



U.S. Small Business
Administration



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The All Small Mentor- Protégé Program

First Wednesday Virtual Learning Series 2018

Hosts

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

**Gwen Davis, Procurement Center Representative
SBA Office of Government Contracting, Area IV, Minneapolis, MN**

Welcome to “SBA Virtual Learning 2018”

1. Questions answered during the final 10 minutes.
2. Technical problems: Contact the moderator with a note 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

2018 SCHEDULE

1:00 to 2:00 Central Time

FY 2018	Date	Topic
1	October 4, 2017	Non-Manufacturer Rule
2	November 1, 2017	About SBA
3	December 6, 2017	SBA Programs You May Not Know About Natural Resources Assistance/Disaster Assistance
4	January 10, 2018	Historically Underutilized Business Zones
5	February 7, 2018	Certificate of Competency Program
6	March 7, 2018	Woman Owned Small Business (WOSB) Program
7	April 4, 2018	Size and Affiliation
8	May 2, 2018	Subcontracting Tools
9	June 6, 2018	SDVOSB
10	July 11, 2018	SBA Legislative Updates
11	August 1, 2018	Mentor-Protégé Program

This will be our final session for FY18. Look for our FY19 program schedule, which begins October 3, 2018.

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.

Today's Speaker

Holly Schick

Director

All Small Mentor Protégé Program

Office of Government Contracting/Business Development

U.S. Small Business Administration

Holly.schick@sba.gov



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The All Small Mentor-Protégé Program
August 1, 2018 First Wednesday

History and Important Facts of SBA's Programs

Authorization - 2010 Jobs Act and 2013 NDAA

SBA had a well-established mentor protégé program for SBA 8(a) certified firms; but lacked an MPP program for other small business concerns and specifically, one for specialized certified concerns such as WOSB, SDVOB, & HUBZone businesses

Final Rule Published July 25, 2016

Effective Date: August 24, 2016

Official Launch Date: October 1, 2016

Created One Government-wide program for all small businesses

Revised rules for 8(a) MP program to make both programs more consistent, where practicable.

Instructed SBA to review all other Agency's MPPs and consolidate where practicable.

Goals and Benefits

The Mentor Protégé Concept

- Streamline access for Small firms to federal marketplace
- Enhance business capabilities and growth potential through mentoring with large (or small) experienced businesses
- Increase Protégé wealth and create jobs through gov't contracts
- Assist large mentor firms develop and increase supply chain through capable small business subcontractors
- Assist contracting officers meet Congressionally mandated set-aside goals

Key Program Elements

- Centralized at SBA HQ
- Online Application through Certify.SBA.gov
- 8-10 day average turnaround time
- Participants must be for-profit
- Protégés – maximum of two MPAs in lifetime
- Self-certifying small firms in primary NAICS
- A tutorial requirement
- Certification (SDVBO, WOSB, HUBZone, 8a) follows Protégé firm
- This is not a match-making program
- JV good for two years (up to 3 in 2)
- Federal Agency MPPs currently offer prime/sub MPA relationships
- SBA MPAs (8(a) and ASMPP offer additional step -

The Difference

Joint Venture capability with exclusion from affiliation

The Federal Mentor Protégé Program Landscape

Mentor Protégé Goal Post Programs (2)

- **Department of Defense**
 - Authorized/appropriated - NDAA
 - All Service Areas
 - Primarily prime/subcontractor relationships
 - Exclusion from affiliation of Mentors and Protégés
- **Small Business Administration**
 - Authorized/not appropriated - NDAA
 - All Small Mentor Protégé Program
 - 13CFR 125.9
 - Joint Venture Capability – No approval
 - Exclusion from affiliation of Mentors and Protégés
 - 8(a) Mentor Protégé Program
 - 13CFR 124.520
 - Not authorized until NDAA13
 - Joint Venture Approval
 - Exclusion from affiliation of Mentors and Protégés

The General Playing Field of Other Programs (4)

- **NASA** – prime/subcontractor
- **DOE** – prime/subcontractor
- **DHS** – prime/subcontractor
- **FAA** – prime/subcontractor
 - 13CFR 125.10 Evaluate Other Prgs.
- Others-retiring (r) or developing (d)
 - GSA (r)
 - USAID (r)
 - STATE (r)
 - HHS (d)
 - HUD (d)
 - TREASURY (d)
 - DOT (d)
- For profit vs. Non-profit
- No exclusion from affiliation

