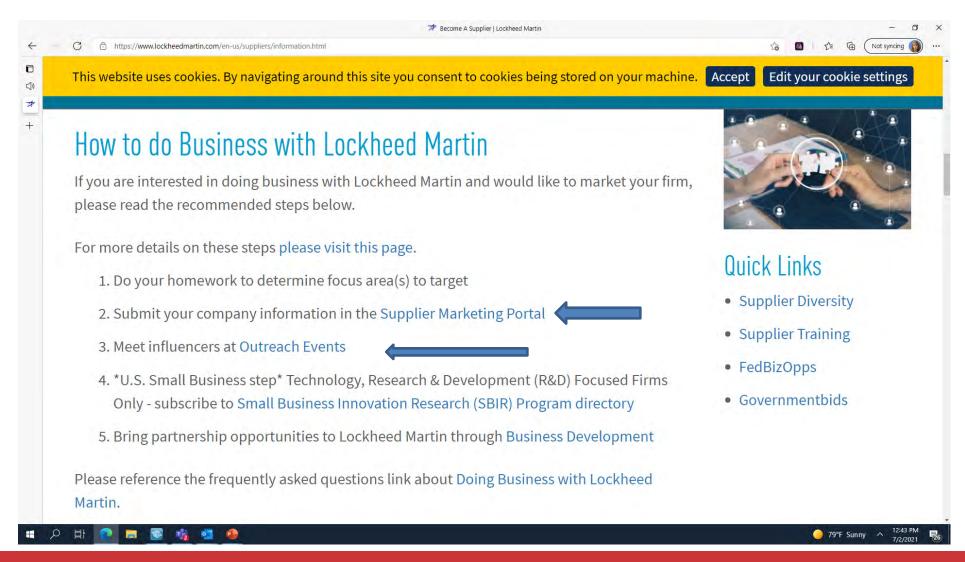
#### **Apex Accelerators**

#### **APEX Accelerators help businesses**

- ► Complete registration with a wide range of databases necessary for them to participate in the government marketplace (e.g., SAM).
- ▶ Identify which agencies and offices may need their products or services and how connect with buying agencies and offices.
- ▶ Determine whether they are ready for government opportunities and how to position themselves to succeed.
- ▶ Navigate solicitations and potential funding opportunities.
- ▶ Receive notifications of government contract opportunities on a regular basis.
- ▶ Network with buying officers, prime contractors, and other businesses.
- ▶ Resolve performance issues and prepare for audit, only if the service is needed, after receiving an award.



#### **Search Sites of Prime Contractors**



### **Tips for Marketing to Prime Contractors**

- Prime contractors seek most subcontractors prior to submitting their own offer on a Federal contract, but many continuously seek small business subcontractors throughout performance as well
- First and foremost, emphasize your company's skills and expertise. Size and socioeconomic status is secondary.
- Size self-certification can be through SAM.gov or a written or electronic representation to the prime contractor
- To be small, the subcontractor must be small for the NAICS code that the prime contractor has assigned to the subcontract
- Prime contractors can count a company towards all of its subcontracting goals for which the subcontractor qualifies: SB, SDB, WOSB, HUBZone, VOSB, SDVOSB





## Subcontracting Questions can be emailed to:

**Subcontracting@sba.gov** 

Monitored on a rotating basis by SBA Government Contracting CMRs.

#### Links to Resources

- DoD Regional Councils: <a href="https://business.defense.gov/Acquisition/DoD-Regional-Councils/">https://business.defense.gov/Acquisition/DoD-Regional-Councils/</a>
- Dynamic Small Business Search: <a href="https://web.sba.gov/pro-net/search/dsp">https://web.sba.gov/pro-net/search/dsp</a> dsbs.cfm
- EPA Vendor Database: <a href="https://www.epa.gov/resources-small-businesses/doing-business-epa">https://www.epa.gov/resources-small-businesses/doing-business-epa</a>
- GSA eLibrary: https://www.gsaelibrary.gsa.gov/ElibMain/home.do
- NASA Vendor Database: <a href="https://www.nasa.gov/osbp/nasa-vendor-database">https://www.nasa.gov/osbp/nasa-vendor-database</a>
- Procurement Technical Assistance Center (PTAC): <a href="https://www.aptac-us.org/">https://www.aptac-us.org/</a>
- SBA Area Directors: <a href="https://www.sba.gov/federal-contracting/counseling-help/contracting-area-directors">https://www.sba.gov/federal-contracting/counseling-help/contracting-area-directors</a>
- SBA Commercial Market Representatives (CMR): <a href="https://www.sba.gov/federal-contracting/counseling-help/commercial-market-representatives">https://www.sba.gov/federal-contracting/counseling-help/commercial-market-representatives</a>
- Subcontracting Network (SubNet): <a href="https://eweb1.sba.gov/subnet/client/dsp">https://eweb1.sba.gov/subnet/client/dsp</a> Landing.cfm
- TRIAD: https://www.ndia.org/divisions/small-business/triad





**Questions?** 



## Intermission

10-minute break







- Jake Zimmerman (Guidehouse)
- Janine Campos (Dexis)-
- Marc Sabbagh (Accenture Federal Services)

Rich Vinnacombe



12/8/2023 Annual Review 45



## Industry Liaison

- Promotes timely responses to general vendor requests where appropriate.
- Helps program and acquisition personnel develop strategies for engaging potential vendors that can provide capabilities necessary to achieve agency missions.
- Works with the agency's AIA and OSDBU to drive practices that improve communication with vendors.
- Encourages vendor feedback on agency acquisitions and monitors marketplace interest in agency requirements.









