



U.S. Small Business  
Administration

**Report to Congress on Agency  
Office of Small Disadvantaged  
Business Utilization Training  
and Travel Costs for  
Fiscal Year 2018**

**September 20, 2019**

**Report to Congress on Agency**  
**Office of Small Disadvantaged Business Utilization Training and Travel**  
**Costs for Fiscal Year 2018**

The Small Business Act (the Act), in Section 15 U.S. C. § 644(k)(16), requires the Agency Offices of Small Disadvantaged Business Utilization (OSDBUs) to submit a report on training provided and training and travel costs as a percentage of the OSDBU budget to the Committee on Small Business of the House of Representatives and the Committee on Small Business and Entrepreneurship of the Senate. Under 15 U.S.C. § 644(k)(16) each agency OSDBU:

*“(16) shall submit, each fiscal year, to the Committee on Small Business of the House of Representatives and the Committee on Small Business and Entrepreneurship of the Senate a report describing-*

*(A) the training provided by the Director under paragraph (13) in the most recently completed fiscal year;*

*(B) the percentage of the budget of the Director used for such training in the most recently completed fiscal year;*

*(C) the percentage of the budget of the Director used for travel in the most recently completed fiscal year; and*

*(D) any failure of the agency to comply with section 637, 644, 657a, or 657f of this title;”*

In order to facilitate this reporting, the Small Business Administration (SBA) has compiled the Agency reports on training and travel costs for FY 2018 and provided a summary table of such reports. Where the agencies separately identified the dollar value of the training and travel costs, it is provided in parentheses. All percentages are calculated as a percentage of the total OSDBU budget, except as noted. Agency OSDBUs provided the required training information and the training and travel costs. For FY 2018, agencies did not report any failures to comply with sections 637, 644, 657a, or 657f of the Act. Individual agency reports are summarized Table 1, below, and copies of agency actual reports are provided as Enclosure.

**Table 1.**  
Agency Training and Travel Reports Summary for FY 2018

Agency	Training Provided	Training Cost	Travel Cost
Department of Agriculture (USDA)	<ol style="list-style-type: none"> <li>1. Clearance Process for Contracts Not Set-Aside or Reserved for Small Business Participation;</li> <li>2. Doing Business with USDA’s Buying Agencies;</li> <li>3. Doing Business with USDA;</li> <li>4. Doing Business with the Federal Government;</li> <li>5. Doing Business with USDA – How to get started as a new Business w/SBA and PTAC;</li> <li>6. AGLearn Small Business Credit Card Training;</li> <li>7. eSRS; and</li> <li>8. Procurement Forecast</li> </ol>	.003% (\$3,500)  Training identified was conducted in federal government space, the only cost involved was preparation of training materials/meeting space valued at \$3,500.00. Out of total USDA OSDBU’s \$1.3 million, \$3,500 used for training represents .003% of the total FY 2018 budget.	.01% (\$12,712)  The USDA OSDBU spent \$12,712 for out of town business travel to participate in a variety of small business outreach events. Out of the total USDA OSDBU budget of \$1.3 million, the \$12,712 used for travel represents .010% of the total FY 2018 budget.
Department of Commerce (DOC)	OSDBU teamed with the Senior Procurement Executive (SPE) on the agency’s annual acquisition conference in 2018. There were over 1,200 attendees, including contracting officers, contracts specialists, CORs, PM, contract attorneys, et al. The OSDBU did not provide training to small business concerns or contract specialists. DOC’s Bureaus organized conferences throughout the year to educate small business concerns on DOC’s programs and potential contract opportunities.	0%.	1%  The DOC OSDBU spent 1% to cover the travel costs and conference fees to participate in four small business outreach events for FY 2018.
Department of Treasury (Treasury)	<p>The Treasury OSDBU provided 4 separate small business training sessions, and 4 quarterly training roundtables for acquisition workforce for FY 2018.</p> <p>The OSDBU hosted 9 vendor outreach events discussing various topics.</p>	0%  The training sessions were conducted in federal government space, the only cost involved was preparation of the training materials, which were provided by Treasury’s Printing and Graphics office, at no cost. Therefore, it represents 0% of Treasury OSDBU’s total FY 2018 budget and Treasury’s non-labor budget.	0.013% (\$9,966)  Treasury’s spent \$9,966 for out of town business travel to participate in a variety of small business outreach events, for the most completed fiscal year (2018). Out of Treasury’s OSDBU total budget of \$798,000 the \$9,966 used for travel represents 0.013% of the total FY 2018 budget.

Agency	Training Provided	Training Cost	Travel Cost
Department of Energy (DOE)	<p>The OSDBU Director provided a variety of training directly to the Small Business Program Managers (SBPMs), OSDBU staff, DOE Goaling submitters, Small Businesses, and other attendees.</p> <p>1. Other training:</p> <p>a. Provided Small Business outreach and development through approximately 129 events.</p> <p>b. October 1, 2017 - September 30, 2018: The OSDBU provided one-on-one development of small businesses on how to do business with DOE.</p> <p>c. May 23-24,2018: Small Business Program Managers (SBPMs)met for a one-day training meeting following the Annual DOE Small Business Forum and Expo.</p> <p>d. Ad hoc sessions with internal stakeholders.</p>	<p>1.34%</p> <p>The OSDBU Director provided 1.34% of the office budget toward training during FY 2018.</p>	<p>3.133%</p> <p>The OSDBU Director provided 3.133% of the office budget toward travel during FY 2018.</p>
Social Security Administration (SSA)	<p>Contracting Officer’s Forum (Skype Meeting) on Acquisition Gateway; CPARS; FPDS-NG; and Competitive Sourcing. Contracting Officer’s Forum (Skype Meeting) on Best in Class/Spend Under Management.</p>	<p>0%</p>	<p>\$900.89 spent by the OSDBU for business travel in FY 2018 to participate in 25 small business outreach events and meetings.</p>
Department of Health and Human Services (HHS)	<p>In FY 2018, HHS OSDBU trained 5,550 of the HHS acquisition personnel at the HHS Operating Division and Staff Divisions. The monthly acquisition training webinars allow us to enhance training assistance for internal and external customers through web-based training initiatives that will lower travel costs while reaching a larger audience in a shorter time period. Training included:</p> <p>HHS COR Best Practices; GSA Acquisition Gateway and Category Management; SBA New Regulations and Updates; How to Prepare for a Surveillance Review; Empowered Market Research through FPDS and DSBS; GSA GWAC Delegated Procurement Authority Training; Subcontracting Plan Compliance; Using Multiple Award Schedules; Understanding Teaming Agreement; and GSA Storyboard Saves Time and Effort.</p>	<p>2.45%</p> <p>In addition to the training provided to acquisition personnel, OSDBU Director also provided OSDBU staff group training in FY 2018 operating budget.</p>	<p>1.20%</p> <p>The purpose of training/conferences is to engage, equip and inform small business participants of the federal procurement process so that they become more effective in pursuing contracting opportunities at HHS and assist the HHS OpDivs with achieving their missions.</p>

Agency	Training Provided	Training Cost	Travel Cost
Department of Homeland Security (DHS)	<p>The DHS OSDBU provided a three-day small business training session May 1- 3, 2018 for a group consisting of DHS OSDBU staff, DHS Component Small Business Specialists, DHS Contract Specialists, and DHS Procurement Analysts. Topics included</p> <p>FY 2018 small business goal progress, FY 2017/2018 revisions to the SBA annual scorecard, an update from SBA on legislative changes and implementation, and strategic sourcing/category management.</p>	<p>0.5% (\$1,000)</p> <p>Since the training outlined in (16) (A) was conducted in federal government space, the only cost involved was preparation of the training materials valued at \$1,000. Out of the total DHS OSDBU budget of \$2,000,000, the \$1,000 used for training represents .05% of the total FY 2018 budget.</p>	<p>1.5% (\$30,000)</p> <p>The DHS OSDBU spent \$30,000 for out of town business travel to participate in a variety of small business outreach events. Out of the total DHS OSDBU budget of \$2,000,000, the \$30,000 used for travel represents 1.5% of the total FY 2018 budget.</p>
Department of Housing and Urban Development (HUD)	<p>The HUD OSDBU provided small business training sessions on small business-related topics.</p> <p>1. FY 2018 Forecast Kick-off Meeting; Subcontracting Refresher: Reviewing Reports in eSRS; WOSB Program; Acquisition Gateway; Market Research; Understanding HUBZone Program; SDVOSB and VETS 2 GWAC; SBA's 8(a) BD Program and 8(a) Partnership Agreement</p> <p>2. Small Business Concerns and Entrepreneur Training:</p> <p>a. 2018 IT Industry Day;</p> <p>HUBZone Small Business Outreach; 3<sup>rd</sup> Annual HUD HUBZone Small Business Conference; and HUD SDVOSB Small Business Conference.</p>	<p>0%</p> <p>Since the training identified was conducted in federal government space, there were no additional costs. Out of the total HUD OSDBU budget of \$647,154.98, there were \$0 of training expenses for FY 2018.</p>	<p>2.24% (\$14,516.36)</p> <p>The HUD OSDBU spent \$14,516.36 for out of town business travel to participate in a variety of small business outreach events. Out of the total HUD OSDBU budget of \$647,154.98, the \$14,516.36 used for travel represents approximately 2.24% of the total FY 2018 budget.</p>
Department of Interior (DOI)	<p>The DOI OSDBU provided the following training to DOI's acquisition staff in FY 2018:</p> <p>a. National 8(a) Conference: Doing Business with DOI;</p> <p>b. Reservation Economic Summit: Buy Indian Act and HUBZone Program;</p> <p>c. Covered new policies related to Section 15(k)(11) and (17) to contract specialist; and</p> <p>d. GSA Forecast opportunities tool to contract specialists.</p>	<p>0%</p>	<p>1.3% (\$6,549.20)</p> <p>The DOI OSDBU spent \$6,549.20 for out of town business travel to participate in a variety of small business outreach events. Out of the total DOI OSDBU budget of \$479,582, the \$6,549.20 used for travel represents approximately 1.3% of the total FY 2018 budget.</p>

Agency	Training Provided	Training Cost	Travel Cost
Department of Justice (DOJ)	In FY 2018, the OSDBU Director provided training on its small business procedures to Contracting Officers, Small Business Specialists, and Program Officials on an Ad hoc basis throughout the year.	0.06%  The training was conducted in federal government space, the only cost involved was the OSDBU Director's time. The percentage of the budget of the Director for such training represented 0.06% of the OSDBU Director's total FY 2018 budget.	0.008%  DOJ OSDBU used .008% of the budget of the Director for travel in FY 2018.
Department of Labor (DOL)	The DOL OSDBU training to small businesses and the DOL Acquisition workforce on prime and subcontracting opportunities; regulatory and compliance assistance and guidance; The OSDBU attended and participated in several small business outreach events hosted by other organizations where individual training was provided to small business concerns.	0%	0.15% (\$1,400)  Travel to Minneapolis, MN for the conference was valued at \$1,400. The \$1,400 represents 0.15% of the total budget of \$929,695 for the total FY 2018 budget.
Department of State (State)	The Office of Small and Disadvantaged Business Utilization (OSDBU) provided an average of 1-2 monthly classroom trainings and one monthly webinar, hosted by the Small Business Administration (SBA), for the acquisition workforce, Program Managers and Foreign Service Officers with approximately 20-30 participants each. Each class focused primarily on educating contracting staff and program office personnel on an array of small business-related subjects including 8(a) Business Development Program, HUBZone Program, Service-Disabled Veteran-Owned Small Business Program, Woman-Owned Small Business Program; Subcontracting Program, Size Determination, Non-Manufacturer Rule, and Market Research. In addition to trainings provided by the OSDBU staff, OSDBU invited subject matter experts from SBA, National Aeronautics and Space Administration, and other organizations to speak on matters relevant to Subcontracting, Affiliations, Size Determination, and the use of small business set asides in schedule contracts.	(\$4,675)  Since the training outlined in (16) (A) was conducted in federal government space, the only cost involved was preparation of the training materials valued at \$4,675, which was included in the OSDBU's total FY 2018 reproduction expense.	6.5% (\$15,557)  The State Department OSDBU spent \$15,557.00 for out of town business travel to participate in a variety of small business outreach events. Out of the total OSDBU budget of \$237,900, the \$15,557 used for travel represents 6.5% of the total FY 2018 budget.