Three Levels of Advantage for Protégé Firms

Business Development	Prime/Subcontractor Award	Joint Venture As “Small Business”
<ul style="list-style-type: none"> • Protégé expands capacity to bid independently • Management & Technical Assistance (Internal) • Financial Assistance (equity or loans) • Contracting Assistance • Trade Assistance • Business Development Assistance (External) • General Administration 	<ul style="list-style-type: none"> • Protégé wins subcontract award from Mentor • Expands capacity to provide “value-add” products/services to Mentor 	<ul style="list-style-type: none"> • Protégé and Mentor form Joint Venture as “small firm” • Bids on small set asides • JV carries “certifications of Protégé”, expanding bid capability • JV carries “past performance” of Mentor & Protégé



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Application, Assessment, and Approval

The All Small Mentor-Protégé Program

Applying To The All Small MPP

Eligibility: For-profit business or an agricultural cooperative - small for the NAICS code in which it is requesting a Mentor-Protégé relationship. Additional requirements include:

- Applicants must register in the [System for Award Management \(SAM\)](#) prior to submitting their Mentor/Protégé application
- Protégé must have a Mentor before submitting Mentor/Protégé application
- Previous experience working in the NAICS code in which assistance is sought
- Mentor must be organized for-profit and cannot own more than 40% equity in the business
- The SBA has not made a determination of affiliation between the Protégé and Mentor
- The Protégé may generally have only one Mentor at a time and cannot have more than two mentors across both SBA-administered Mentor-Protégé programs. Two Mentor Protégé Applications over the life of the Protégé.
- Mentors limited to three protégés. The SBA may authorize a small business to be both a Mentor and a Protégé, but only if it can demonstrate that the second relationship will not compete or conflict with the first Mentor-Protégé relationship

How To Apply

- Evaluate and select your Mentor prior to applying. This is not a matching program. SBA will not find a Mentor for Protégés.
- Applicants are required to register in the [System for Award Management \(SAM\)](#) database prior to submitting their Mentor/Protégé application.
- Protégés and Mentors must complete the online tutorial and have certificate of completion ready for upload.
- Have required documents ready for upload.
- Complete your business profile in Certify.SBA.gov.
- Begin the ASMPP application process.

8(a) Firms

Active 8(a) business concerns with an existing Mentor-Protégé Agreement (MPA), may transfer that relationship to the All Small Mentor-Protégé Program, if it is **within six months** of graduating from the program.

- Transfer only if 8(a) has an existing MPA. 8(a) firm must request a transfer.
- Use the ASMPP MPA Template
- Firm must complete a profile at certify.sba.gov, upload the existing MPA and the latest Annual Review letter.
- SBA district office approval is not required to request the transfer.
- There is no action required by the BOS

13 CFR 125.9 / 13 CFR 124.520

Comparison

ASMPP and 8(a) MPP

COMPARISON OF ALL SMALL MENTOR-PROTÉGÉ PROGRAM (ASMPP) AND 8(a) MENTOR-PROTÉGÉ PROGRAM (8a MPP)		
	ASMPP	8(a) MPP
Application	Centralized Through Certify.sba.gov Easier Application Faster processing time (10 day average) Streamline Process (no financial statements)	Decentralized Application to District Office BOS Package of documents to submit Multiple levels of review (BOS, Lead BOS, District Counsel, District Director, HQ OMTA, back to BOS- then to applicant)
Size	Self-certify (SAM.gov)	8(a) eligibility requirements
Areas of Assistance	Management & Technical, Financial, Contracting, International Trade Education, Business Development, General and/or Administrative Assistance	Management & Technical, Financial, Contracting, International Trade Education, Business Development, General and/or Administrative Assistance
Documentation Required	Application, Business Plan, Tutorial Certificates, Mentor-Protégé Agreement	Mentor-Protégé Agreement, Business Plan and documents required by District Office
Term	3 years with 3 years renewal	3 years with 3 years renewal
Protégé Limit	Protégé may have up to 2 SBA MP relationships over firm's life time. 8a may transfer existing MPA to the ASMPP within 6 months of graduating.	Protégé may have up to 2 SBA MP relationships over firm's life time
Mentor	Mentor may have up to three protégés at any one time in the aggregate in SBA's MP Programs	Mentor may have up to three protégés at any one time in the aggregate in SBA's MP Programs
Joint Venture Agreements	Not reviewed or approved by ASMPP	District Office BOS approves 8(a) JVs only

