

Moderator: Hello and welcome to today's live SBA web conference. Please note that all participant lines will be muted for the duration of this event. You are welcome to submit written questions during the presentation, and Deborah Crumity will repeat the questions that come in for the benefit of the entire group. To send a note, please select the participants menu at the top of your screen, and opt to send note to all presenters.

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I would now like to formally begin today's conference and turn the call over to Valerie Coleman. Valerie, please go ahead.

Valerie: Thank you, Carla. Good afternoon, good morning to you, depending on where you are located. As program manager for the prime contract program, I am very proud of the First Wednesday training webinar series. It started 10 years ago, in the Area IV Office of Government Contracting by Dwight Johnson. The program has grown from a mailing list of approximately 20 small business specialists and contracting officers in three states to over 8000 individuals located throughout the United States and beyond.

For the past three years I have had the pleasure of working with Janis Kaiser, who has served as your host and has been the backbone of First Wednesday. Under Jan's leadership, the program has undergone major changes, including for the first time, moving the training to the afternoon to accommodate the West Coast, and including subjects that you have specifically asked for such as the one that we are doing today and the Native American program that was presented last month.

While some things will remain the same, such as Deborah Crumity taking care of your questions during the training and myself, monitoring and answering your emails that have been sent to the SBA Learning inbox, change does happen. It is fitting that Jan is a co-presenter this month as she is retiring at the end of the month. While I have thanked Jan privately for everything that she has done, I wanted to thank her publicly also. So on behalf of Seán Crean, SBA Director of Government Contracting, and myself – we want to congratulate Jan on her pending retirement, and wish her well on whatever road she may travel.

Even though she will no longer be your host, Janis has made sure that First Wednesday has been left in good hands. Starting this month, Chris Eischen will

be your new host and from whom you will be receiving notices of future training. I would like to welcome him. Chris, you have our full support, and we look forward to your leadership over this very important program. So at this time, I would like to turn over the First Wednesday training to your new host, Chris Eischen.

Chris: Hello, and thank you Val. Hello everyone and welcome to SBA's First Wednesday webinar series. We appreciate you joining us for a final event of the calendar year. This webinar series focuses on getting subject matter experts on specific small business programs and having them provide information you can successfully utilize in the performance of your job as an SBA employee, a member of the Federal acquisition community, or any of our resource partners.

I periodically get emails asking if small business concerns can be invited to participate in the First Wednesday program. The simple answer is – no. SBA hopes to train small business concerns using other methods. But let me tell you a little more about how and why the SBA First Wednesday program started.

SBA's procurement center representatives – or PCR's – are tasked with conducting training for procurement personnel located at their assigned procurement centers or federal buying activities. This is to assist in keeping them abreast on changes in the procurement process that impacts small businesses.

So in 2008, Dwight Johnson, a PCR from SBA's Office of Government Contracting in Area IV – created the 1102 First Wednesday program. Which began as a scheduled conference call to provide small business training to contracting personnel at his assigned federal buying activities. Some of them were rather remote, within the large geographic area he covered. Over time, Dwight worked to increase the number of conference call lines from 25 to 50. And eventually began utilizing the AT&T GoToMeeting application, which we use today, with up to 1000 participants able to participate in the presentations.

The 1102 First Wednesday program was not created to have small or large business participants. As I mentioned, the conceptual framework was created for contracting staff, which is why the training series was called 1102 First Wednesday. The 1102 government occupational designator for contracting personnel within the training title, was dropped to be more inclusive of other GS-series, as federal agencies increase the requirements for non-1102's, to obtain DAWIA and FAC-C certifications.

Additionally, other federal buying activities, SBA staff, PTAC and SBDC personnel – who after hearing about the training, requested access, and were added to the list of invitees. So that is why SBA's First Wednesday program is

aimed at Federal Government employees and our resource partners, like PTAC and SBDCs.

Thank you to those who are repeat attendees and welcome to those of you who are new to the program.

As Carla mentioned, I am Chris Eischen and I work as a procurement center representative, or PCR, within the Small Business Administration. And I am located in Kansas City, Missouri. Additionally, Deborah Crumity, the SBA PCR assigned to the Rock Island Arsenal, will be reading your questions submitted during the program for our speakers to address towards the end of today's session.

We hope you have had a chance to settle in so you can hear about how today's webinar works. All lines are on mute, but we will address questions that we have received during the program at the end of our speakers' presentations. Just submit them in the Chat Box.

