



U.S. Small Business
Administration



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Administration

SBA's Small Business Market Research

Not intended for public distribution

Hosts

Darryl Williams

Procurement Center Representative

SBA Office of Government Contracting, Area IV

Warren, MI

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Government Contracting, Area IV

Rock Island, IL

SBA Office of

Welcome to “SBA Virtual Learning 2023”

1. Questions answered during the final 10 minutes.
2. Technical problems: Contact your IT admin who manages Teams settings for your organization.
3. Captioning available for this presentation.
4. We cover the “SBA Quick Reference” as time allows.
5. For more SBA training visit the SBA Learning Center website <https://www.sba.gov/tools/sba-learning-center/search/training>

Association of Procurement Technical Assistance Centers (APEX/APTAC)

Procurement Technical Assistance Centers are a vital resource partner.

- APTAC posts past “First Wednesday” programming at this link:
<http://www.aptac-us.org/for-contracting-officers-sba-webinar-library/>
- Contracting officer resources: “How PTACs partner with federal agencies”: <http://www.aptac-us.org/federal-partners/>
- Find your nearest APEX Accelerators/Procurement Technical Assistance Center at <http://www.aptac-us.org>
- APEX Accelerator Information at <https://www.apexaccelerators.us/#/>

Small Business Administration YouTube Page

SBA YouTube page posts past “First Wednesday” programming at links below.

- October 5, 2022 – 8(a) Business Development Program Updates: <https://youtu.be/YL5Sp0dP1aE>
- November 2, 2022 – Surety Bond Guarantee Program: <https://youtu.be/QIZJiMLcc5o>
- December 7, 2022 – Subcontracting Program: <https://youtu.be/gMaaeGI8CBs>
- January 4, 2023 – Surveillance Review Program: <https://youtu.be/euUX4Jv6kRI>
- February 1, 2023 – HUBZone Program: <https://youtu.be/YGnS8e6idCc>
- March 1, 2023 – The Mentor Protégé Program: <https://youtu.be/A9KbCm4FP1c>
- April 5, 2023 – Non-Manufacture Rule (NMR): <https://youtu.be/AqwYMWoe9f0>
- May 3, 2023 – Size Program: https://youtu.be/45WZ_oPb1GY
- Jun 7, 2023 – Legislature and Regulatory Updates: <https://youtu.be/ljx9IajQJNY>
- July 5, 2023 – Market Research:
- August 2, 2023 – Service-Disabled Veteran Owned Program (SDVOSB):

FIRST WEDNESDAY VIRTUAL LEARNING SERIES

FY 2023 SCHEDULE

1:00 to 2:00 PM Central Time

FY 2023	Date	Topic
1	October 5, 2022	8(a) Business Development Program Updates
2	November 2, 2022	Surety Bond Guarantee Program
3	December 7, 2022	Subcontracting Program
4	January 4, 2023	Surveillance Review Program
5	February 1, 2023	HUBZone Program
6	March 1, 2023	The Mentor Protégé Program
7	April 5, 2023	Non-Manufacture Rule (NMR)
8	May 3, 2023	Size Program
9	June 7, 2023	Legislature and Regulatory Updates
10	July 5, 2023	Market Research
11	August 2, 2023	Service-Disabled Veteran Owned Program (SDVOSB)

The program schedule is for information only and is subject to change.

One Continuous Learning Point

Self-service process for one CLP of credit: Many of you want to receive credit for today's training. You will be glad to know that today's training is worth one CLP. The slide presentation will include the training certificate on Slide 9. Fill, download the training certificate, copy and submit it through regular channels.

If you listen in groups and you want all attendees to be included on the future mailing list, send email addresses of participants in an excel document to sbalearning@sba.gov.

“SBA 1st Wednesday Virtual Learning 2023”

This Certificate is awarded to

Insert Your Name Here

For completion of

Market Research

This training seminar may be credited towards “Continuous Learning Points” as described in OFPP Policy Letter 05-01. Recommendation of One CLP.



Pamela J. Beavers

Director, Area IV
SBA Office of Government Contracting

7/05/2023

DATE

Today's Speakers

Ms. Yuri Y. Dyson

Procurement Center Representative (OR/ID/SW WA & NorCal)

Office of Government Contracting, Area VI

Jason Johnston, PCR

Procurement Center Representative (OR/ID/SW WA & NorCal)