Agency	Training Provided	Training Cost	Travel Cost
Department of Transportation (DOT)	<p>1. For FY 2018, DOT's OSDBU office provided training for Small Business Specialists (SBS) and DOT Acquisition Officials on procurement rules and regulations impacting socioeconomic procurements. Conducted monthly SBS Training meetings focused on procurement and programmatic updates impacting small business socioeconomic procurements, and agency specific training sessions to assist acquisition officials in the implementation of their small business programs.</p> <p>2. Enclosure of Agency Report lists all the Training provided by the OSDBU Director.</p>	0%	0%
National Science Foundation (NSF)	NSF leveraged training provided by other agencies such as SBA First Wednesday Virtual Learning and Small Business Contracting offered by TAI.	0%	0%
Nuclear Regulatory Commission (NRC)	<p>The Small Business Program assisted with development of Small Business training; Expanded outreach efforts to agency's regional offices; Director of Small Business Program briefed NRC Commission and staff on plans to increase engagement during market research phase of procurements; Small Business Manager educated participants on various outreach events; Maintained weekly counseling sessions with senior business executives; Provided technical assistance to staff on how to evaluate small business marketplace capability. Participated in a variety of Outreach Events.</p>	<p>0%</p> <p>While there are costs associated with the training and resources identified, the costs were incurred by other NRC offices, Federal agencies, and organizations. As a result, the Small Business Program did not fund any training costs from its budget (other than the time and effort expended by Small Business Program staff). Therefore, there are no direct costs attributed to the Small Business Program's total FY 2018 budget.</p>	<p>0.92% (\$1,408.90)</p> <p>The Small Business Program spent \$1,408.90 for out of town business travel to participate in a variety of small business outreach events. Out of the total Small Business Program budget of \$151,967.09, the \$1,408.90 used for travel represents 0.92% of the Small Business Program's total FY 2018 budget.</p>
Small Business Administration (SBA)	<p>In accordance with public law, the Small Business Administration is exempt from the requirement to have an Office of Small and Disadvantaged Business Utilization (OSDBU). As a result, there is no OSDBU Director. Thus, there are no training and travel expenses to report.</p>	0%	0%

Agency	Training Provided	Training Cost	Travel Cost
Department of Veterans Affairs (VA)	<p>OSDBU provided sessions on Pre-Application; Preparing for Recertification; Veterans First – post Kingdomware; and How to stay Verified. Procurement-readiness training: How to do Business with VA; Building Effective Capabilities Statements; How to prepare for Attendance at Direct Access Events; How to be Procurement Ready; Navigating FedBizOpps; and Navigating VA’s Forecast of Contract Opportunities. Two (2) training sessions at NVSBE during the first quarter of FY2018, in calendar year 2017. Over 1800 VOSBs attended the event, which covered “How to Build a Capability Statement that Showcases your Company’s Abilities and a Center for Verification and Evaluation Town Hall on December 5-7, 2017 in conjunction with the 2017 NVSBE. Specific virtual training sessions were offered:</p> <ul style="list-style-type: none"> <li>a. Success at the 2017 NVSBE for Small Businesses</li> <li>b. Procurement Decision Makers (PDM) – Maximize Your Benefit at Direct Access Events</li> <li>c. Success at the 2017 NVSBE for PDMs.</li> </ul>	0.09%	0.2%
Office of Personnel Management (OPM)	<p>The OPM OSDBU created and branded the “Stay Ready” Small Business Series and Conference. The Stay Ready Conference focused on the following:</p> <ul style="list-style-type: none"> <li>a. Ins and Outs of Teaming Agreements, November 16, 2017;</li> <li>b. Primed to Win Big/Jump Start FY2018 Success, December 14, 2017;</li> <li>c. Subcontract Agreements for Small Businesses, January 17, 2018; and</li> <li>d. OPM’s Stay Ready Small Business Conference April 24-26, 2018.</li> </ul>	<p>9.15% (\$39,000)</p> <p>Training was conducted in federal government space, the only cost involved was preparation of the training materials valued at \$39,000. Out of the total OPM OSDBU budget of \$427,277 the \$39,000 used for training represents 9.15% of the total FY 2018 budget.</p>	<p>5.15% (\$22,000)</p> <p>The OPM OSDBU spent \$22,000 for out of town business travel to participate in a variety of small business outreach events. Out of the Small Business budget of \$427,277, \$22,000 used for travel represents 5.15% of the total FY 2018 budget.</p>



Agency	Training Provided	Training Cost	Travel Cost
General Services Administration (GSA)	<p>General Services Administration (GSA) Office of Small Business Utilization (OSBU) hosted at least 338 events advocating for more than 71,400 small businesses throughout the country in 2018. The training included:</p> <ol style="list-style-type: none"> <li>1. Contracting Officer Training Subcontracting;</li> <li>2. How to Review ISRs and SSRs in eSRS;</li> <li>3. How to get on GSA Schedule;</li> <li>4. Federal Strategic Sourcing Initiative;</li> <li>5. How to Market Your Small Business;</li> <li>6. How to identify Federal Contracting Opportunities; and</li> <li>7. Category Management.</li> </ol>	<p>116.36% (\$45,963)</p> <p>GSA OSBU's budget totaled \$39,500. OSBU spent \$45,963 for training, which represents 116.36% percent of the total FY 2018 budget.</p>	<p>129.61% (\$187,940)</p> <p>GSA OSBU's total budget totaled \$145,000. OSBU spent \$187,940 for travel, which represents 129.61% percent of the total FY 2018 budget.</p>
Department of Defense (DoD)	<p>The DoD OSBP conducted two (2) major training events in FY2018. The first training event was the Small Business Training Week in New Orleans, LA. This event trained small business professionals within the government to better equip them with the skills necessary to assist small businesses in engaging federal contracting opportunities. The second event was SBIR/STTR-Mentor Protégé joint training week in Tampa, FL. This event provided small businesses with information on best practices for federal contracting and on the SBIR, STTR, and Mentor Protégé program.</p>	<p>7.52% (\$301,084)</p> <p>Training provided was conducted at a contracted location by the government. The cost to conduct the preparation and execution of the conference and course development for the Small Business Professional was valued at \$301,084. Out of the total DoD OSBP budget of \$4,000,000, the \$301,084 used for training represents 7.52% of the total FY 2018 budget.</p>	<p>0.0039% (\$15,651.80)</p> <p>The DoD OSBP spent \$15,651.80 for out of town business travel to participate in a variety of small business outreach events. Out of the total DoD OSBP budget of \$4,000,000, the \$15,651.80 used for travel represents 0.0039% of the total FY 2018 budget.</p>
Department of Education (Education)	<p>Education OSDBU provided small business training sessions in conjunction with the two contract operations groups, Contracts and Acquisitions Management and Federal Student Aid, Training topics included the following:</p> <ol style="list-style-type: none"> <li>1. 8(a) Business Development program;</li> <li>2. Category Management;</li> <li>3. WOSB Program;</li> <li>4. SVOB Program;</li> <li>5. SBA Mentor Protégé;</li> <li>6. HUBZone Program Opportunities</li> </ol>	<p>16.5% (\$9,737)</p> <p>Training was conducted in federal government space, there was \$0 cost involved in preparation of the training materials. Outside training provided for OSDBU's staff members. Out of the total the U.S. Department of Education's OSDBU budget of \$59,000 the \$9,737 used for training represents 16.5% of the total FY 2018 budget.</p>	<p>36.1% (\$21,325)</p> <p>The U.S. Department of Education's OSDBU spent \$21,325 for out of town business travel to participate in a variety of small business outreach events. Out of the total U.S. Department of Education's OSDBU budget of \$59,000, the \$21,325 used for travel represents 36.1% of the total FY 2018 budget.</p>

Agency	Training Provided	Training Cost	Travel Cost
Environmental Protection Agency (EPA)	Annual Government Procurement Conference; National Veteran Small Business Engagement Conference; HUBZone Summit; EPA Region 3 Training ChallengeHER Conference; OSDBU Women-Owned Small Business Counseling Session; OSDBU Service-Disabled Veteran-Owned Small Business Counseling Session; OSDBU HUBZone Small Business Counseling Session; EPA Environmental Counseling Session; Annual Department of Energy Small Business Forum & Expo; Record of Procurement Request (EPA Form 1900-37) Form Training; Ask the Direct National Procurement Program Manager Training; and Contractor-led training on governing small business contracting requirements for the entire EPA acquisition community.	.0054% (\$12,792)  EPA OSDBU spent \$12,792 on training events for small business, and the internal EPA contracting community. Out of the total EP AOSDBU budget of \$2,374,000, the \$12,792 expended on training represents 0054 % of the total EPA OSDBU's total FY 2018 budget.	.0086% (\$20,455)  EPA OSDBU spent \$20,455 for travel, which represents .0086% percent of the \$2,374,000 EPA OSDBU's total FY 2018 budget.
National Aeronautics and Space Administration (NASA)	Internal Training provided to Center Small Business Specialists (SBS), Program/Technical and Acquisition personnel. Training provided at local Chamber of Commerce Events, Regional Outreach Events, and HBCU/MSI Infusion Road Tours.	7.35%	0.57%
U.S. Agency for International Development (USAID)	USAID's Office of Small and Disadvantaged Business Utilization (OSDBU) provided training sessions to educate 202 program and contracting officials on U.S. Small Business Programs. USAID conducted one training session in Washington, DC, two sessions at the USAID mission in Pakistan and one each in Zambia, Malawi, Jordan, Ukraine, and Kosovo. The training sessions included USAID's small business utilization goals; the impact of U.S. small business utilization on the U.S. economy; statutory and regulatory requirements; market research; subcontracting; and contract bundling.	42.2% (\$111,037)  Out of the total USAID's budget of \$263,000 the \$111,037 used for training represents 42.2% of the total FY 2018 budget.	6.7% (\$17,495)  Out of the total USAID's budget of \$263,000 the \$17,495 used for travel represents 6.7% of the total FY 2018 budget.

# **ENCLOSURES**

Agency: United States of Agriculture (USDA)

(13) & (16)(A)

The USDA OSDBU provided small business one-day training sessions for the following groups:

Training	Date	Number of Participants	Topics
Webinar Training	12/7/2016	200	Clearance Process for Contracts Not Set-Aside or Reserved for Small Business Participation
Training Forum for USDA's Farm Service Agency	4/5/2018	40	Doing Business with USDA's Buying Agencies
USDA Animal, Plant and Health Inspection Outreach Event	5/1/2018	60	Doing Business with USDA
North Florida SBA Small Business Summit (Jacksonville, FL)	5/8/2018	80	Doing Business with the Federal Government
EPA HubZone Small Business Summit (Dallas, TX)	5/17/2018	65	Doing Business with USDA
DOE Small Business Forum & Expo (Houston, TX)	5/22-24/2018	300	Doing Business with the Federal Government (USDA)
CelebrAsian Forum (Bethesda, MD)	5/29-31	300	Doing Business with the Federal Government (USDA)
Rural Small Business Connections (Nashville, TN))	8/1/2018	130	Doing Business with USDA; How to get started as a new Business w/SBA and PTAC
Small Business Summit (Montgomery, AL)	9/20/2018	200	Doing Business with the Federal Government (USDA)
AGLearn Small Business Credit Card Training	as needed	by agency	System
eSRS	as needed	by agency	System
Procurement Forecast	as needed	by agency	System

(16)(B)

Since the training outlined in (16)(A) was (not conclusive of federal government space) conducted in federal government space, the only cost involved was preparation of the training materials/meeting space valued at \$3,500.00. Out of the total USDA OSDBU's \$1.3 million the \$3,500.00 used for training represents .003% of the total budget.