Once again, if you are having technical problems and can hear my voice, but cannot log on to the AT&T Connect participation application, which is the online portion of the webinar, call the following AT&T Connect Support desk number at 1-888-796-6118. If you didn't get that, the telephone numbers for the AT&T Connect Support desk are on the email invitation for today's program and on slide three of the PowerPoint slide deck that accompanied the SBA email notifying you of today's training.

Otherwise, just keep listening in and follow along with the PowerPoint that accompanied the invitation for today. We will periodically announce the page numbers, so you can keep up.

For more SBA small-business program training like this, you can visit the SBA Learning Center at www.SBA.gov. Please note that this session is being recorded. The Association of Procurement Technical Assistance Centers – or APTAC – hosts a website where they post previous First Wednesday programs. And their website is provided here on slide four.

Procurement Technical Assistance Centers, or PTACs, are a great resource. Partnering with a PTAC for an industry day, sharing a sole-source notice or (RFI?) notices or referring small business concerns to a PTAC, are just a couple of reasons why PTACs are such a useful resource for acquisition personnel.

Slide five is the current program schedule for fiscal year 2018. A few months ago, we conducted the survey and reviewed the topics suggested by you, the audience. We listen to what you had to say and as a result, we added a couple of topics that

we hadn't done before, including today's session, as well as last month's SBA Native American program. We appreciate all of you who provided SBA small business topics to be considered for this series. We hope you find these topics interesting and applicable to your job, and look forward to your participation during future programs.

I am sure many of you are wanting to receive credit for attending today's training. And fortunately, today's session is worth one CLP. On slide seven is the certificate you will complete with your individual name. I'll go into more detail on the next slide.

If you want to receive an email directly from us, notifying you of upcoming First Wednesday events, just email us at SBALearning@SBA.gov. Please enter the words, "add to list," in the subject line and we'll be sure to add you to the distribution list.

On slide seven, you'll see the certificate. First, you will fill in your name, where it says insert your name here – and then you'll print the certificate from the PowerPoint to request credit for today's session. The PowerPoint was part of the SBA's invitation for today's session, so you'll be able to view them. SBA does not track your CLPs or communicate with your training program regarding your CLP achievements.

Today's topic evolved from the survey you took earlier this year, and we have assembled today's training to address SBA programs that you may not know about. Our speakers graciously accepted our invitation and they will be directing me to change the slides. Please note that due to connectivity issues, some viewers may experience a delay when the slides change on your screen.

Our speakers today are Valerie Coleman, Jan Kaiser, and Stewart Kallam. Ms. Coleman is the Prime Contracts program manager for SBA's Office of Government Contracting, and with her today is Ms. Kaiser, who served as a procurement center representative, located in Chicago, Illinois, and is proudly representing Area IV. Mr. Kallam is also with SBA's Office of Government Contracting and serves as an Industrial Specialist in Area II, out of Atlanta. Stewart will be discussing SBA's timber program.

We are very pleased, you can meet with us today, and I'll turn the program over to you. Take it away, Jan.

Jan: Thank you, Chris. The presidentially-appointed, Senate-confirmed SBA Administrator is currently Linda McMahon, who serves as the 25th Administrator

of the US Small Business Administration. As a member of President Trump's cabinet, she advocates on behalf of the 30 million small businesses in America.

Did you know that no fewer than 57 million Americans work for small businesses? Nearly half of all private sector jobs in the United States of America are at small businesses. Think for a moment – how many of you got your first job with a small business? Or have a family member who is employed by a small business concern?

I'd wager that a number of you have somehow benefited from employment at a small business. Small businesses provide employment, pay taxes, and with the federal government providing assistance, can ensure that large businesses have competition which helps the government get better prices, in the end. I just wanted to remind folks that if you have questions about today's presentation, to address them to the sbalearning@SBA.gov email address.

So, right now, we're on slide 10. And SBA has assisted in delivering millions of loans, loan guarantees, contracts, counseling sessions, and other forms of assistance to small businesses. SBA does this primarily through its four primary mission functions.

Access to capital – which is where SBA works with lenders to provide loans to small businesses. The agency doesn't lend money directly to small business owners, instead it sets guidelines for loans made by its partnering lenders, community development organizations, and micro lending institutions. The SBA guarantees these loans will be repaid, which eliminates some risk for the lending partners.

The second function is entrepreneurial development. SBA provides free, individual face-to-face and Internet counseling for small businesses, and low-cost training to nascent entrepreneurs and established small businesses in over 1800 locations throughout the United States and US territories. Go to the SBA.gov website to locate the office closest to you.