Office of Government Contracting, Area III



Conducting & Documenting Market Research

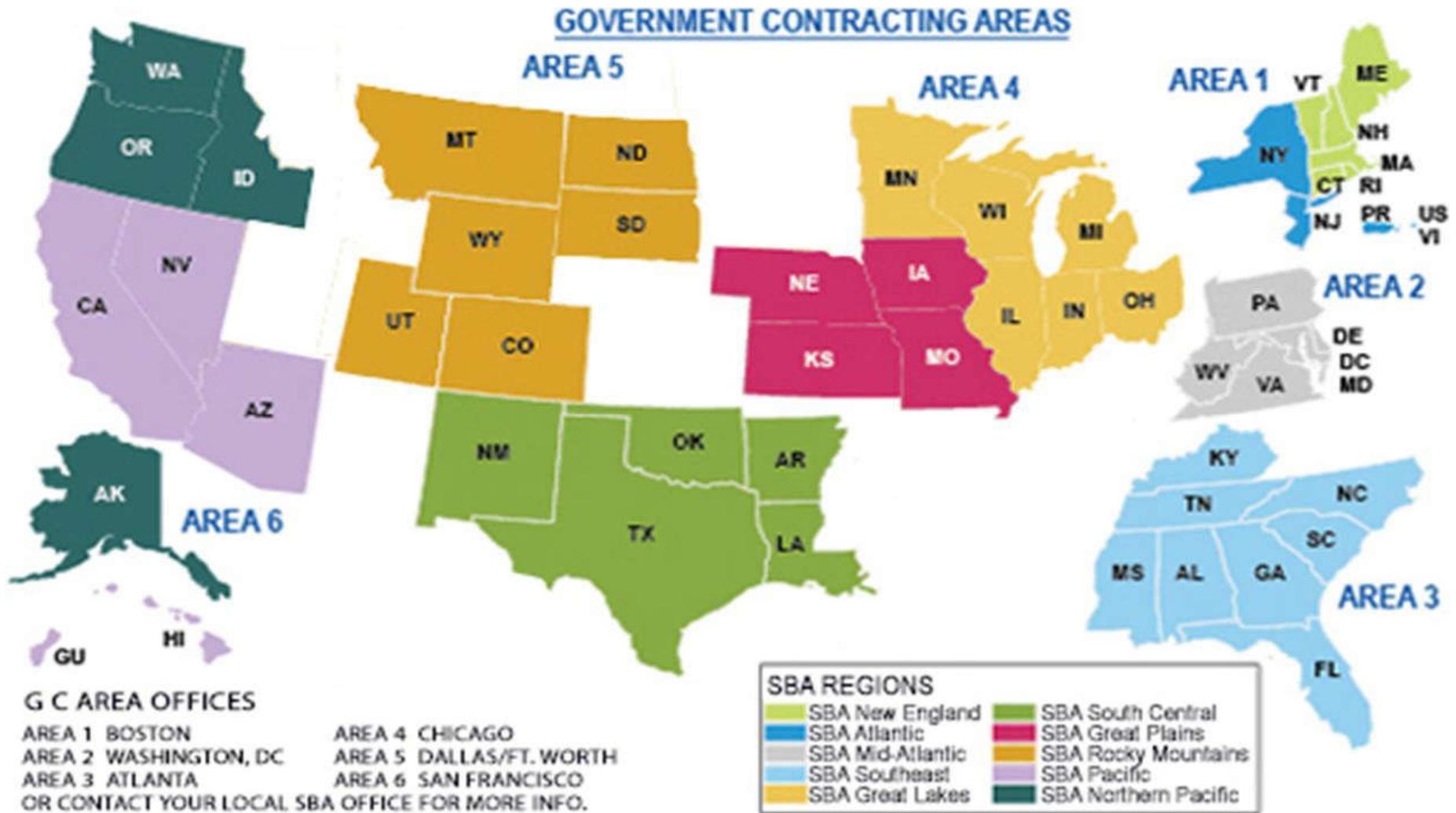
JUL 2023

SBA's Office of Government Contracting

- OGC focuses on federal agency use of SB programs and helping them attain agency SB goals.
 - Are agencies meeting their SB goals?
 - Do their buyers understand how to use the SB programs?
 - Are they setting aside contracts for SBs appropriately?
- OGC Programs:
 - Size determinations
 - Commercial Market Representatives
 - Certificates of Competency
 - **Procurement Center Representatives**

Office of Govt. Contracting Area Offices

<https://www.sba.gov/federal-contracting/counseling-help>



Find your PCR!

[Procurement Center Representative directory | U.S. Small Business Administration \(sba.gov\)](https://www.sba.gov/procurement-center-representative-directory)



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Counseling and help

[Contracting area directors](#)

Procurement Center Representative directory

[Commercial Market Representatives](#)

Procurement Center Representative directory

Contact a PCR near you.

Content

[Area 1 — CT, ME, MA, NH, NJ, NY, PR, RI, USVI, VT](#)

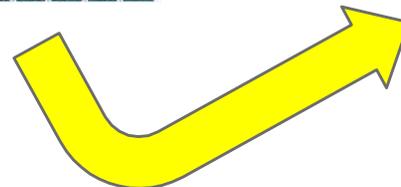
[Area 2 — DC, DE, MD, PA, VA, WV](#)

[Area 3 — AL, FL, GA, KY, MS, NC, SC, TN](#)

[Area 4 — IL, IN, IA, KS, MI, MN, MO, NE, OH, WI](#)

[Area 5 — AR, CO, LA, MT, NM, ND, OK, SD, TX, UT, WY](#)

[Area 6 — AK, AZ, CA, HI, ID, NV, OR, WA, GU, MP](#)



Alaska

Mr. Randall (Randy) Miller

Procurement Center Representative

U.S. Small Business Administration

Office of Government Contracting

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Activities covered:

- U.S. Army Corps of Engineers – Anchorage
- Joint Base Elmendorf – Richardson (JBER)
- Eielson AFB – Interior Alaska
- Fort Wainwright (Mission and Installation Contracting Command (MICC)- Fairbanks
- Alaska National Guard – JBER
- U.S. Department of Agriculture (USDA) (Forest Service, APHIS)
- Dept of the Interior (DOI) (IBC Aviation Management, National Park Service (NPS), U.S Fish and Wildlife Service
- Bureau of Land Management (BLM)
- and other Alaska based buying offices



Federal & Agency-Specific Goals

FY23	GOVT-WIDE	DOD	GSA	TRANSPORTATION	INTERIOR	HUD
SB	23%	21.83%	34%	33.4%	49.37%	20%
SDB	12%	8.05%	21%	21%	30.50%	18.9%
WOSB	5%	5%	5%	5%	5%	5%
HZ	3%	3%	3%	3%	3%	3%
SDVOSB	3%	3%	3%	3%	3%	3%