(16)(C)

The USDA OSDBU spent \$12,712.00 for out of town business travel in FY 2018 to participate in a variety of small business outreach events. Out of the total USDA OSDBU budget of \$1.3 million, the \$12,712.00 used for travel represents .010 % of the total budget.

U.S. Department of Commerce  
Office of Small and Disadvantaged Business Utilization  
FY 2018 Training and Travel Report

The Department of Commerce (DOC), Office of Small and Disadvantaged Business Utilization (OSDBU) is staffed by two FTEs: a director and one GS-13 small business specialist. The FY 2018 budget for OSDBU was \$335,000: 96% covered personnel salaries and benefits; 4% covered operating expenses. DOC had very limited resources to allocate to OSDBU in support of the agency's Small Business Program resulting in the deminimis amount of travel and training budget.

In FY 2018, the OSDBU spent approximately 1% of its budget to cover travel costs and conference fees to participate in small business outreach events. The OSDBU Director effectively overcame resource and budget constraints by leveraging the resources of the bureaus and other administrative offices. DOC's bureaus organized conferences throughout the year to educate small business concerns on DOC's programs and provide useful information on potential contract opportunities. The OSDBU also teamed with the agency's Senior Procurement Executive on the agency's annual acquisition training conference held in 2018. There were roughly 1,000 employees in attendance and over 200 participated via video conference. Participants included contract specialists, contracting officers, purchasing agents, contracting officer representatives (CORs), small business specialists, contracting supervisors, program managers, and other members of the acquisition community. Participants received continuous learning credit toward satisfying required acquisition training.

Finally, DOC is pleased to report that we successfully met and/or exceeded all FY 2018 prime contracting small business and socio-economic small business goals. This achievement is the culmination of a deliberate and concerted effort led by DOC's leadership to create new opportunities and broaden existing opportunities for small business concerns, and to support the OSDBU's effort to continuously strengthen the agency's Small Business Program.

**FY 2018 Annual Report**  
**Travel and Training**  
**U.S. Department of the Treasury (Treasury)**

15 U.S. Code § 644 - Awards or contracts

(k)

(16) shall submit, each fiscal year, to the Committee on Small Business of the House of Representatives and the Committee on Small Business and Entrepreneurship of the Senate a report describing—

(A) the training provided by the Director under paragraph (13) in the most recently completed fiscal year (see paragraph 13 below);

(B) the percentage of the budget of the Director used for such training in the most recently completed fiscal year; and

(C) the percentage of the budget of the Director used for travel in the most recently completed fiscal year; and

(13) may provide training to small business concerns and contract specialists, except that such training may only be provided to the extent that the training does not interfere with the Director carrying out other responsibilities under this subsection;

**Required FY 2018 Annual Report**

**Agency: U.S. Department of the Treasury (Treasury)**

(16)(A)

The Treasury OSDBU sponsored 4 separate small business training sessions and four quarterly training roundtables for fiscal year (2018). This training was provided to the acquisition workforce (contract specialists, Contracting Officers, and Small Business Specialists.

1. **Annual Small Business Training Day** - 1/19/18 – Topic(s): GSA/GWACS, WOSB, 8(a) Graduation Overview, and Category Management/Best in Class contract vehicle utilization
2. **Annual Small Business Specialists Roundtable** – 02/02/2018 – Topic(s) Category management and Subcontracting
3. **Government Procurement Conference** - 4/20/18 – Topic(s): GSA/GWAC Training Overview
4. **Small Business Brown Bag Lunch Training** - 8/26/18 – Topic(s): Treasury-wide Subcontracting Management and Oversight.
5. **Small Business Specialists Quarterly Roundtable** – Topic(s): various Small Business topics, Category Management, GSA VETS GWAC, Small Business Set-asides

The Treasury facilitated and hosted 9 Vendor Outreach Sessions (VOS) in fiscal year 2018, which trained small business and large business vendors. After the VOS, the OSDBU Director held mini-Small Business Specialists Roundtables providing latest small business program news and updates.

6. **Monthly Vendor Outreach Sessions (VOS)** – Treasury’s OSDBU hosted 9 VOSs during fiscal year 2018 and during each session a guest speaker is brought in to give a “flash” training to the vendors in attendance. Topic(s): VIP Program, WOSB Certification Updates,

NDAAs Updates, available BPA's for use, DC/PTAC, Montgomery County Chamber Certification Updates, Subcontracting Opportunities, etc.

(16)(B)

Since the training sessions outlined in (16)(A) were conducted in federal government space, the only cost involved was preparation of the training materials, which were provided by Treasury's Printing and Graphics office, at no cost. Therefore, **it represents 0% of Treasury OSDBU's total budget and 0% of Treasury's non-labor budget. Employees traveled via the metro to the training sites.**

(16)(C)

Treasury's spent \$9,966 for out of town business travel in FY 2018 to participate in a variety of small business Conferences and Outreach events. **Treasury's OSDBU total budget of \$798,000 (labor and non-labor dollars) used \$9,966 for travel expenses. These expenses represent 0.013% of the total Treasury OSDBU budget or .12% of Treasury OSDBU's non-labor dollars (\$85,000).**





**U.S. DEPARTMENT OF  
ENERGY**

**Fiscal Year 2018  
Agency Travel and Training Report**

**U.S. DEPARTMENT OF ENERGY**  
**Office of Small and Disadvantaged Business Utilization**

**FY 2018 Agency Training and Travel Report**

The Department of Energy (DOE) Office of Small and Disadvantaged Business Utilization (OSDBU) Fiscal Year 2018 Agency Travel and Training Report is hereby submitted to the U.S. Small Business Administration in accordance with Subsection (k) of section 15 of the Small Business Act (15 U.S.C 644) and as requested in support of the referenced Small Business Act.

The DOE hosted and supported a wide variety of training opportunities to the Agency staff, which included government employees, contractor staff and other employment categories in support of DOE's mission and consistent with the criteria as outlined in Subsection (k) of Section 15 of the Small Business Act (15 U.S.C 644) and other training opportunities beyond the scope of the Small Business Act.

**As required by the reporting requirements** (In accordance with Subsection (k) of section 15 of the Small Business Act (15 U.S.C 644):

**(A) the training provided by the Director under paragraph (13) in the most recently completed fiscal year;**

In support of the paragraph (A) above, the OSDBU Director provided the following training directly to Small Business Program Managers (SBPMs), OSDBU staff, DOE Goaling submitters, Small Businesses and other attendees as per the invitations:

1. **Small Business Program Monthly Meeting:** These meetings were held throughout the fiscal year with invitations to all DOE small business program managers (SBPMs), and shared with contracting officers, DOE Goaling submitters and other DOE staff members who have a vested interest in the subject matter. The purpose of these training meetings was to provide tools, information and updates concerning small business laws and regulations, small business prime and subcontracting goals and achievement updates, DOE Goaling process, small business outreach opportunities, and other important information concerning small business. Copies of the agendas can be made available upon request.
2. **Additional training was provided as listed below:**
  - a. Provided Small Business outreach and development through approximately 129 events.
  - b. October 1, 2017-September 30, 2018: The OSDBU provided one-on-one development of small businesses on how to do business with DOE.
  - c. May 23-24, 2018: SBPMs met for a one day training meeting following the Annual DOE Small Business Forum & Expo in Houston, TX.
  - d. Ad hoc sessions with internal stakeholders.

**U.S. DEPARTMENT OF ENERGY**  
**Office of Small and Disadvantaged Business Utilization**

**FY 2018 Agency Training and Travel Report**

**(B) The percentage of the budget of the Director used for such training in the most recently completed fiscal year:**

In support of paragraph (B) above, the OSDBU Director provided 1.34% of the office budget towards training during Fiscal Year 2018.

**(C) The percentage of the budget of the Director used for travel in the most recently completed fiscal year:**

In support of paragraph (C) above, the OSDBU Director provided 3.133% of the office budget towards travel during Fiscal Year 2018. In support of paragraph (B) above, the OSDBU Director provided 1.34% of the office budget towards training during Fiscal Year 2018.

**Agency Information:**

U.S. Department of Energy  
Office of Small and Disadvantaged Business Utilization  
1000 Independence Avenue, SW  
Washington, DC 20585

**Review, Accepted and Submitted by:**



Charles R. Smith

Director

Office of Small and Disadvantaged Business Utilization  
U.S. Department of Energy

02/05/19  
Date

## FY18-FY19 Agency Reporting Requirements DRAFT (02/26/2019)

### FY18 Training and Travel Report – Due Date: Friday, March 15, 2019

#### **(k) Office of Small and Disadvantaged Business Utilization; Director**

In accordance with Subsection (k) of section 15 of the Small Business Act (15 U.S.C. 644):

There is hereby established in each Federal agency having procurement powers an office to be known as the “Office of Small and Disadvantaged Business Utilization”. The management of each such office shall be vested in an officer or employee of such agency, with experience serving in any combination of the following roles: program manager, deputy program manager, or assistant program manager for Federal acquisition program; chief engineer, systems engineer, assistant engineer, or product support manager for Federal acquisition program; Federal contracting officer; small business technical advisor; contracts administrator for Federal Government contracts; attorney specializing in Federal procurement law; small business liaison officer; officer or employee who managed Federal Government contracts for a small business; or individual whose primary responsibilities were for the functions and duties of section 637, 644 or 657q of this title. Such officer or employee—

**(13)** may provide training to small business concerns and contract specialists, except that such training may only be provided to the extent that the training does not interfere with the Director carrying out other responsibilities under this subsection;

**(16)** shall submit, each fiscal year, to the Committee on Small Business of the House of Representatives and the Committee on Small Business and Entrepreneurship of the Senate a report describing—

**(A)** the training provided by the Director under paragraph (13) in the most recently completed fiscal year;

**(B)** the percentage of the budget of the Director used for such training in the most recently completed fiscal year; and

**(C)** the percentage of the budget of the Director used for travel in the most recently completed fiscal year;

Please note: percentage of budget refers to total OSDBU office budget, not budget execution of a training or travel budget line. Providing that information as a percentage of the total budget with actual dollar amounts assists with error proofing agency inputs. SBA will gather the individual reports for the 24 CFO-Act Agencies and forward same in one report to Congress, as described above.

#### **Reporting Requirements**

- Each agency will provide a one-two page narrative to address the Training and Travel Report requirements shown in the statute language above.
- The document must be submitted in Microsoft Word format – **please do not use PDF or any other format.**
- If an agency does not have any training or travel activities to report, please submit as your report a brief paragraph indicating that your agency did not have any training or travel for FY18. References to “percentage of the budget” pertain to the complete budget allocated to the OSDBU Director, including personnel.
- Each agency will submit its Training and Travel Report as a Microsoft Word attachment in an e-mail message to Mrs. Mihaela Ciorneiu, at [mihaela.ciorneiu@sba.gov](mailto:mihaela.ciorneiu@sba.gov) **on or before Friday, March 15, 2019.**

**Department of Health and Human Services  
FY 2018 Travel and Training Report**

**A. The training provided by the OSDBU Director under paragraph (13) in the most recently completed fiscal year;**

In Fiscal Year 2018, HHS OSDBU trained 5,550 of the HHS acquisition personnel at the HHS Operating Division and Staff Divisions. The monthly acquisition training webinars allow us to enhance training assistance for internal and external customers through web-based training initiatives that will lower travel costs while reaching a larger audience in a shorter time period.