The third function is government contracting. In keeping with the mandate of section 15(g) of the Small Business Act, SBA's Office of Government Contracting sets goals with other federal departments and agencies to reach the statutory goal of 23% in prime contract dollars to small businesses. This office also provides small businesses with subcontracting procurement opportunities, and outreach programs like training.

Additionally, the fourth function is advocacy. Created in 1978, the SBA's Office of Advocacy reviews congressional legislation and testifies on behalf of small

businesses. It also assesses the impact of the regulatory burden on behalf of small businesses. Additionally, it conducts a vast array of research on American small businesses and small business environment. The chief counsel of this office is appointed by the president of the United States.

Slide 11. Prior to working for the SBA, I worked for the Navy as a full-time, small business specialist for my buying activity. Sometimes I received questions about how SBA was organized and where the SBA employees we spoke to, like PCRs, or procurement center representatives, business opportunity specialists, or size specialists fit into the organization. The First Wednesday survey we took earlier this year, also had numerous suggestions related to discussing SBA's organizational construct. So, we show this organizational chart, here. And our discussion today starts to put things into perspective for you.

Many of the SBA employees that buying activities work with are from the SBA's Office of Government Contracting and Business Development. And by the way, we're on slide 12, just so everyone can keep up.

Because the US government is the largest single purchaser of goods and services in the world, awarding approximately 500 billion in contracts every year, the Small Business Administration's Office of Government Contracting and Business Development works with federal agencies to award at least 23% of all prime government contract dollars to small businesses. And helps federal agencies meet specific statutory goals for small businesses, disadvantaged businesses, women owned small businesses, service-disabled veteran-owned small businesses and small businesses that are located in historically underutilized business zones.

In addition, SBA's Business Opportunity Specialists, who are located in SBA District Offices, work under the SBA's Office of Business Development. And SBA's 8(a) Business Development program to assist eligible, socially, and economically disadvantaged individuals in developing and growing their businesses through one-on-one counseling, training workshops, matchmaking opportunities with federal buyers and other management and technical guidance.

Right now, I'm going to highlight the Office of Government Contracting. Slide 13. The Office of Government Contracting field structure is organized into six area offices. One is located in Boston. Another is located in Washington DC. There is one in Atlanta, another in Chicago. There is the area office in Dallas/Fort Worth. And another one in San Francisco. Each is headed by an area director.

The government contracting program field staff are typically located at SBA offices, except for the Procurement Center Representatives. Which may be

located at federal military and civilian agency buying offices around the country. Some of you may have a PCR located with you.

Slide 14. The Office of Government Contracting administers programs and services that assist small businesses in meeting the requirements to receive government contracts, either as prime contractors or subcontractors. The area office programs and field staff positions include PCRs, as I mentioned, or commercial market representatives – CMRs. Or certificate of competency specialists. Size determination specialists. And industrial specialists, like in the forestry program. This provides a good point to hand over the program on slide 15, to Stewart Kallam, an industrial specialist, to talk about SBA's timber program from his location, in Atlanta, Georgia. Stewart?

Stewart: Thank you, Jan. Our SBA Office of Natural Resource Sales Assistance is part of the Office of Government Contracting. And we deal with the sale of government timber, mineral leases, and excess property. Slide 16, please.

SBA's Natural Resource Sales Assistance Program is intended to 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.

We are a four-person shop. Headed by our Program Director at SBA headquarters in Washington DC, David Loines. And, as mentioned, I am Stewart Kallam out of the government contracting office in Atlanta. And I am responsible for the Forest Service regions 8 & 9, and other agencies that also sell timber to the public.

We have another industrial specialist forester, located in Seattle, Washington – John Bagaason. And he is responsible for US Forest Service regions two, three, four, and five – for the timber sales in those four regions. And we have a third industrial specialist forester in Auburn, Washington – Kevin Michael. And he is responsible for Forest Service timber sales in regions 1, 6, and 10. And also the Bureau of Land Management timber sales in western Oregon. Next slide, please

And this map just shows the layout of the different regions that I mentioned. From my office in Atlanta, I am responsible generally for the eastern half of the country, or more. And the guys on the West Coast are responsible for the Western regions of the country.

Federal timber is sold to the public for processing into wood products used daily around the world. The different materials that we use every day that come from wood or lumber or plywood, paper, fuel wood, chemicals, etc. that come from wood.

The U. S. Government owns and manages roughly 640 million acres of land. The largest land management agencies – and the ones that we deal with for the most part – are the Bureau of Land Management and the Forest Service.

