The Procurement Technical Assistance Center (PTAC) is funded in part through a cooperative agreement with the Defense Logistics Agency.
Steps to Succeed in Federal Contracting as a Small Business

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NC PTAC at ECU

May 29th, 2019
About the NC Small Business and Technology Development Center (SBTDC)

• Established in 1984:
  – initiated by the US Small Business Act
  – funding through US Small Business Administration (SBA) and matching funds from the University of North Carolina System

• SBTDC Mission:
  – Support the growth and development of North Carolina’s economy by:
    • encouraging entrepreneurship
    • assisting in the creation and expansion of small to medium-sized enterprises
    • facilitating technology development and commercialization
    • supporting economic development organizations
SBTDC Programs & Services

• Confidential one-on-one counseling:
  – Leadership & Program Development
  – Strategy and Organization Development Services
  – International Business Development (Export Assistance)
  – Technology Commercialization Services
  – Marketing & Research Services
  – Supply Chain Services (formerly Boating Industry Services)
  – Government Procurement Assistance
    • Procurement Technical Assistance Center (PTAC)

www.sbtdc.org
Regional Service Centers in:
Asheville, Boone, Chapel Hill, Charlotte, Cullowhee, Durham, Elizabeth City, Fayetteville, Greensboro, Greenville, Hickory, Pembroke, Raleigh, Wilmington, Winston-Salem
About the Procurement Technical Assistance Program (PTAP)

National program established in 1985:

- Authorized by Congress
- Funded by the Department of Defense and administered through the Defense Logistics Agency (DLA)
- Provides matching funds through cooperative agreements with state and local governments and non-profit organizations
- Commonly referred to as PTAC offices and/or counselors
What are Procurement Technical Assistance Centers?

- **Nationwide** network of procurement professionals comprised of 94 centers with over 300 local offices

- Provide a wide range of services including classes and seminars, individual counseling, and easy access to information necessary to successfully compete for government contracts
NC PTAC Services

- Assistance selling to federal, state, and local government entities
  - Completing mandatory and beneficial registrations
  - Identifying business development programs and applicable certifications
  - Researching contract award history
  - Locating specifications and standards
  - Identifying contracting opportunities
  - Understanding solicitation requirements and terminology
  - Reviewing bids and proposals

www.nc-ptac.org
OBJECTIVES

- Determine whether contracting is a viable option for your business
- Registering to do business with the government
- Determine the small business programs that may be applicable to your business
- Locating opportunities and identifying ones to pursue
- Research and Marketing strategies
- Identify next steps moving forward
Is the Government Market right for me?

- What a government contract can do for your business
  - Diversify your customer base
  - Cover overhead costs
  - Even out cash flow

- What a government contract cannot do for your business
  - Jump-start your business
  - Save your business
  - Be the sole customer of your business
Before Selling to the Government

- Internet access and computer knowledge
- Potential to sell to the government
- Knowledge of competition and how they succeed
- Determination to sell to the government
- Perseverance
Who are the Federal Government Buyers?

- Department of Defense (DoD)
- General Services Administration (GSA)
- Department of Veteran’s Affairs (VA)
- Department of Homeland Security (DHS)
- United States Department of Agriculture (USDA)
- Environmental Protection Agency (EPA)
Federal Small Business Contracting Goals

- Government wide statutory goals:
  - 23% of prime contracts to small businesses
  - 5% of prime and subcontracts to SDBs
  - 5% of prime and subcontracts to WOSBs
  - 3% of prime and subcontracts to SDVOSBs
  - 3% of prime and subcontracts to HUBZone businesses

- Agency goals negotiated and monitored by the SBA
- Small Business Procurement Scorecards published annually
  
  www.sba.gov/goaling
How Does the Federal Government Buy?