<b>Date:</b>	<b>Title:</b>	<b>HHS:</b>
10/12/2017	HHS COR Best Practices	1,115
11/09/2017	GSA Acquisition Gateway and Category Management	697
1/11/2018	SBA New Regulations and Updates	462
2/8/2018	How to Prepare for a Surveillance Review	531
3/8/2018	Empowered Market Research through FPDS and DSBS	575
4/12/2018	GSA GWAC Delegated Procurement Authority Training	659
5/10/2018	Subcontracting Plan Compliance	452
6/14/2018	Using Multiple Award Schedules	458
7/12/2018	Understanding Teaming Agreement	289
8/9/2018	GSA Storyboard Saves Time and Effort	312
	<b>Total Registrants:</b>	<b>5550</b>

**B. The percentage of the budget used by the HHS OSDBU for Small Business Acquisition personnel training listed above was 2.45%.**

OSDBU provided OSDBU staff group training in FY18. The training sessions provided were: 1) Language Training; 2) "Change Your Questions, Change Your Life"; 3) The Critical Thinking Workshop; 4) Organizational and Operational Efficiency Support; 5) AEON Reporting Tool; and 6) ProFIT MAP. The classes provided critical skill-sets needed for OSDBU to implement the requirements of their duties and responsibilities, as delineated by the Small Business Act.

**C. The percentage of the budget used for traveling by the HHS OSDBU in Fiscal Year 2018 was 1.20%.**

The purpose of training/conferences is to engage, equip and inform small business participants of the federal procurement process so that they become more effective in pursuing contracting opportunities at HHS and assist the HHS OpDivs with achieving their missions. Specifically, 1) familiarize small businesses with the processing of procedures associated with federal Government contracting; 2) gain insight on identifying and pursuing contract opportunities with HHS; 3) provide an opportunity for small businesses to attend matchmaking and networking sessions to meet with Government representatives in pre-scheduled meetings.

15 U.S. Code § 644 - Awards or contracts

(k)

(16) shall submit, each fiscal year, to the Committee on Small Business of the House of Representatives and the Committee on Small Business and Entrepreneurship of the Senate a report describing—

(A) the training provided by the Director under paragraph (13) in the most recently completed fiscal year (see paragraph 13 below);

(B) the percentage of the budget of the Director used for such training in the most recently completed fiscal year; and

(C) the percentage of the budget of the Director used for travel in the most recently completed fiscal year; and

(13) may provide training to small business concerns and contract specialists, except that such training may only be provided to the extent that the training does not interfere with the Director carrying out other responsibilities under this subsection;

Required FY 2018 Annual Report

Agency: Department of Homeland Security (DHS)

(16)(A)

The DHS OSDBU provided a three day small business training session on May 1-3, 2018 for a group consisting of DHS OSDBU staff, DHS Component Small Business Specialists, DHS Contract Specialists, and DHS Procurement Analysts. Topics included FY 2018 small business goal progress, FY 2017/2018 revisions to the SBA annual scorecard, an update from SBA on legislative changes and implementation, and strategic sourcing/category management.

(16)(B)

Since the training outlined in (16)(A) was conducted in federal government space, the only cost involved was preparation of the training materials valued at \$1,000. Out of the total DHS OSDBU budget of \$2,000,000, the \$1,000 used for training represents .05% of the total budget.

(16)(C)

The DHS OSDBU spent \$30,000 for out of town business travel in FY 2018 to participate in a variety of small business outreach events. Out of the total DHS OSDBU budget of \$2,000,000, the \$30,000 used for travel represents 1.5% of the total budget.

15 U.S. Code § 644 - Awards or contracts

(k)

(16) shall submit, each fiscal year, to the Committee on Small Business of the House of Representatives and the Committee on Small Business and Entrepreneurship of the Senate a report describing—

(A) the training provided by the Director under paragraph (13) in the most recently completed fiscal year (see paragraph 13 below);

(B) the percentage of the budget of the Director used for such training in the most recently completed fiscal year; and

(C) the percentage of the budget of the Director used for travel in the most recently completed fiscal year; and

(13) may provide training to small business concerns and contract specialists, except that such training may only be provided to the extent that the training does not interfere with the Director carrying out other responsibilities under this subsection;

Required FY 2018 Annual Report

Agency: Department of Housing and Urban Development (HUD)

(16)(A)

The HUD OSDBU provided small business training sessions on small business related topics as delineated in the chart below.

<b>HUD Acquisition and Program Office Staff Training</b>	
<b>Training</b>	<b>Date</b>
FY2018 Forecast Kick-Off Meeting	10/24/2017
Subcontracting Refresher: Reviewing Reports in eSRS	03/01/2018



Women-Owned Small Business Federal Contract Program	03/14/2018
Acquisition Gateway Training - Using the Acquisition Gateway as a Market Research Tool	04/11/2018
Market Research	04/28/2018
Understanding the Historically Underutilized Business (HUBZone) Program	05/10/2018
Service Disabled Veteran Owned Small Business (SDVOSB) and VETS 2 GWAC Training	06/21/2018
SBA's 8(a) Business Development Program and the 8(a) Partnership Agreement	09/12/2018

<b>Small Business Concerns and Entrepreneur Training</b>	
<b>Training</b>	<b>Date</b>
FY 2018 IT Industry Day	12/13/2017
HUD Women Owned Small Business Outreach	03/14/2018
3 <sup>rd</sup> Annual HUD HUBZone Small Business Conference	05/10/2018
HUD SDVOSB Small Business Conference	06/21/2018

(16)(B)

Since the training outlined in (16)(A) was conducted in federal government space, there were no additional costs. Out of the total HUD OSDBU budget of \$647,154.98, there were \$0 of training expenses.

(16)(C)

The HUD OSDBU spent \$14,516.36 for out of town business travel in FY 2018 to participate in a variety of small business outreach events. Out of the total HUD OSDBU budget of \$647,154.98, the \$14,516.36 used for travel represents approximately 2.24% of the total budget.

## Department of Interior FY18 Training and Travel Report

### **(k) Office of Small and Disadvantaged Business Utilization; Director**

In accordance with Subsection (k) of section 15 of the Small Business Act (15 U.S.C. 644):

There is hereby established in each Federal agency having procurement powers an office to be known as the "Office of Small and Disadvantaged Business Utilization". The management of each such office shall be vested in an officer or employee of such agency, with experience serving in any combination of the following roles: program manager, deputy program manager, or assistant program manager for Federal acquisition program; chief engineer, systems engineer, assistant engineer, or product support manager for Federal acquisition program; Federal contracting officer; small business technical advisor; contracts administrator for Federal Government contracts; attorney specializing in Federal procurement law; small business liaison officer; officer or employee who managed Federal Government contracts for a small business; or individual whose primary responsibilities were for the functions and duties of section 637, 644 or 657q of this title. Such officer or employee—

(13) may provide training to small business concerns and contract specialists, except that such training may only be provided to the extent that the training does not interfere with the Director carrying out other responsibilities under this subsection;

(16) shall submit, each fiscal year, to the Committee on Small Business of the House of Representatives and the Committee on Small Business and Entrepreneurship of the Senate a report describing—

(A) the training provided by the Director under paragraph (13) in the most recently completed fiscal year;

***Presented at the National 8a Conference. Presentation titled "Agency Panel: Doing Business with the Department of Interior" Training provided on the following date:***

***January 30<sup>th</sup> 2018 @ 2PM***

***Presented at the Reservation Economic Summit. Presentation titled "Buy Indian Act and the HUBZone Program: Utilizing to Win the Federal Government as your Customer" Training provided on the following date:***

***March 5<sup>th</sup> 2018 @ 3PM***

***Provided Training that covered new policies related to Section 15(k)(11) and (17) to contract specialist Training provided on the following date:***

***June 29<sup>th</sup> 2018 @2PM***

***July 11<sup>th</sup> 2018 @1PM***

***Provided training to contract specialist on the GSA Forecast Opportunities tool. Training provided on the following dates:***

***February 6<sup>th</sup> 2018 @2PM***

(B) the percentage of the budget of the Director used for such training in the most recently completed fiscal year; and

***In FY 18 the Department of Interior OSDBU Director has spent \$0 while providing over 5 separate training events.***

(C) the percentage of the budget of the Director used for travel in the most recently completed fiscal year;

***In FY 18 the Department of Interior OSDBU Director has spent \$6,549.20 in travel costs related to outreach activities. In FY 18 our budget was \$479,582 and travel costs accounted for 1.3% of DOI OSDBU's budget***

15 U.S. Code § 644 - Awards or contracts

(k)

(16) shall submit, each fiscal year, to the Committee on Small Business of the House of Representatives and the Committee on Small Business and Entrepreneurship of the Senate a report describing—

(A) the training provided by the Director under paragraph (13) in the most recently completed fiscal year (see paragraph 13 below);

(B) the percentage of the budget of the Director used for such training in the most recently completed fiscal year; and

(C) the percentage of the budget of the Director used for travel in the most recently completed fiscal year; and

(13) may provide training to small business concerns and contract specialists, except that such training may only be provided to the extent that the training does not interfere with the Director carrying out other responsibilities under this subsection;

Required FY 2018 Annual Report

Agency: Department of Justice

(16)(A)

In FY 2018, the OSDDBU Director provided training on its small business procedures to Contracting Officers, Small Business Specialists, and Program Officials on an ad-hoc basis throughout the fiscal year.

(16)(B)

Since the training outlined in (16)(A) was conducted in federal government space, the only cost involved was the OSDDBU Director's time. The percentage of the budget of the Director for such training represented 0.06% of the OSDDBU Director's budget.

(16)(C)

In FY 2018, DOJ OSDDBU used 0.008% of the budget of the Director for travel.



NOV 09 2018

Mr. Robb N. Wong  
Associate Administrator  
Office of Government Contracting and Business Development  
Small Business Administration  
409 3<sup>rd</sup> Street, SW, 8<sup>th</sup> Floor  
Washington, DC 20416

Dear Mr. Wong:

The purpose of this letter is to transmit the Department of Labor's (DOL) Fiscal Year (FY) 2018 Training and Travel Report in accordance with paragraphs (16)(A), (16)(B), and (16)(C) of Section 15(k) of the Small Business Act (15 U.S.C. 644).

During FY 2018, the Office of Small and Disadvantaged Business Utilization (OSDBU) provided training to hundreds of small businesses and to the DOL acquisition workforce. The OSDBU's quarterly vendor outreach training sessions provided small businesses with insight on how to network and market effectively to procurement decision-makers. These events also increased the DOL acquisition workforce's awareness on how to compete contracting opportunities effectively among procurement-ready small businesses. During these training events, the OSDBU invited subject matter experts from the Small Business Administration (SBA), General Services Administration (GSA), National Aeronautics and Space Administration (NASA), Office of Personnel Management (OPM), other than small businesses, small businesses, Contracting Officers (CO), and Historically Black Colleges and Universities (HBCUs) representatives to train on small business-related topics, such as prime and subcontracting opportunities; regulatory and compliance assistance and guidance; navigation of the Acquisition Gateway; 8(a) Partnership Agreement; obtaining an award on the GSA Professional Services and IT 70 Schedules, OPM Human Capital and Training Solutions (HCaTS), and NASA Solutions for Enterprise-Wide Procurement (SEWP); implementing purchasing by category management; the small business mentor-protégé program; and Executive Order 13779 White House Initiative to Promote Excellence and Innovation at HBCUs.

The OSDBU is also committed to conducting regular training of acquisition personnel on issues, procedures, policies, and regulations impacting small business and has done so through DOL Procurement Council meetings, emails, and individual counseling/assistance. Moreover, the DOL LaborNet (intranet available to DOL employees) hosts a procurement page that provides acquisition personnel with continuous access to CO notices, informational training notices, acquisition policies, and webinars from outside sources such as SBA, GSA and the Federal Acquisition Institute (FAI).