The small business timber sale program contracts offered by the U.S. Government and covered by the SBA program are solicited under NAICS Code 113310, which is the Logging code. Participants under the Logging NAICS code must be primarily engaged in the logging or forest products industry. The size standard for participants and their affiliates is 500 employees or less.

The buyer agrees when purchasing set-aside sales to only manufacture the logs into finished products at their own facilities or those of concerns that qualify as small businesses. They agree that if they resell the timber from set-aside sales, they will sell no more than a specified percent of the advertised saw timber volume to other than small businesses.

The Small Business Timber Sale program is not governed by FAR contracting regulations. The regulations for the timber sale program are found in 13 CFR 121.

So how do we manage this program? We do it through a calculation of small business shares with the Forest Service and Bureau of Land Management under memorandums of understanding with both agencies. Small Business shares were established back in the 70s to define the percentage of saw timber volume sold to small businesses in defined Market Areas. The shares are based on past purchase history and are recomputed every five years using the most recent five-year purchase data. And, just for an example, the current 5-year period is 2016-2020.

Next slide – slide 22. And as I mentioned earlier, I am responsible for the timber sales from other agencies, and these agencies include landholding agencies of the Department of Defense, Department of Energy, Department of the Interior, Fish and Wildlife Services, Tennessee Valley Authority, and the National Park Service. Any agencies that have land bases and choose to manage their land for timber sales and timber harvesting.

These agencies are not governed by small business shares but by the expressed need of the small business community operating in their area for set-aside timber sales.

When governed by calculated shares, as is the case with the Forest Service and BLM, if Small Business Timber Purchasers buy greater than or equal to the share – then, of course, there's no need for set-asides. If they buy less than the share, it generates a small business deficit. And if their purchases go less than 90% of the

calculated share, then that's the point that there's a need for set-asides and the market becomes triggered for preferential set-asides for small business.

And we should now be on slide 24. Just some statistics for timber sales for 2017. Small businesses purchased 73% of all Federal timber sold. The total value of Federal timber sold to small business is more than \$180 million.

Next slide, number 25. We also manage the Royalty Oil, coal, gas, and property sales, and I do that from the office back in Atlanta. The mineral bases are all managed by the Department of the Interior, the Bureau of Land Management, the Minerals Management Services, and the excess property generally comes from the General Services Administration, and the Defense Logistics Agency.

So, what do we mean by Royalty Oil sales? The Federal Government receives crude oil and gas royalties, instead of cash, as payment for the leasing of public lands for the exploration and mining of oil and gas. The payment to the government is called Royalty-in-Kind.

And property sales assistance – the Federal Government sells large quantities of personal property declared surplus. This includes military surplus property. SBA does not sell surplus property, but is responsible for helping small business find and obtain its fair share of this federal property for sale.

So how can you help us with this program? The property sales? You can keep abreast of market changes and any government surplus generated as a result. And, periodically update the Industrial Specialist – Forester when excess stockpiles have been identified. And you can counsel small businesses on the help available from the Natural Resource Sales Assistance Program.

With that, that's the summary of the Office of Natural Resource Sales Assistance programs, and I'll turn it over to Valerie Coleman, who is the Manager of Prime Contracts.

Valerie: Thank you, Stewart. We should be on slide 29. One of the programs that we have is our Office of Disaster Assistance. And, unfortunately, everyone has heard a lot about this program due to the fires in Northern California, hurricane Harvey that hit Houston, where I live. Hurricane Irma and hurricane Maria. So mother nature has not been happy with us, this year. So, the Office of Disaster Assistance has been extremely busy.

So, one of the things that SBA does do in this case, is we do give loans to homeowners. This is the only time that we do this. So, if there is a natural disaster such as a tornado or a wildfire or hurricane – that plays a major part in it – and if

it is a presidentially declared disaster area. Our primary disaster assistance has always been to small businesses, but as I said, in this case, we give loans to small business owners, at a very low interest rate. And they range anywhere from 1.75 to 3 ½%. They are three-year loans and a homeowner can get a loan, and SBA loan, for 30 years and it can go up to \$200,000 for the home and \$40,000 for contents. And renters, up to 40,000 and small businesses up to 2 million.

After the disaster happens, we open up our disaster centers all over. I think down in the Houston area, we had about 35 or 40 in the Houston area that were open. And this was available to give counseling to homeowners who had come in, to small business owners. And then we have another section that we just added – and you see the website below – for disaster response. We get questions all the time about how can I get these disaster contracts to help revitalize the area that was hit by a hurricane, for example.