## Industry Liaison Capabilities & Engagement Resources

- Industry Meeting & Event Planning
  - ✓ Listening Sessions
  - √ Industry Days
  - √ Vendor Demonstration Meetings
  - ✓ Pre-Solicitation & Solicitation Input Sessions
  - √ Roundtables
- Stakeholder Registry & Industry Identification
  - √ Tailored Matchmaking
- Stakeholder Insights & Feedback
  - ✓ Annual Survey
  - ✓ Pulse Surveys
- Industry Preparation & Coaching
  - √ Backgrounders
  - ✓ Tip Sheets
  - ✓ Question Prep
  - √ FAQ

Social Media



https://www.linkedin.com/company/department-of-state-industry-liaison/

Department of State Website





https://www.state.gov/business/



# Procurement Center Representative (PCR)

Fitzia L. Justice

Area II

Office of Government Contracting

#### **Procurement Center Representatives Overview**



#### **Advocate on behalf of SBs**

#### Train other Federal agency, Resource Partner staff and Vendors



#### **Mediate SB Issues**



#### Work closely with contracting staff at Federal buying offices

- Communicates with Agency on upcoming requirements
- Review acquisitions and solicitations
- Inform agencies on updates to SB regulations and changes in SBA certification programs
- Assist agencies in meeting their SB goals through training, counseling & technical assistance
- Review Subcontracting Plans for compliance prior to award
- Receive copies of Cure/Show Cause notices of SB firms headquartered in the PCRs territory; contacts firm to offer assistance if needed
- Review buying office SB policies & procedures



#### **PCR's Customers**

PCRs interact with an array of customers on multiple levels to achieve a variety of outcomes when performing compliance and advocacy.





#### **PCR Resources and Tools**



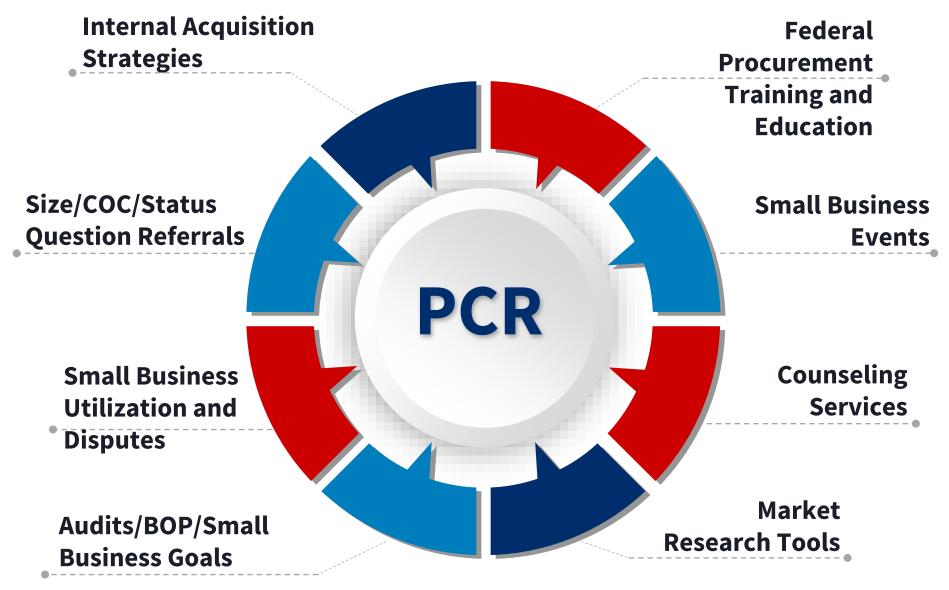




Resource Partners	02 Federal Buyers	O3 Small Businesses
-Participate in outreach events -Referral System -Provide technical training on federal procurement subjects	-Surveillance Reviews (SR) -Business Operation Plans -Annual PC SB Goals Analysis -Advise Senior Level Exec. (HCA) -Collaborate with SBP -Informal/Formal Form 70 -Performs Extensive Market Research	-Public Speaking Events (SME) -Provide Counsel to SBs Owners -Connect SBs to PCs -Recommend Policy changes



#### When to contact a PCR





### **How to Contact a PCR**

- <u>https://www.sba.gov/federal-contracting/counseling-help/procurement-center-representative-directory</u>
- https://www.sba.gov/tools/local-assistance

#### Counseling and help

SBA offers counseling and training resources that help small businesses win federal contracts.

#### Contracting area directors

Contact a contracting area director near you.

Find a contracting area director

#### Procurement Center Representatives

PCRs help small businesses win contracts, conduct market research, assist small businesses with payment issues, and provides counseling.

Find a Procurement Center
Representative

#### Commercial Market Representatives

CMRs work to ensure that small businesses are receiving maximum practicable opportunity to participate as federal subcontractors.

Find a Commercial Market
Representative



## Conclusion

Thanks to your commitment and strong work ethic, we know next year will be even better than the last.

We look forward to working together.

**DEPERTMENT OF STATE OSDBU** 



12/8/2023 Annual Review 55

