

Candice: Welcome and thank you for joining today's live SBA web conference. Before we begin, please ensure you're 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 and A. To submit a question, select all panelists from the dropdown 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 Eischen. Chris, please go ahead.

Chris: Thank you, Candice. Hello everyone, and welcome to the 10th session of SBA's 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 be found at www.sba.gov/coronavirus. We also want to take the opportunity to welcome the Associate Administrator for the Office of Government Contracting and Business Development, Dr. Francis Spampinato. Sir, I give you the floor now.

Francis: Thank you, Chris. Good afternoon, everyone. I just want to say, first of all, I am an 1102 myself and I want to say I love being in an audience of 1102s, and this is the biggest collection of 1102 that I've ever heard or seen in my career. I just want to say hello to everyone, and I would love to meet each and every one of you. If things ever get back to "normal" and I can get out there and meet people. I'd love to do that but I'm happy to be on board here.

I think I'm in day number seven, so of course I don't know anything yet, of course, but I do know I've been an 1102 for a long time, so I guess I feel your pain as they say. It's a great and noble profession. I think these webinars are fantastic. I mean, I've just been apprised of them now and I think it's great to have that monthly, that training and just to get 1102s together. I think it's a great thing. Thank you, Chris, for allowing me to introduce myself and I hope to meet each and every one of you. I'm going to do my best to meet you all and say hi and share our 1102 stories. Thank you.

Chris:

Thank you for that, sir. All right. Now on to our program. For today's session, we'll be focusing on the functions of the procurement center representative or otherwise known as a PCR. By the end of the program, you should have a better understanding of this topic, as well as the resources available to you. If you are new to our events, this is a webinar series that focuses on getting subject matter experts on specific small business topics 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 the FY-20 program, and we hope you benefit from today's session. On to slide three.

As Candice mentioned, I am Chris Eischen and I work as a Procurement Center Representative or PCR in Kansas City, Missouri. Additionally, Mr. Charles Mason, who is the PCR in Omaha, Nebraska will be reading your questions submitted during the program for our speakers to address at the end of today's session. We both work in government contracting area four, and slide three includes our information. On to 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 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 question doesn't get overlooked, please ensure it is address to all panelists on the dropdown menu 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 blocked website or other error messages when attempting to access the conference log in from their computer. If you 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.

If you're having any other technical issues, please call the 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 APTAC host a website where they post the first Wednesday

programs? Since these sessions are being recorded, you can relisten to this program as well as previous sessions by visiting their website, which is provided here on slide five.

Additionally, Procurement Technical Assistance Centers or PTAC are a great resource in partnering with your local PTAC for an industry day, sharing RFI notices or sources sought announcement, or simply referring small business concerns to a PTAC are just a few reasons why they are such a useful resource for acquisition personnel. Please contact your local PTAC for additional information. On to slide six.

Slide six, the program scheduled for fiscal year 2020 and today's session on the procurement center representative functions is the 10th topic in the series for this fiscal year. As you'll see, there's only one training session remaining for this fiscal year so you won't want to miss that. The main reason we don't have a session for September is just year-end and all those other issues. To make sure that everyone's able to focus on their stuff, we do have one session available, and like I said, you don't want to miss that. 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 for today's session, it is worth 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 the training from a friend or colleague, but if you want to receive an email directly from us, notifying you of upcoming first Wednesday webinar events, just send us an email at SBA learning. That's S-B-A-L-E-A-R-N-I-N-G@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.

First you, okay, you'll see the certificate and first you'll need to access the PowerPoint presentation that was emailed to you. Then you manually insert your name where it states, insert your name here. Next within the print settings, you'll select print current slide, which will allow for only the certificate to be printed. Once this is done, you can coordinate the CLP achievement through your training program. Another reminder, SBA does not track your CLPs or communicate with your training program regarding your CLP achievements. On to slide nine.

Today's training has been assembled to educate you on the functions of the procurement center representative, as well as provide you with

additional SBA resources available for your use. As mentioned earlier, if you are unable to access WebEx, please follow along with the PowerPoint presentation that was included in the email for today's training. We will identify the page number so you can follow along. Also, please note that some viewers may experience a delay as a slide changes on your screen.

Now, I'm pleased to introduce Ms. Marquiesha Gillispie, who was the Procurement Center Representative in area six and located in Las Vegas, Nevada. She and I will both be presenting today. Marquiesha, if you're ready, I'll turn the program over to you now.