- Micro Purchases
  - FAR Part 13
- Simplified Acquisitions
  - FAR Part 13
- Sealed Bids
  - FAR Part 14
- Negotiated Procurements
  - FAR Part 15
Micro Purchases

• Micro-purchase threshold
  – Purchases less than $10,000 – recently changed
• May be credit card transactions or purchase orders
• Advertisement and competition are not required
• Open to large and small business
• Account for $18 billion in annual sales
• Award is usually based on **lowest price**
Simplified Acquisitions

- Purchases over micro purchase threshold and up to $250,000 – recently changed
- Solicitation in form of Request for Quote (RFQ)
- Informal advertisement required for purchases over $10,000 and up to $25,000
- Formal advertisement in FBO required for purchases over $25,000
- Automatically set aside for small business
- Award is usually based on lowest price
Sealed Bids

• One of two methods used for procurements over $250,000
• Solicitation in form of Invitation for Bid (IFB)
• Formal Advertisement in FBO required
• May be set-aside for small business, 8(a), HUBZone, SDVOSB or WOSB firms
• Bids are publically opened and read aloud by an authorized person at the time set for bid opening
• Award is made to lowest cost responsive and responsible bidder
Negotiated Procurements

- One of two methods used for procurements over $250,000
- Solicitation in form of Request for Proposal (RFP)
- Formal advertisement in FBO required
- May be set-aside for small business, 8(a), HUBZone, SDVOSB, or WOSB firms
- All proposals are evaluated, and the evaluations committee holds discussions with “Short List” bidders
- Award is made to **best value** responsive and responsible bidder
Where do I find these Opportunities?

• Federal Business Opportunities “FedBizOpps”
  [www.fbo.gov](http://www.fbo.gov)
  – Government-wide Point of Entry (GPE)
  – Federal government business opportunities including:
    • Notices and requests used to conduct market research
    • Solicitations for all contracts with an anticipated award value greater than $25,000
    • Award notices for contracts that will likely result in the award of subcontracts
    • Other notices for events such as vendor days, trade fairs, etc.
Where do I find other Opportunities?

- FedBid
  www.fedbid.com
  – Reverse auction system used for informal or simplified acquisitions

- FedConnect
  www.fedconnect.net
  – Government acquisition and communication web portal

- PROBID
  www.sbtdc.org/probid
  – Electronic bid matching system (fees apply)
Subcontracting

• What is Subcontracting?
  – An agreement between a government contract holder (prime contractor) and other businesses (subcontractors) to provide supplies or perform services required for the government contract

• Advantages of Subcontracting
  – Builds past performance on government projects
  – Provides opportunity to learn from the experience of others
  – Allows small businesses to better leverage their resources
Where do I find Subcontract Opportunities?

- SBA Subnet
- Supplier Connection
  [www.supplier-connection.net](http://www.supplier-connection.net)
- USA Spending
  [www.usaspending.gov](http://www.usaspending.gov)
- Federal Agency Subcontract Directories
  - Department of Energy Prime Contractor Directory
Federal Registration: Codes and Identifiers

- Identify your NAICS codes – http://www.census.gov/eos/www/naics
- Identify your FSC and PSC codes – https://www.acquisition.gov/index.asp
- Obtain Tax ID Number (TIN) – 1-800-829-1040 or www.irs.gov/businesses
  - Even if Sole Proprietor
- Obtain DUNS Number – 1-866-705-5711 or http://fedgov.dnb.com/webform
  - Required for registrations
Federal Registration: The System for Award Management

- What is SAM?
  - System combining nine legacy systems the federal community and those who want to do business with the government use regularly.

- Currently undergoing another update
  - Launched January 1st 2018
  - Going to integrate another 10 sites
    - FBO - FedBizOps
    - FPDS – Fed Procurement Data System
    - WDOL – Wage Determination Online
    - CFDA – Catalog of Federal Domestic Assistance
Federal Registration: The System for Award Management

- Includes basic vendor information and vendor assertions
- Commercial and Government Entity Code (CAGE code) assigned when registration complete
- Annual renewal required – Have to Change Passwords Regularly
- Training and assistance available through the Federal Service Desk (www.fsd.gov) and PTAC (www.nc-ptac.org)
- Interfaces with the SBA Firm Profile (Dynamic Small Business Search)

www.sam.gov
Upcoming Changes:  SAM → beta.SAM → SAM

beta.SAM.gov is now operational – launched in Q4 FY17

Current operational systems will run in parallel to the beta site and will remain the authoritative source until they are decommissioned.

beta.SAM.gov will eventually become SAM.gov
Federal Registration: The System for Award Management

- Dun & Bradstreet (DUNS) going away
  - The federal government did not renew the long-standing contract for Dun & Bradstreet that issue DUNS numbers.

