

Candice: Welcome and thank you for joining today's live SBA web conference. Before we begin, please ensure you are in the WebEx event and have opened the chat panel by using the associated icon located at the bottom of your screen. You are welcome to submit written questions during the presentation and these will be addressed during Q&A. To submit a question, select all panelists from the drop-down menu in the chat panel. Enter your question in the message box provided and press enter to send. Note that all audio connections are muted at this time. If you require technical assistance, please send a chat to the event producer. With that, I'll turn the conference over to Chris **[00:00:39 inaudible]**. Chris, please go ahead.

Chris: Thank you, Candice. Hello everyone and welcome to the eighth session of SBA first Wednesday webinar series for fiscal year 2020. We want to remind you that within the email invitation for today's session, we included some SBA guidance and resources regarding Covid-19, so please check that out. Additional information can also be found at www.sba.gov/coronavirus. On to slide two. For today's session, we'll be focused on market research with a bonus topic of SBA points of contact. By the end of the program you should have a better understanding of this topic as well as the resources available for you. If you are new to our event, this is a webinar series that focuses on getting subject matter experts on specific small business topics such as market research and having them provide you with valuable information you can use in the performance of your job. We appreciate you taking the time to participate in FY20 program, and we hope that you'll benefit from today's session.

On to slide three. As Candice mentioned, I am Chris **[00:01:48 inaudible]** and I work as a Procurement Center Representative or PCR and I'm located in Kansas City, Missouri. Additionally, Mr. Charles Mason, who is a PCR in Omaha, Nebraska will be reading your questions submitted during the program for our speaker to address at the end of today's session. We both work in government contracting area four and slide three includes our information. Onto slide four. Please note that all lines are on mute. However, you may submit questions or technical issues in the chat box on your screen. Your questions may be submitted at any time during today's session by entering them into the chat box and these questions will be addressed at the end of our speaker's presentation. To make sure your questions don't get overlooked, please ensure it is addressed to all panelists on the dropdown and not just to one individual.

As most of you know, we have transitioned to WebEx and I've been informed that some users may experience issues such as a block website or other air messages when attempting to access the conference log in from their computer. If you're affected by this issue, please make sure you dial in and follow along with the slides provided in this email. We will ensure the page numbers are clearly stated so you can follow along. Now, if you're having any other technical issues, please call the AT&T support desk at the following number, (301) 250-7202. This telephone number

is also included in the email invitation for today's program and on slide four of the PowerPoint presentation. For more SBA small business program training and additional resources, please visit the SBA learning center at www.sba.gov.

On to slide five. Did you know that the Association of Procurement Technical Assistance Centers or App Tech hosts a website where they post the first Wednesday programs? Since these sessions are being recorded, you can re-listen to this program as well as previous session by visiting our website which has provided here on slide five. Additionally, procurement technical assistance centers or P-tax are a great resource and partner with your local P-tax for an industry day, sharing RFI notices or sources sought announcement or simply referring small business concerns to a P-tech or just a few reasons why they are such a useful resource for acquisition personnel. Please contact your local P-tax for additional information.

On to slide six. Slide six of the program scheduled for fiscal year 2020 and today's session on market research is the eighth topic and the series for this fiscal year. You will see that we have had to adjust the schedule slightly due to speaker availability as well as adjusting or adding some new topics to our program lists and the improvement of other topics that have been presented in the past. As you know, the participation continues to grow each month and the positive word of mouth is greatly appreciated.

On to slide seven. I'm sure many of you will want to receive credit for today's training, so you'd be glad to know that today's session is with one CLP. On the following slide, which is slide eight, you'll find the training certificate and I will go over the instructions at that time. Now several of you may have received this information for this training from a friend or colleague, but if you want to receive an email directly from us notifying if you have upcoming first Wednesday webinar event each month, just email us at SBA learning, which is sbalearning@sba.gov. In the subject line, please enter the words Add to List and we'll ensure you're added to the distribution list.

Now on to slide eight. On Friday you'll see the certificate. First, you'll need to access the PowerPoint presentation that was emailed to you. Then you'll manually fill in what state, your name. Insert your name here. Next, within the print settings, you will go to select print current slide, which will allow for only the certificate to be printed. Once this is done, you can coordinate the CLP achievement with your training program coordinator. Another reminder, SBA does not track your CLPs or communicate with your training program regarding your CLP achievements.

Onto slide nine. Today's training has been assembled to educate you on market research tools as well as provide you with additional SBA resources available for your use. Our speaker has graciously accepted the invitation and she'll be directing me to continue on to the next slide. As mentioned earlier, if you're unable to access

WebEx, please follow along with the PowerPoint presentation that was included in the email for today's training. We'll identify the page number so you can follow along. Also, please note that some viewers may experience a delay as the slide changes on your screen. I'm pleased to introduce today's speaker to you, Ms. Valerie Coleman, who is the Program Manager for SBA Prime Contracts Program. We appreciate that you could meet with us today, Val, and I'll turn the program over to you now.

Valarie: All right. Thank you very much Chris. Happy May the 6th to everyone. I work for SBA headquarters in Washington, DC but I have a post of duty here in Houston. I just want to say it's a beautiful day down here and I just watched the Blue Angels fly over. It's a great afternoon in Houston. Thank you all for calling in for this first Wednesday webinar series. Next slide please.