Marquiesha:

Thank you so much, Chris, and good morning, everyone, or afternoon. My name is Marquiesha Gillispie and I am the SBA Procurement Center Representative for Nevada. Some brief information about me is I have been with the SBA since October 2018, and next month I'll reach a major milestone in my career, 20 years of public service. Most of those years were with [0:08:55 inaudible]. Now, let's get started. On to slide eleven.

Chris and I are very excited to share with you an overview of the Office of Government Contracting, explain the roles and responsibilities of PCRs, discuss tools and resources PCRs may use to perform their duties. We will also spend a moment to identify key differences between PCRs and BOSs is for your edification. Finally, we'll tell you how and when to contact your PCR. We intend for everyone to be able to use these slides and links as sources when researching solutions in a number of areas and contracting. On to slide number twelve.

Created in 1953, the United States Small Business Administration continues to help small business owners and entrepreneurs pursue the American dream. The SBA is the only cabinet level federal agency fully dedicated to small business and provides counseling, capital and contracting expertise as the nation's only go to resource and voice for small businesses. Next slide, please. We're now on slide number 13.

How does the SBA provide contracting expertise? Well, it's through the Office of Government Contracting, which is a program office under the Office of Government Contracting and Business Development. On to slide 14.

You've met our wonderful new Associate Administrator. Welcome aboard, sir. We're going to go onto slide 15, which is going to have our mission of the Office of Government Contracting.

Our mission is to assist small businesses in obtaining a fair share of federal government contracts, subcontracts and property sells. This mission is achieved through the prime contract program, which serves to strengthen the economy of the nation by striving to create maximum opportunities to small businesses.

Veteran owned small businesses, service-disabled veteran owned small businesses, historically underutilized zoned small businesses, small disadvantaged businesses, which include the 8(a)-business development concern, women owned small business concerns and economically disadvantaged women on small businesses, while increasing overall competition in the federal acquisition process. Procurement center representatives are the small business administrations, procurement analysts and industry engineers who implement the prime contract program. Slide 16, please.

Before Chris begins to explain the roles and responsibilities of PCRs, I wanted to conclude the overview of the Office of Government Contracting with some contact information and a brief description of other team members and the office of government contracting family. We have the size and status determinations program, we also the certificate of competency program, we have our commercial marketing representatives and procurement center representatives. With that, Chris, I'll go ahead and concede the floor to you.

Chris:

Thank you, Marquiesha. I'm just going to give a brief explanation of the arrows on top of the slide. For the small business goals, as you know, each agency has assigned their goals to include the overall small business, as well as each of those socioeconomic ones. In that the PCRs assist in helping you meet those goals through the SBA programs, such as the women owned small business program, the HUBZone program, 8(a) as well as the service-disabled veteran owned small business program. We encourage these types of set asides if the market research supports that rule of two, and we'll go into more detail in the slides to come.

We're going to go over the PCR roles and responsibilities. This is slide 18. Within the Small Business Act, Congress created the Small Business Administration whose function is to aid counsel assist and protect the interest of small business concerns. It also stipulates that SBA would ensure small business a fair proportion of government contracts and that's where the PCRs role is so important. If you are interested in

reviewing this 321-page document, the assignments and roles of the PCR can be found on page 221.

Now, into this slide. The basic information on the PCR role is located at FAR part 19.402. However, if you are speaking with the PCR and they referenced the CFR, it is because the SBA follows the code of federal regulations, which 48 CFR 19.402 provide the same information. You will notice that the FAR in CFR contains similar language, however, in some instances, the FAR lags in incorporating updated language or dollar thresholds. The last reference here is 13 CFR 125.2, which is addressed in both references above and explain the responsibilities of SBA and the procuring agency when providing contracting assistance to small businesses.

On the right-hand side, you're going to see PCRs background, where they come from. As you know, PCRs are all 1102 level three certified. Just like the majority of you out there we've got that 1102 certification. As far as on the job training, we set up... speaking from my experience, we have a mentor-mentee relationship with one of, I don't want to call senior PCRs, but one of the PCRs who has the experience and has been in the field and that allows us to get an understanding and gain experience before being just let go to make sure we can assist you as well.

Also, the fourth one, security clearance, we have those as well. We all come from backgrounds of acquisitions. In my case, I was a small, I started out as a contract specialist with contracting officer then became a small business specialist, all that through the army, and then became a PCR. All the PCRs have a vast acquisition background. Then as far as that last one, the release of contract information, we are obligated to comply with the review and release of procurement sensitive information.