Office of Management & Budget (OMB) Memorandum: Advancing Equity in Procurement

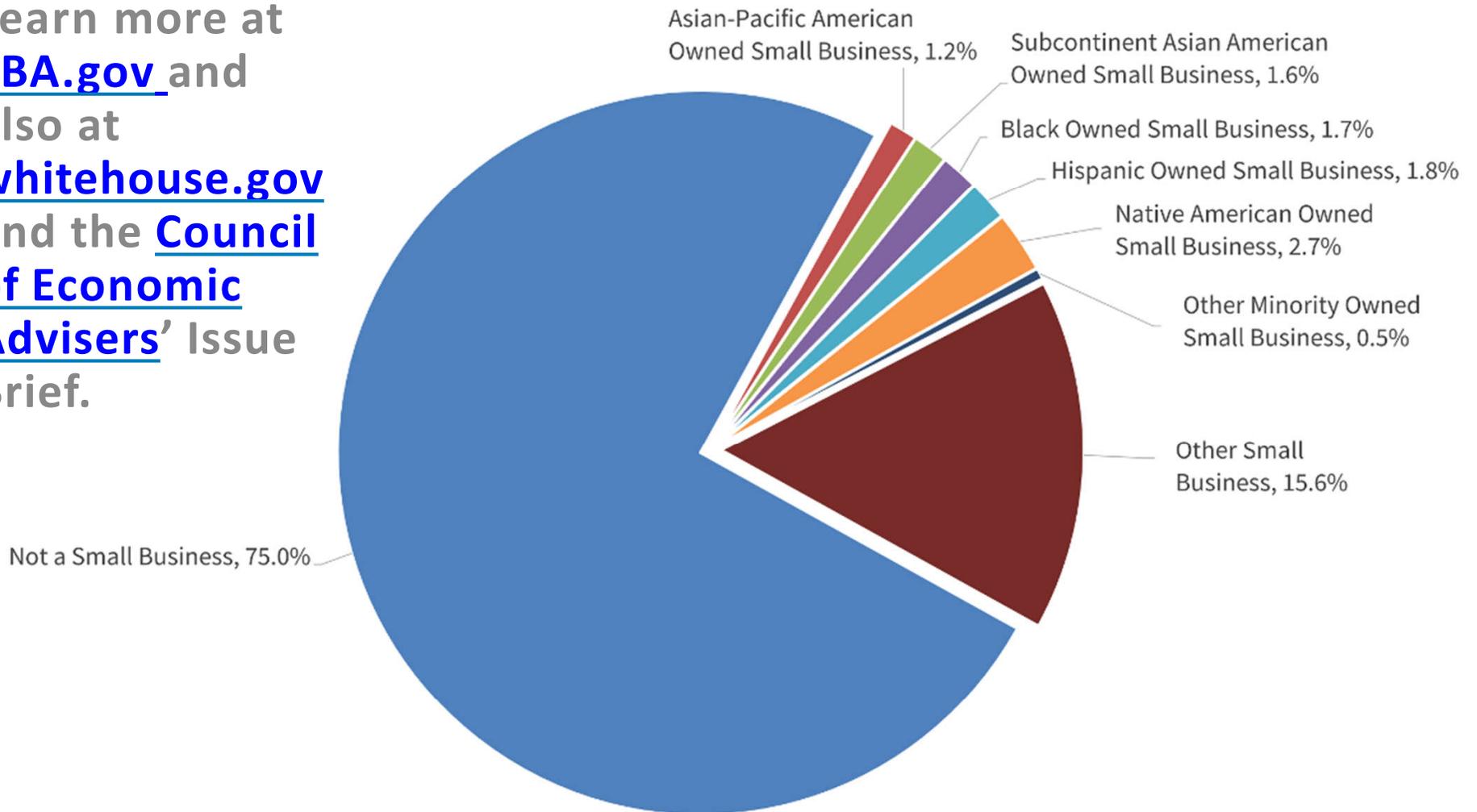
[M-22-03](#), Dec. 2, 2021 – implementing [Executive Order 13985](#)

1. Raised governmentwide Small Disadvantaged Business (SDB) contracting goal to 11% for FY22 and **12% in FY23**. Additional yearly increases up to 15% by FY25.
2. Implemented major changes to Category Management.
 - A. Automatic Tier 2 credit for socioeconomic small businesses (SDB, WOSB, HUBZone, SDVOSB)
 - B. Reinforced importance of small-business goal achievements
 - C. Made SBA and Dept. of Commerce voting members on the Category Management Leadership Council.
3. Seeks to increase new entrants and reverse the decline in the small business supplier base.
4. Made Federal senior managers accountable for small business contracting goals.
5. Ensures OSDDBUs have access to senior agency leadership.

SBA Disaggregated Data Release

Learn more at [SBA.gov](https://www.sba.gov) and also at [whitehouse.gov](https://www.whitehouse.gov) and the [Council of Economic Advisers](#)' Issue Brief.

FY 2020 Federal Contracting¹ by Race² and Business Size



1. Includes only small-business-eligible dollars (\$559 billion in FY 2020). This includes all Federal contracts except those excluded by SBA's Goaling Guidelines. This data does not apply the double-credit and subcontracting adjustments required by statute for SBA's annual scorecard.

2. Racial and ethnic categories are reflected here as they appear in the System for Award Management when an entity registers to do business with the government. Classifications are self-reported. The other small business category reflects those firms who did not report as being minority-owned.