So, on this website you will see Sean Crean, who is our Director of Government Contracting, who leads the disaster contracting program. And one of my other duties as the Program Manager for Prime Contracts is to be the action officer for all disaster emergency contracts. So you will see also names of different people in our area offices, that Jan talked about earlier that would be points of contact for you to get in touch with.

As a contracting officer, one of the things that you need to realize about the Office of Disaster Assistance, are that when we have a disaster, there are two Acts that you can find in the Code of Federal Regulations in the FAR. And of course, the first one is the Stafford Act. And the Stafford Act happens when, during major disaster emergencies, the priority on contracting is given – to the extent practical and feasible – to local firms. And that can be through a set-aside or an evaluation preference.

The other one that just came into existence a year and a half or so ago was the RISE Act – which stands for Recovery Improvement for Small Entities. And what that does, and you will be very interested in this – it gives federal agencies double credit for awards to the small businesses that are located in the presidentially declared major disaster areas.

So, for example, if you gave a small business in the Houston area, a \$2 million contract, you would be able to count it as \$4 million. So, this is what the RISE Act did.

Next slide – so these are the Offices of Disaster Assistance Centers, that you can see all around. One of the biggest ones is in Fort Worth, which is the national processing center. But we do have field operations, all around. You know, one of

the reasons why we wanted to do this workshop was, we have a lot of contracting staff who called to say – I don't know where to send stuff. I don't know the difference between District offices and Area offices and Regional offices, and who am I supposed to go to?

So, starting with the next slide, and Jan is going to take over, we hope to clear up that information and give you a good foundation on where to send your information when it comes up in your area. So, Jan, do you want to take the next slide?

Jan: Yes, thanks Val, that was really good and both Stewart's topic about timber sales and Val's topic about disaster assistance – if you are not operating in an environment or contracting office that currently deals with these topics, who knows, in the future, you might be in an office that will have to deal with timber or disaster assistance in helping out a contracting office that has become overloaded because of their contracting response to disaster. So, it's always good to just keep these things, if you're not currently working in these programs, in the back of your mind as something that you may need to know, possibly for the future.

So, as Val mentioned, just regarding what the difference is between different types of offices that we hear about, an area office, a district office, a regional office – and what are the differentiators for some of those? We discussed area offices earlier, so now we are going to talk about the SBA's Office of Field Operations, and the role of regional and district offices.

Slide 33, please. Although the SBA has grown and evolved in the years since it was established, the bottom line mission remains the same. SBA helps start, build, and grow small businesses, through an extensive network of field offices, and their partnerships with resource partners, like PTACs, as well as public and private organizations. The SBA delivers services to people throughout the United States, Puerto Rico, the US Virgin Islands, and Guam.

The figure on the left, shows how the country is divided by SBA into 10 regions, which are each assigned a different color. The figure on the right displays SBA's 10 regions of how the footprint of some of the six area offices cover more than one regional location. So, I'm speaking to you from area IV, so we've got all the states that are highlighted there in that golden red color. So, you can see that there are two regions covered by area IV. Will

District offices are in each state. Some states have more than one district office. So, if you look at each of the individual states, you know that you have at least one district office in your state. So, when you are reading the FAR, or you are

following along with the instructions that you have about what you are supposed to do with different procedures or different processes that you're working with, you will know that there is a difference between a regional office, an area office, and a district office.

And when you send your correspondence to one of these offices, sometimes they can get slowed up – if you are sending it to the wrong location. So it's important that you pay attention to the instructions that you are following along with – let's say if you are doing an offer letter for the SBA's 8(a) program, that you send that to a district office, and not an area office or a regional office, because if it's sent to one of these other offices, those people might be on vacation – it's going to take some lag time to try and figure out the right place to straighten out the error. So, just pay attention to these differences.

So, if we go to slide 34, every state has at least one district office with 68 district offices, and all. For example, Illinois has one district office and California and Texas each have six district offices. So, once you locate the district office on this page – or you can always visit the SBA.gov website and search for district office locations.

Slide 35, please. So, let's talk about regional offices. Regional administrators are appointed by the president and their offices support district and area offices in their region to advocate for economic growth and competitiveness in their assigned region. They meet with small business partner organizations and assist in coordinating small business concerns with SBA resources.

Currently, FAR 49.402 provides that if a contracting officer issues a cure notice or a show cause notice to a small business concern, the contracting officer shall immediately provide a copy of the SBA regional office nearest the contractor. A copy of that cure notice or show cause notice. The link to locate the correct SBA regional office is provided on this slide.