Additionally, the OSDBU attended the following small business outreach events hosted by other organizations where small business concerns received individual training:

- The 4th Employment Training Administration (ETA) Vendor Outreach Session, October 2017, sponsored by ETA;
- Federal Small Business Procurement and Technology Plus Expo, October 2017, sponsored by Defense Tech Expos;
- DOL Vendor Outreach Session, October 2017, sponsored by DOL;
- National Small Business Federal Contracting Summit-Fall 2017, November 2017, sponsored by the U.S. Women's Chamber of Commerce (USWCC);
- Maryland Small Business Match Maker, December 2017, sponsored by the Government Contracting Network (GovConectx);
- Government Agency Procurement (GAP) Conference, December 2017, sponsored by the Business Service Center (BSC);
- Vet-Force Veterans Small Business Forum, December 2017, sponsored by DOL's Veterans' Employment and Training Service (VETS);
- DOL Vendor Outreach Session, January 2018, sponsored by DOL;
- Winter Showcase Small Business Seminar and Match Maker, February 2018, sponsored by GovConectx;
- National Small Business Federal Contracting Summit-Spring 2018, March 2018, sponsored by the USWCC;
- DOL Vendor Outreach Session, April 2018, sponsored by DOL;
- The 28th Annual Government Procurement Conference 2018, April 2018, sponsored by the Federal Business Council, Inc.;
- Business Matchmaking, April 2018, sponsored by FWDthink, LLC;
- The 6th Annual Northern Virginia Business-to-Government (B2G) Matchmaking Conference and Small Business Expo, May 2018, sponsored by the Greater Reston Chamber of Commerce;
- The 3rd Annual HUBZone Small Business Conference, May 2018, sponsored by the United States Department of Housing and Urban Development (HUD);
- The 2018 National Asian and Pacific Islander (AAPI) Business Summit, May 2018, sponsored by the United States Department of Commerce's Minority Business Development Agency (MBDA);
- United States Department of Transportation (DOT) Small Business Opportunities Day, May 2018, sponsored by DOT;
- GovConectx Small Business Match Maker, May 2018, sponsored by GovConectx;
- Annual HUBZone Summit, May 2018, sponsored by the United States Environmental Protection Agency (EPA) and the HUBZone Contractors National Council;
- The 2018 Montgomery County Chamber of Commerce (MCCC) GovConNet Pathway to Growth Procurement Conference, May 2018, sponsored by GovConectx;
- DOL ETA 3rd Job Corps Vendor Outreach Session, May 2018, sponsored by ETA;
- Government Agency Procurement (GAP) Conference, June 2018, sponsored by the BSC and the HUBZone Coalition;
- The 2018 HUD Service-Disabled Veteran-Owned Small Business (SDVOSB) Vendor Outreach Event, June 2018, sponsored by HUD;
- American Express Summit for Success, June 2018, sponsored by American Express;
- DOL Vendor Outreach Session, July 2018, sponsored by DOL;
- Annual Prime Subcontracting Training Session, August 2018, sponsored by the State Department and the Small Business Administration (SBA);

- GovConectx Last Chance Showcase, August 2018, sponsored by GovConectx;
- National Small Business Federal Contracting Summit, August 2018, sponsored by the USWCC and the American Small Business Chamber of Commerce; and
- Congressional Black Caucus Foundation's 48th Annual Legislative Conference, September 2018, sponsored by the Congressional Black Caucus Foundation.

The DOL ETA 3rd Job Corps Vendor Outreach Session in Phoenix, AZ, in the above list had a total travel cost of \$1,400 and there were no training costs associated. All other small business outreach events listed above were held in the Maryland, Virginia, and the Washington, D.C. area and no OSDBU travel costs were incurred. As a result, the Department is reporting the total budget used for training and travel represents 0.15 percent of the OSDBU Director's total budget of \$929,695.

If you have any questions or concerns, please contact Gladys Bailey at (202) 693-7244 or by email at [Bailey.Gladys@dol.gov](mailto:Bailey.Gladys@dol.gov).

Sincerely,



Bryan Slater  
Assistant Secretary for Administration and Management  
Director, Small and Disadvantaged Business Utilization





United States Department of State

*Assistant Secretary of State  
for Administration*

March 12, 2019

*Washington, D.C. 20520*

Mihaela Ciorneiu  
Acting Goaling Manager  
U.S. Small Business Administration  
409 3<sup>rd</sup> Street, SW  
Washington, DC 20024

Dear Ms. Ciorneiu:

In accordance with Subsection (k) of section 15 of the Small Business Act (15 U.S.C. 644): I am writing to provide a report on the Department of State's Office of Small and Disadvantaged Business Utilization (OSDBU) training and travel for the Fiscal Year (FY) 2018. Please find below the Department's responses for the referenced sections of 15 U.S.C. 644.

(16)(A)

The Office of Small and Disadvantaged Business Utilization (OSDBU) provided an average of 1-2 monthly classroom trainings including one monthly webinar, hosted by the Small Business Administration (SBA), for the acquisition workforce, Program Managers and Foreign Service Officers. The training sessions had approximately 20-30 participants each. Each class focused primarily on educating contracting staff and program office personnel on an array of small business-related subjects including 8(a) Business Development Program, HUBZone Program, Service-Disabled Veteran-Owned Small Business Program, Woman-Owned Small Business Program; Subcontracting Program, Size Determination, Non-Manufacturer Rule, and Market Research. In addition to trainings provided by the OSDBU staff, OSDBU invited subject matter experts from SBA, National Aeronautics and Space Administration, and other organizations to speak on matters relevant to Subcontracting, Affiliations, Size Determination, and the use of small business set asides in schedule contracts.

(16)(B)

Since the training outlined in (16)(A) was conducted in federal government space, the only cost involved was preparation of the training materials, which was included in the OSDBU total FY 2018 reproduction expense of \$4,675.

(16)(C)

The State Department OSDBU spent \$15,557 for out of town business travel in FY 2018 to participate in a variety of small business outreach events. Out of the total OSDBU budget of \$237,900, the \$15,557 used for travel represents 6.5% of the total budget.

Sincerely,

  
George L. Price

Director  
Office of Small and Disadvantaged Business Utilization  
Department of State

## FY18 Agency Training and Travel Report

In accordance with Subsection (k) of section 15 of the Small Business Act (15 U.S.C. 644), the U.S. Department of Transportation (DOT) submits the information for Fiscal Year 2018 (FY18).

Small Business Act Citation	Description	Response (FY2018)
Section 15(k)(16)(A)	Training provided by the Director	Appendix A
Section 15(k)(16)(B)	Percentage of the budget of the Director used for training	0.00%
Section 15(k)(16)(C)	Percentage of the budget of the Director used for travel	0.00%

In FY2018 DOT continued its commitment to provide outreach, technical and financial assistance to small business concerns, and maximized the use of the Small Business Transportation Resource Centers (SBTRC). DOT's Office of Small and Disadvantaged Business Utilization (OSDBU) participated in several small business outreach sessions for which are duties and responsibilities for the OSDBU Director as indicated in the Small Business Act.

Our office provided acquisition training for Small Business Specialist (SBS) and DOT acquisition officials on procurement rules and regulations impacting socioeconomic procurements. OSDBU continues its participation in the agency wide Acquisition Conference held by DOT's Office of the Senior Procurement Executive. Furthermore, OSDBU conducted monthly SBS Training meetings focused on procurement and programmatic updates impacting small business socioeconomic procurements; and agency specific training sessions to assist acquisition officials in the implementation of their small business programs.

In FY18, all OSDBU Director training activities were in the DC Metro area and no travel funds were used. A list of training provided by DOT OSDBU Director for fiscal year 2018 has been included in Appendix A.

**U.S. DEPARTMENT OF TRANSPORTATION  
OFFICE OF SMALL AND DISADVANTAGED BUSINESS UTILIZATION (OSDBU)  
REPORT TO CONGRESS NATIONAL DEFENSE AUTHORIZATION ACT (NDAA)  
FOR FISCAL YEAR 2018**

**Appendix A**

<b>TRAINING PROVIDED BY THE OSDBU DIRECTOR</b>		
Congressman Donald Payne, Jr. Event on Infrastructure	Washington, DC	November 17, 2017
Morgan State University, Small Business Development	Washington, DC	November 21, 2017
Asian Pacific Chamber of Commerce	Washington, DC	November 29, 2017
GEARS, Inc	Washington, DC	December 7, 2017
Nahigian Strategies LLC	Washington, DC	December 20, 2017
Veterans and Infrastructure	Washington, DC	January 10, 2018
DOD OSDBU	VA	January 11, 2018
Department of Treasury, Financing small business transit	Washington, DC	January 18, 2018
Commercial Space/OSDBU	Washington, DC	January 30, 2018
SpaceX	Washington, DC	January 31, 2018
US Pan Asian American Chamber of Commerce (USPAACC)	Washington, DC	February 14, 2018
Women Construction Owners & Executives	Washington, DC	March 5, 2018
Rutgers, Advanced Infrastructure	Washington, DC	March 21, 2018
National Autonomous Innovation Lab	Washington, DC	March 22, 2018
El Paso Hispanic Chamber of Commerce	Washington, DC	April 24, 2018
Surety & Fidelity Association, Bonding Education Program	Washington, DC	April 25, 2018
DOT OSDBU Small Business Opportunities Day	Washington, DC	May 16, 2018
Greg Autry, USC Marshall School of Business	Washington, DC	May 17, 2018
InLab Group	Washington, DC	May 29, 2018
Trufund	Washington, DC	June 6, 2018
McKissack & McKissack	Washington, DC	June 20, 2018
Puerto Technical Assistance Center	Washington, DC	August 22, 2018
Strategic Aerospace International	Washington, DC	September 6, 2018
Mid-Atlantic Small Business Transportation Resource Center (SBTRC)	Washington, DC	September 14, 2018
JonesPR	Washington, DC	September 26, 2018
Boardman USA	Washington, DC	November 7, 2018
DOT Subcontracting programs - Deloitte	Washington, DC	November 27, 2018
Smart1 Management Solutions	Washington, DC	November 28, 2018
SBTRC Project Directors	Washington, DC	December 12, 2018



**NATIONAL SCIENCE FOUNDATION**  
2415 Eisenhower Avenue • Alexandria, VA 22314

March 15, 2019

Ms. Mihaela Ciorneiu  
U.S. Small Business Administration  
409 3<sup>rd</sup> Street, S.W.  
Washington, D.C. 20416

Dear Ms. Ciorneiu:

Please see the attached National Science Foundation (NSF) response containing our FY 2018 Small Business Training and Travel Report.

If you have any questions or require additional information, please contact the undersigned at (703) 292-8100 or via email at [wgardner@nsf.gov](mailto:wgardner@nsf.gov).

Sincerely,

A handwritten signature in blue ink, reading "Wonzie L. Gardner Jr.", is positioned above the printed name.

Wonzie L. Gardner Jr.  
Director  
Office of Small and Disadvantaged Business Utilization

Enclosure:  
Attachment 1, NSF FY 2018 Small Business Training and Travel Report

National Science Foundation (NSF) Small Business Training and Travel  
Report for FY 2018, dated March 15, 2019

The following report is provided in accordance with Subsection (k) of section 15 of the Small Business Act (15 U.S. Code § 644 - Awards or contracts).

1. Paragraph (16) of Subsection (k) states that the officer or employee serving as the agency Director of the Office of Small and Disadvantaged Business Utilization (OSDBU) “shall submit, each fiscal year, to the Committee on Small Business of the House of Representatives and the Committee on Small Business and Entrepreneurship of the Senate a report describing—

(A) the training provided by the Director under paragraph (13) in the most recently completed fiscal year (paragraph (13) states that the Director “may provide training to small business concerns and contract specialists, except that such training may only be provided to the extent that the training does not interfere with the Director carrying out other responsibilities under this subsection);

(B) the percentage of the budget of the Director used for such training in the most recently completed fiscal year; and

(C) the percentage of the budget of the Director used for travel in the most recently completed fiscal year; and”

2. Below is the National Science Foundation (NSF) input which corresponds to the requested information in subparagraphs (A), (B) and (C) listed above.

