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Twelve Steps to Success

**A PRACTICAL GUIDE TO DOING
BUSINESS WITH THE
FEDERAL GOVERNMENT**



This guide was developed by and is maintained by the SBA's Government Contracting Area VI Office which serves small businesses across the 11 western states and Guam

Message from the Area Director-

Each fiscal year, the Federal Government purchases almost **\$500 Billion** in goods and services, ranging from paper clips and janitorial services to next-generation space shuttles and advanced scientific research - and pretty much everything in between. Small businesses receive nearly **\$110 Billion** in Federal contract awards.

While dealing with the Federal Government can be a formidable task at times, the Small Business Administration (SBA), through our Office of Government Contracting (GC) and our many Resource Partners, can assist you to get 'contract-ready' and then to market your firm's products and services to Federal customers.

Knowledge is power! We hope this guide and directory will help you overcome any uncertainties that you may have and be a useful tool for you. Best wishes and Good Luck!

James A. Gambardella

SBA GC Area VI -

Providing Small Business with the Competitive Edge!

Twelve Step Program for Federal Procurement Contracts

Dealing with the Federal Government can- at times- seem like a difficult task. However, with a little patience, persistence and perseverance on your part -- your efforts can be rewarded in the long run. To assist you, we developed a procedural step-by-step process that will enhance your potential for success. Good Luck!

1. Become familiar with the following websites for Government Contracting:

SBA Office of Government Contracting (GC): <http://www.sba.gov/about-offices-content/1/2467>;

Title 13 of the Code of Federal Regulations (Part 125): <http://www.ecfr.gov/cgi-bin/text-idx?c=ecfr&SID=050baaba66237280dd45adb991741ced&rgn=div5&view=text&node=13:1.0.1.1.20&idno=13>

Federal Acquisition Regulation (FAR): <https://www.acquisition.gov/far/loadmainre.html>

SBA offers a wide array of programs and hands-on assistance to small businesses considering the federal marketplace. Go to <http://www.sba.gov/content/government-contracting-field-staff-directory> where you can identify local contracting experts who can be an invaluable resource to you, whether you are new to government contracting or are currently doing business with the government and are seeking advice on how to deal with a particular issue.

From the Contracting Section under Contracting Opportunities: <http://www.sba.gov/category/navigation-structure/contracting/contracting-opportunities> you will find links to additional procurement-related programs and assistance such as; [Subcontracting](#), [Federal Business Opportunities](#), [GSA Schedules](#), [Green Contracting Opportunities](#), [Federal Procurement Database Systems - Next Generation](#), [USA Spends](#), [Contracting of Manufacturing](#), [Contracting Opportunities for Energy Efficient Businesses](#). For Federal Agency Acquisition Forecasts of upcoming government contract opportunities go the website: https://www.acquisition.gov/comp/procurement_forecasts/index.html and 'click on' the agency you are interested in doing business with.

The SBA also offers a wide array of self-paced, on-line courses and training resources through our Small Business Training Network (SBTN). The SBTN is a virtual campus providing quality and targeted online training to meet the information needs of prospective and existing small business owners. SBA has created a series of free on-line contracting courses designed to help prospective and existing small businesses understand the basics about contracting with governmental agencies. So whether you're just getting started or looking for ways to compete more successfully in the government contracting marketplace, check out the GC Classroom courses at <http://www.sba.gov/gcclassroom>. You should check-out this site often as new courses are being offered regularly.

2. Obtain a DUNS Number, register in the System for Award Management (SAM) and Dynamic Small Business Search (DSBS) Database.

If you don't yet have a DUNS number, contact Dun & Bradstreet (D&B) at <http://fedgov.dnb.com/webform> to get one. Obtaining a DUNS number is free. Also be sure to see step number 4, below, prior to starting System for Award Management (SAM) registration, as you will need to determine which Federal Supply Classification Codes (FSC)

<http://www.dispositionservices.dla.mil/asset/fsclist.html> and North American Industry Classification System (NAICS) Codes <http://www.census.gov/eos/www/naics> apply to your business. Once you have obtained your DUNS number, your next step is to register in the SAM system. You should approach and treat your SAM profile as you would a resume, i.e., review and update it regularly to ensure that it best describes your firm and its capabilities.