Mentor Provided Assistance

Mentor-provided assistance can be sought for any, or all of the following activities:

- **Management and Technical Assistance**
Internal business management systems; accounting processes; marketing and business/strategic planning assistance; technology transfers; and manufacturing assistance.
- **Financial Assistance**
In the form of equity investments and/or loans; and bonding.
- **Contracting Assistance**
Contracting processes; capabilities; acquisitions; and performance.
- **International Trade Education**
International Trade business and strategic planning; finding markets, and learning how to export.
- **Business Development Assistance**
Strategy; and identifying contracting and partnership opportunities.
- **General and/or Administrative Assistance**
Business processes and support; human resource sharing; security clearance support; and capacity building.

[← Back to Contracting assistance programs](#)

Contracting assistance programs

[Women-Owned Small Business Federal Contracting program](#)

[Service-disabled Veteran-Owned Small Business program](#)

[8\(a\) Business Development program](#)

[All Small Mentor-Protege program](#)

[Home](#) / [Federal Contracting](#) / [Contracting assistance programs](#) / **All Small Mentor-Protege program**

All Small Mentor-Protégé program

Your small business can learn from an experienced government contractor through the mentor-protege program.

Joint Ventures and Teaming

- ASMPP JVs are eligible to joint venture as a small business for any Federal government prime contract or subcontract.
 - 13 CFR 121.103 (3)(ii)
- 13 CFR 125.8 governs SB joint ventures (ASMPP)
 - 13 CFR 124.513 (8a), 125.18(SDVOSBC), 126.616 (HUBZone), 127.506 (WOSB/EDWOSB)
- 13 CFR 125.8(e) governs past performance and experience for JVs. Procuring activities must consider work done individually by each partner to the joint venture as well as any work done by the joint venture itself.

Joint Ventures and Teaming

- ASMPP JVs take on the identity of the Protégé
- MPA approval required prior to JV bid on award
- An ASMPP approval letter should accompany a bid
- 13 CFR 121.103 (3)(ii) – grants ASMPP JV exclusion to affiliation
- SBA District Offices review and approves 8(a) JVs only
- ASMPP does not review or approve JVs

Annual Evaluation Completion

The ASMPP will review the protégé's report on the mentor-protégé relationship, and may decide not to approve continuation of the agreement if it finds that the mentor has not provided the assistance set forth in the mentor-protégé agreement or that the assistance has not resulted in any material benefits or developmental gains to the protégé. A letter will be sent outlining the findings.



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The All Small Mentor-Protégé Program

