



U.S. Small Business
Administration



Market Research

Bonus Topic: SBA Points of Contact

Hosts

**Christopher Eischen, Procurement Center Representative
SBA Office of Government Contracting, Area IV,
Kansas City, MO**

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SBA Office of Government Contracting, Area IV,
Omaha, NE**

Welcome to “SBA Virtual Learning 2020”

1. Questions answered during the final 10 minutes.
2. Technical problems: *Contact the moderator with a note in the chat box* or call the AT&T Support Desk at 1-888-796-6118.
3. Page numbers stated for those working off hard copies of the program.
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 (APTAC)

Procurement Technical Assistance Centers are a vital resource partner.

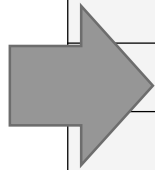
- APTAC posts past “First Wednesday” programming at this link: <http://www.aptac-us.org/for-contracting-officers-sba-webinar-library/>
- Contracting officer resources: “How PTACs partner with federal agencies”: <http://www.aptac-us.org/federal-partners/>
- Find your nearest Procurement Technical Assistance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

FIRST WEDNESDAY VIRTUAL LEARNING SERIES

FY 2020 SCHEDULE

1:00 to 2:00 PM Central Time

FY 2020	Date	Topic
1	October 2, 2019	Size & Affiliation
2	November 6, 2019	Understanding the Non-Manufacturer Rule
3	December 4, 2019	Subcontracting Plans (pre-award)
4	January 8, 2020	Surveillance Reviews
5	February 5, 2020	Historically Underutilized Business Zone (HUBZone) Program
6	March 4, 2020	Certificate of Competency (COC)
7	April 1, 2020	Regulation Updates
8	May 6, 2020	Market Research & SBA Points of Contact
9	June 3, 2020	Procurement Center Representative (PCR) functions
10	July 1, 2020	Woman Owned Small Business (WOSB) Program
11	August 5, 2020	All Small Mentor Protégé Program



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

One Continuous Learning Point

- Self-service: Using the PowerPoint that was sent with your invitation for this training event, fill in your name on the certificate slide and save. Download the certificate and print for your records. You submit your request for training credit IAW your agency policy, i.e. FAITAS.
- Phoning in only: 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 2020”

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.



MAY 6, 2020

Pamela J. Beavers
Director, Area IV
SBA Office of Government Contracting



Today's Speaker

Valerie Coleman
Program Manager, Prime Contracts
Office of Government Contracting
U.S. Small Business Administration

Cover

Every Action
Starts.....

Your

**As a Small
Business
Action!!**

Acquisition

“DOING THE RIGHT
THING”

Who conducts market research?

- **Contracting**
- **Requirements Personnel including Project Managers & customers**
- **Technical Personnel**
- **Small Business Specialist**
- **SBA Procurement Center Representative**

Basically, everyone !!

Some Regs...

FAR Part 2.101 – Definition of market research: 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...**

One More....

FAR Part 10.001 –

(a)(2) Conduct market research appropriate to the circumstances

(i) before developing new requirements;

(ii) before soliciting offers for acquisitions with an estimated value in excess of the SAT;

(iii) before soliciting offers for acquisitions with an estimated value less than the SAT when adequate information is not available and the circumstances justify its cost

(iv) Before soliciting offers for acquisitions that could lead to consolidation or bundling

(v) Before awarding a task or delivery order under an indefinite-delivery/indefinite-quantity (ID/IQ) contract (e.g., GWACs, MACs) for a noncommercial item in excess of the simplified acquisition threshold

Role of PCRs

Review proposed acquisitions to recommend—

- **New qualified small, veteran-owned small, service-disabled veteran-owned small, HUBZone small, small disadvantaged, and women-owned small business sources, and**
 - **Breakout of components for competitive acquisitions.**
 - **The setting aside of selected acquisitions not unilaterally set aside by the contracting officer,**
-
- **Upon their request.... contracting officers shall give SBA procurement center representatives..... access to all reasonably obtainable contract information that is directly pertinent to their official duties. (FAR Part 19.402)**
 - **May appeal a contracting officer's rejection of its recommendations (FAR Part 19.505)**

FAR 19.203(a)

There is no order of precedence among the 8(a) Program (subpart 19.8), HUBZone Program (subpart 19.13), Service-Disabled Veteran-Owned Small Business (SDVOSB) Procurement Program (subpart 19.14), or the Women-Owned Small Business (WOSB) Program (subpart 19.15).