Let's start with market research and CYA. It's not what you think it is, it's Cover Your Acquisition. Before we start, I do want to give a shout out to Malia Krauss who's with the Fort Worth core in Texas. She did this presentation a long time ago, years and years ago, and this was her first slide and we fell in love with it and we've used it and used it and used it. Malia, thank you very much for always having my first slide when I do a market research presentation. We always want to make sure that everyone's doing the right thing, and so every action should really start off as a small business action. Please remember on market research, you don't have to tell SBA or anyone else why you're going full and open. What you do have to do is to explain and show us why you're not going small business. It's two different things. So please keep that in mind as we go along. Next slide please, Chris.

Who conducts market research? As you can see, it's basically everyone. It starts at the very beginning and goes through your technical people, your requirements, personnel, your project managers, contracting, and then it eventually gets to your small business specialist. We want to make sure that you're not forgetting to include your small business specialist in market research because they can assist in finding small businesses that you may not be aware of. So, get them involved early. Also, get your SBA PCR involved early. The small business specialist, especially works with the PCR to review proposed acquisition strategy and suggest alternatives as needed so that we can comply with our small business laws and regulations. If we can get everyone involved early, it just makes the process so much easier and everyone brings their knowledge and their possible separate listings of small businesses into the market research that other people may not be aware of. Next slide please.

Let's talk about some regulations. We can't do anything in the federal government unless we have some regs. We have a couple here. The first one is in far apart two, which always talks about our definitions. The definition of market research is collecting and analyzing information about capabilities within the market to satisfy the agency needs. That's also understanding of industry capabilities, trends, and

costs. Then far part seven talks about acquisition planning policy. As you can see down here in a, one of the second things that they mentioned is to conduct market research and it gives you a far reference of 10. Next slide please, Chris. Which is the section of the far that deals with market research. I'm not one to read slides, so I'll just go through them and talk about when we do market research. Of course, it's when we have new requirements before soliciting offers with an estimated value in excess of the SAT, acquisitions estimated with a value less than the SAT when we don't have adequate information for anything that could possibly lead to consolidation. That word we don't like to say in federal contracting bundling. Then before awarding a task or delivery order under an IDIQ. Next slide.

While we're talking about market research, you do want to talk about the role of the PCRs in market research while we're here? You'll learn a lot more next month when you listen in and hear the presentation on the first Wednesday about PCRs and what they do. But this is a condensed version. The PCRs review proposed acquisitions to recommend to any of the new small businesses that the agency may not be aware of in each of the social economic groups. We looked for being able to break out components possibly to make partial set asides. We also recommend setting aside of acquisitions that the agency may not have decided should be small business set aside. That's where all your market research is coming in. We can look at all of that to determine if a set aside could be done.

A couple of things, if you want to know more about the role of PCRs, it's in far apart 19.402. I wanted to let you know that PCRs, a lot of you may not be aware, but all PCRs are [00:12:08 inaudible] level three certified. That's not only because they want to be, but also because Congress mandated that PCRs be level three. You can have two types of PCRs, a resident or liaison. A resident is one that's going to sit at your agency. The only reason I mentioned this is because if you want to get in touch with a PCR and you don't have one assigned to your center, the area office where the procuring activity is located will be able to assist you on who your PCR is and we'll give you more information about that when we get to the SBA points of contact. I'm going to be able to give you web addresses and names and everything else like that to assist you.

Also, under 19.402, PCRs are given access to as much information as possible that will help them determining, especially if something comes to them full and open, on whether it should be a set aside. They may appeal the contracting officer's rejection of its recommendation. Hopefully not a whole lot of you have heard about this, but those of you who have, it's the dreaded form 70. It is not a source of happiness with anyone because your project stops. But fortunately, most of the form 70s that have been filed, the general disagreement's on issues, we've been able to resolve them without the PCR filing a formal appeal and that formal appeal goes up to the secretary of the agency. We try to avoid that as much as possible. The more market research that you're able to give a PCR, the better it is for him or her to make a

decision to either go along with your recommendation or to get with you to talk to you about why they don't agree with it. Next slide.

Chris: Okay, and we're on slide 15.

Valarie: So far part 202 says that small businesses, and this is word for word, so I want to read this. Small businesses shall be afforded an equitable opportunity to compete for all contracts that they can perform to the extent consistent with the government's interest. When we talk about that, we're talking about all the different kinds of small businesses and far apart 19.2038 talks about that. But the main thing it talks about when you're talking about the 8(a) program and HUBZone, Service-Disabled Vet and the WASPI program, whether it be WASPI or dead WASPIs, which is economically disadvantaged women owned businesses, there's no order of preference, which means there's not one program that is higher than the other. If you have, for example, three 8(a) firms and three Service-Disabled Vet firms and three woman owned small businesses in three HUBZones, it's a contracting officer's decision on which way they go. Normally, it's that area where they're not reaching their goals. But those are some things that a PCR can help you with, is to find additional small businesses that are in these categories. We're going to talk a little bit about that further on when we get to talk about SBAs dynamics small business search or DSPs.

Also, we see on here 419-part 203 C, where the first consideration should be given to the socioeconomic categories, HUBZone, 8(a), Service-Disabled Vet, WASPI or Ed WASPI. Then after that it's to be considered small business set aside. After that full and open competition. I did add a section after 203 C. We do want to remind you, however, if a requirement's been accepted by the SBA under the 8(a) program, it must remain in the 8(a) program unless the SBA agrees to its release in accordance with 13 CFR 124, 125 and 126. If you are uncertain about that, you can always contact your local district office and talk to your business opportunity specialist about those requirements that are in the program that for some reason you want taken out of the program. We're getting these requests all the time. So, this gives you the CFR reference. Next slide please.