This allows us to release information to the vendors out there without releasing procurement sensitive information. We're working with you to ensure that this procurement gets the attention **[0:15:39 inaudible]**. That's just a little background on us.

As far as what you might see on the slide 19, different kinds of PCRs out there. We have area-wide PCRs, and that is basically a PCR that comes in, we have the regular PCR role, but in addition, you take on that area wide role as far as assisting in any other areas. There's always people retiring, people leaving so if there's a void left through that, the area

wide PCR steps up and takes that, or if there's an area where no one else is able to assist that's where the area wide PCR comes in to help out with that too.

Statewide PCR is exactly what it is by state, multiple PCRs in one state. Let's get, I'll give you my example, I'm located in Kansas City, Missouri and I have Kansas and Missouri as my territory. However, Maria Galloway, who is at Scott Air Force Base, which is Metro St. Louis area, she takes on that Eastern portion of Missouri. In that case, you can have multiple PCRs. As Marquiesha had that link earlier, that will give you the PCR directory and it lays it out exactly by procurement agency who we support in there.

Then also number four, PCR locations and PC assignments. Please note that some of you might be out there, well, some of you may have not have never met a PCR or like, "Hey, why don't we have a PCR," but if you didn't know, there are over 3200 buying activities and currently there's only 43 PCRs. That's quite a vast difference there, so you'll find that some of us are located at district offices, other ones are located at the contracting activity. But we do try our best to support whether it's a primary or your secondary agency for us. Okay. On to slide 20.

Here are PCRs major customers. I'll start with the last and go around. First one is federal buyers. That's when we work with our contracting officers program managers, everyone like that included see what procurements are coming as well as to ensure that market research is valid, and any questions you may have with that acquisition strategy, things like that. Small business professional, in my opinion, I believe up the chain right there because that links us directly to the agencies and they are in a sense they're the middleman or woman, and that's who we go through to get everything done.

The small business coordination documents, market research, any issues that they may be having, we're there to assist them, or you, if that applies to you. Small businesses, that's the vendors who we're advocating for, self-explanatory there, in addition, that goes in large business as well. I didn't put them as our customer, but we do support them and we do give them the opportunities on sub-net and things like that, where we can refer them, can't refer small business directly to them, but we can give them sources such as DSBS and sub-net, as a way so that they can find their small business vendors.

SBA staff, so this goes more into detail with the BOS at the district level, and then we've got our program offices at headquarters. We've got the women on small business HUBZone, 8(a) programs, things like that. Also, our valuable resource partners like Score, SBDC and PTAC. Those are just a list of our customers that we have. On to slide 21.

As I mentioned earlier, we are an advocate for small businesses and we can do this by training federal agencies, resource partners, as well as small vendors out there. We mediate small business issues, and that may be things such as the small business vendors having issues with the agency or it could be the agency is having performance issues with the small business, so there's a variety of things that we are able to assist with. Go down to the **[0:20:16 inaudible]** work closely with the contract and staff and federal buying offices. We communicate with the agency in upcoming requirements.

The second bullet, I think, is the most important because review acquisition and solicitation. What I tell my agencies is it's better to have a PCR involved upfront, especially if it's complicated or there's special circumstances that the PCR might have issue within the end. I'm telling you if I get a small business coordination document and there's some issues with it, I'm going to have a lot of questions. The last thing I want to do is slow down the acquisition. Hopefully, the sooner you involve the PCR upfront, the smoother your acquisition should be.

You can give them an opportunity. Give them the information they need up front to talk things out until the last minute and they feel pressure or there they might dig in and it might get late. Best thing I can offer there is get your PCR involved upfront. As you all know, there's always regulations, policy updates, things like that. We get those out to our customers. Assisting agencies in meeting their small business goals through the training counseling and technical assistance. We review subcontracting plans for compliance. The key thing with all subcontracting plans is we don't approve, we just advise.

The comments that we have are just advisory and to ensure that you're compliant with what's in the FAR. Also, we review copy to cure notices and things like that. The FAR says right now, you're supposed to send those to the regional administrator, however, those typically trickle down to the PCRs anyway, because the regional administrator really isn't involved in the process, but we have more communication with the agencies on that. Then again, we want to work with you regarding policies and procedures to ensure we're both on the same page with

that. Okay. Now, we'll go on to slide 22. Marquiesha, I'll turn it over to you.