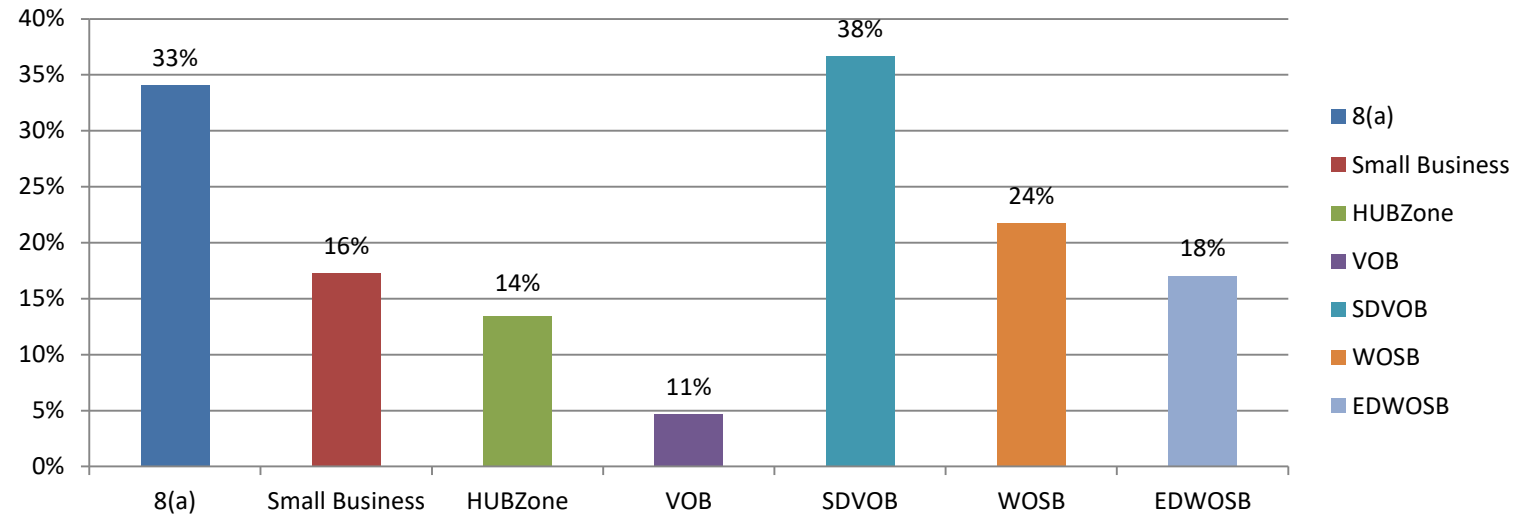
Summary

Summary of CFR Regulations

All Small Mentor-Protégé Program	13 CFR 125.9
SBA Size Regulations	13 CFR 121
HUBZone Program	13 CFR 126.6
SBA Certificate of Competency	13 CFR 125.5
Service-Disabled Veteran	13 CFR 125.15(b)
8(a) and SDB Regulations	13 CFR 124.5
Small Disadvantaged Business	13 CFR 124.1002(f)
WOSB Program	13 CFR 127
SBA Prime Contracting	13 CFR 125.2
SBA Subcontracting	13 CFR 125.3
Non-manufacturer rule	13 CFR §121.406(b)
Limitations on subcontracting	13 CFR §125.6

FAST FACTS

Approved Protégé Categories



Date ASMPP Commenced	October 1, 2016
Date of First ASMPP Application Approved	October 6, 2016
Total Applications Received (approved, denied, withdrawn, pending)	686
Total Applications Processed (approved and declined)	665
Total ASMPP Applications Approved	578
Percentage of ASMPP Applications Approved	78%
Total ASMPP Applications Declined	122
ASMPP Applications Pending	24
Average Number of Applications Received Per Day	2

Resources

<https://www.sba.gov/tools/local-assistance>

<https://www.sba.gov/learning-center>

- **Small Business Development Centers (SBDCs)**
- **SCORE**
- **Women's Business Centers (WBCs)**
- **SBA District Offices**
- **Procurement Technical Assistance Centers (PTACs)**
- **PCRs (Procurement Center Representatives)**
- **The SBA Learning Center (online training)**

Contact Information ASMPP

For questions, please contact the
AllSmallMpp Team at:

allsmallmpp@sba.gov

Visit our website at:

<https://www.sba.gov/allsmallmpp>

asmppannualreporting@sba.gov

asmppjvreporting@sba.gov

Questions



SBA Quick References

Types of SBA Contacts and Offices

- A. SBA Government Contracting Area Offices
 - 1. SBA Procurement Center Representatives (PCRs)
 - 2. SBA Commercial Market Representatives (CMRs)

- B. SBA District Offices
 - 1. Business Opportunity Specialists (BOS)