On July 29, 2012, the System for Award Management (SAM) was launched. SAM combined a number of existing federal procurement systems into one new system. Included as part of the phase 1 SAM implementation are: Central Contractor Registration (CCR), Online Representations and Certifications Application (ORCA) and the Excluded Parties List System (EPLS) (commonly known as the "debarred list").

Future phases will add the Federal Business Opportunities (FBO), the Federal Procurement Data System-Next Generation (FPDS-NG), Electronic Subcontracting Reporting System (eSRS), Federal Funding Accountability and Transparency Act (FFATA) Sub-award Reporting System (FSRS), Wage Determinations Online (WDOL), Past Performance and Information Retrieval System (PPIRS) and the Catalog of Federal Domestic Assistance (CFDA).

You must be registered in SAM to be awarded a federal contract and to receive payment by the Government. You can register for a SAM account by going to www.sam.gov and clicking on the "create account" or "register" buttons. If you were registered in CCR or ORCA, you don't need to do anything until you update your registration. You'll receive an e-mail letting you know when your account is about to expire. However, it's recommended that you review the SAM website and training materials before you need to update your registration. Your records will be "waiting" for you in SAM. All you have to do is register in SAM and SAM will validate your identity and lead you thru the process of connecting you with your records. It's recommended that you wait until it's time to update your registration before creating a SAM account. (Data which was public in the legacy systems (i.e., CCR) will remain public in SAM).

To register your firm in SAM, follow these steps:

Step 1: Collect all of your pertinent documents and have them handy. See the [SAM User Guide](#) for what you'll need.

Step 2: Access the SAM online registration at www.sam.gov.

Step 3: Create a User Account.

Step 4: Click on "Register New Entity" from the left side navigation pane.

Step 5: Complete and submit the online registration.

Training materials are available for SAM at: <https://www.sam.gov/>. Quick-start guides and user guides are also available. Your local Procurement Technical Assistance Center (PTAC) and Small Business Development Centers (SBDC) can provide you with 'hands-on' assistance with SAM. (See step 8, below for links to directories of the PTACs and SBDCs).

NOTE: When you see "Registration Complete" at the bottom of the CCR portion of the SAM registration page, you will see two SBA symbols. Click on the one on the right hand side that says "SBA Register or Update your SBA Profile." Once you click on this, you will get a message that states you will log out of SAM/CCR Update. You will then be taken to the Small Business Administration's Dynamic Small Business Search (DSBS) profile registration and update page. In the SBA's DSBS profile registration and update page profile, you will list items such as your Construction and Service Bonding Levels, Quality Assurance Standards, Capabilities Narrative, Special Equipment/Material, Past Performance, etc. All this information will be accessible by contracting staff under the [SBA - Dynamic Small Business Search](#) (http://dsbs.sba.gov/dsbs/search/dsp_dsbs.cfm). Although DSBS is not a component of SAM, the SAM-SBA Profile linkage is part of a comprehensive strategy to consolidate DSBS functions to the E-Gov Business Partner Network (BPN) in order to simplify government-wide vendor registration. A DSBS profile can be an important step leading to your success as buyers use DSBS as part of their market research efforts to identify small business sources for contracting opportunities.

Based on the information you enter into DSBS, the SBA's small business size logic application will populate fields indicating if a firm is self-certified as small. Only SBA can enter information with regard to a firm's certification as 8(a) Business Development or Historically Underutilized Business Zone (HUBZone) program participant.

3. Determine if your firm qualifies for one of SBA's Certification Programs.

Formal certifications by small business concerns are not required to bid on federal contracts. Firms self-certify that they are small at the time of bid/proposal submission. The contracting officer will generally verify the firm's size in the ORCA database (see step 2 above for info regarding ORCA).