Agencies are graded on SB performance

[Small business procurement scorecard overview | U.S. Small Business Administration \(sba.gov\)](#)

Department of Defense

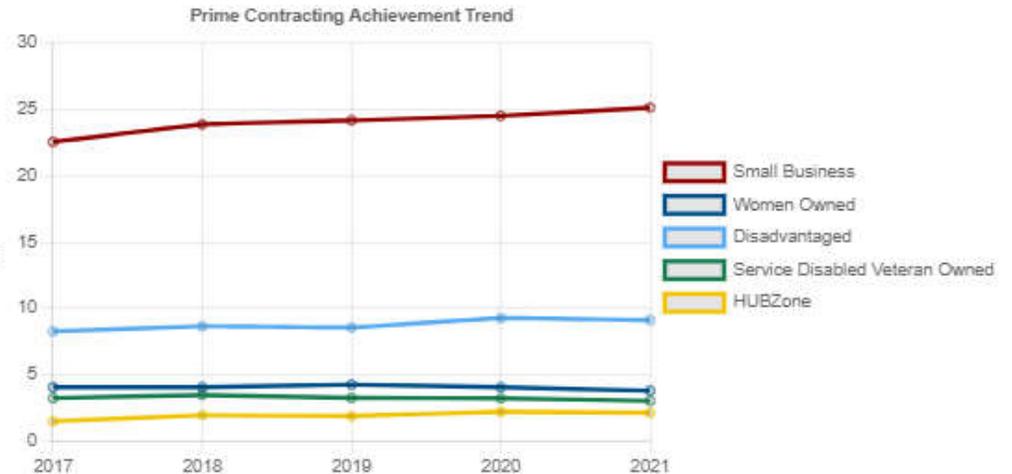
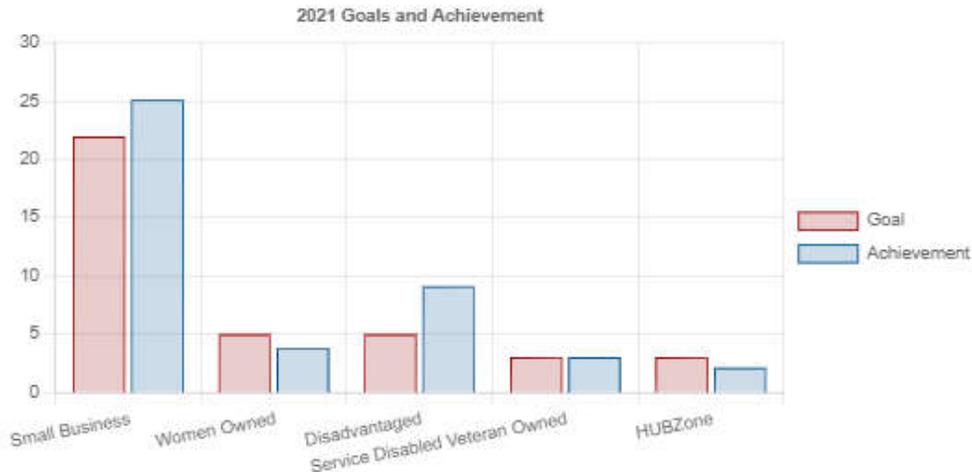
FY2021 Small Business Procurement Scorecard

A
103.58%

Prime Contracting Achievement

55.84%

► Achievement Data



Subcontracting Achievement

19.21%

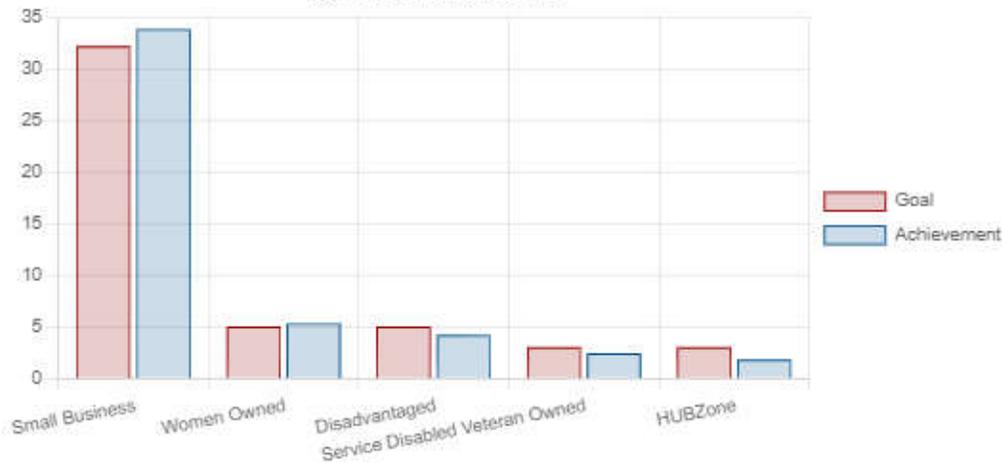
▼ Achievement Data

Category	2020 Achievement	2021 Goal	2021 Achievement	Dollars	Category Weight	Weighted Score
Small Business	33.40%	32.25%	33.90%	\$49.6 B	60.00%	63.07%
Women Owned Small Business	5.40%	5.00%	5.30%	\$7.8 B	10.00%	10.60%
Small Disadvantaged Business	4.10%	5.00%	4.20%	\$6.2 B	10.00%	8.40%
Service Disabled Veteran Owned	2.20%	3.00%	2.40%	\$3.6 B	10.00%	8.00%
HUBZone Small Business	1.70%	3.00%	1.80%	\$2.6 B	10.00%	6.00%