Marquiesha:

Thank you, Chris. That was a wonderful overview. I'm just going to dive a little bit deeper into some of the areas that Chris has previously touched on. PCR duties include review of the procurement of government plans and it is in evaluation of their effect on the small business participation and the recommendations of changes that will support the interest of small businesses and obtain their fair share of federal procurements. We also use surveillance reviews to accomplish this duty.

When it comes to informing our different customers, PCRs also represent the SBA on procurement matters pertaining to policy or operations, which affect SBAs programs, or small business community at major federal buying centers around the country. PCRs provide small business program training to contracting activity personnel as well. Some of the training on to our retirement centers, maybe on other office of government contracting areas, such as the certificates and competency programs, size determination program, or size standards.

PCRs may also provide direction to contacts regarding the district programs, including the 8(a)-program. When it comes to counseling, although PCRs provide counseling to small business firms, it's not the primary focus. Whenever possible, a PCR should refer businesses to SBA district offices and SBA resource partners for counseling and training assistance. When a referral to a resource partner is not appropriate, the PCR would provide counseling and assist small businesses seeking information or help in doing business with the federal government.

Some, but not all of those counseling topics would be advising them on how to identify government customers that are buying what they're selling, the items or services, advise them on the different certification programs, advise them on the requirement that is registering into SAM or the System for Award Management in order to do business with the federal government and also, advising on subcontracting opportunities. Most often, we would refer these small businesses to our local procurement technical assistance center or PTAC.

These topics are important for you, and you should be aware of them as acquisition professionals because often your procurement center representative may ask you to participate in an outreach event on how small business can do business with your agency. We also assist because

the PCR may receive a request from a small business, or contracting activity, or even our area director, or SBA headquarters to investigate an issue.

Lastly, as Chris already pretty much touched upon. We deal with acquisition reviews. It's the bulk of our responsibility and how we advocate and perform reviews, but we also do reviews on subcontracting plans as an advisory capacity. We make sure that these small business sub-contracting plans are expectable in accordance with FAR subpart 19.702, based on the dollar amount and the expected small business participation available.

Now, we're going to move on to slide number 23, and we're going to talk about some of the recommendations that a procurement center representative may make. As you can tell, we would often make recommendations for small business set aside in order to make sure small business gets their fair share of federal acquisition dollars. Again, that's done through our reviews and we provide opportunities for the PCR to recommend those certified not only for the social economic categories mentioned, but even for the 8(a)-business development program.

Specifically, PCRs review and analyze the proposed acquisitions, not set aside or not proposed for competition by contracting officers to determine if they can be certified for one of those categories as small businesses or competition can be enhanced. PCRs often assist when required by an identifying small business concerns or sources, which may be new to the contracting officer. The PCRs primary tool to identify and match these qualified small businesses would be the SBAs dynamic, small business search.

To the best of the PCRs knowledge, the sources provided will be capable of meeting the solicitation technique, the solicitations technical, management and delivery requirements. PCRs will also review and investigate any bundled acquisitions and make recommendations for strategies that will enhance small business participation in federal contracting opportunities. Agencies will also coordinate these strategies and plans and any contemplated bundling with the contracting activity, small business specialist or small business professional and PCR at least 30 days before issuing a solicitation.

Finally, when it comes to certify recommendations, maybe used with a term formal or informal action. Before using an SBA form 70 to make a

certified recommendation, the PCR should always try to resolve the issue informally. If these efforts are unsuccessful, then the PCR must document their actions by filling out an SBA form 70 and issuing it to the agencies contracting officer. If the contracting officer continues to deny the certify requests, upon the approval of the area director, the PCR may issue an appeal to the head of contracting agency. That's what we're talking about on that last leg appealing to the chief of contracting office.

Onto the next slide, slide number 24. Here, we're going to talk about some of the key FAR citations. Of course, this is not all of them or not an all-inclusive list. But in the capacity, the PCR works to create an environment for maximizing the participation of small businesses through certified and subcontracting opportunities. PCRs are assigned to the federal contracting agencies to increase both the dollar value and percentage of total contract awards to small businesses as well, enhance the overall competition.

Everyone will not always agree, but it's important to consider both parties perspectives and understand the options available to both the PCR and buying activity. Just to mention a few of the FAR parts that you may look at when you're having maybe a question about how you should proceed if you do not agree, we wanted to make sure we provided you at least with a starting point on where we would get our authority and where we would be, what we would follow.