- New contractor to manage the numbering process: **Ernst and Young**

- SAM Managed Identifier (SAMMII) will replace DUNS
  - GSA will manage the transition
  - All current DUNS holders will be notified of the upcoming changes
Federal Registration:
SBA Dynamic Small Business Search

- Access through SAM once registration is complete
- DSBS number (SBA customer number) assigned
- Includes company information from SAM
- Allows firms to include supplemental information
  - Non-government certifications
  - Capabilities narrative and keywords
  - Quality assurance standards
  - Export profile
  - Performance history

http://dsbs.sba.gov
Federal Research: Rules and Regulations

• Federal Acquisition Regulation (FAR)
  www.acquisition.gov/far
  – Codification of uniform policies for acquisition of supplies and services by the executive agencies

• Code of Federal Regulations (CFR)
  www.gpoaccess.gov/cfr
  – Codification of the general and permanent rules published in the Federal Register by the executive departments and agencies

• United States Code (USC)
  www.gpoaccess.gov/uscode
  – Codification of the general and permanent laws of the United States
Federal Research: Procurement History

- **USASpending.gov**
  [www.usaspending.gov](http://www.usaspending.gov)
  - Searchable website with basic information on all federal awards

- **Federal Procurement Data System (FPDS)**
  [www.fpds.gov/fpdsng_cms](http://www.fpds.gov/fpdsng_cms)
  - Searchable website with detailed information on all federal awards
  - Users can run simple searches through ezSearch tool or create an account to build custom Adhoc reports

- **Federal Procurement Forecasts**
  [www.acquisition.gov/comp/procurement_forecasts/index.html](http://www.acquisition.gov/comp/procurement_forecasts/index.html)
  - Federal Agency “wish lists”
Federal Marketing and Outreach: Strategy

- Complete all registrations
- Identify and target key agencies
  - Know the agency’s mission and their needs
- Identify and target key prime contractors
  - Know the prime’s current and past projects
- Prepare a Capability Statement
- Visit target agency and prime contractor contacts

*Remember that business certifications provide opportunities, they do not guarantee contracts!
Federal Marketing and Outreach: Capability Statement

- One to two page business resume
- Provides high level overview of who you are as a business, what you do, and why you are the best

- Company Data
  - DUNS, CAGE, etc.
- Business Description or Value Proposition
- Core Competencies
- Past Performance or References
- Contact Information
Sample Capability Statement

PROCUREMENT TECHNICAL ASSISTANCE CENTER
201 Fumace Road, Lewistown, PA 17047 • (570) 524-4491 • www.sedacog.org/ptac

Serving Adams, Centre, Clinton, Columbia, Cumberland, Dauphin, Franklin, Juniata, Lancaster, Lebanon, Lycoming, Mifflin, Montour, Northumberland, Perry, Snyder, Union and York Counties

CAPABILITY STATEMENT

Capabilities
- Federal & State Vendor Registrations (SAM & PA Supplier Portal)
- Federal & State Certification Assistance (DBE, 8A, HUBZone, WOSB, VetBiz, PA Small Diverse Business)
- Market Research
- Locating Bid Opportunities
- Bid and Proposal Review
- Wide Area Workflow Assistance
- Support to small business contractors for:
  - DLA Distribution Susquehanna
  - Federal Bureau of Prisons (Allentown & Lebanon)
  - Lebanon Army Depot
  - Tobyhanna Army Depot
  - NAVSEA-Mechanicsburg
  - Pennsylvania Department of General Services

