



U.S. Small Business
Administration



8(a) Releases/Follow-on Requirements

Hosts

**Charles Mason, Procurement Center Representative
SBA Office of Government Contracting, Area IV,
Omaha, NE**

**Steven Szalo, Procurement Center Representative
SBA Office of Government Contracting, Area IV,
Rock Island, IL**

Welcome to “SBA Virtual Learning 2021”

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 (APTAC)

Procurement Technical Assistance Centers are a vital resource partner.

- APTAC posts past “First Wednesday” programing 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>

Small Business Administration YouTube Page

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

- October 6, 2021 – 8(a) Program Updates: <https://youtu.be/yNQ4u-Ha9Go>
- November 3, 2021 – Non-Manufacture Rule (NMR): <https://youtu.be/QnN2XvlaupQ>
- December 1, 2021 – Releasing Requirements from 8(a):
- January 5, 2022 – Category Management Part 1:
- February 2, 2022 – Category Management Part 2:
- March 2, 2022 – Market Research:
- April 6, 2022 – All Small Mentor Protégé Program:
- May 4, 2022 – ESRS System:
- Jun 1, 2022 – Legislature and Regulatory Updates:
- July 6, 2022 – Women Owned Small Business Program:
- August 3, 2022 – HUBZone Program:

FIRST WEDNESDAY VIRTUAL LEARNING SERIES

FY 2022 SCHEDULE

1:00 to 2:00 PM Central Time

FY 2022	Date	Topic
1	October 6, 2021	8(a) Business Development Program Updates
2	November 3, 2021	Non-Manufacturing Rule (NMR)
3	December 1, 2021	Releasing Requirements from 8(a) Business Development Program
4	January 5, 2022	Part I: Category Management: Policy Considerations and Flexibilities and Small Business Utilization
5	February 2, 2022	Part 2: Category Management: Increasing Small Business Participation Through Subcontracting and Legal Obligations
6	March 2, 2022	Market Research
7	April 6, 2022	All Small Mentor Protégé Program
8	May 4, 2022	Electronic Subcontracting Reporting System (ESRS)
9	June 1, 2022	Legislature and Regulatory Updates
10	July 6, 2022	Women-Owned Small Business Program
11	August 3, 2022	HUBZone 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.
- 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 2022”

This Certificate is awarded to

Insert Your Name Here

For completion of

Release Requirements from 8(a) Business Development Program

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

12/01/2021

DATE

Today's Speakers

Mr. Stanley Jones Jr.
Director, Management and Technical Assistance
Division
Office of Business Development
U.S. Small Business Administration

Ms. Kiya Perrin
Sr. Business Management Specialist
Management and Technical Assistance Division
Office of Business Development
U.S. Small Business Administration

Mr. Mark Hagedorn
Attorney Advisor
Office of General Counsel
U.S. Small Business Administration

Discussion Topics

- New Changes to 13 CFR 124.504 Releases/Follow-on Requirements
- Panel Discussion

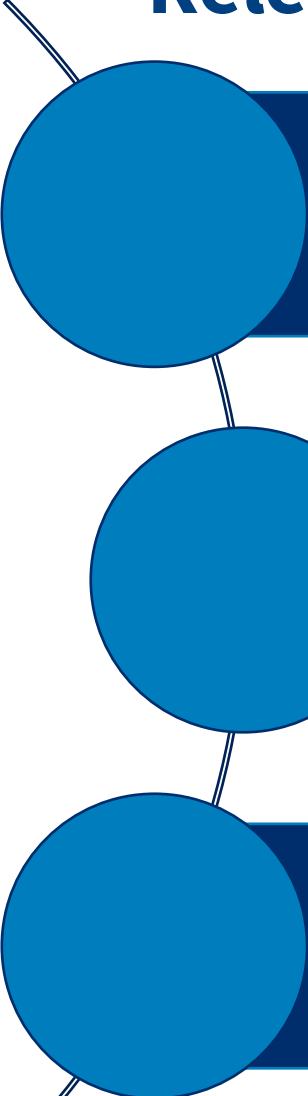
New Changes to 13 CFR 124.504 Releases/Follow-on Requirements

Must seek and obtain SBA's concurrence to release any follow-on procurement from the 8(a) BD program, even when going to a **MAC** that is **not itself an 8(a) contract** but where the procuring activity intends to compete and award a **competitive 8(a) order** under the MAC.

If procuring activity seeks to **reprocure an 8(a) requirement through a limited contracting vehicle which is not available to all 8(a) BD Program Participants** (e.g., an 8(a) MAC), must **notify SBA** of that intent and SBA will **consider the business development purposes** of the 8(a) program in determining how to accept the requirement.

SBA may not accept a follow-on 8(a) requirement as an 8(a) MAC where the incumbent contractor is still in the program, is not a contract holder on the 8(a) MAC, and the follow-on would be important to its continued business development.

New Changes to 13 CFR 124.504 Releases/Follow-on Requirements cont.



Whether a procurement is a follow-on, important in 3 instances: (1) follow-on stays in the 8(a) program unless **release**; (2) adverse impact – not required for “new” requirements or follow-on 8(a)s; and (3) follow-on sole source can’t be awarded to sister company.

Whether the **scope** has changed significantly, requiring meaningful different types of work or different capabilities; Whether the **magnitude** of the requirement has changed by at least 25 percent; and Whether the **end user** of the requirement has changed.

25% is a guide – not necessarily determinative. Procuring activity must **notify SBA** if work previously performed through the 8(a) program will be performed through a different means (where CO believes it is a “new” requirement and release not needed).



Panel Discussion