FAR 19.203(c)

For acquisitions of supplies or services that have an anticipated dollar value exceeding the simplified acquisition threshold definition at 2.101, the contracting officer shall first consider an acquisition for the small business socioeconomic contracting programs (i.e., 8(a), HUBZone, SDVOSB, or WOSB programs) before considering a small business set-aside (see 19.502-2(b)).

However, if a requirement has 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 parts 124, 125, and 126.**

What is the rule of two?

FAR 19.502-2 (a) reserves acquisitions of over \$3,500 and \$250,000 for small business.

FAR 19.502-2(b).

b) The contracting officer shall set aside any acquisition over \$250,000 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.

Questions to Ask FAR 10.002(b)(2)

- **What did you do last time? (history)**
- **Is there existing market research elsewhere in your agency?**
- **Is there existing market research outside of your agency, i.e. source lists?**
- **Have you done a RFI and/or sources sought?**
- **Have you reviewed the Dynamic Small Business Search (DSBS)?**
- **Have you been in touch with knowledgeable individuals in government, industry and the small business community?**
- **Is there documentation?**

Think small business

- **Use market research to craft a strategy, not to validate a pre-existing strategy**
- **Work with a mindset to show why small business cannot perform rather than why “other than small” businesses can.**
- **Make the research “small business friendly”**

DSBS

- DSBS is an “and” program; not an “or” program
 - The more criteria specified; the more precise the results

The screenshot displays the SBA Dynamic Small Business Search (DSBS) interface. At the top, there is a navigation bar with the SBA logo and links for DSBS, Quick Market Search, and TM OnLine. The main content area is titled "Welcome to the Dynamic Small Business Search" and includes a disclaimer: "This is generally a self-certifying database. The SBA does not make any representation as to the accuracy of any of the data included, other than certifications relating to 8(a) Business Development, HUBZone or Small Disadvantaged Business status. The SBA strongly recommends that contracting officers diligently review a bidder's small business self-certification before awarding a contract." Below this, there are two main sections: "Location of Profile" and "Government Certifications".

Location of Profile

States: (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

Searching within a State: (Requires exactly one state from the State list at left.)

Congressional District: [Help](#)

County: Select 1 State, then press Lookup [Lookup Help](#)

Area Code or Phone Number Initial Fragment

Metropolitan Statistical Area [Help](#)

SBA Servicing Office [Help](#)

Zip Code or Zip Code Initial Fragment

Government Certifications

8(a) Certified or 8(a) Joint Venture:

- Required (Active Certifications only)
- Required (Active Certifications and Previously Certified)
- Required (Previously Certified only)
- Not Required

Small Disadvantaged Business:

- Required (Active Certifications only)
- Required (Active Certifications and Previously Certified)
- Required (Previously Certified only)
- Not Required

HUBZone Certification:

- Required (Active Certifications only)
- Required (Active Certifications and Previously Certified)
- Required (Previously Certified only)
- Not Required

Footer: Last modified: 07/13/2004 12:00:00 AM. SBA Processing: 0.121 seconds Version: SBSS 8.1.1 Session timeout in 29 minutes.



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: Alabama;
the profile's status is that of a standard DSBS search;
and economic groups randomized by original start time of search: 2019-02-22 01:01:10 PM.

Data validation took 0.02 seconds. The search took 2.68 seconds for certifications and 10.47 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	174
Service-Disabled Veteran	523
Currently SDB Certified	73
Currently HUBZone Certified	171
Veteran	785
Woman or Women Owned	678



SBA Search Results

view	Name of Firm	Contact	Zip	Capabilities Narrative
26	ENVIROWORKS, LLC	Brad Flanagan	5934 S 25TH ST OMAHA, NE 68107-4443	Environmental Restoration and Abatement. Demolition and small size construction services. Emergency Response Company. Levee repair, maintenance and construction.