You do need to know what the rule of two is. I've given you the far references here and that's basically if you have two small businesses in any type of category where you could do a socioeconomic set aside that you'll have at least two responsible small business concerns and the awards going to be made at a fair market price. One of the things that I've heard from some contracting folks, they say, well, I have one moment, and I have a HUBZone. Can't I go either way? Either woman or HUBZone? No, there must be at least two. If you have a HUBZone and you have a woman-owned, you can't do a set aside in neither of those categories. What you can do is a small business set aside so that both of them would be able to compete. Next slide.

One of the things I wanted to bring up was some questions that you can ask to help with your market research. One of the things I also want to say is when your present market research to your small business specialist, and particularly to your procurement center rep, if you're doing something full and open, we need everything that you've looked at. A lot of times when I was a former PCR, I would go back to my small business specialists with questions and when we would contact the contracting officer, they go, "Well, I did that." We said, "Well, she didn't put it in your market research." The answer was always, "I didn't know I needed to be that detailed." The answer is, "Yes, you do." Because you need to tell the story. You need to be able to put in your market research enough information so anyone that picks it up can read it and understand why your procurement center is going the way it is.

Here's some basic questions that you can ask. What did you do the last time? You're going to be looking at historical information. Again, this is not comparing apples to oranges. This is comparing apples to apples. If you're comparing apples to oranges, you didn't do it last time because your statement of work or whatever performance work statement is, is different. Is there existing market research elsewhere in your agency? I sat at Johnson Space Center in Houston as a PCR and maybe JSC didn't have information, but maybe Goddard or Armstrong, one of them had information. You can go to other divisions or different locations of your organization to see if they've done something like this and what did their market research show?

Is their existing market research outside of your agency such as **[00:19:28 inaudible]**? You can go to other agencies. There's nothing that says, NASA can't call the army and say, "Hey, I heard that you might've done something. Who did you use? What was your results? Is this close to what we did?" So, there's a lot of different areas other than just going to the internet or Google. You have each other also that you can do some market research. Have you done a request for information and or sources sought? Here's the first thing you need to know. An RFI and sources sought are not the same thing. They are totally different. The one thing you do need to know on the sources thought, and I would ask that you go to far 10.001 B, is that when you are conducting market research and you do a sources thought, the agencies should not request potential sources to submit more than the minimum information necessary to make a decision.

I don't normally give you examples, but I want to give you one that happened with me at one of the agencies that I dealt with, is we got the information back and what it said was that there was no small businesses that were capable of doing it. I asked for the results of the sources sought. Folks, we don't want the watered-down version of what answers the small businesses gain. We want exactly what they said. When they gave them to me and I looked at him, I said, "Well, you have ten areas and you've got six small businesses that can do six or seven out of the ten. Why are you saying we don't have the rule of two?" They said, "Well, the two that no one could do are the two most important and are 80% of the job." Well then that's what

you should have asked for, was who had experienced in those two areas so that you could make sure that you had qualified people. What we did was, we canceled that sources sought after we got it, they put it back out with a revised version of what they wanted. They actually got three and they were able to do a set aside and awarded and the job went well. Just make sure you're not asking for everything [00:21:50 inaudible], is not a proposal. It's just that, it's just giving you the basic information you need to make a decision.

The second to the last one is have you been in touch with industry in government and, and the small business community to see if they have small businesses? And is there documentation to be able to prove your market research? When I say documentation, you just can't say, agency ABC said they had four blah, blah, blah. Get it in writing so that you have the story to tell. Next slide please.

We want you to think small business. We want you to use market research to craft a strategy, not to validate something you've been doing for the last 10 or 15 years. I think times changed; things are different. New small businesses come up all the time. Just because you didn't find anyone last year, doesn't mean that there are not small businesses this year that can do it. We want you to think about that when you're looking at your small business. Again, work with a mindset to show why small businesses cannot perform well rather than why other small businesses or large can. Make your research small business friendly. Next slide.

Let's talk about the dynamic small business search. It's a great tool. It's SBAs database of small businesses that want to do business with the federal government. One of the big things you need to understand with DSBS when you're doing your market research is this is an and program, not an or. Another story, I got a market research DSBS printout and they said there's no small businesses. Well, when I looked at the top, they had 15 different criteria in there that a small business had to meet. Well, of course there was no one that could do that. We went back and changed it to and, or we just did certain criteria independently of each other and they were able to get their firms. One of the things I want you to pay attention to when you see this screenshot of DSBS is if you look at the top where it says RSPA seal and DSPS, you'll see some blue bubbles. One of the parts in the blue bubbles is what's called a quick market search. A lot of contracting activities are not familiar with the quick market search. I want to show you what happens with that. Next slide please, Chris.

What happens on the quick market search is, you can enter information such as, you're looking for a small business with a certain next code, let's say 541330. Let's say in this and it's an Alabama. When you do this search, it brings up all the social economic groups and how many in each group there are. You're going to get some crossover because you could have an 8(a) firm that's also HUBZone certified and a woman-owned business. When you do this, what you can do then is click on either

the economic group or the number and the profiles are going to come up just like a regular search that you would do. If you were looking for an 8(a) firm who is a Service-Disabled Vet and you were looking for SDBS and HUBZones and women and you clicked all those boxes and the regular search on DSPs, you were only going to get those small businesses that are owned by a woman who certified SA and HUBZone and is a veteran. This way you get each of the separate social economic groups so you can go in and then make a decision about whether you have enough to do with social economic set aside or actually go in there and contact them to see if they would respond to a sources sought. They could provide capability statements, things of that nature.