(A) The NSF leveraged small business trainings provided by other agencies in FY 2018. The NSF acquisition community was informed of small business training sessions that were available throughout the year such as the SBA First Wednesday Virtual Learning 2018 sessions and a complimentary course on small business contracting offered by the Treasury Acquisition Institute (TAI). The TAI course was entitled “Contracting with Small Business Concerns” and was offered March 24 -25, 2018 and May 16-18, 2018.

(B) There were no costs involved for training in FY 2018 since the trainings discussed in subparagraph (A) above were not conducted by the NSF. The budget for the NSF OSDBU is \$100,000. Consequently, 0% of the NSF total OSDBU budget was used for training in FY 2018.

(C) The NSF OSDBU spent \$0.00 for out of town business travel in FY 2018 to participate in a variety of small business outreach events. Out of the total NSF OSDBU budget of \$100,000, the \$0.00 used for travel represents 0.0% of the total budget.



**U.S. Nuclear Regulatory Commission  
Fiscal Year 2018  
Small Business Training and Travel Report**

## **U.S. Nuclear Regulatory Commission Fiscal Year 2018 Small Business Training and Travel Report**

In accordance with Section 15(k)(16) of the Small Business Act, as amended, the U.S. Nuclear Regulatory Commission (NRC) Small Business Program is submitting this report describing the training it provided, the percentage of its budget used for training, and the percentage of its budget used for travel in fiscal year 2018 for small business outreach activities.

### Section 15(k)16(A) - Training Provided

The Small Business Program provided training to the business community and acquisition staff through a variety of methods to successfully target the needs of each audience. Such efforts included developing agency small business training, launching regional small business events, briefing the agency's senior leaders on small business-related matters, educating business owners on navigating the Federal marketplace, maintaining weekly counseling sessions, and providing technical assistance to acquisition staff regarding market research and the mechanics of set-asides.

Specific examples of such training to the business community and acquisition staff include the following activities listed below.

- Assisted with the development of small business training offered to acquisition staff at the agency's onsite training center and online training portal. The course covered topics such as the importance of small businesses, relevant laws, market research, and the benefits of contracting with small businesses.
- Expanded its outreach efforts to the agency's regional offices to educate companies on how to leverage small business certifications, explain the services offered by the Small Business Program, and discuss how to identify prime and subcontract opportunities.
- Director of the Small Business Program briefed the NRC Commission and staff on plans to increase engagement with acquisition staff during the market research phase of the procurement process, provided an update on the Small Business Administration's Scorecard performance measures, and highlighted progress towards meeting agency small business prime contract goals.
- Small Business Program Manager educated participants at the various outreach events held throughout the year, including the Veterans Institute for Procurement training program, which is sponsored by the Small Business Administration, and showcased the services offered by the Small Business Program to the business community and how to identify and respond to agency prime and subcontract opportunities.



- Maintained weekly counseling sessions with senior business executives to explain the resources available under the agency's web-based Small Business Toolbox and how to effectively use the tools to foster the business development needs of Federal contractors.
- Provided technical assistance to acquisition staff on how to evaluate small business marketplace capability and the mechanics of conducting set-asides under the various rules associated with the Federal portfolio of small business programs.

#### Section 15(k)16(B) - Percentage of Budget Used for Training

While there are costs associated with the training and resources mentioned above in Section 15(k)16(A), the costs were incurred by other NRC offices, Federal agencies, and organizations. As a result, the Small Business Program did not fund any training costs from its budget (other than the time and effort expended by Small Business Program staff). Therefore, there are no direct costs attributed to the Small Business Program's budget.

#### Section 15(k)16(C) - Percentage of Budget Used for Travel

The Small Business Program spent \$1,408.90<sup>1</sup> for out of town business travel to participate in a variety of small business outreach events. Out of the total Small Business Program budget of \$151,967.09, the \$1,408.90 used for travel represents approximately 0.92% of the Small Business Program budget.

<sup>1</sup> Costs associated with airfare not included as airfare is funded from a central agency account and not through the Small Business Program's budget. In addition, this amount does not capture travel costs associated with contractor support for out of town outreach events.

Training and Travel  
by the  
Office of  
Small and Disadvantaged Business  
Utilization (OSDBU)

Annual Report  
Fiscal Year 2018

---



## ***Introduction***

---

As required by section 15(k)(16) of the Small Business Act (15 United States Code (U.S.C.) § 644(k)(16)), the Department of Veterans Affairs (VA) Office of Small and Disadvantaged Business Utilization (OSDBU) submits this report describing the training activities conducted for small business concerns and for contracting personnel. The report also includes data on the portion expended for this training representing a percentage of the total OSDBU budget as well as the percentage of the OSDBU budget expended for travel.

Consistent with the priorities established by the law authorizing VA's Veterans First Contracting Program (38 U.S.C. §§ 8127-28), OSDBU and other VA organizations emphasize events targeting Service-Disabled Veteran-Owned Small Businesses (SDVOSB) and Veteran-Owned Small Businesses (VOSB). Small businesses holding other socioeconomic statuses also benefit from such training sessions, particularly if they seek dual certification as verified SDVOSBs or VOSBs in addition to their existing socioeconomic statuses. OSDBU participates in a range of small business outreach activities which often include training presentations. These events are conducted by other VA organizations; Federal, state, or local agencies; trade associations; and Veterans Service Organizations. OSDBU prioritizes its participation decisions in light of VA's Veterans First requirement.

OSDBU conducts only limited training for small businesses and contracting personnel as part of its signature event, the National Veterans Small Business Engagement (NVSBE). Instead of emphasizing training, the NVSBE primarily seeks to connect small businesses with VA contracting and program personnel (procurement decision makers), to support market research and provide insight into small business capabilities to fill VA contracting requirements. SDVOSBs and VOSBs find it advantageous to complete necessary training before the NVSBE so they may arrive as procurement-ready firms able to take full advantage of opportunities to market themselves to procurement decision makers (PDM). Because OSDBU receives extensive support from other VA activities, as well as other Federal agencies, the NVSBE offers unprecedented matchmaking and direct access to PDMs. Accordingly, for the training portion of this report, OSDBU has included learning sessions conducted by OSDBU staff as part of the NVSBE. Travel costs to the NVSBE are included in the percentage of OSDBU's budget expended on travel since the statutory mandate for this report covers all travel and not just travel associated with a training activity.

With regard to training for contracting personnel, OSDBU training addresses processes for which OSDBU is responsible. For example, section 15(k)(10) of the Small Business Act (15 U.S.C. § 644(k)(10)) directs OSDBU to make recommendations to contracting officers on the use of set-aside acquisition strategies to improve the likelihood of small business participation as prime contractors. OSDBU provides recommendations for alternative approaches to contracting officers in response to proposed acquisition strategy submissions. OSDBU conducts training on this process to clarify expectations and avoid unnecessary delays.

In addition to in-person training at small business outreach events, OSDBU's primary training format uses interactive webinars which are recorded for on-demand viewing. Webinars are typically 30 to 60 minutes long and are accessed over the Internet using a standard computer browser. Individuals use a web-based platform to register for webinars and view the training material used during the session.

This training format provides long-term value to both VA and the participants. Presentations can be accessed on-demand after the training event has ended. Participants can review the session multiple times and revisit the material for reference and apply the information as needed.

### ***Fiscal Year (FY) 2018***

---

VA verification of SDVOSBs and VOSBs is a prerequisite for participation in the VA Veterans First Contracting Program. This program affords verified firms the opportunity to compete for VA set-aside procurement opportunities. OSDBU hosts recurring training sessions to inform SDVOSBs and VOSBs about verification and provide assistance before, during, and after the application process. Verification training focused on the following topics:

- Pre-Application Webinar
- Preparing for Reverification
- Changes and updates to the Veterans Engagement Management System
- Veterans First Contracting – Post *Kingdomware*
- How to Stay Verified

Additionally, to assist verified SDVOSBs and VOSBs to compete for VA procurement opportunities, OSDBU implemented a procurement-readiness training program. The program included the following modules:

- How to Do Business with VA
- Building an Effective Capabilities Statement
- How to Prepare for Attendance at Direct Access Events
- How to be Procurement-Ready: Framework of Success Focused Training
  - Awareness – Insight regarding ongoing opportunities and regulatory guidance within VA acquisition and contract procurement processes
  - Risk Mitigation – Solutions to help minimize risks for both small businesses and the Federal Government
  - Access – Programs and resources for small businesses to market services to and engage with Procurement Decision Makers (PDM) and contracting professionals
  - Procurement Mechanisms – Details on contracting vehicles and contract types used in the Federal acquisition of products and services
  - Performance – Tools and operations used to help small businesses document contract performance

- Navigating FedBiz Ops
- How to respond to a Request for Information and Request for Proposal
- Understanding Subcontracting
- Navigating VA's Forecast of Contract Opportunities
- How to take advantage of Construction Opportunities using the Strategic Capital Investment Planning

Additional modules were tailored for Women-Owned Veteran-Owned Small Businesses and Veteran HUBZone firms.

OSDBU staff conducted two training sessions at the NVSBE during the first quarter of FY 2018. Over 1,800 VOSBs attended this event held in St. Louis, Missouri December 5-7, 2017. OSDBU's two sessions covered "How to Build a Capability Statement that Showcases your Company's Abilities" and a Center for Verification and Evaluation Town Hall on SDVOSB and VOSB verification. Additionally, other VA organizations provided training sessions with OSDBU assistance. Examples included the following:

- Kingdomware, Tiered Evaluation, Fair and Reasonable Pricing
- The Medical/Surgical Prime Vendor Program
- Veterans Enterprise Contracting for Transformation and Operational Readiness

Tailored virtual training sessions were offered to both small businesses and contracting personnel before attending the 2017 NVSBE. The following modules helped ensure attendees were prepared to take full advantage of the matchmaking opportunities at the event:

- Success at 2017 NVSBE for Small Businesses
- Procurement Decision Makers (PDM) – Maximize Your Benefit at Direct Access Events
- Success at 2017 NVSBE for PDMs

Overall, in FY 2018, OSDBU trained over 7,000 unique SDVOSB and VOSB firms using the virtual webinar modality. The actual number of participants who attended the OSDBU training sessions was much higher, but the training systems recorded unique firms and not individual attendance. Based on feedback, this virtual format improved affordability for SDVOSB and VOSB participants by delivering time-efficient, cost-effective training. Accordingly, VA staff optimized service to our SDVOSB and VOSB customers without incurring travel costs.

Training for Small Businesses and Contracting Personnel	0.09%
Travel (All)	0.2%
Travel in Support of Training for Small Businesses and Contracting Personnel	0.01%

Figure 1. Outlays for Training and Travel as Percentage of Total OSDDBU Outlays, FY 2018.

***New Reporting Requirement: Small Business Act Compliance (Section 15(k)(16)(D))***

---

Congress has added a new requirement beginning in the FY 2018 report to ensure that each agency reports any failure of the agency to comply with sections 8, 15, 31, or 36 of the Small Business Act. VA has identified three areas of concern that are applicable to these sections. The first is related to sections 8(m) and 31 dealing with meeting goals for Women-Owned Small Business (WOSB) and Historically Underutilized Business Zone (HUBZone) categories. The second deals with the assignment and supervision of Small Business Technical Advisors, and the third area concerns the Simplified Acquisition Threshold (SAT) set-aside requirements.