PCRs do have the authority to challenge the acquisition strategy proposed by a contracting officer and to aggressively pursue all instances where contracting agencies bundle requirements, making it unlikely for small businesses to compete for the consolidated requirements, to review a solicitation terms and conditions to determine if they are **[0:29:28 inaudible]** or restricting small business participation. To challenge subcontracting plans that propose a low or zero goal for any small business category and to investigate miscellaneous contracting issues upon the request of the small business contracting office, SBA directors or SBA headquarters.

Chris, please feel free to make any additional comments that you have before covering the next section.

Chris:

Marquiesha, I believe you've got it all covered.

Marquiesha:

Thank you. I'm going to turn it over to you now. Oh no. We're going to go ahead and go into slide number 26. Under this slide is talking about

the resources and tools that we use in order to perform our tasks or our duties. Most of them have already been mentioned and so I don't want to exhaust them but I do want to bring to your attention that we, as Chris mentioned, we interface with multiple customers for multiple reasons throughout the acquisition process.

We're not here to be an impediment. We're not here to add an extra layer of bureaucracy on your acquisition, we're only here to help and we want to do what's in the best interest of the government. As you've had a moment to read over this slide, if you have any questions about the resources that we use, such as our outreach or our district office engagement, we're not passing you off to someone because we don't want to help you.

It's just usually, which Chris is going to go over in the next section, sometimes it doesn't always fall into our lane. It might get district office staff element that you're looking at. We also have the capacity to advise seniors at the executive levels. Just know that when we're doing what we're doing, whether it's our annual goals for the federal buyers, or whether it's a surveillance review, we're only doing this in order to improve or sustain your already, hopefully well-tuned small business programs, and we're here to be a part of the team.

Lastly, with small businesses, of course, we engage in speaking events and we also counsel them based on wanting to become federal in the federal contracting arena, and we recommend policy. We also help the small businesses. We point them in the right direction to recommend a policy changes through our small business advocacy office as well. Chris, slide 27. With that, I'm going to turn it over to you.

Chris:

Great. Thank you, Marquiesha. On to slide 27 and then to slide 28. With this one, this is a summary of the Office of Government Contracting basically versus the Office of Field Operations. OGC works with the focus on procuring agencies using the small business programs and helping them obtain their agency small business goals. Office of Government Contracting programs center on size determinations, COCs, PCRs, commercial marketplace representatives or CMRs as well as the WSB and HUBZone program.

SDVOSB program is not of this yet, but hopes will be in the future. To the right, you'll notice that the Office of Field Operations that's at a district office level and OFO focuses on delivering SBAs wide variety of programs to help small businesses in the local community. The SBA

district office delivers SBA loan, education and assistance, economic development with the state and local agencies and organizations in mind. On the next slide, I'm going to go give a little more specific roles of the PCR and the BOS, and that'll be explained to you on the next slide, which is slide 29.

To 29 here, the PCR. We focus on the federal procuring agencies and use of their small business programs in goal attainment. We do outreach help small businesses, usually in particular issues regarding your size questions, that aside, disputes there as well as other items. We provide technical assistance to the procuring agencies on limitations of subcontracting, non-manufacturer role, set aside strategies, market research, and other things that coordinate with the small business coordination document and procurement strategy with that.

We are assigned to specific agencies in a geographic area. I mentioned earlier is we have primary and secondary agencies. The primary agencies, we typically focus on their procurements and the small business coordination documents and things like that. However, the secondary agencies are ones that were on call essentially for. If they need assistance or have any questions, small business-related questions, we're more than happy to assist you with that.

Now, for the BOS role. The BOS, they're located in the district offices and they focus on local 8(a) firms, managing their 8(a) program requirements. They process the 8(a) offer and acceptance letters and conduct 8(a) annual reviews on firms to ensure their continued eligibility. They provide general outreach and assistance to small businesses who are considering or wanting to increase business with the government, and that's at the federal state or local level. They serve all firms located within their SBA district office territory.

On the next slide, I'm going to show you how to find your BOS because there's several times where I being a PCR will receive an offer letter mistakenly, so then I will walk the individuals through, or I'll just give them the information, but I will show you how to obtain your appropriate BOS.

First, we're going to use DSBS and these are screenshots. I just randomly took a firm and this one happened to be in Indiana. When I did the search on DSBS, when you go through there you can do socioeconomic next code searches like that, I typed in the specific company's name, if you have an 8(a) firm you'll know what the company name is, so you put

the vendor's name and then you do search, and this is what I got. You scroll down a little bit and on this page, you'll notice that the business development servicing office located here is the Indiana district office, and that's circled.