You're looking at these numbers and you're saying, well that's a lot of emails. No, it's not. It's basically one email. If you do it through the regular search, if you do it through this, it would be one in each category. But let me show you how you do that that will take two minutes of your time and you will get major results back. Next slide please, Chris.

Chris: We're on to slide 21 and I also wanted to mention that it appeared that the lines were full. We've added several hundred more lines. Obviously if I'm saying that they won't be able to hear it anyway, so we'll do a chat. That sounds better. Val, continue, we're on slide 21.

Valarie: Let's say that you click on one of the categories and as you can see at the top where it says number 26 in **[00:26:48 inaudible]** works, that's how you're going to get all your profiles to show up. You can go down to the very bottom and you can hit the button that says save email addresses for all. Next slide.

Once you do that, as you can see in the bottom where we circled, all of them will come up. This is just a short version because we couldn't get all thousand or whatever on there, but you can do a cut and paste of all of that. So just highlight all of them. Do a copy, do your outlook, go on to the blind carbon copy, which is the way we would recommend that you do it, so everybody doesn't see who you're sending it to and do a paste. Every single one of them will get your email. You can send out a sources sought. That's the way a lot of PCRs assist you is they will do it that way. You can send it out to hundreds of people at the same time and it's one email. As you can see over here when we did the saved email addresses and all, it took 1.86 seconds and we got all the addresses.

Are you going to get some back that are undeliverable and not good anymore? Sure, you are, but you are going to get a lot more that people will respond back to you, thanking you for the sources sought or whatever you send to them and asking for more information. This is a great way to attach to your small business coordination forums so that the PCR can see that you've done a great job of going out there and

trying to find additional sources that you may not have on your internal list that either you are someone else in your agency has. Next slide,

So, far apart 15.201, what we'd like for you to do is to be able to think about these before you make a decision on your next acquisition. Consider some of the things on here because you want to improve the understanding of government requirements and industry capabilities. This allows a small business to determine that they can satisfy the government needs. So, industry or small business conferences. We talk about the market research, industry days where you hold one on one meetings with potential offers, draft RFPs, that's really great. I know when I worked at NASA, sometimes we would do a draft RFP and then put it back out three or four times and we're constantly getting comments or questions so that they could better understand it because if they can understand, what you want is a Seesaw that's straight across. You understand fully the requirements and the person who is going to be giving you a proposal or a bid fully understands it. If it's up or down one way or the other, that's not good. What we want is a level Seesaw on this.

Sometimes there's pre solicitation conferences. You can use the RFIs. Again, RFIs are different from sources sought. RFIs are asking industry whether they think it should be a firm fixed price contract or whether it should be a cost plus. Should they do auctioneers, things of that nature? Whereas sources sought, you've already made those determinations. You're just trying to make determination on how it's going to be put out and synopsized. Whether it could be a social economic set aside, a small business set aside or full and open. Next slide please.

Believe it or not, it would be wonderful if we had one small business coordination form, but we don't. We have NASA 1787 the VA's 2268 DOD 2579 that we see the most of. Health and human services, 653, the interiors 1886, department of transportation's 4250, department of agriculture's 1205, Homeland security 700-22, department of labor DL1-2004, energy F4200.40, and I apologize, 81205 is still department of agriculture, but we have one more commerce, CD 570. Yes, it would be absolutely wonderful if we just had one. But we see all of these. A PCR that covers eight or nine of these agencies sees the same information, but all in different formats.

Let's talk about what a well-prepared form should look like when you give it to your small business specialist and then when it comes to the PCR. Because as **[00:31:38 inaudible]** a lot, a lot of times PCR has asked the question and the CEO will say that they did it, but they never put it in writing, they never attached it. If you're doing a J&A or a Joe Fox, depending on which agency you're with, attach it to the small business coordination. The form is totally filled out. We don't want blanks left in there. Okay. All the information, you should attach. Make sure on your next codes please, wholesale and retail codes in the codes 42, 44 and 45, are not allowed in

federal procurement. You have to use the corresponding manufacturing codes, so please make sure that that manufacturing code is listed on there.

If you're trying to do a WASPI or Ed WASPI set aside, is the next code a qualifying next code? If you're not sure, I'm going to give you information farther down and where you can look. You can always go to your PCR. Please don't editorialize. I actually was in the middle of an interview with someone and his comment back to me was, small businesses costs are always much higher than everyone else's. That's not true. Sometimes they are, but to put on their 8(a) cost too much. That's your opinion. That's not market research. The locale is too far.

Now, when they say the locale is too far, there have been instances where we've seen requirements where it was a requirement because of the urgency of getting a piece of equipment fixed or something like that. They couldn't be more than 40 miles away, for example. If all of them are more than 40 miles away, it needs to say that rather than just they're too far away. We don't want small businesses to lose money. Well, you know what? Guess what? We don't either, but that's not your decision on their cost or anything else. For anyone to make that state... And all of these statements are statements that have come off of small business coordination forms, by the way. We don't want them to lose money and we had to go back and say, "Okay, that's not a valid reason not to go small business." There were 20 8(a)'s, 20 HUBZones and 10 Service-Disabled-Vets, but none could do it and that's all we got.