Certifications
- Certified Contracting Assistance Specialists through the Association of Procurement Technical Assistance Centers
- Department of Veterans Affairs Center for Veterans Enterprises certified verification counselors

Resources
- Daily Bid Match
- Military/Commercial Specifications/Standards
- Individualized government consulting
- Government training seminars

Past Performance
- Assisted businesses to secure over $211 million in local, state and federal government contracts in fiscal year 2019
- Introduced 273 new businesses to government contracting in fiscal year 2019
- Held or supported 45 outreach events involving education on government contracting in fiscal year 2019
- "Outstanding" program rating by Defense Contract Management Agency

Since 1984, the SEDA-COG Procurement Technical Assistance Center (PTAC) helps businesses compete and get their share of federal, state, and local government purchases. The PTAC provides individualized counseling that helps companies understand and compete in the government marketplace.

DUNS: 173859243
CAGE: AV513
NAICS: 541611 Business management consulting services

922102 Community development agencies, government; Regional planning & development program
922110 Development assistance program administration; Urban development program administration; Industrial development program administration

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Federal Business Development Programs

- **Self Certifications:**
  - Small Business Certification
  - Small Disadvantaged Business Certification
  - Veteran Owned Small Business Certification
  - Women Owned Small Business Certification

- **Formal Certifications:**
  - 8(a) Business Development Program
  - HUBZone Empowerment Contracting Program

[www.sba.gov/contracting](http://www.sba.gov/contracting)
Small Business Certification and Small Disadvantaged Business Certification

- **Small Business Certification**
  - Firms may self certify through SAM
  - Must meet small business size standard for NAICS code
  - May be small in some NAICS codes, and not others

- **Small Disadvantaged Business Certification**
  - Firms may self certify through SAM
  - Must be small in primary industry and be owned and controlled by socially and economically disadvantaged individual(s)
  - Formal SBA certification program discontinued October 2008
Veteran Owned Business Certification and Women Owned Business Certification

- Veteran Owned Small Business Certifications
  - Firms may self-certify through SAM
  - Firms may also pursue verification through the VA (mandatory if contracting with the VA)
  - Must be small in primary industry and be 51% owned and controlled by veterans

- Women Owned Small Business Certifications
  - Firms may self-certify through SAM
  - Firms may also pursue third party certification through SBA approved third party certifiers
  - Must be small in primary industry and be 51% owned and controlled by one or more women
8(a) Business Development Program and HUBZone Empowerment Program

- **8(a) Business Development Program**
  - Formal certification through SBA
  - Must be small in primary industry and 51% owned and controlled by socially and economically disadvantaged individuals
  - Must also demonstrate good character and a reasonable potential for success

- **HUBZone Empowerment Program**
  - Formal certification through SBA
  - Must be small in primary industry and 51% owned by American Citizens
  - Must also have principal office in a designated HUBZone and have 35% of employees residing in designated HUBZones
Veteran Owned Business Certification from the VA Center for Verification and Evaluation (CVE)

• Service Disabled Veteran Owned Small Business Certification
  – Firms must pursue verification through the VA/SBA (mandatory if contracting with the VA for SDVOSB set-aside contracts)
  – Must be small in primary industry and be 51% owned and controlled by veterans
  – Very stringent application process

NOTE: The VA and SBA SDVOSB certification criteria have merged; the CVE is still certifying but using SBA standards
What does all of this mean for my business?

• The federal government is the world’s largest buyer, and opportunities exists for many different goods and services
• In order to take advantage of the opportunities for my business, I must do my homework
• Small business resources, like the PTAC, are available to help me through the process
Stay Connected!

- NC PTAC Events  
  [www.nc-ptac.org/events](http://www.nc-ptac.org/events)
- Selling to the Government Newsletter  
  [www.nc-ptac.org/newsletter](http://www.nc-ptac.org/newsletter)
- SBTDC Events  
  [www.sbtdc.org](http://www.sbtdc.org)
QUESTIONS?
Procurement Technical Assistance Center (PTAC)

www.nc-ptac.org

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