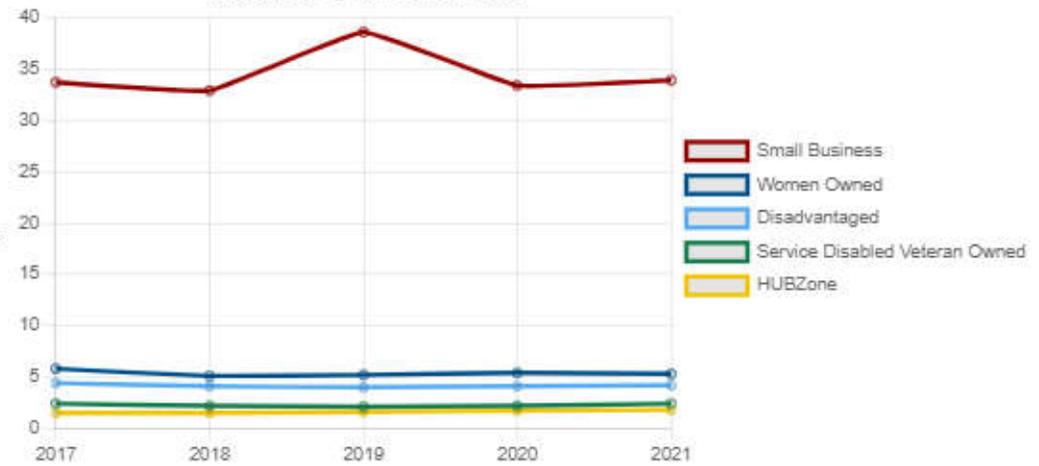
Capped at 200%.

Subcontracting data as of March 15, 2022.

2021 Goals and Achievement



Subcontracting Achievement Trend



Number of Small Business Prime Contractors Comparison

9.80%

▼ Performance Scores

Category	2020 Count	2021 Count	Percent Change	Performance
Small Business	33,552	31,944	-4.79%	0.9
Women Owned Small Business	6,794	6,559	-3.50%	0.9
Small Disadvantaged Business	11,604	11,441	-1.40%	0.9
Service Disabled Veteran Owned	3,137	3,180	1.37%	1.1
HUBZone Small Business	1,734	1,800	3.80%	1.1
Score				4.9

Scoring Range	Score
Increase in number of SB primes by 10% or more	1.3
Increase in number of SB primes by 5% or more but less than or equal to 10%	1.2
Increase in number of SB primes between 0% and less than or equal to 5%	1.1
No change in the number of SB primes (Change = 0%) 0% increase; 0% decrease (no change)	1.0
Decrease in number of SB primes by more than 0% but less than or equal to -5%	0.9
Decrease in number of SB primes by -5% or more but less than or equal to -10%	0.8
Decrease in number of SB primes by -10% or more	0.7

15(k) OSDBU Compliance Requirements

18.73%

▶ Performance Scores

SCORE:

NO

OPTIONAL

YES

Total Score = 20.6

The OSDBU peer review consists of scoring a written response from agencies using a detailed compliance checklist for 22 requirements in 15 U.S.C. 644(k).

To review the full text of 15 U.S.C. 644(k), please visit: [House.gov](https://www.house.gov)

Comments

The Department of Defense (DOD) continues its commitment to the defense small business industrial base. The DoD achieved an "A" rating for the eighth consecutive year due to more than \$83 billion in obligations directly to small businesses, as well as another \$50 billion that was subcontracted to small business from DoD's large prime suppliers. Additionally, DoD's Mentor Protégé Program continues to provide a robust platform for small businesses to grow as viable contributors to the defense industrial base. Diversity and equity are strategic imperatives critical to mission readiness, and DoD is committed to cultivating, and increasing access to, a more diverse and equitable industrial base. DoD will prioritize the use of the Procurement Technical Assistance Centers along with the Small Business Professionals to increase the number of small businesses in the defense industrial base.

Market Research

Defined and outlined in the FAR

- FAR Part 2.101 – Definition: Collecting & analyzing information about capabilities within the market to satisfy agency needs.
- FAR Part 7.102 – Acquisition planning policy: (a) Agencies shall perform acquisition planning and conduct market research (FAR Part 10) for all acquisitions...
- FAR Part 10.001 – (a)(2) Conduct market research appropriate to the circumstances...
(dollar value, complexity, one-time vs. repeated need)

Market Research, continued...

FAR Part 10.001(a)(2)

- (i) Before developing new requirements documents...
- (iii)...when adequate information is not available...
- (vi) On an ongoing basis... to effectively identify the capabilities of small businesses and new entrants into Federal contracting...in furtherance of...contingency operation...attack; and Disaster relief...

(3) Use the results of market research to –

- (i) Determine if sources capable of satisfying the agency's requirements exist;....
- (viii) Determine whether the acquisition should utilize any of the small business programs in accordance with [part 19](#);

(b) When conducting market research, agencies should not request potential sources to submit more than the minimum information necessary.

Who conducts market research?

- Contracting Officers/Specialists
- Requirements Personnel including Project Managers & internal customers
- Technical Personnel
- Small Business Specialist
- SBA Procurement Center Representatives

Basically, everyone !!

FAR 15.201, Exchanges With Industry Before Receipt of Proposals

- b) The purpose of exchanging information is to improve the understanding....
- c) Agencies are encouraged **to promote early exchanges of information** about future acquisitions.... Some techniques to promote early exchanges of information are –
 - (1) Industry or small business conferences;
 - (2) Public hearings;
 - (3) Market research, as described in part 10;
 - (4) One-on-one meetings with potential offerors....
 - (5) Presolicitation notices;
 - (6) Draft RFPs;
 - (7) RFIs;
 - (8) Presolicitation or preproposal conferences; and
 - (9) Site visits.
- d) The special notices of procurement matters....to publicize the Government's requirement or **solicit information from industry**.
- e) RFIs may be used....to obtain price, delivery, other **market information or capabilities** for planning purposes...
- f) General information about agency mission needs and future requirements may be disclosed at any time....