Give me the background information on how you made that decision. We do not have contract capacity. For what? I had to go back and ask them. That was one of mine. We don't have contract capacity to deal with small business. As you can probably guess, I didn't accept that, and I sent it back. Can small business perform or tend to not perform? Again, tell the story, give us a narrative. Would anyone reading your market research thoroughly understand it and agree on the decision that was made by your agency on the way you wanted to do this solicitation? Next slide.

Chris: On to slide 25.

Valarie: Here's all the forms. I just listed a few. Where do you send them? I've given you the web address on where all the [00:35:12 inaudible] center representatives are located. I'm pleased to say that as of a couple of days ago, it has been updated because we've had some retirees, we've had some new PCRs come on board. It is fully up to date. If you go to sba.gov and the rest of that, you will find the procurement center rep that is in your area. If you cannot see that they cover your agency, I'm going to give you the address when we get into the bonus part of this where you can call someone to ask who covers their agency. It may just be a PCR who covers every federal agency in one state. We'll talk about that when we get there. But your coordination forms after the small business specialist looks at it, it

goes to the PCR. It does not go to the PCR before the small business specialist looks at it. Next slide please.

Finally, I'm not going to read this, but we are stewards of taxpayer dollars and we want to do what we can for small business. The Covid-19 thing, the last seven or so weeks is a prime example of why we want to help small businesses. They are the backbone of our economy and over half of all the jobs come from small business. We want to make sure we're doing what we can to help small businesses have the maximum extent practicable when we're dealing with federal procurement. Next slide please.

So, gone through market research and I knew we were going to have some time. I will quickly go through the points of contact because if we get calls all the time in the field going, I don't know who to send this to or I don't know where this goes. I wanted you to have this to assist you in some way so that you would have the information. Next slide please.

Chris: Slide 28.

Valarie: We work in the office of government contracting and our mission is to assist small businesses in obtaining a fair share of federal government contracts, subcontracts and property sells. It's pretty short, sweet. That's what we do. Next slide please. We have area offices, and this is what we do. If you see on the left, we handle the prime contracts program, which I'm the program manager of, sub-contracting programs, COC, natural resources, service- Disabled-Vets, size, waivers of the non-manufacturer rule. Women-owned small businesses, surveillance reviews. We also play a major role in the formulation of federal procurement policies that affects small businesses that you all see.

Who are we? We have a government contracting headquarters and field staff. That is what I am. I work for government contracting headquarters in DC, but I have a post of duty here in Houston. We have our PCRs; we have our commercial market reps or CMRs that deal with subcontracting. We also have our specialists that do certificate of competency, determinations, and size determinations. We have our industrial specialists that may be a combination of COC and size people and also our forestry people. If you're not sure who any of these individuals are or if you need to get in contact with one of them, I've given you the web address for where the area offices are and you can go on there and look at them and determine who should be your point of contact.

Now I want to talk to you about the difference between an SBA district office and an area office, which causes a lot of confusion out there. Next slide please, Chris. We are on slide 30. As you can see on the left are the picture of the United States, there are 10 different regions of SBA. Each of the States, it grouping has a different color

because those are the regions. It starts with region one up in Maine and goes all the way down over to California and Alaska and Hawaii up to region 10. Regional offices, they cover all of the one color and each state has at least one district office. The district offices are the ones that you guys are familiar with, with the 8(a) program. On the right side, you see how those regional offices have been divided up into area offices. An area office is where PCRs and CMRs and size and field C people are. In this case, if you look on the far left to area six, area six actually covers regions nine and ten. Area five in the middle covers regions six and eight and so forth all the way across.

If you're needing local assistance, like through the 8(a) program, I've given you the web address for local assistance and that's where you go to find out information on 8(a) program where you might find information on Covid on the loans and things of that nature that are going on right now. Those are the differences between the two. There is a distinct difference between what the district offices do and what the area offices do. With the office of government contracting, we are area offices, not districts. Even though some of our PCRs may sit at a district, they are not district office employees. They are government contracting employees. Next slide please.

So, PCRs, what do they do? Well, I'm not going to rain on the parade of our guest people next month, but I will just tell you that the first Wednesday webinar on June 3rd is going to be on PCRs, what they do, why they're there, how do they operate, things of that nature. I highly encourage you to put on your calendar June 3rd to hear about PCRs. Next slide please. The 8(a) program, any question you have about the 8(a) program, an 8(a) participant and 8(a) contract goes to the district office and probably to the business opportunity specialist where the 8(a) firm is located. This includes offering letters, sending copies of awards and modifications, eligibility questions. All of that goes to the district office. They have responsibility for the 8(a) program. To find your 8(a) firm's district office, then you can go to the web address I have at the bottom.

Let's say you're in New York, but your 8(a) firm's in California, you can go to that area, look up California to find out what district office your 8(a) firm is located in. You can also go on to DSBS and put in the name of the firm and at the very top of DSBS it'll come up with a number that corresponds to the region. For example, if it was California, it would 09 something, so you know it's in the ninth region. You can click on that and it will tell you the various district offices that are in California. As I said, every state has at least one. Some of the larger States like California and Florida and Texas, there are multiple SBA offices and those are divided up into areas of the States. You want to make sure you get to the right district office. Next slide.

COC size, those go to the area office where the headquarters of the small business is located, not to the district offices. Again, it goes to the area office. That's the map that was on the right that showed the six area offices. Let's say you need a COC

done, the small business is located in Oklahoma City, you're going to send that to the Dallas Fort Worth area office. If you need to size determination and let's say the small businesses located in Seattle, it's going to go to San Francisco. It goes to the area office. Next slide, Chris.