No more matches

[Refine Search](#)

(or jump to any page, below)

[First](#) [Prev](#) [1](#) [2](#)

Save E-mail Addresses for All

delimited by:

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

Please notify SAM if you discover any inaccurate contact information (address, e-mail address, fax or phone number) in the way most convenient for you:

For SAM Customer Service, contact:
[Federal Service Desk](#) (8am - 8pm Eastern Time)
 866-606-8220
 334-206-7828
 DSN: 866-606-8220

The structure of this page was last updated 02/01/2013, as part of SBSS 8.1.1.



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 profile location is in: Nebraska;
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;
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 1.86 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:

MARK.COATS@TEPA.COM; bachigbu@bmaak.com; bflanagan@enviroworks.net; chendrickson@katmaicorp.com; dave.hron@wellsgroup.us; dnestor@thecseteam.com; hrist@allnativegroup.com; jeffrey.miner@ssandtech.com; jharrison@allnativegroup.com; jmoore@allnativesolutions.com; jstantorelli@allnativeservices.com; kal@agiletraining.com; kkilpatrick@hochunkconstruction.com; kasmussen@techsi.com; l.andrews14@yahoo.com; lee@lpcustodial.com; mfaulconer@ieinc.net; mmorgan@bristol-companies.com; rsilva@coastalgrp.net; shelleyyost@cableone.net; tlederle@ieinc.net; tmedhi@ae-pc.com; wayne@wdjbinc.com; wendel.torres@tepa.com

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....

(e) RFIs may be used....

(f) General information about agency mission needs and future requirements may be disclosed at any time....

**1787, 2268, 2579, 653, 1886, 4250, 1205,
700-22, DL1-2004, F4200.40, AD1205**

Form is totally filled out. Easy to understand.

All information is attached. Stand alone explanation for an outsider.

No editorializing:

“8(a) costs too much.”

“The locale 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 do not have contract capacity.”

Can small business perform or can it not perform?

The best: Narrative

Small Business Coordination Records

DD 2579, GSA 2689, VA 2268, NASA 1787, etc. – send to the assigned PCR.

<https://www.sba.gov/contracting/resources-small-businesses/procurement-center-representatives>



Finally,

Understanding the small business programs and market research is essential to successful acquisition planning and the outcome of the solicitation/contract award processes. It is our responsibility to conduct and document market research as stewards of taxpayer dollars as well as what we can do for SMALL BUSINESS.



Bonus

SBA Points of Contact

Office of Government Contracting (GC)

Our mission is to assist small businesses in obtaining a fair share of Federal Government contracts, subcontracts and property sales.

Area Offices

What Do We Do:

- **Prime Contracts Program**
- **Subcontracting Program**
- **Certificate of Competency Program**
- **Natural Resources Assistance Program**
- **Service-Disabled Veteran-Owned Small Business Program**
- **Small Business Size Determinations**
- **Waivers of the Nonmanufacturer Rule**
- **Women-Owned Small Business Program**
- **Surveillance Reviews**
- **GC also plays a major role in the formulation of federal procurement policies that affect small businesses**