Things to consider

- Was a set aside done last time? (history)
- Is there additional market info elsewhere in the agency? (technical staff)
- Is there additional market research outside of the agency? (another agency, federal or local?)
- Do we need more info about what we are buying? (RFI)
- We know what we need but don't know who can perform. (Sources Sought)
- Check the SBA Dynamic Small Business Search database
- Doing outreach to small business community? (Industry days, meet the buyer events, site visits?)



Welcome to Quick Market Search

All search form hotlinks open a new browser window.

All form fields that require typing in data have "tooltips" with data format information.



NEW FEATURES FOR MOBILE USERS:

Phone number hotlinks can be used to dial the number on mobile phones.
Address hotlinks can be used to show the address in Google Maps.

Based on the search criteria selected, the Quick Market Search will return an aggregate number of profiles in the following socio-economic categories: HUBZone, 8(a), Small Disadvantaged Business (SDB), Woman-owned, Veteran owned and Service Disabled Veteran-owned in a randomized order. It is also possible to drill down to the specific profiles identified in the search results. (Note: To find small businesses NOT in these socio-economic categories, go to DSBS using the button above.)

Specific Nature of Business

NAICS Codes: Any All (slower) [Help](#)

Keywords: Any All (slower) [Help](#)

Location of Profile

States: Metropolitan Statistical Area [Help](#)

Zip Code or Zip Code Initial Fragment

- (any state)
- AL - Alabama
- AK - Alaska
- AA - American Atlantic (APO/FPO)
- AE - American Europe (APO/FPO)
- AP - American Pacific (APO/FPO)
- AS - American Samoa
- AZ - Arizona
- AR - Arkansas
- CA - California

[\(How to make multiple selections.\)](#)



SBA Quick Market Search Results

Quick Market Search Listing, where

the firm has not opted out of DSBS searches;
the firm is small in any of these NAICS codes: 541330;
the profile location is in: California;
the profile's status is that of a standard DSBS search;
at least one word of the Capabilities Narrative, Special Equipment/Materials or Keywords is historic;
and economic groups randomized by original start time of search: 2020-05-26 06:59:14 PM.

Data validation took 0.02 seconds. The search took 0.33 seconds for certifications and 0.21 seconds for non-certifications.

Click on either hotlink in a row to list the firms in the economic group meeting your search criteria.

Economic Group	Number of Firms Found
Currently 8(a) Certified	20
Currently SDB Certified	0
Currently HUBZone Certified	4
Service-Disabled Veteran	8
Veteran	8
Woman or Women Owned	32

SBA Search Results

1	Wendy L. Tinsley Becker	9340 Fuerte Drive Suite 203 La Mesa, CA 91941-4164	Established in 2005, Urbana Preservation & Planning, LLC is an 8(a) consulting firm offering urban planning, historic preservation, history and architectural history services. We provide regulatory compliance support for owners and occupants of historic-era properties. Urbana's team members maintain certification in the AICP and meet The Secretary of the Interior's Professional Qualification Standards for Historic Preservation Professionals in the disciplines of History and Architectural History. Urbana has provided services as both a prime and a sub-contractor for a variety of private and public sector client types in the local, state, and federal arenas including: energy, transportation, education, hotel, residential, and commercial. Federal projects include HABS/HAER/HALS Documentation and Photography, NHPA Section 106 Effects Analysis, NEPA Historic Property Analysis, Historic-Era Built Environment Reports, and other federal regulatory documentation.	C006d2	01/09/20
2	Glenn A Mouritzen	6593 Riverdale St San Diego, CA 92120-2327	Mour Group Engineering + Design, established in 2014, is a multiple disciplined office offering: Architecture, Structural Engineering, Civil Engineering, Interior Design Services. Having multiple disciplines in-house, Mour Group provides cohesive, cost effective designs to meet our client's needs. Mour Group has extensive experience in the design of commercial facilities, efficiently carrying projects from schematic design, through permits and construction administration for the following construction types: Big Box Retail, Entertainment, Historic Renovation, Warehouse, Residential, Shopping Center/Retail, Dining, Industrial & Parking Structures.	C00cTA	05/31/20

No more matches

[Refine Search](#)

Save E-mail Addresses for All
delimited by:

- semi-colon and space
- comma and space
- new line
- tab



SBA Search Results - E-mail

CAUTION: The following feature is intended for those who wish to send electronic solicitations. Do NOT use this feature to advertise your products and services to Small Business Administration registrants. Any misuse of this feature for mass e-mailing (the practice of sending unsolicited commercial advertising, commonly referred to as "**spamming**") is not permitted. All complaints of "**spamming**" which are received by the SBA will be referred to the Office of the Inspector General for review and investigation.

Thank you for your cooperation.

E-mail Address Listing, where

- the firm is small in any of these NAICS codes: 541330;
- the profile location is in: California;
- because criteria include SBA certification(s), profile statuses are expanded;
- the profile's status can be Active or Inactive;
- the profile may have expired in SAM;
- the business is not necessarily registered in SAM (no CAGE code issued yet);
- the business is not necessarily small;
- at least one word of the Capabilities Narrative, Special Equipment/Materials or Keywords is historic;
- the firm is currently 8(a)-certified or an 8(a) Joint Venture;
- and the profile has an e-mail address.

The e-mail query took 0.33 seconds.