The SBA currently has three contracts-related certification programs: 8(a) Business Development (BD), HUBZone and Economically Disadvantaged/Women-Owned Small Business Programs (ED/WOSB). Our 8(a) BD program assists eligible small businesses to compete by providing them with business development assistance. Although primarily a business development program, there are certain contracts 'restricted' to certified 8(a) concerns. Certification in our HUBZone program entitles qualified firms to special bidding benefits in the federal contracting arena. Our ED/WOSB program requires a "documented" self-certification process.

The SBA offers an on-line application process that makes it easier, faster and less expensive for small firms to apply for [8\(a\) Business Development](#) and [HUBZone certification](#) directly from SBA's website, eliminating the need to download and complete a paper application. The applications are 100% web-based, which incorporates context sensitive help, real-time validation, printer-ready versions and is integrated with the System for Award Management (SAM) and Dynamic Small Business Search (DSBS) database.

Women-Owned Small Business (WOSB)/Economically Disadvantaged Women-Owned Small Business (EDWOSB) Program- (<http://www.sba.gov/content/contracting-opportunities-women-owned-small-businesses>) The Women-Owned Small Business (WOSB) Federal Contract program authorizes contracting officers to set aside certain federal contracts for eligible Women-owned small businesses (WOSBs) or Economically disadvantaged women-owned small businesses (EDWOSBs). (EDWOSBs also qualify as WOSBs, so only 1 certification is required). Those firms can self-certify their status by providing documentation demonstrating eligibility or can use the services of an SBA approved 3rd Party Certifier. Information on those organizations authorized by SBA as 3rd party certifiers can be found on the above WOSB website.

Log onto the SBA's WOSB/EDWOSB to learn more about this Program, including a list of those eighty-three 4-digit NAICs codes for which contracting officers may set aside contracts, so that you can determine if your firm qualifies for participation. Your firm must have its documents demonstrating that it meets the criteria as either a WOSB or EDWOSB uploaded into the SBA repository, which you will then need to make available to a contracting officer if you are in line for a set-aside award. To access the repository, firms must have an SBA General Login System (GLS) account. It's free to sign up for a GLS account. Go to <https://eweb.sba.gov/gls> for information and registration.

Service-Disabled Veteran-Owned Small Business Concerns (SDVOSB) - (<http://www.sba.gov/content/service-disabled-veteran-owned-small-business-concerns-sdvosbc>) - Although not a formal government-wide certification program, **Public Law 108-183 dated Dec 16, 2003**, the service-disabled veteran-owned small business (SDVOSB) program can lead to increased contract opportunities for those concerns. Under the rule, contracting officers *may* restrict contract awards to SDVOSBs where there is a reasonable expectation that two or more SDVOSB concerns will submit bids at a fair market price. If the anticipated contract price will not exceed \$3.5 million (or \$6 million for manufacturing contracts), the new rules allow for a sole-source award, if there is not a reasonable expectation of competitive bids/offers from two or more SDVOSB concerns. In addition, the rule allows SDVOSB concerns to self-certify. Any challenge to a concern's status as a small business or as a SDVOSB- on other than a Veterans Administration (VA) procurement- must be referred to the SBA for resolution.

The Department of Veterans Affairs (VA) has unique statutory authority to set-aside requirements for both Veteran-owned Small Businesses (VOSBs) and SDVOSBs for its procurement actions. The VA handles SDVOSB/VOSB certifications and status protests on its procurements. For more information, go to <http://www.vetbiz.gov/>. The principal purposes of the VetBiz website is to provide information about the Vendor Information Page (VIP) verification process; to assist Veteran business owners in registering their business in the Secretary's Database of Veteran-owned small businesses and to enable VA contracting officers to easily identify service-disabled Veteran-owned small businesses (SDVOSBs) and VOSBs eligible for its procurement opportunities.