Due to VA's specific requirement to comply with 38 U.S.C. 8127 establishing the Veterans First contracting program, VA has been unable to meet the contracting goals established under the Small Business Act, sections 31 and 8(m). While VA complies with these sections, most requirements suitable for the HUBZone and Business WOSB also fall under VA's explicit priority to use Service-Disabled Veteran-Owned and Veteran-Owned Small Businesses (SDVOSB and VOSB). SBA has identified the issue of using specific SBA-approved North American Industrial Classification System (NAICS) codes for WOSB set-asides. In particular, SBA is concerned that some agencies may not be properly applying the correct set-aside to the proper NAICS. During FY 2018, SBA did not identify any specific instances of non-compliance with section 8(m) at VA, but VA is aware of this area of concern and will work with SBA to remediate any problems identified. This is less of a concern for VA because the Veterans First Program order of priority, validated by the Supreme Court decision in *Kingdomware Technologies v. United States* (2016), makes SDVOSB and VOSB set-asides a higher priority and our dominant methodology.

Another area of concern identified by VA is compliance with section 15(k)(7) and (8). These provisions require the OSDDBU Executive Director to assign Small Business

Technical Advisors (SBTA) to each office where SBA has assigned a Procurement Center Representative and to exercise supervisory authority over these personnel.

While OSDDBU has a collaborative relationship with the Small Business Liaison Officers, the Executive Director does not have supervisory authority over them (paragraph (7)). Although there are Small Business Specialists assigned to the procurement centers, the Executive Director of OSDDBU does not assign them (paragraph (8)). This is an issue identified by the Government Accountability Office (GAO) to which VA has agreed in principle and is working through the coordination process to implement.

Finally, VA has identified that procurements made under the SAT as another area of concern. VA's oversight of SAT transactions has been hindered by the lack of a standardized Government-wide procedure for measuring and assessing compliance. VA has conducted its own analysis of awards in this range and discovered that the awards were unexpectedly low. To improve upon its performance, VA OSDDBU has provided guidance to ensure that Contracting Officers are aware of the set-aside requirements and has set goals to improve the consistency of the application of the set-aside criteria.

### ***Summary***

---

During FY 2018, OSDDBU relied on training to small businesses and contracting personnel through virtual delivery of webinars. This enabled OSDDBU to reach a broader audience than was possible through in-person events while minimizing costs to the taxpayer.

Ninety-seven percent of OSDDBU's total training events during FY 2018 were provided virtually without travel costs to the Government or participants. The cost to provide training to small businesses and contracting personnel remained below one-tenth of one percent of total OSDDBU obligations. As a result of OSDDBU's use of the virtual training format, travel costs were one hundredth of one percent of OSDDBU's total budget.

VA plans to continue to review its execution of Small Business Act requirements and work with SBA for practicable solutions. The Veterans First order of priority makes reaching WOSB and HUBZone goals difficult when firms from these categories are not also SDVOSBs or VOSBs. The SBTAs were also identified as an area of concern by the GAO, and VA is currently working to solve this issue. Finally, we believe that VA OSDDBU's guidance will improve compliance with set-asides under the SAT.



UNITED STATES OFFICE OF PERSONNEL MANAGEMENT  
Washington, DC 20415

Office of Small and  
Disadvantaged  
Business Utilization

March 11, 2019

**SUBJECT: U.S. Office of Personnel Management’s OSDBU Training and Travel Report FY18**

**15 U.S. Code § 644 - Awards or contracts**

(k)

(16) shall submit, each fiscal year, to the Committee on Small Business of the House of Representatives and the Committee on Small Business and Entrepreneurship of the Senate a report describing—

(A) the training provided by the Director under paragraph (13) in the most recently completed fiscal year (see paragraph 13 below);

(B) the percentage of the budget of the Director used for such training in the most recently completed fiscal year; and

(C) the percentage of the budget of the Director used for travel in the most recently completed fiscal year; and

(13) may provide training to small business concerns and contract specialists, except that such training may only be provided to the extent that the training does not interfere with the Director carrying out other responsibilities under this subsection;

**Required FY 2018 Annual Report**

Agency: U.S. Office of Personnel Management (OPM)

**(16)(A)**

During fiscal year 2018 OPM’s OSDBU created and branded the “Stay Ready” Small Business Series & Conference. Stay Ready Series is a series of tough-love workshops designed to provide the elements missing to strengthen and position small business owners. The Stay Ready Series focused on the following training workshops:

- |                      |  |               |
|----------------------|--|---------------|
| 1. November 16, 2017 | Ins & Outs of Teaming Agreements               | Roy Conley    |
| 2. December 14, 2017 | Primed to Win Big / Jump Start to FY18 Success | Judy Brandt   |
| 3. January 17, 2018  | Subcontract Agreements for Small Businesses    | Rebecca Kehoe |



OPM's Stay Ready Small Business Conference April 24-26, 2018 Atlanta, GA

**(16)(B)**

Since the training outlined in (16)(A) was conducted in federal government space, the only cost involved was preparation of the training materials and training support valued at \$39,000. Out of the total OPM OSDBU budget of \$427,277 the \$39,000 used for training represents 9.15% of the total budget.

**(16)(C)**

The OPM OSDBU spent \$22,000 for out of town business travel in FY 2018 for OSDBU and procurement staff to participate in a variety of small business outreach events throughout the country. Out of the total OPM OSDBU TRAVEL budget of \$22,000 all funding was utilized.  $\$22,000/\text{Total OSDBU Budget} = 5.15\%$



Desmond A. Brown  
Director  
Office of Small & Disadvantage Business Utilization  
Office of Personnel Management



February 14, 2019

Mr. Robb Wong, Associate Administrator  
Office of Government Contracting and Business Development  
U.S. Small Business Administration  
409 3rd Street, SW, Suite 8000  
Washington, DC 20024

Dear Mr. Wong:

The U.S. General Services Administration (GSA) is pleased to provide the enclosed fiscal year (FY) 2018 Training and Travel Report.

This submittal outlines the training and travel requirements that have been established by the Office of Small Business Utilization's Director in accordance with Section 15 of the Small Business Act (15 U.S.C. 644), Subsection (k), for small business concerns and contract specialists associated with GSA.

We would welcome any follow-up discussion regarding our small business and acquisition personnel training. Please feel free to contact me at [charles.manger@gsa.gov](mailto:charles.manger@gsa.gov) or (202) 969-7086.

Sincerely,

A handwritten signature in blue ink, appearing to read "Charles S. Manger", with a long horizontal flourish extending to the right.

Charles S. Manger  
Associate Administrator  
Office of Small Business Utilization  
General Services Administration

U.S. General Services Administration  
1800 F Street, NW  
Washington, DC 20405-0002  
[www.gsa.gov](http://www.gsa.gov)

**Response to: In accordance with Subsection (k) of section 15 of the Small Business Act (15 U.S.C. 644) training to small business concerns and contract specialists, except that such training may only be provided to the extent that the training does not interfere with the Director carrying out other responsibilities under this subsection.**

**A. Training for small business and acquisition staff:**

General Services Administration (GSA) Office of Small Business Utilization (OSBU) hosted at least 338 events advocating for more than 71,400 small businesses throughout the country in 2018. GSA OSBU updated its 2018 training to not only include in-person events but also virtual training classes that included GSA, SBA, and other advocacy groups. GSA OSBU also redesigned its website so that the information small businesses need to access is in one location ([www.gsa.gov/smallbiztraining](http://www.gsa.gov/smallbiztraining)). GSA will continue to utilize Twitter and Interact while looking at new communication resources as they become available to stay connected in the modern network. GSA OSBU is posting information through weekly blogs that share news, events, information on procurement opportunities, and policy changes that affect small businesses.

During FY 2018, GSA OSBU continued to provide robust training to the Acquisition Workforce and the GSA Small Business Technical Advisors. Highlights involved conducting internal trainings to the entire GSA acquisition workforce on the following topics: GSA Forecast tool, Mentor-Protégé Program, Subcontracting and eSRS, HUBZone and the 8(a) Partnership Agreement. As a result, our acquisition workforce has a robust and elevated education regarding utilization of small businesses in both routine and very complex procurements.

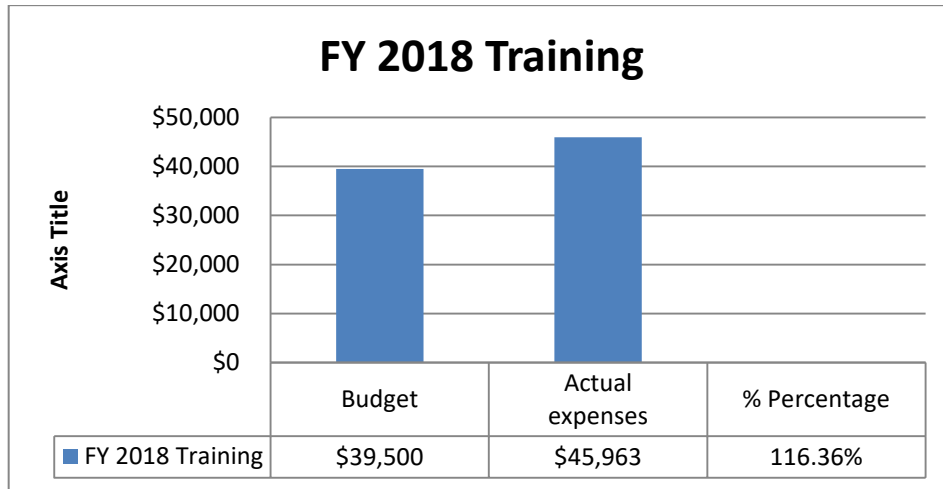
GSA also provided specific training in many other areas such as:

- Contracting Officer Training Subcontracting (Pre-Award and Post Award)
- How to Review ISRs and SSRs in eSRS
- How to Get on GSA Schedule
- Federal Strategic Sourcing Initiative
- How to Market Your Small Business
- How to Identify Federal Contracting Opportunities
- Category Management

**B. The percentage of the budget of the Director used for such training in the most recently completed fiscal year**

GSA OSBU's FY 2018 training budget totaled \$39,500 and \$45,963 (116.36 percent of the budget) was spent for training.

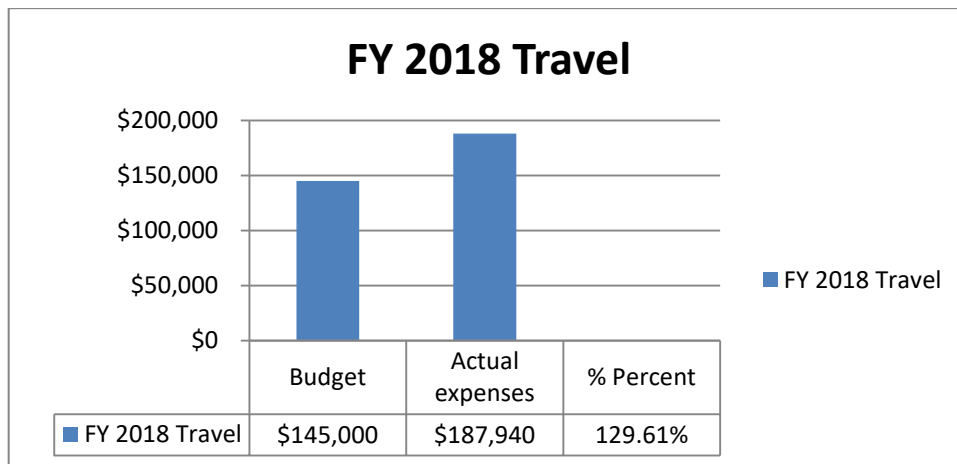
<b>FY 2018</b>	<b>Budget</b>	<b>Actual Expenses</b>	<b>% Percentage</b>
Training	\$39,500	\$45,963	116.36%



**C. The percentage of the budget of the Director used for travel in the most recently completed fiscal year**

GSA OSBU's FY 2018 travel budget totaled \$145,000 and \$187,940 (129.61 percent of the budget) was spent for training.