We will be on slide 34 when it comes up. This is where you send your COC referrals. I've tried to make it as easy as I can. Area one has a listing of all the States that are covered. This is where the COC goes. That's the person's point of contact. Their email address, their phone number, that's who you call. If you have to do a COC and let's say it's an area two, you're going to call Adrian no matter where you are in the country. If that's small business is located in DC, it's going to Adrian. He's the person that you will call. Next slide.

By the same token, if you have a size protest, I've given you the name of the person, their phone number, and their email address. If you are down in area five, which is Arkansas and Colorado, Louisiana.

If you're a small business in one of these States, you're going to send it to Stephanie Lewis in US, Texas. That's where all the size cases are going to go. So hopefully these two sides you'll keep in case you have any COC or size protests, you know where they go. This has been updated. All of this is current information for you. Next slide please.

HUBZone information. If you want to know anything about HUBZone, whether you want to look at a map, whether you have specific questions. I've given you all of the web addresses and I've even giving you, if you have some small businesses that might like to get HUBZone certified, every Thursday at two, they have a conference call where they talk about HUBZone where you can ask questions. I've given you the phone number and the access code if you're interested in that. Next slide.

Next WASPI, big stuff coming out on the women-owned small business program. I've given you the web address of WASPI already. You can send questions, if you're having problems with the repository or the certify, because as of now contracting officers still have to go into the repository or the database to certify women. Well not certify, but to check that their information is there before they award a contract. Just to let you know, as you see highlighted, we're having a first Wednesday webinar on July 1st on WASPI and all of the changes. So, mark that one down. Next slide please.

All small mental protégé, changing all the time. It's been a great program for us. It's getting bigger and bigger. I've given you the web address for that where you can send questions and guess what? August 5th, we're having an all small mentor protégé, first Wednesday. The last couple of slides just happened to be for the last three months of us looking, during first Wednesdays because we don't do anything

in September. You're going to have webinars that we'll be able to answer your questions on these topics. Next slide please.

Non-manufacturer rule, we get this all the time. Carol Hume is in charge of that. I've given you her email address and her phone number. Anytime you're requesting a class or an individual waiver, it goes to nmrwaivers@sba.gov. Next slide. Surveillance reviews. I have oversight of that program. If you have any questions on surveillance reviews, you can send an email to me. That's my direct phone number. If you have a division or a section or a procurement center under your purview that you feel like needs a surveillance review, you can send an email to me and we can put them on the list to have a surveillance to do the following year. We are always looking for agencies that needs surveillance reviews. This year, well, in the past we've normally averaged about three or four of the agencies we do surveillance reviews on that were requested by higher ups in that agency to do for whatever reason. If you have any questions on that, please send me an email, or give me a call. Next slide please.

Subcontracting plans. I do this as complicated. I'll give you an example as complicated as possible to show you, but you were required by the far to send the copy of the subcontracting plan to the area director, and that would be one of the six area directors in our area offices. Let me give you an example. If the agency is in Denver but the work is in Seattle and the prime is located in Albany, but the administrator, the plan is located in Des Moines, it goes to the area office in Chicago because they cover Iowa. It doesn't go to where the agency is located. It doesn't go where the work is. It doesn't necessarily go where the prime is. Look in your subcontracting plan, see who the administrator of the plan is, where they're located, and that's the area office where it goes. The information I have below is a direct link to the subcontracting webpage under SBA. If you go to the bottom where it says need help, we just got this added last week and you click on CMRs, it will give you a listing of all the CMRs in each of the area offices so that you can contact them if you have questions. Next slide.

Chris: Slide 42.

Valarie: Natural resources program. A program that not a whole lot of people are aware of, but we aid and assist small business concerns in obtaining a fair share of federal property, which includes timber. That's why we normally call this our timber program. Strategic materials, royalty oil, leases involving rights to minerals, coal, oil and gas surplus, real and personal property. What we're wanting to do here is if for example, in federal timber, if we're going out and we're working with the department of agriculture for example, or we're looking with the US Forest Service, excuse me, we want to make sure that small business saw mills are getting their fair share of lumber. Believe it or not, the natural resources program and especially the timber program are sold by a department of agriculture forest service, Bureau of land management, under department of interior, department of defense,

department of energy, department of interior, fish and wildlife service and the Tennessee Valley authority. It's not just what you would normally think of agencies that get involved in the timber program. Next slide please.

Then David Loins is the program director for the timber program. David Loins is also the director of government contracting for SBA in SBA headquarters in Washington, DC. Then we have three industrial specialists that are in forestry. Stewart's in Atlanta and then John and Kevin are on the West Coast in Washington and the country's divided up between the three of them. If you have any of your national forest and you want information on our timber program, you can go into this and contact one of them. Next slide.

General questions. You're not sure who you're supposed to contact. You can always send an email to contracting@sba.gov or you can send it to our email, our inbox. We have sbalearning@sba.gov. I monitor that one and I will get you the answer. I may have to forward it to someone to get the answer, I probably will. It may take a day or two to get the answer back, but we'll always get you answers back on that I you have any. Next slide please. That's the end of the presentation. I appreciate so much everyone being on the line. The fact that we had to even add lines is absolutely wonderful. I'm open for any questions that may come up, Charles and Chris. If we can't get to all of them, they're going to send me a list of the questions I'll get with you or you can send them to sbalearning@sba.gov and I'll respond back to you.