4. Identify your product or service.

It is essential to know the Federal Supply Classification Codes (FSC) and North American Industry Classification System (NAICS) Codes for your product or service. Many government product/service listings and future procurements are identified by FSC and contracting officers often use NAICS codes when searching for sources in SAM. To identify FSCs applicable to your company, log onto <http://www.dispositionservices.dla.mil/asset/fsclist.html>. Detailed information regarding NAICS can be found on the SBA website at <http://www.sba.gov/content/table-small-business-size-standards>

5. Identify current federal procurement opportunities.

Federal Business Opportunities (FedBizOps) <https://www.fbo.gov/> – the designated government-wide point of entry – is the exclusive official source for public access to notices of federal contracting actions over \$25,000. (Agencies are also encouraged to use FedBizOps to provide notices for actions of \$25,000 or less). Once you identify those agencies and buying offices that purchase your products and services, it's a good idea to contact them directly to learn more about upcoming procurements (i.e., procurement forecasts) posted on websites or electronic bulletin boards. FedBizOps allows businesses to sign up for automatic e-mail notifications of open and upcoming contract actions. See the FedBizOps (FBO) website for guidance.

The government is encouraging agencies to utilize environmentally-friendly oriented products and services (Buy Green). To learn more about the government's Buy Green/Comprehensive Procurement Guideline, log onto <http://www.sba.gov/content/green-contracting-opportunities/>.

The SBA and the White House's [Presidential Innovation Fellows](#) have partnered to launch [RFP-EZ](#), a pilot version online marketplace that gives business owners easy access to the government contracting process like never before. On the new platform business owners can find and bid on 'low-dollar' contracts available at various federal agencies. The beta version of the program allows innovative tech companies to be sourced by the government at low-cost. Once the model proves to be successful, contract opportunities will be available to a larger assortment of industries.

6. Familiarize yourself with the government's contracting procedures.

Be familiar with Federal Acquisition Regulations (FAR) (<https://www.acquisition.gov/far/index.html>) and the Defense Federal Acquisition Regulation Supplement (DFARS) <http://www.acq.osd.mil/dpap/dars/index.html>. You can also get access to other federal agency's FAR supplements from their respective webpage. Acquisition.gov (<https://www.acquisition.gov/>) is an E-Gov Initiative that aggregates federal acquisition content by providing one website for regulations, systems, resources, opportunities, and training. This website was designed to create an easily navigable resource to share the efforts to achieve its vision of more efficient and transparent practices through better use of information, people, processes and technology. Search engines such as "Google" can also be useful in searches for contracting information. For Service or Construction firms: The Department of Labor provides a single location for identifying the appropriate Service Contract Act (SCA) and Davis-Bacon Act (DBA) wage determinations (WDs) for each official contract action. The website <http://www.wdol.gov/> is available to the general public. Guidance in selecting WDs from this website is provided in the WDOL.gov User's Guide.

Regulations.gov (<http://www.regulations.gov>) is your source for information on the development of federal regulations, including those which affect contracting matters, and other related documents issued by Federal agencies. Through this site, you can find, read and comment on regulatory issues that are important to you.

7. Investigate Federal Supply Schedule (FSS) contracts.

The General Services Administration (GSA) manages Multiple Award Schedule (MAS) contracts, also known as Federal Supply Schedule (FSS) contracts. Under MAS/FSS, contracts are awarded to multiple companies supplying comparable products and services at pre-negotiated prices, terms and conditions. Once GSA awards the contracts, federal contracting officers and other authorized users order directly from the contractor. Contracting officers may conduct set-asides utilizing MAS/FSS contracts. Many federal purchases are, in fact, orders made against MAS/FSS contracts. Contact the General Services Administration (GSA) for information on how to obtain a MAS/FSS contract or visit <http://www.gsa.gov/portal/content/198005>. (Be sure that your marketing information and SAM profile contains information on any MAS/FSS contracts held by your firm).