Under that, you'll also notice that there's the 8(a) certification dates. You'll see the case number, their entrance date, and their exit date, so the exit date isn't until December of 2024. They still have four plus years remaining. What I'm taking with this, I'm going to take the Indiana district office information from this slide. I'm going to go to [sba.gov](https://www.sba.gov), and on that, I want to locate the business opportunity specialist at the district office.

I'm going to go to the right there, where it says local assistance and within that local assistance, I'm going to find your district office. From here you'll type in Indiana and when I collect Indiana and that drop down is the SBA district office, it's going to populate the Indiana district office and from there I'm going to click that on the left-hand side and it will take me to this website. When I first pulled up this site, there was a picture of the COVID virus, and I wanted something a little more enlightening so I went and saw all these smiling faces with the SBA, Indiana emerging leaders. I posted that instead of the COVID picture.

The important thing here on the far left, every website has this on the SBA website. It's going to have the district director as well as the office directory. Within the office directory, you're going to click that, and this is what, something like this will appear. You'll have the directory of the district office. At the bottom, you'll notice, so you have the director of public affairs to all these other categories, but what you're looking for is the business opportunity specialist.

In this case I've circled her, this is just an example, she is not the one you contact every single time you have it, this is just for the Indiana office. This is the simple way you do it. Offer letter you'd have, or any other questions regarding that 8(a) firm, feel free to reach out to this business opportunity specialist for the specific district office that the vendor is located under. That concludes that portion of finding the BOS. I wish it was more streamlined, but this is the best way I find, the availability to finding the BOS.

On to the next slide, 34. When and how to contact a PCR 35. When to contact a PCR, I'm going to start at the top right-hand corner. As I mentioned, federal procurement training and education. Here's, you're

experience in it today. This is part of the training. There's also several other topics. Actually this, the first Wednesday program gives you a ton of opportunities and allows you to engage in all of the programs that the SBA has to offer as well as other hot topic issues as well. We're here to assist and engage in assisting you with educating you in the procurement field.

Our small business events, we have, it's limited now with COVID, but we do still have virtual events as well, just to get you out there. With this one, actually, I'm part of an open house for Mick and that will be coming this next month or this month actually, July. Those are opportunities for PCRs to assist the agencies with their procurement goals and outreach. Our counseling services, that can be with the agencies.

We also offer one on one assistance with small businesses and any counseling services that we can provide whether you're large, small, contracting officer, small business specialist or anything like that, we're able to assist. Market research tools, like I mentioned earlier, we have DSBS and beta SAM is also another one, Sub-net, any information we can get out there to basically bulk up your market research that you have so you can have an informed and positive decision on how you're going to proceed, what are you going to do, a small business set aside for an open competition?

We just want to make sure that you have the tools necessary that will assist you with making that decision. Marquiesha, I will turn the rest over to you.

Marquiesha:

Okay, everyone, we are in the last stretch of this. I wanted to make sure that you, as Chris has already reiterated, I want to reiterate what Chris said. It is really important to include the PCRs early as possible in the acquisition planning. The PCR will be able to provide you information on size COC statuses, but we'll refer you to those team members for assistance when it, so we would basically refer you to our Office of Government Contracting teammates.

Any small business cradle to grave, or we call it planning to procurement to payment now is the PCRs business. Ask those questions about that. If you don't know or understand something, please feel free to reach out. Again, our reviews are very friendly and made to be as a tool for you to better your small business program, and we are here to help. On to slide 36.

Slide 36 and slide 37 are more informational for you and there's some of the issues that the PCR and the small business professional or small business specialists will engage in, in the initial planning phases. Of course, market research and [0:41:54 inaudible] are going to be super important, but sometimes you might have a question on the type of contract or even consolidation or bundling. We just wanted to start give you some links to, so you can have this, a jumping off point for your research on any of those topics and then you can always call and ask if you have a problem interpreting the regulation or figuring out what's the best way to move forward.

On slide 37. There's just going to be some additional areas that are, addressed by the procurement center representative and small business specialists as a team, when you're in your initial phases of your contract acquisition. Remember market research is always continuous throughout the process. We believe in that and so as new information becomes available, of course, being a part of your team, we would want to share that with you. As we move on to slide 38, now we know when you should contact your PCR. Now we want to talk to tell you a little bit about how.

Throughout this presentation, there's been several links to the PCR directory. We also wanted to show you here, how if you went to the SBA website, you would be able to find our directory. Of course, it's going to be under federal contracting, and you're going to see a link, that's going to get you to the counseling and help section of that website. Right at the very top, you're going to see the procurement center representatives, and there's a link there to our directory.