Chris: Okay, great. Thank you for that Val. Charles, if you are ready, we'll start with some questions. I know somewhere, so flowing in there. If you could sort them out, we're ready to go.

Charles: Yes, we have quite a few questions. Thanks everyone for keeping engaged. The first question is, please clarify, only 81 can be sole sourced. All of the programs such as HUBZone, women-owned small business, Service-Disabled-Veteran-owned small business, et cetera, must be completed. Is this correct?

Valarie: No, that is not correct. HUBZone, Service-Disabled-Vet, WASPI and Ed WASPI, all have criteria in them where they can be sole sourced, and each one is so you will need to go to each one to look at them. But yes, you can do sole source under those social economic programs also.

Charles: Great. Thank you. In the woman owned small business and HUBZone categories, if you have one of each, could you then sole source to either one in this case?

Valarie: If it meets the qualifications of being sole sourced, yes. You're going to have to look at the solicitation. For example, if the solicitation, if they come and say we want to do HUBZone and they have to be within 40 miles of the facility and there's only one HUBZone within 40 miles, they can do a sole source, because that's the only one that meets the criteria that's a solicitation's asking for. But again, every one of them

is different. You need to make sure that you go in and read the regulations in the far for each of those programs.

Charles: Thank you, Val. I'm working on a solicitation for HUBZone competitive. Will I send the offer letter? Okay, one second. It's asking, I'm working on a solicitation for HUBZone competitive, so who would I send my offering letter to, if it's competitive.

Valarie: There is no offering letter for HUBZone. You would post it just like you would any type of small business set aside, or woman set aside. Offering letters or to the 8(a) program.

Charles: Great. Thank you. Do you encourage registrants to enter key words into their business description in the DSBS system?

Valarie: Yes because most of the time a contracting officer's going to search by keywords. One of the things that and thank you for that question because when I teach dynamic small business search, this is a big area for us. Let's say for example, that you're looking for janitorial firms. Well, when you do a certain in DSBS, you would probably put the word janitorial, but you also need to do a search with the word custodial, because they could have put the words that custodial instead of janitorial. If you're going to do a guard service, you may also want to do a separate search with the word security. That's why I said be careful of your words. Keywords are very important. I always encourage small businesses that I talk to, to put as many words as possible in there that'll fit what they do, because never sure exactly how the government is going to put key words in there. So yes, keywords are really important.

Charles: Great. Thank you. Is there a way to identify the States that contractors provide their services in, in the DSBS system?

Valarie: If you go into DSBS under capabilities, they may list the States that they work in. I know it talks about the different countries where they want to work, but as far as States, it may. What I would suggest is send an email to them and ask for a capability statement or just ask the question, is your company limited to servicing only a certain number of States and if so, what are they?

Charles: Okay, great. Thank you. Is there a GSA database of previously completed market research similar to the GSA's proving ground published reports?

Valarie: I cannot answer and I'm very honest. I've been with SBA 47 years. If I don't know the answer, I'm going to tell you. I have absolutely no idea. I've never seen one, but if you want to send that question in, I'll be more than happy to see if I can find someone that might be able to answer it.

Charles: Next question. Is there a limit to how many email addresses that can be emailed at one time in the DSBS system?

Valarie: That's going to be up to your internal policy within your agency. At one time I was limited to 500 in SBA and I recently got it lifted up too much higher. If you think you're going to be sending out a lot, you might want to check with your IT people to see what your limit is. I found that out when I was trying to do something that had 20,000 emails and I got to 10,000 and it said, you can't send out any more emails. That's when I knew I had to get my system upgraded a little bit. So, check internally to see what the limit would be for your particular activity.

Charles: Thank you. Is there a preference to select a small business that fits multiple economic group criteria versus just a single economic group?

Valarie: Well, here's the thing. You want to get the best qualified people, but you're not going to go out and say, I only want to look at women- owned SDVs, who are Service-Disabled-Vets. You're not going to put out information for that. You can do searches like that in DSBS. If they have multiple certifications, you can pull up their company and they will have them listed on there. Each of these programs are totally different. Realize though that you can multiple count. If you happen to get a small business and it also happens to be a Service-Disabled-Vet and a woman, you're going to be able to count that in those categories also. But, DSBS is a great place to look at the multiple certifications that a small business may have.

Charles: Thank you. Is a requirement considered to have been accepted into the 8(a) program at the time of the SBA acceptance or at the time of 8(a) award?

Valarie: No. When you send in your offering letter for those that are over the dollar limit where they need an offering letter, they will send an acceptance letter back and as soon as they send the acceptance letter, it's in the 8(a) program.

Charles: Thank you. What is the role of the small business specialist? Does their authority come from the headquarters of SBA and how do they assist execution, other than sending the coordination record to the PCR?

Valarie: Small business specialists are at every federal location by congressional legislation. SBA has nothing to do with a small business specialist and their duties. That's up to the individual activities, but mainly what a small business specialist does in very basics. A lot of them do a lot more, but very basics. They do handle coordinations of the small business coordination records. They also talk and interview small businesses that want to do business with their activity. They do outreach, go, and speak at seminars, workshops. They do training of small business issues with their activity. They interact with the PCR, they attend acquisition sessions, they get involved in reviewing subcontracting plans. They do a whole lot more than just

handling the coordination. Some do more than others depending on how big the facility is.

If you're interested in that, I would definitely contact your small business specialist and sit down and talk with them. They would love to be able to interact more with contracting because having a relationship between the small business specialist and the contracting office is really important in an activity.

Charles: Thank you. What does COC stand for?