eBuy, GSA's request-for-quote (RFQ) system (<http://www.gsa.gov/portal/category/25579>), a component of **GSA Advantage!**, is designed to facilitate the request for submission of quotations for a wide range of commercial supplies (products) and services under a variety of acquisition vehicles. eBuy has recently been updated to facilitate set-asides. Now a Contracting Officer can choose whether your requirement will be set-aside for small business or another small business category. If a Federal buying office decides to set-aside the requirement, then the RFQ will be “viewable” only by eligible Schedule contractors. For example, only HUBZone Schedule contractors could view a RFQ set-aside for HUBZone small business concerns, etc.

8. Seek additional assistance as needed in the federal marketplace.

There are a number of important resources that are available to provide you with hands-on assistance in the federal marketplace:

-SBA Procurement Center Representatives (PCRs) and Commercial Market Representatives (CMRs) SBA has a nationwide cadre of procurement professionals who are charged with assisting small businesses and acting as their advocates at both the prime and subcontracting levels. PCRs assist small firms interested in doing business as prime contractors directly with federal agency buying offices. CMRs work with those small firms interested in identifying subcontracting opportunities with large businesses that have been awarded a federal contract. To identify the PCR or CMR located nearest to you, visit: <http://www.sba.gov/content/government-contracting-field-staff-directory>

-Procurement Technical Assistance Centers

Procurement Technical Assistance Centers (PTACs) are located in most states. PTACs, funded by the Department of Defense, provide “hands-on” technical contracting and marketing assistance to small businesses wishing to do business with any federal agency. They provide training and counseling on marketing, financial, and contracting issues at minimal or no cost. To identify a local PTAC, go to: <http://www.dla.mil/SmallBusiness/Pages/ProcurementTechnicalAssistanceCenters.aspx>

-Small Business Development Centers offer training and counseling services to small businesses and would-be entrepreneurs. They offer free, one-on-one consulting, and training programs on a variety of issues, including marketing, regulatory compliance and international trade. Go to <http://www.sba.gov/content/small-business-development-centers-sbdc> to find an SBDC near you.

-Small Business Specialists are located at each federal buying office and can provide assistance on how to market to that Agency. A complete listing of Small Business Specialists can be obtained from each agency’s website. Links to the homepages of every military activity/agency can be found on the DOD website at <http://www.defense.gov/>. This information is invaluable when researching the federal marketplace and identifying your target market, e.g., those buying office that buy your products and services. Links to **Agency Recurring Procurement Forecasts** are located at http://acquisition.gov/comp/procurement_forecasts/index.html. Additional program information may be located on each agency’s website.

-Directors of Federal Agency Office of Small and Disadvantaged Business Utilization (OSDBU)/Directors of the Office of Small Business Programs (OSBP) (<http://www.osdbu.gov/>) for Defense agencies are in place at the headquarters level of each federal agency and department. They are responsible for ensuring that small businesses are afforded an equitable opportunity to compete for prime contracting opportunities. The OSDBU Directors have formed an Interagency Council which meets regularly to, among other functions, identify procurement practices that will enhance small business participation for the government’s procurement opportunities. A listing of each of the OSDBU offices is located on the OSDBU website on the members’ page at <http://www.osdbu.gov/members.html>.

-SBA’s Women Business Centers (WBC) at <http://www.sba.gov/about-offices-content/1/2895/resources/13729> is the SBA’s Business Center Program of national networks of WBC’s providing business training, counseling and other resources to help women start and grow successful businesses.

-SCORE – Counselors to American’s Small Business (SCORE) – www.score.org – is a nonprofit association dedicated to educating entrepreneurs and the formation, growth and success of small businesses. SCORE provides mentoring to both start-up and existing small businesses through face-to-face and email counseling as well as educational workshops. All counseling is provided free of charge. Explore the SCORE website to find a chapter and counselor near you.