Before I go over the bonus information, we're going to move to slide 39. Before I go over the bonus information, I want to let you know, we have a call to action for everyone on this phone call. Please take the time to learn who your PCR is and if you already know your local PCR, make sure you understand your informal or formal business operation plan.

What that is, is just an agreement sometimes in writing as a formal one, or sometimes it's just the conversation that you have with your PCR, quarterly or monthly, regarding thresholds, small business goals, and other areas that you may have questions or your staff. It may even be just when you will start to request training. I'm going to say, make sure you understand that your business plans of operation with your PCR.

If you're buying from multiple States, contact the PCR and one of those States and introduce yourself. Because you might be dealing with the local one, but maybe you haven't dealt with the one that you're buying for in that particular geographical location or place of performance. What this might do is be able to give you or your staff in that area, a resource to help with planning industry days, like the one that Chris is going to be a part of, the open house or a vendor collaboration event.

If you're SBA staff, especially if you're a PCR and you're reviewing for a place of performance in another state, where there may be a local PCR, reach out to that PCR and just have a conversation about what you're reviewing in their backyard. This may also lead to joint training events and for both of the PCRs. Let's get to know our PCRs, that's my call to action.

Quickly, we're going to go into some bonus information, and I'll send you the next slide. On our final slide we have, which is slide 41. What are PCRs looking for? In other words, if you're asking yourself, how can I make my acquisition reviews or acquisition coordinations as painless as possible? First, we want you to remember that you have to have a good understanding of your PCRs expectations of documentation and thresholds to a formal or informal business plan of operation, which I've already mentioned.

We understand that some small business professionals and some small business specialists have these duties as an additional or collateral duty, and you may be a contracting officer or play another critical role within your agency. When you have to send an acquisition coordination form to your PCR for review, ensure you have the correct NAICS code and size information. We are looking at the acquisitions use of small business certified whole or partial, and if the market research is adequate and supports your strategy.

You should ask yourself, does the market research capture and justify the rationale for the strategy? Can this document stand alone? If this information contradicts each other, that's going to be a red flag for your procurement center representative, and you may have to do a little bit of back and forth or conversation before it can be concurred with. We understand, and we look at the totality of your market research, but we are not mind readers. You have to document what you found and why you've chosen that strategy to be within the best interest of the government.

We are reasonable people and we take into consideration unique aspects, such as specs, urgency, and delivery needs. If you have noted an exception or an exemption to use synopsis, we're going to double check and make sure you're citing the correct one. Also, is there an opportunity for subcontracting plans? Lastly, if your strategy is unrestricted or sole source to a large company, what considerations has your agency made to increase competition in the future?

By providing well-written market research comments or documents, your review can be very simple and very painless. Provide the necessary justification and approvals or JNAs, and this is my little thing, please do not use the word sole source and limited source interchangeably. Remember just like your PCR, just like you, your PCR may take special notes of different things based on their experience and what may have been a high visibility situation for them in the past so they're taking it as a lesson learnt.

If you are unclear on why your PCR, your assigned PCR or your alternate PCR providing coverage is making a request for information, please just ask. Thank you for all of your attention, and I will turn it over to Chris for any final thoughts or comments.

Chris: Marquiesha, thank you for that great summary. It was a really good overview of what we're looking for. Charles, I'm going to turn it over to you. I believe there's a few questions in there. If you want to ask, then ask away.

Charles: Great, Chris, thank you. The first question is, how do the PCRs relate to the small business specialist?

Marquiesha: [0:48:08 crosstalk] Oh, you got it. Okay.

Chris: You can start now. I'll piggyback off. If there's anything else to add.

Marquiesha: No, I just wanted to say that we relate because most of us have been there and we know and understand that you have to determine two things when you're buying. You have to determine the what's in the best interest of the government and you have to determine a fair and reasonable price, and we're just here to help you do both of those. Now you go ahead, Chris.

Chris: I have experienced this as well. The misunderstanding from some agencies is that the small business specialist is an employee of that agency, they are not SBA. PCR is an SBA employee. We are basically like

connectors, I guess. We connect the agency, and in a case like this, our army and SBA. The small business specialists with the army, the PCR, myself is with SBA. We work together as a team and as far as that relationship, because I've seen that get confused a lot. How they, the contract officer specialists might say, well, SBA said this, actually it was the small business specialist that we were working with. Hopefully, we can clear that up and just allow that communication.