Slide 36, please. When I was a contracting officer, I was the small business specialist for a federal buying activity. I often worked with the district offices. They were to provide federal contracting assistance to businesses owned and controlled by socially and economically disadvantaged individuals through the SBA's 8(a) Business Development Program.

So, searches for qualified 8(a) program contractors, 8(a) program offer letters, and other 8(a) program issues would be discussed with a Business Opportunity Specialist at the District Office. So, the link on where to search for an SBA District Office is on this page.

Val, can you take this next?

Val: Now we're going to talk about SBA area offices. And we talked a little bit about this before. But we have given you the website on this slide, to find an area office to go to. But it handles our Certificate of Competency Program, Natural Resources Assistance Program, Service-Disabled Veteran-Owned Small Business Program, Small Business Size Determinations, Waivers of the Nonmanufacturer Rule, and the Women-Owned Small Business Program.

So that's the responsibility of the area offices. Within the area offices, of course, as we have already mentioned, we have procurement center representatives that work directly with the federal agency. Commercial Market Representatives who work with the "other than" small businesses, who have federal small business subcontracting plans. If you need a Certificate of Competency done, we have industrial specialists, or a size specialist that can work with you on size matters.

And, as we go farther into this slide, we're going to give you examples of where a small business may be located. Where do you send the paperwork, if you need to do a COC or size, or if you have a protest. All of that is coming up. So, we wanted to be able to give you as much information as we possibly could.

So, when we are going through there, as Jan said, you can see how they are divided up into the six area offices. And Jan has already talked to you about where the area offices are located. We also have a charge, down at the bottom, that talks about that. But as you can see, we have some area offices that are much bigger than others. I actually live in Houston, Texas.

So, you can see, we have a very large area size, from Mexico up to Canada. Area I has the US Virgin Islands and Puerto Rico. So, they cover that. And then area VI has Guam and, of course, Alaska and Hawaii. So, we are really spread out, all over. And we do a lot of good work for small businesses with the size of the COC's and the PCR's and the CMR's to cover these large, large areas with the small staff.

So again, just to reiterate what our mission is with the office of Government Contracting – we've also given you that website. If you want to know any more about Government Contracting programs, when you go to this website, every one of their programs will be listed and you can click on their heading, and it will take you to their website.

So the next slide asks, "who do I send information to?" As Jan mentioned earlier, on anything dealing with the 8(a) program, whether it's offer letters, copies of awards or modifications, or if you have any eligibility questions concerning an

8(a) firm – those go to the District Office. They are the managers and the stakeholders that handle the SBA 8(a) program.

So, let's talk about COC and size. It goes to the area office where the headquarters of the small business is located. So, you have a small business located in Oklahoma City. And they need a COC. Then you're going to send it to the Dallas-Fort Worth area office. And again, we've given you the website of the area offices. And we've given you the website of the COC specialists that are in each one of the six area offices.

Also, on size issues, let's say you have a small business located in Seattle and you need to do a size determination. So, you would send it to the San Francisco area office. And in this case, we've given you the website to talk about where to send size protests. So, the main thing that you need to understand in both of these issues – it doesn't matter where the work is being done. It doesn't matter where you as a federal agency, are located. You send it to the area office where the supporters of the small business are located. And if you have any doubts, about where you should send it, or you have some concerns, you can always contact your PCR, or go to SBA.gov.

And so, one of the other things that we do is we have subcontracting plans. And a lot of times, as a former PCR, I got a lot of plans that didn't need to come to me. So, I kind of made this a little more complex than it needs to be. But I just wanted to give you an example of how it works.

So, let's say you are a federal agency in Washington DC and you have awarded some work to a firm in Albany, New York. But they are going to be doing the work in Houston, Texas. But when you look at item number seven in the plan, the person who is administering the plan is located in Des Moines, Iowa.

So, you have all these four locations where you could send it. It always goes to where the administrator of the plan is located. It doesn't matter where you are located. It doesn't matter where the work is, or where the large prime is. If the administrator of the plan is in Iowa, then you're going to send it to the area office in Chicago. And again, we've given you a directory of the commercial market reps that are in each of the six areas. Subcontracting plans go to the GC area office where the Administrator named in the plan is located.

On the Non-Manufacturer Rule – we are going to make this just as easy as we can. Everything goes to nmrwaivers@sba.gov – so anything involving NMR, the Non-Manufacturer Rule, whether you have a question, whether it's an individual waiver or class waiver – it doesn't make any difference. Everything goes to nmrwaivers@sba.gov.