- C. SBA Regional Offices

- D. SBA Headquarters

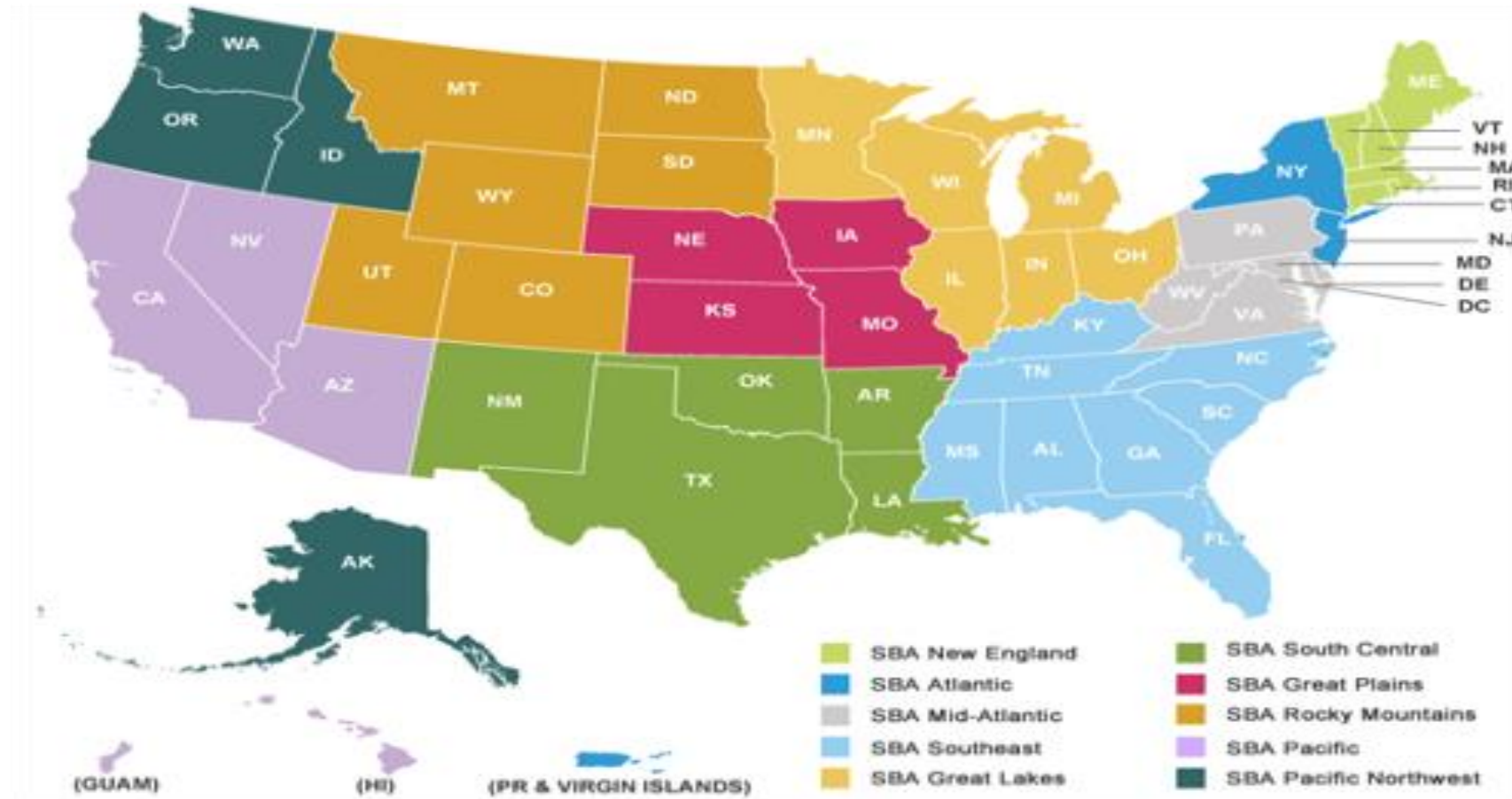
Six SBA Government Contracting Areas

SBA Government Contracting Areas at hyperlink: <https://www.sba.gov/content/pcr-directory>



Area 1 | Area 2 | Area 3 | Area 4 | Area 5 | Area 6
Area Directors

SBA Quick Reference – SBA Regional and District Offices



Link to district offices at: <http://www.sba.gov/about-offices-list/3>

SBA Quick Reference - SBA Headquarters

- | | |
|----------------------------------|---|
| 1. HUBZone status protests | FAR 19.306
13 CFR 126.801 |
| 2. NAICS code appeal | FAR 19.30 3
13 CFR 121.1103 |
| 3. Non-manufacturer rule waivers | FAR 19.102(f)(1)-(7)
13 CFR 121.1204 |
| 4. SDVOSB status protest | FAR 19.307
13 CFR 125.23 |
| 5. WOSB Program status protest | FAR 19.308
13 CFR 1275.600 |

How to Locate a Procurement Center Representative



Find your PCR at <https://www.sba.gov/content/pcr-directory>