Valarie: Certificate of Competency. What this means is, you have a small that appears to be the apparent awardee on a contract and for some reason you don't think that they're responsible to perform the work. When I'm talking about responsible, they're lacking the management, technical, financial, et cetera, and you don't think there'll be able to perform. Well, then you have to send that to SBA for us to do a Certificate of Competency where we gather information from the small business and make a determination by a committee on whether we feel like they can do that job or not. I just will have to say that, just very briefly, when we get COC, I know a lot of people out there saying, well, we're just going to arbitrarily approve it, and we don't do that. About 50% of the time when we ask small businesses to fill out the information and send it back, we don't get anything back from them.

For those that do send it in, it's about half, maybe a little bit more than half, maybe 50 to 53%. I don't have the exact number that we agree to, that we issue the COC. It's not really a certificate, it's just a letter back to the agency saying we believe they can do it. But the one that's the most important that you need to understand over 95% of the time, that small business that got the COC performs the job without any problems. We are very careful about who we issue COCs to. But it's a great program for small businesses to get another opportunity to get a federal contract.

Charles: Great. Thank you. In the past we've had to print everything out to submit a small business size protest. Can these be accomplished electronically?

Valarie: I will tell you that I would have to ask one of our sites people because I don't work in the sites program. I know they just redone their SOP. If you can send whoever asked that question, if you can send it to sbalearning@sba.gov, I'll forward it to the individuals that wrote the... Just got through writing and getting the SOP approved to find that out because I know that that has been a question in the past.

Charles: Thank you. Can you touch on the 8(a)-program concerning once it enters the 8(a) program, it stays in the 8(a) program unless it is released by the SBA?

Valarie: Yes, it's just part of the regulation on dealing with the 8(a) and the way the program was set out by Congress and approved. That once you give us a requirement normally like for services and let's say it's a base plus two years and then you're

going to do a follow one, the follow one contract, we'll go back to that same 8(a) firm. If that 8(a) has graduated, we would look at another 8(a) firm to be able to participate in it. If for some reason, let's say that performance was not done well and there was a lot of problems and that there's no other 8(a) firms that can do it, then the contracting officer can ask for the 8(a) program to release that requirement back to the agency so that they can solicit a different way, which if that happens then we would hope it would be solicited in one of the other social economic categories, at a minim it moves to small business set aside.

Charles: Okay, thank you. How does the process work in reference to the surplus of real property?

Valarie: One of the things that we started working on, it started with just the 8(a) folks and now, the 8(a) firms and now Service-Disabled-Vets can do it, but the government has xx property. One of the things that happens is GSA then takes it over. I know when I lived in Little Rock, there was a huge facility that had all sorts of federal surplus property, including helicopters and tanks, but they also had file cabinets and desks and chairs and tools and et cetera. 8(a) farmers were allowed to go in there and get surplus property that they could actually use in their business. I will tell you that they were able to get most of what they want. I did stop a one 8(a) firm who wanted to buy the helicopter and he owned a service business and I didn't think he needed a helicopter.

It has to relate to the business that they're in, but the local state governments are starting to get more involved with that. If you'd like more information on that program, you can send an email. I've got a little bit more information, defense logistics agency, NGS handle that and they do have sales also. We could give you some more information on that.

Charles: This is the last question, and this is concerning COC. It says, we have an SBA COC contact list that references Carol L. Thompson area director in area three versus Gary Hart and Nicholas [01:07:58 inaudible], area director area six versus Aaron Parlor. Should we stop using these area directors for coordinating COCs and instead coordinate directly through Mr. Hart and Mr. Parlor?

Valarie: You can send them directly to them if you want. If for some reason you lose this and you know about Nick in area six and Carol down in area three and you want to send it directly to them, they're going to get it to the right person. It's just, we would prefer that you send it directly to the person that's mentioned in there only because the COC person or the size person may not be in the same building or office as the area director. We don't want to take up time with mail. The reason we gave you those points of contact right there is, so you get it directly to the person that's going to be taking care of the protest or the COC determination.

Charles: This is another part of that question. Can COCs be accepted by all area offices electronically versus shipping hard copy due to Covid-19?

Valarie: Yes. That's been another thing that we've looked at. I just got a word from one of our areas, it says areas six, which covers regions nine and ten over on the West coast. They accept size electronically but not COCs. The reason for that electronically on the COC, is because sometimes we get drawings, we have to get drawings and things of that nature for us to understand the job and our system just will not be able to handle that. So, on COCs, I can check on that, but I think across the country, COCs need to come in hard copy.

Charles: That was the final question.

Valarie: Okay.

Chris: Alright. Charles, thanks for compiling all those questions. Val, thank you again for providing another outstanding training session. Thanks again for that. Slide five, what I have up right now on the screen, there were several questions asking about, if there will be the presentation, the recorded version will be available? That first bullet point there, the app tech website, they post all of our training sessions there. So, feel free, give it about a week or so, and the program is usually posted by then. I know we did have some people that had some difficulties getting on the phone line. When you do access that, that will give you the full session with the slides as well as the audio. Also, if we overlook any of your questions or you'd not submit them to all panelists, or you want further clarification, please send any questions you have, that's sbalearning@sba.gov email and we'll get those answered for you. I know we're over, a little bit on time, so we want to thank you for your time. It's very valuable. Stay safe and we look forward to you joining us next month. Thank you again.

Candice: That concludes our conference. Thank you for using AT&T Event Conferencing Enhanced. You may now disconnect.