So again, when we are talking about where to send stuff, we want to make sure that you get the correct information. So, when it comes to the small business coordination records – whether it's a 2579, a 2689, a 2268, it doesn't make any difference. Those are sent to the assigned PCR, that you have. And, again, I think for about the fifth time, we've given you the address of how to find your PCR.

If you do not have a PCR, you can send the small business coordination record to your local area office where you are located – so if you are in Houston, Texas, it will go to the area office in Fort Worth. If you are in Michigan, it's going to go to the area office in Chicago. And we will have a PCR that will be able to review it.

Jan, I think we're going to turn it over to you for the next couple of slides.

Jan: Thanks, Val. I know we mentioned that for contract terminations and the cure notices and show cause notices, we mentioned earlier that the contracting office is supposed to send that to the SBA regional office nearest the contractor. So, we did talk about that, but I want to reinforce that. Because that doesn't always happen. And, additionally, I wanted to note that the SBA location to send cure notices or show cause notices, may change in the future. But for now, they have to be sent to the regional office.

I would like to suggest that you that also send a copy to the area office that covers the subject's small business, that you may be having some difficulties with. But that suggestion is certainly not in the FAR – it's just a suggestion. At this point, it's "shall" provide a copy to the regional office.

Slide 44. In recognition of FAR 19.800(e) when SBA has delegated its 8(a)-program contract execution authority to an agency, the contracting officer must refer to its agency supplement, like the DFARS, VAAR, GSAM, etc. Or other policy directives for appropriate guidance. These agency supplements reference the SBA's partnership agreement, or PA, to streamline the execution process between SBA and participating federal agencies and the 8(a) participants.

SBA has executed approximately 50 PAs with federal agencies. I suggest contracting officers and small business specialists from any federal agency have a copy of the PA, negotiated with the SBA and your agency. To locate a copy of the partnership agreement, between most federal agencies and the SBA, the link is provided on this page.

And so, this provides lots of insights to answer some of the questions that you may have about how long a certain action is supposed to take, or whose responsibility is what when it comes to SBA and the specific federal agency. The partnership agreements include a provision that the responsible agency "shall"

ensure that all contracts awarded pursuant to the partnership agreement contain provisions that require advance notice to SBA as the prime contractor, prior to issuance of a final notice terminating the 8(a) contract, in whole or in part. So communication is key with the district office.

So finally, FAR 19.812(b) provides that all contracts and mods, if any, "shall" be distributed to both the SBA and the 8(a) contractor, in accordance with the time frames set forth in FAR 4.201.

Slide 45. The Women-Owned Small-Business Program will be the First Wednesday topic for March 2018. So that's coming up. The contracting officer's roles and responsibilities in connection with the Women-Owned Small-Business Program are discussed in FAR 19.15.

So the Women-Owned Small-Business Program has a page called, "what you need to know if you are a federal contracting officer." For your reference, we have provided a link to that page on this slide. This page contains references and details on this hyperlink, once you get on this webpage. That webpage contains references and details regarding Women-Owned Small-Business contracting, verifying eligibility documents on the Women-Owned Small-Business repository at certify.SBA.gov, and providing Women-Owned Small-Business process – how to process Women-Owned Small-Business status protests.

Questions about protests can be submitted to WOSB@SBA.gov. The contracting officer must forward all protests to SBA, regardless of the time limit or the specificity to the Director of Government Contracting at SBA. And the address of where to send that package to is on the WOSB page of the SBA.gov website. Val, back to you.

Valerie: Thank you, Jan. We can will move to the next slide. This is information on protests involving service-disabled veteran-owned small businesses that you may get. Again, we have given you the direct website, so you can get some more information. But, all of the protests that we have received on service-disabled vets in the past have usually come in to us via mail. So, we wanted to give you the correct mailing address on where to send any of these protests that involves a small business who is also owned by a service-disabled vet. Will

So we also have information on our HUBZone program. Again, we have as you can see, protests. The website goes straight to what contracting officers need to know. And we have Frequently Asked Questions. We have also given you the website for the maps involving HUBZone firms. This is, of course, a program that SBA handles and does the certification for. We do know that we have some states out there – like Texas and Virginia, for example – that have a HUB program. That

is something that small businesses get confused between HUB and HUBZone. So as a contracting officer, if someone comes up and says that they are state of Texas or state of Virginia – or if there is another state that has a HUB program – you can direct them to this website, so they can learn more about HUBZone. And again, we also gave you the website, if you have a protest on HUBZone, where that should go.

So, we talked about our training opportunities. Of course, we are very proud of our First Wednesday and Chris explained all of that, so I don't need to go back over that. But we also have a wonderful Learning Center on the SBA website that gives training to contracting officers. It gives training to small businesses. And we have a new addition, under the contracting program where there is a training session for contracting officers dealing with subcontracting. So that's brand-new.