-*Veterans Business Outreach Program (VBOP)* is designed to provide entrepreneurial development services such as business training, counseling and mentoring, and referrals for eligible veterans owning or considering starting a small business. The SBA has 16 organizations participating in this cooperative agreement and serving as Veterans Business Outreach Centers (VBOC). Go to <http://www.sba.gov/content/veterans-business-outreach-centers> .

9. Explore subcontracting opportunities.

Subcontracting can be an excellent entre into contracting. Regardless of your product or service, it is important that you do not neglect our very large secondary market, Subcontracting Opportunities with Federal Prime Contractors. Be sure to check out our website at <http://www.sba.gov/category/navigation-structure/contracting/contracting-opportunities/sub-contracting/subcontracting-opportunities-directory> . The SBA/GC Subcontracting Opportunities Directory lists, by state, large business Federal Prime Contractors along with the name and telephone number of each firm's Small Business Liaison Officer (SBLO). We encourage you to investigate potential opportunities with these firms. Many of these firms also have websites that may be useful and we encourage you to contact their respective SBLO for subcontracting and teaming opportunities. Many major Large business prime contractors use the SBA's SUB-Net to post subcontract opportunities. SUB-Net can be accessed at <http://web.sba.gov/subnet/search/index.cfm>. SBA also recently announced the new **Supplier Connection** which is an online portal that the IBM Foundation created to make it easier for small businesses to sell to large companies <https://www.supplier-connection.net/SupplierConnection/index.html>. It's like a universal—or common—college application. You fill in the supplier form once and then you're in the supplier databases of all the large companies using the portal. Currently, there are 15 large companies participating in Supplier Connection, including Citi, Facebook and major American manufacturers like John Deere and Caterpillar. The participating companies have a combined supply chain of more than \$300 billion – and they are looking to work with more small businesses.

10. Investigate other federal, state and local programs.

There are several other programs that may be of interest to you, such as individual agency Mentor-Protégé Programs (<http://www.sba.gov/content/mentor-prot%C3%A9g%C3%A9-program>) and the SBA's Small Business Innovation Research Program (<http://www.sba.gov/category/navigation-structure/contracting/working-with-government/small-business-innovation-research>). Information on these and other programs is available on the SBA website at <http://www.sba.gov/aboutsba/sbaprograms/gc/programs/index.html>. Don't overlook state and local government procurement opportunities. Contact your state and local government contracting agencies to learn more about how they do business.

11. Accept credit cards.

More than 250,000 federal employees are using the GSA SmartPay cards. As a vendor, you can maximize your ability to capture government sales by accepting credit cards (Visa, MasterCard and Voyager). If you already accept these cards, you have no additional work to do. If you do not accept these cards, contact a bank to establish a merchant account. For more information, visit GSA's website at <http://www.gsa.gov/portal/content/104616>

12. Market, Market, Market!

The three most important words to remember in order to be successful in the Federal Procurement Arena is **market, market, market**. Hopefully, this guide provided you with some good ideas on how to market your firm. After you have identified your customers, researched their requirements, and familiarized yourself with the government's procurement regulations and strategies, it is time to market your product or service. Present your capabilities directly to those buying offices that purchase your products or services. Realize that, like you, their time is valuable and if the match is a good one and you can provide them with a cost-effective, quality solution to their requirements, the contract could be yours. Good luck and while you're ultimately responsible for your own success— you're not alone.

SBA's Government Contracting Area VI –

Providing the Nation's Small Businesses with the Competitive Edge

The SBA's Office of Government Contracting Area VI office covers the states of Alaska, Arizona, California, Hawaii, Idaho, Montana, Nevada, Oregon, Utah, Washington, Wyoming and the Territory of Guam. The Area Office is located in San Francisco with field representatives in Los Angeles, Santa Ana, San Diego (California), Phoenix, Arizona, Las Vegas, Nevada, Ogden, Utah, Honolulu, Hawaii, Seattle and Auburn (Washington) and Anchorage, Alaska.