Due to the 4K limit in the size of a "mailto" URL in Microsoft Internet Explorer 6, we are no longer generating a mail message containing the e-mail addresses. Instead, copy and paste the following into your e-mail client (outgoing mail message recipient list or personal distribution list), spreadsheet or database:

eric.anania@tepa.com; glenn@mourgroupp.com; karl@theprecisioncs.com; lharris@heg-inc.com; wendy@urbanapreservation.com

Federal WOSB Program change

Per May 2020 [Federal Register](#) notice

- WOSBs and EDWOSBs must be formally SBA-certified through the [WOSB.Certify.sba.gov](https://www.wosb.certify.sba.gov) website to participate in the WOSB Federal Contract program set-aside or sole-source contracts.
- SBA-approved Third-Party Certifiers still ok but firm must upload TPC certification docs to [WOSB.Certify.sba.gov](https://www.wosb.certify.sba.gov) to complete the certification process.
- WOSBs awarded WOSB program contracts before 7/15/20 may continue through completion.
- Make sure the firm's Dynamic Small Business Search ([DSBS](#)) Profile looks like this    

• If the firm is Pending, they must be Certified by time of award. COs can request SBA WOSB Program office for expedited processing if firm is in line for award. See [FAR 19.1505\(f\)](#).

Women Owned - SBA Certified:

WOSB Certified?:

WOSB Certification Date:

WOSB Pending?:

Yes No

11/15/2022

Yes No

Economically Disadvantaged Women Owned - SBA Certified:

EDWOSB Certified?:

EDWOSB Certification Date:

EDWOSB Pending?:

Yes No

11/15/2022

Yes No

VetCert: SBA's Veteran Small Business Certification Program

<https://veterans.certify.sba.gov>



U.S. Small Business Administration

Veteran Small Business Certification (VetCert)

Veteran-owned small businesses can use this application to be certified by SBA to compete for federal contracts. Certified veteran-owned small businesses (VOSBs) will have the opportunity to pursue sole-source and set-aside contracts at the Department of Veterans Affairs under the VA's Vets First program. Certified service-disabled veteran-owned small businesses (SDVOSBs) will have the opportunity to compete for federal sole-source and set-aside contracts across the federal government.

Register

Sign In

Search for a Certified Veteran Small Business

Search By Business Name

Search Veteran Certifications

Business Name

SAM.gov UEI

DUNS Number

State/Territory

NAICS Code

Search Results

Total Results

2767

Search By NAICS Code | v

236220

Name	DBA	Type	SAM UEI	DUNS Number	State/Territory	
12Bravo Group, LLC		Service Disabled Veteran Owned Small Business	DY5BU6UJ2BT5	081247920	NJ	View Details
17 Moreno, LLC		Veteran Owned Small Business	KWPWLFMPFP51	081182857	CA	View Details
1st Stop Vazquez JV LLC		Joint Venture Designation -	KUZQQCL6Q9A3	117570640	IL	View Details
2BG Venture LLC		Service Disabled Veteran Owned Small Business	CW6JF71CU218	094972821	IL	View Details
2H&V Construction Services, LLC		Service Disabled Veteran Owned Small Business	JM6EATAHBEL6	793186557	FL	View Details

12Bravo Group, LLC

Service Disabled Veteran Owned Small Business

Certification Information

DUNS	DBA	Last Verified	Expiration Date
081247920	-----	Jan 7, 2022	Jan 7, 2026

Business Information

SAM UEI	Cage Code	Entity Type	Year Established
DY5BU6UJ2BT5	85KC1	Limited Liability Company (LLC)	2018

Website

Business Address 1	Business Address 2	City	State/Territory	Zip Code
3 Oak Leaf Court	-----	Medford	NJ	08055

NAICS CODES

221114	Solar Electric Power Generation
236220	Commercial and Institutional Building Construction
237130	Power and Communication Line and Related Structures Construction
238160	Roofing Contractors
238210	Electrical Contractors and Other Wiring Installation Contractors
238220	Plumbing, Heating, and Air Conditioning Contractors

Approach Market Research as a Small Business Champion



- Assume that SBs can perform.
- Use CURRENT market research info along with past history
- Don't just repeat a past acquisition strategy without checking current conditions.
- Do not assume that “only LBs can do it”
- Make the research “small business friendly” (try related NAICS codes, include SBs who have done smaller or similar projects)
- Beat the bushes when possible. Email known sources or organizations that know potential sources (chambers, APEX Accelerators, other agencies at federal, state & local levels)



What is the rule of two?



FAR 19.502-2(a): “Each acquisition... above the micro-purchase threshold, but not over the simplified acquisition threshold, shall be set aside for small business...” (currently \$10,000* and \$250,000)

FAR 19.502-2(b): “Before setting aside an acquisition under this paragraph (Total SB Set Asides) refer to 19.203(c). The contracting officer **shall set aside** any acquisition **over the simplified acquisition threshold for small business participation** when there is a **reasonable expectation that:**

- (1) Offers will be obtained from at least two responsible small business concerns....; and**

- (2) Award will be made at fair market prices.**



Small Business Programs, FAR Part 19 continued...

19.203: Relationship among small business programs

(a) **No order of precedence** among the 8(a), HUBZone, SDVOSB or WOSB Programs.

(b) Micropurchase threshold up to SAT: the requirement at [19.502-2\(a\)](#) to set aside acquisitions for small business concerns **does not preclude the contracting officer from awarding a contract to a small business under the 8(a) Program, HUBZone Program, SDVOSB Program, or WOSB Program.**

(c) **Above SAT: CO shall first consider an acquisition for the small business socioeconomic contracting programs before considering a small business set-aside (see [19.502-2\(b\)](#)). (Exception: 8(a) contracts)**

(d) **In determining which socioeconomic program to use for an acquisition, the contracting officer should consider, at a minimum-**

(1) **Results of market research that was done to determine if there are socioeconomic firms capable of satisfying the agency's requirement; and**

(2) **Agency progress in fulfilling its small business goals.**

(c) **SBSAs have priority over acquisitions using F&O.** See requirements for establishing a small business set-aside at subpart [19.5](#).