So, we highly recommend that you take advantage of the training webinars that we have on there that you can look at, and go at your own pace. You can also contact your government contracting area office and talk to the deputy area director or the area director about any personal training that you would like done for your agency. PCR's do that all the time. They have an agency asking can you come out and give us some training on subcontracting programs or on the COC program. And we're more than happy to go out to your agency and give training, as long as we have the budget and travel funds to be able to do that.

So, we have some time for some questions. If you aren't comfortable having your question answered today, you can always send your question to SBAlearning@SBA.gov, and we will make sure that your questions get answered. And so, Deborah, I will turn it over to you to see if we have any questions, so far.

Deborah: Well, Val, it appears that the representatives provide great information and – oh, a question just came in – *Slides 35 & 43 reference FAR 49 concerning SBA notification for cure and show cause notices...that only applies to non-commercial contracts, right?*

Valerie: I'll be glad to answer that. Any time a small business is given a cure or show cause notice, it should be sent to SBA so that we can look at it. A lot of times, when we have seen show cause or cure notices, we are able to contact the small business. Sometimes they feel more comfortable talking with us. And we have been able to mediate a conclusion that is beneficial to both the small business and the procuring activity.

It doesn't happen all of the time, but I know that the last two or three that I have been involved in – we have been able to work out to a good conclusion for both

parties to get the contract going. So, we can't help the small business and try to be a mediator between you and a small business, if we don't know about it. So that's one of the reasons why – while it does say regional offices – Jan said, if you would also send a copy to the area office. It will get to the PCR that covers the state or the area where that small business is located, and we can get involved.

Deborah: Okay, Val, I just wanted to reiterate a bit, too. A point of clarification... (indiscernible)... which exempts FAR, part 49, termination procedures. So, I think that question was based on that. But I believe, without it being said, that it should be sent to the appropriate SBA office.

Valerie: Correct.

Deborah: Val, I don't see that we have any additional questions at this time.

Jan: I just noticed that there was one about assistance available from FHA for individual homeowners in Federally Declared Disaster Areas who have FHA-insured mortgages. And it is talking about – this question has to do with what assistance is available from HUD to FHA mortgage holders in disaster areas. I know, Val, you might have seen something like this? You know, what role does SBA play in that?

Valerie: Yes, we had seen the question, thank you, Jan. And I'm going to reach out to the gentleman who sent us that after I get some more information. Since HUD is not our agency, but maybe I can get him some additional information from our disaster office, and send it directly to him. So, thank you.

Deborah: I believe that wraps up the questions.

Valerie: So Chris, do you want to – one of the things we haven't been able to do lately because our programs have run long – we have a lot of resource information after the slide 49. Do you want to go over some of that?

Chris: Yeah, we can have a couple of those. And then we will wrap it up here.

So, let's see. What we have here in the next slide are some SBA quick references, and then we go into the dynamic small business search. And this is a key tool that we utilize in market research. Hopefully all of you are familiar with the DSBS and all the market research capability, it has for you. And you can do a variety of things here. You can search by state, by NAICS code, socioeconomic status – if you want HUBZone, 8(a), SDB, anything like that. So please visit the DSBS website, located here, if you would like some more information on the dynamic small business search.

And here we also have a summary of some CFR regulations for you to review. And some of the programs we touched on earlier today. We have some of those CFR references if you would like to learn more about those, please reference our CFR regulations, here.

And we have definitely talked about this, earlier today. We've had several slides on the government contracting area offices, SBA District offices, regional offices, headquarters. And I really appreciate Jan and Val, what you guys did, in breaking that out, because it is very confusing, and it is not clear. So, I really appreciate you guys opening that up and explaining that in detail. And hopefully that clarifies a lot for the individuals out there to ensure that they are sending the information to the proper people. So, we understand that there are timelines and very key things that need to be done, in a timely manner. So that is definitely very important for you to understand where people are, what the roles are of the individuals, as well as where to send the information.

So, I'm going to cut it off, there. And I want to thank Val, Jan, and Stewart. We appreciate all the valuable input that you provided today on the topics. And I want to thank all of you who participated in today's training. And we look forward to next year. And the programs that we have planned for the remainder of the year. And once again, thank you, Jan, for your service, and all that you have provided for us. And this will conclude our call for today. Thank you.

Moderator: Thank you for joining today's conference. This session has now concluded. And you may disconnect.

[End of Recording]