Because we do it, in my mind, the small business specialists that I work with at the specific agencies, they're my biggest advocate. They help us get involved in the procurements. Hopefully, that helps with the clarification. Small business specialists with the agency, procurement center representative is with SBA.

Charles: Okay, great. Thank you. Next question. Can you explain why a PCR or CMR is not allowed to provide a warm introduction of a responsible small business to a large business that is looking to meet their subcontracting plan requirement?

Chris: The reason I would discourage that is just, say another small business gets wind of this, and so is SBA playing favorites now on who they're going to determine? I understand the question and a warm welcome potentially. If you're at one of a small business or one of those events and expo or things like that, that might come up like, "Oh, here's a small business," and introduce them to a large business. But as far as going out of your way and saying, "Hey, here's a good small business for you to reach out to," I typically don't like doing that just because of the perception that it could create, and that's why we have DSBS and other tools like that available so they can research and do that themselves.

Charles: Okay, great. Thank you for that, Chris. Okay. Next question. With respect to slide number 23, do PCRs educate federal contracting officers about using a source sought notice to seek advice from industry on ways to improve the contracting officer's planned acquisition strategy?

Marquiesha: Chris, I think I might be able to take this one and then you can add if you like. In my opinion, the PCR can give you training or help provide different ways for you to be able to tap into all small business resources that are available. If that means that a sources sought notice, we always tell our small businesses to respond to those, to let them know that you are an interested and responsible or responsive firm. Yes, we have no problem with educating our contracting, our acquisition professionals upon request, or if there's a special need. I feel like that's not a far

stretch request for the procurement center representative to be able to provide that procurement center with that support and that training.

Chris: I think that's good, Charles.

Charles: Okay. Thank you, Marquiesha. I just want to say this, there are a couple of questions that were asked during the presentation that we will have to have answered at a later time, because I'm not for sure if we'll be able to answer a few of these questions pertaining to sub-net and any plans to make it more user friendly. Some of these questions we're just going to hold off and we'll answer at a different time and we'll send out to all the attendees.

Chris: Charles, with that, I would recommend if you ask the question and it's not answered, please send an email through sbalearning@sba.gov and we will ensure that question is answered. If your question is overlooked by chance, or you don't hear it today please send that to sbalearning@sba.gov.

Charles: Okay. Thanks. Okay. Next question. When you say engage the PCR early in the procurement planning process, are you referring to the small business professional contacting the PCR on behalf of the contracting officer?

Chris: With that, what I was... you can add after, Marquiesha, if you think. In my interaction, I think the small business specialist, as well as the contracting officer need to be proactive and coordinate with the PCR and get that word out. Obviously, the small business specialist needs to be involved as well up front, because I think times where they've been blindsided as well. I think if you have that combined effort, if you're a contracting officer work with your small business specialist and then recommend, "Hey, this is going to be kind of a sticky one, I think we should get the PCR involved." That's my recommendation.

Marquiesha: Chris, I'll just add one comment. I know that some procurement centers or buying activities have a certain process that they have for their staff. They like all the information that's being sent to the procurement center representatives to go through the small business specialist or the small business professional. Some agencies are not like that, where the contracting officer or the specialist contacts the PCR directly because it's understood that the small business specialist will be Cc'd on it or brought in the loop during some type of meeting.

I agree with Chris, I think he answered it properly. I just know that you might want to have a talk with your small business specialist or a professional and make sure that we follow the processes that are in place through the business ops plan and how you guys want to conduct business.

Charles: Okay. Thank you. Next question. Who populates DSBS information and how does it connect to the SBA?

Chris: It's a populated through beta SAM.

Marquiesha: Yes, and there's additional buttons that the firm can click. Say, for instance, if they have other than federal certification, there's a box they can click there and then what's going to happen is they will fill out what we call an SBA supplemental form and it's going to annotate their DBE status or something like that, that has a certification is maybe for the state or city. But, yes, like Chris said, all of that information is pulled from beta SAM, there's self-certification in beta SAM.

Charles: Okay, great. With that, that is the last of the questions.

Chris: Okay. Thank you for that, Charles. Like I said, if your question was unanswered or you want just a clarification, please send an email directly to sbalearning@sba.gov and we will be glad to get back with you and get you an answer on that. Once again, I want to thank everyone again for your participation this month and we look forward to attending the final session of FY-20 next month. I hope everybody has a safe and happy 4th of July. Thank you.

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