Procurement Center Representatives

- Advocate on behalf of SBs
- Mediate SB Issues
- Work closely with contracting staff at Federal buying offices
 - Communicate with Agency on upcoming requirements
 - Review acquisitions and solicitations (including set aside decisions)
 - Inform agencies on updates to SB regulations, changes in SBA certification programs
 - Assist agencies in meeting their SB goals through training, counseling & technical assistance
 - Review/approve Subcontracting Plans at time of award.
 - Receive copies of Cure/Show Cause notices of SB firms headquartered in the PCR's territory. Contacts firm to offer assistance if needed
 - Review buying office SB policies & procedures
- Train other Federal agency, Resource Partner staff and Vendors

Procurement Center Representatives work with Small Businesses

- Provide training about the various SB programs and agency goals
- Assist with Limitations on Subcontracting, Non-Manufacturer Rule and provide info on the Disputes process
- Look into why an agency didn't set aside a specific opportunity for SB
- Provide agency SB Liaison/SB Specialist contacts if a firm is procurement-ready
- Provide suggestions on marketing to agencies or primes, or contract vehicles to consider (GSA, IDIQs, BPAs, etc.)

Therefore, we have connections to SBs that may be valuable to you!

**FULL &
OPEN**

SBSA

Partial SB
Set Aside

**WOSB or
EDWOSB
Set Aside**

**SDVOSB
SET ASIDE**

Other than
Full & Open

**HUBZONE
SET ASIDE**

Documenting Market Research

*8(a) Sole Source
or Competitive*

To support your recommended
Procurement Method

*WOSB/EDWOSB, HZ or
SDVOSB Sole Source*

FAR 10.002(e): The head of the agency shall document the results of market research in a manner appropriate to the size and complexity of the acquisition

SMALL BUSINESS COORDINATION RECORDS

2579, 2689, 4220, 2268, 1787, 1886, 1205 – whatever your agency calls the document 😊

- Form required per agency policy for Agency Small Business Specialist review & approval
- Agency OSBP and SBA HQ have signed Business Operations Plans (BOPs) which provide detail on the agreed upon coordination process. (what types of actions are coordinated, often including dollar thresholds).
- The assigned PCR and specific Procurement Center (PC) may negotiate more detailed coordination processes. (check with your PC's Small Business Professional/Specialist/Liaison).
- **Full & Open below SAT, over SAT, SB over SAT all may require PCR review based on the BOP or local agreement between the PCR and PC.**

Particularly high dollar value, consolidation or bundling usually triggers Agency HQ-level review in addition to PCR review.

Coordination Form & Back-up Documentation

- Submit form with CURRENT market research documentation (results of DSBS searches, summary of Sources Sought responses, etc.)
Please show your work!
- Include fully signed/executed J&As or D&Fs (no drafts or unsigned docs), if applicable (FAR 6.302, 8.405-6, or 16.505)
- ***Assure the documentation fully & clearly supports the recommended procurement method to an outsider.***

Coordination Form & Back-up, continued

- No editorializing:

“8(a) costs too much.”

“The firm’s location is too far.”

“We do not want small business to lose money.”

“There are 20 8(a)s and 20 HZs, and 10 SDVOSBs but none can do it.”

“We want F&O for maximum competition.”

- Use facts. **The regulations prioritize SB utilization.** Can small business perform, or can it not perform?

BEST Back-up contains details

Market research should include findings and facts, so that an outsider will clearly see why you recommended F&O, SBSA or one of the Socio-Economic programs. If there is an internal audit or SBA Surveillance Review can the reviewer follow your logic with the info provided?

“A Sources Sought was issued on 1/5/22 and closed 15 days later. **Copy attached.** Fifteen firms responded, 10 of which were Small Businesses and 5 LBs. Of the 10 SBs, only 7 had the required industry certification described in the Sources Sought for this work. Of these 7 SB firms, 3 were SBs without any socio-economic status, 3 were SDBs, 2 were WOSBs, and 2 were SDVOSBs. All 7 indicated positive, recent and relevant past performance. **See attached analysis of 15 respondents.** Per FAR 19.203(c), set asides for SDB, WOSB and SDVOSB were considered before a SBSA. Our current SB achievements for the socio-economic goals were reviewed with the Small Business Specialist. The goal we are most challenged in at this time is SDVOSB, therefore an SDVOSB set aside is recommended.”

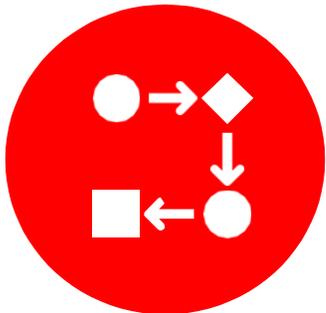
What is crucial in Market Research?



Given total estimated dollar value, are there SBs who can perform? Partial set aside appropriate? Is a subcontracting plan required?



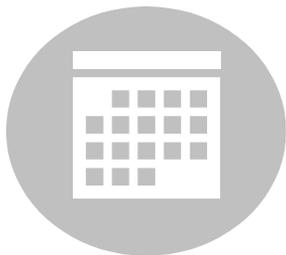
Is the NAICS code correct? Can affect who you find and who sees the opportunity.



Does the Market Research Report adequately support the recommended strategy? Any gaps in the breadcrumb trail?



Were market research efforts *reasonable and sufficient*? Are there unique aspects of the requirement that affect SB participation?



If procured in the past, did SBs or socio-economic firms participate? **Conduct current market research** to check for new entrants or changes in size or socio-economic certifications.



Did the market research *adequately and fairly* consider SB firms?



Here to help agencies maximize use of Small Businesses!

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