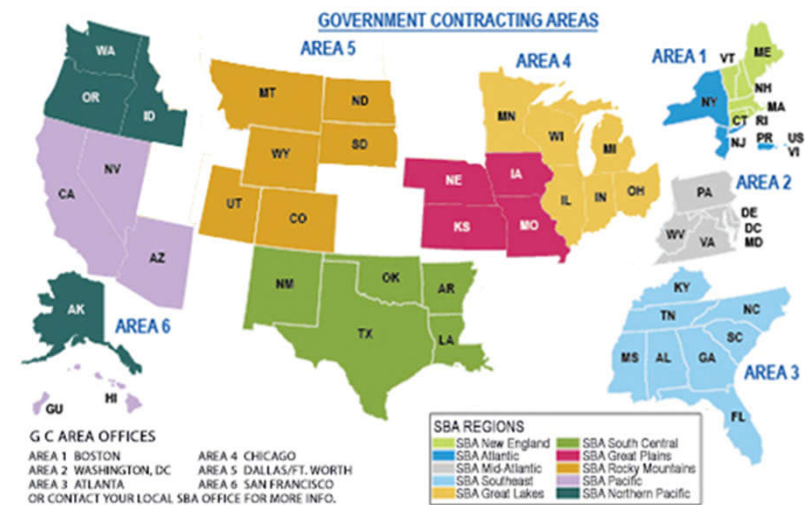
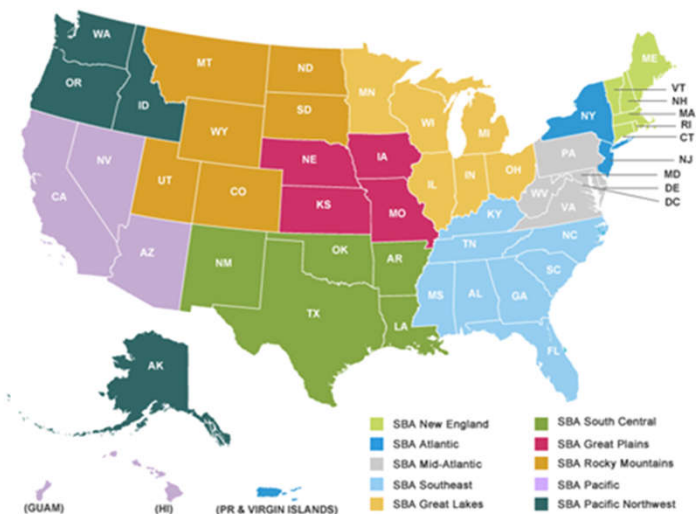
Who Are We:

- **GC headquarters and field staff positions**
- **Procurement Center Representatives (PCRs)**
- **Commercial Market Representatives (CMRs)**
- **Certificate of Competency (COC) Specialists**
- **Size Determination Specialists and**
- **Industrial Specialists (IS)**
- **To locate an SBA Area Office go to <https://www.sba.gov/federal-contracting/counseling-help/contracting-area-directors>**

Regional/District vs. Area Offices

- Regional Offices cover multiple states and are all the same color
- Area Offices can cover multiple Regions
- District Offices are in each state – same states have more than one District Office
- <https://www.sba.gov/tools/local-assistance>

To further the mission of helping small businesses succeed, SBA has established offices across the country.



Prime Contracts

PCRs

Note: First Wednesday webinar on June 3 is on PCRs

8(a) Program

Any question regarding the 8(a) program, an 8(a) participant or an 8(a) contract goes to the District Office/Business Opportunity Specialist (BOS) where the 8(a) firm is located.

This includes:

- Offering letters
- Awards/modifications
- Eligibility questions

To find the 8(a) firm's district office, go to:
<https://www.sba.gov/local-assistance>

COC/Size

- **Goes to the GC Area Office where the HQ of the SB is located**
 - SB located in Oklahoma City needs a COC done – send to the Dallas/Fort Worth Area Office
 - SB located in Seattle needs a size determination – send to the San Francisco Area Office

Where to send COC referrals

If the HQ of the offeror is located in:

AREA I

CT, ME, MA, NH, NJ, NY, RI, VT, PR,
VI

AREA II

DE, DC, MD, PA, VA, WV

AREA III

AL, FL, GA, KY, MS, NC, SC, TN

AREA IV

IL, IN, IA, KS, MI, MN, MO, NE,
OH, WI

AREA V

AR, CO, LA, MT, ND, NM, OK, SD,
TX, UT, WY

AREA VI

AK, AZ, CA, HI, ID, NV, OR, WA

the COC must be sent to:

Carolyn Clark, Admin. Specialist
U.S. Small Business Administration
Office of Government Contracting, Area I
26 Federal Plaza, Room 3100
New York, NY 10278

carolyn.clark@sba.gov
(212) 264-3231

Adrian Groth, COC Specialist
U.S. Small Business Administration
409 Third Street, S.W.
Washington, DC 20416

adrian.groth@sba.gov
(202) 205-6840

Gary Heard, COC Coordinator
U.S. Small Business Administration
Building 5303, Room 3135
Redstone Arsenal, AL 35898

gary.heard@sba.gov
(256) 842-6240

David Gordon, COC Coordinator
U.S. Small Business Administration
500 West Madison Street, Suite 1150
Chicago, IL 60661

david.gordon@sba.gov
(312) 353-7674

Mia Fagley, Industrial Specialist
U.S. Small Business Administration
721 19th Street, Suite 426
Denver, CO 80202-2517

mia.fagley@sba.gov
(303) 927-3487

Aaron Parra, COC Coordinator
U.S. Small Business Administration
330 N. Brand Blvd., Suite 1200
Glendale, CA 91203

aaron.parra@sba.gov
(818) 552-3297

Size Protests

If the HQ of a protested concern is located in:

CT, ME, MA, NH, NJ, NY, PR, RI, VI
VT

DE, DC, MD, PA, VA, WV

AL, FL, GA, KY, MS, NC, SC, TN

IL, IN, IA, KS, MI, MN, MO, NE, OH,
WI

AR, CO, LA, MT, ND, NM, OK, SD,
TX, UT, WY

AK, AZ, CA, HI, ID, NV, OR, WA,
Guam

Forward the protest to the SBA Office of GC:

10 Causeway Street, Room 265
Boston, MA 02222-1093
Janette Fasano (617) 565-5622; Janette.Fasano@sba.gov

660 American Avenue, Suite 301
King of Prussia, PA 19406
Helen Goza (484) 868-3263; helen.goza@sba.gov

51 SW 1st Avenue, Suite 201
Miami, FL 33130
Ivette Bascumbe (305) 536-5749
Ivette.Bascumbe.mesa@sba.gov

500 West Madison Street, Suite 1150
Chicago, IL 60661
David Gordon (312) 353-7674; David.gordan@sba.gov

150 Westpark Way, Suite 245 (Mailbox 8)
Euless, TX 76040
Stephanie Lewis (817) 684-5303; stephanie.lewis@sba.gov

455 Market Street, 6th floor
San Francisco, CA 94105
Esmeralda Sanchez (415) 744-4242
Esmeralda.sanchez@sba.gov

HUBZone Information

- HUBZone website and checklists:
www.sba.gov/hubzone
- View the map:
www.maps.certify.sba.gov/hubzone/maps
- Email specific questions: hubzone@sba.gov
- Join the Help Desk Conference Call—every Thursday at 2pm: 202-765-1264; Access code: 63068189#

WOSB Information

- For more information and to keep informed of events, go to: www.sba.gov/wosbready
- For questions on the WOSB program, email wosb@sba.gov
- For technical questions on the WOSB Program Repository, please email help@certify.sba.gov
- **Note: First Wednesday webinar on July 1 is WOSB**

ASMPP

- Visit the ASMPP website at <https://www.sba.gov/federal-contracting/contracting-assistance-programs/all-small-mentor-protege-program>
- For questions on the ASMPP, send an email to allsmallmpp@sba.gov
- Note: First Wednesday webinar on August 5 is ASMPP

Nonmanufacturer Rule (NMR)

Carol J. Hulme
Office of Government Contracting
U.S. Small Business Administration
Washington, D.C.

nmrwaivers@sba.gov

Carol-ann.hulme@sba.gov
(202) 205-6347

Surveillance Reviews

Valerie Coleman

Valerie.coleman@sba.gov

281-245-4777

Subcontracting Plans

- **Send to the GC Area Office where the Administrator named in the Plan is located**

- Agency is in Denver; Work is in Seattle; Prime is located in Albany; Administrator of Plan is located in Des Moines– send to the Area Office in Chicago

- For more info:

<https://www.sba.gov/federal-contracting/contracting-guide/prime-subcontracting#section-header-2>

SBA's Natural Resource Sales Assistance Program

- **Aid and assist small business concerns in obtaining a fair share of Federal property offered for sale or lease.**
- **These efforts are concentrated primarily on sales of Federal Timber**

SBA Timber Program

**David Loines, Program Director
Washington, DC**

Industrial Specialists – Forestry

**Stewart Kallam
Atlanta, GA**

404-331-0141

Stewart.kallam@sba.gov

**John Bagaason
Seattle, WA**

206-553-8546

john.bagaason@sba.gov

**Kevin Michael
Auburn, WA**

253-931-7161

kevin.michael@sba.gov

General Questions

Contracting@sba.gov

sbalearning@sba.gov

Questions

Valerie Coleman
Program Manager, Prime Contracts Program
Office of Government Contracting
U. S. Small Business Administration
Washington, DC

Valerie.coleman@sba.gov

281-245-4777