<b>FY 2018</b>	<b>Budget</b>	<b>Actual Expenses</b>	<b>% Percentage</b>
Travel	\$145,000	\$187,940	129.61%



MEMORANDUM FOR SMALL BUSINESS ADMINISTRATION

SUBJECT: Department of Defense Annual Report on Travel and Training for Fiscal Year 2018

Pursuant to 15 U.S. Code § 644(k), the Department of Defense (DoD) Office of Small Business Programs (OSBP) is providing a report on the Office's training and travel for FY18.

(k)

(16) Shall submit, each fiscal year, to the Committee on Small Business of the House of Representatives and the Committee on Small Business and Entrepreneurship of the Senate a report describing—

(A) The training provided by the Director under paragraph (13) in the most recently completed fiscal year (see paragraph 13 below);

(B) The percentage of the budget of the Director used for such training in the most recently completed fiscal year; and

(C) The percentage of the budget of the Director used for travel in the most recently completed fiscal year; and

(13) May provide training to small business concerns and contract specialists, except that such training may only be provided to the extent that the training does not interfere with the Director carrying out other responsibilities under this subsection;

Please find DoD OSBP's response below.

Required FY 2018 Annual Report

Agency: Department of Defense (DoD)

(16) (a) The DoD OSBP conducted two major training events in FY18. The first training event was the Small Business Training Week in New Orleans, Louisiana. This event trained small business professionals within the government to better equip them with the skills necessary to assist small businesses in engaging federal contracting opportunities. The second event was SBIR/STTR-Mentor Protégé joint training week in Tampa, Florida. This event provided small businesses with information on best practices for federal contracting and on the SBIR, STTR, and DoD Mentor Protégé programs.

(16) (b) The cost of the first event was \$227,084. The cost of the second event was \$74,000. Out of the total DoD OSBP operating budget (~\$4 million), the \$301,084 used for training represented 7.52% of the total budget.

(16) (c) In addition, the Director of OSBP participated in a number of events in FY18 to train both small business and small business professionals within the government. These trainings focused on improving small businesses' understanding of and capability to successfully find, compete for, and execute government contracts. The Director traveled to take part in nine events in FY18 (listed below) for a total cost of \$15,651.80. This cost represents 0.39% of the total DoD OSBP operating budget (~\$4 million). A detailed outline of the travel is charted below.

Start Date	End Date	Travel Location	Cost	Description
11/14/2017	11/17/2017	Pittsburgh, PA	\$1,437	Keynote address to Society of Military Engineers
01/30/2018	01/31/2018	Nashville, Tn.	\$683.18	National 8(a) Association Small Business Conference Speaker
3/6/2018	3/9/2018	Tampa, FL	\$1,270	SB Directors training and coordination
4/23/2018	4/27/2018	New Orleans, LA	\$1,400	Small Business Training Week 2018 (Speaker, Panel Member, Planner)
5/1/2018	5/3/2018	Southbridge, MA	\$631	Human Capital Initiatives training
5/16/2018	5/18/2018	Huntsville, AL	\$1,190	Keynote presentation at the Missile Defense Conference
05/21/2018	05/23/2018	Tampa, Fl.	\$1621.73	SOFIC Conference (Speaker/Panel)
5/30/2018	6/1/2018	Sandusky, OH	\$930	Keynote presentation at Ohio Defense Procurement Summit
6/20/2018	6/22/2018	Columbus, OH	\$950	Keynote presentation at the Defense Logistics Agency Land & Maritime Conference
08/12/2018	08/17/2018	Orlando, Fl.	\$2400	BPII/Mentor Protégé Training Week (Speaker, Panel Member, Planner)
09/04/2018	09/06/2018	Birmingham, Al.	\$1294.75	DOL Apprenticeship Program Discussion at Stillman College (Speaker)
09/24/2018	09/27/2018	Chicago, Il	\$1889.14	DMDII Cybersecurity Forum (Speaker, Panel)
		TOTAL:	\$15,651.80	

Shannon C. Jackson  
Acting Director, DoD Office  
of Small Business Programs



# U.S. DEPARTMENT OF **ENERGY**

## **Fiscal Year 2018 Agency Travel and Training Report**

**U.S. DEPARTMENT OF ENERGY**  
**Office of Small and Disadvantaged Business Utilization**

**FY 2018 Agency Training and Travel Report**

The Department of Energy (DOE) Office of Small and Disadvantaged Business Utilization (OSDBU) Fiscal Year 2018 Agency Travel and Training Report is hereby submitted to the U.S. Small Business Administration in accordance with Subsection (k) of section 15 of the Small Business Act (15 U.S.C 644) and as requested in support of the referenced Small Business Act.

The DOE hosted and supported a wide variety of training opportunities to the Agency staff, which included government employees, contractor staff and other employment categories in support of DOE's mission and consistent with the criteria as outlined in Subsection (k) of Section 15 of the Small Business Act (15 U.S.C 644) and other training opportunities beyond the scope of the Small Business Act.

**As required by the reporting requirements** (In accordance with Subsection (k) of section 15 of the Small Business Act (15 U.S.C 644):

**(A) the training provided by the Director under paragraph (13) in the most recently completed fiscal year;**

In support of the paragraph (A) above, the OSDBU Director provided the following training directly to Small Business Program Managers (SBPMs), OSDBU staff, DOE Goaling submitters, Small Businesses and other attendees as per the invitations:

1. **Small Business Program Monthly Meeting:** These meetings were held throughout the fiscal year with invitations to all DOE small business program managers (SBPMs), and shared with contracting officers, DOE Goaling submitters and other DOE staff members who have a vested interest in the subject matter. The purpose of these training meetings was to provide tools, information and updates concerning small business laws and regulations, small business prime and subcontracting goals and achievement updates, DOE Goaling process, small business outreach opportunities, and other important information concerning small business. Copies of the agendas can be made available upon request.
2. **Additional training was provided as listed below:**
  - a. Provided Small Business outreach and development through approximately 129 events.
  - b. October 1, 2017-September 30, 2018: The OSDBU provided one-on-one development of small businesses on how to do business with DOE.
  - c. May 23-24, 2018: SBPMs met for a one day training meeting following the Annual DOE Small Business Forum & Expo in Houston, TX.
  - d. Ad hoc sessions with internal stakeholders.



**U.S. DEPARTMENT OF ENERGY**  
**Office of Small and Disadvantaged Business Utilization**

**FY 2018 Agency Training and Travel Report**

**(B) The percentage of the budget of the Director used for such training in the most recently completed fiscal year:**

In support of paragraph (B) above, the OSDBU Director provided 1.34% of the office budget towards training during Fiscal Year 2018.

**(C) The percentage of the budget of the Director used for travel in the most recently completed fiscal year:**

In support of paragraph (C) above, the OSDBU Director provided 3.133% of the office budget towards travel during Fiscal Year 2018. In support of paragraph (B) above, the OSDBU Director provided 1.34% of the office budget towards training during Fiscal Year 2018.

**Agency Information:**

U.S. Department of Energy  
Office of Small and Disadvantaged Business Utilization  
1000 Independence Avenue, SW  
Washington, DC 20585

**Review, Accepted and Submitted by:**



Charles R. Smith

Director

Office of Small and Disadvantaged Business Utilization  
U.S. Department of Energy

02/05/19  
\_\_\_\_\_  
Date

***Fiscal Year 2018  
Training and Travel Report***

***Submitted by  
Office of Small and Disadvantaged Business Utilization***

***March 14, 2019***

## **Fiscal Year 2018 Small Business Training and Travel Report**

The Office of Small and Disadvantaged Business Utilization (OSDBU) of the U.S. Environmental Protection Agency (EPA) is pleased to submit this report providing the Fiscal Year (FY) 2018 training and travel information required under Section 15(k)(16) of the Small Business Act, 15 U.S.C. § 644(k)(16). In particular, Section 15(k)(16) requires the OSDBU Director for each agency to submit an annual report describing the following:

- (A) Training provided by the OSDBU Director for the most recently completed FY;
- (B) Percentage of the budget of the OSDBU Director for this training in the most recently completed FY; and
- (C) Percentage of the budget of the OSDBU Director for travel in the most recently completed FY.

As reflected below, in carrying out the OSDBU functions under Section 15(k) of the Small Business Act, the EPA OSDBU has provided effective procurement training to small business concerns and the EPA contracting community. The EPA OSDBU has worked in partnership with EPA officials to identify potential training needs to maximize the understanding of small business requirements and to enhance small business participation in EPA procurements. The training has included EPA participation in government-wide small business training conferences and various OSDBU-hosted training events targeting various categories of small businesses. Further, to effectively leverage EPA resources, OSDBU funded the participation of EPA regional small business coordinators in local training events.

### **Training Provided (Section 15(k)(16)(A)) of the Small Business Act**

During FY 2018, OSDBU funded the following training events, which included outreach to small businesses on doing business with the EPA:

- Annual Government Procurement Conference;
- National Veteran Small Business Engagement Conference;
- HUBZone Summit;
- EPA Region 3 ChallengeHER Conference;
- OSDBU Women-Owned Small Business Counseling Session;
- OSDBU Service-Disabled Veteran-Owned Small Business Counseling Session;
- OSDBU HUBZone Small Business Counseling Session;
- EPA Environmental Counseling Session;
- Annual Department of Energy Small Business Forum & Expo;
- Contractor-led training on governing small business contracting requirements for the entire EPA acquisition community, including contracting and program officials;
- Record of Procurement Request (EPA Form 1900-37) Form Training; and
- Ask the Direct National Procurement Program Manager Training.

**Percentage of Training Budget (Section 15(k)(16)(B) of the Small Business Act)**

During FY 2018, the EPA OSDBU spent approximately \$12,792 on the above training events for small businesses and the internal EPA contracting community. Out of the total EPA OSDBU budget of \$2,374,000, the \$12,792 expended on training represents .0054% of the total EPA OSDBU budget. This \$2.374 million dollar budget is based on EPA's two-year appropriations for FY 2018/19 and includes the appropriations for EPA's Asbestos and Small Business Ombudsman Program, which is required to be carried out as part of EPA's OSDBU, under Section 507(d) of the 1990 Clean Air Act Amendments.

**Percentage of OSDBU Director Budget used for Travel (Section 15(k)(16)(C) of the Small Business Act)**

In FY 2018, the EPA OSDBU expended a total of \$20,455 for out-of-town business travel, including the travel for OSDBU staff and EPA Regional Small Business Coordinators, to participate in a variety of small business training and outreach events. This amount represents .0086% of the total EPA OSDBU budget of \$2,374,000.



**(k) Office of Small and Disadvantaged Business Utilization; Director**

In accordance with Subsection (k) of section 15 of the Small Business Act (15 U.S.C. 644): There is hereby established in each Federal agency having procurement powers an office to be known as the "Office of Small and Disadvantaged Business Utilization". The management of each such office shall be vested in an officer or employee of such agency, with experience serving in any combination of the following roles: program manager, deputy program manager, or assistant program manager for Federal acquisition program; chief engineer, systems engineer, assistant engineer, or product support manager for Federal acquisition program; Federal contracting officer; small business technical advisor; contracts administrator for Federal Government contracts; attorney specializing in Federal procurement law; small business liaison officer; officer or employee who managed Federal Government contracts for a small business; or individual whose primary responsibilities were for the functions and duties of section 637, 644 or 657q of this title. Such officer or employee—

**(13)** may provide training to small business concerns and contract specialists, except that such training may only be provided to the extent that the training does not interfere with the Director carrying out other responsibilities under this subsection;

**(16)** shall submit, each fiscal year, to the Committee on Small Business of the House of Representatives and the Committee on Small Business and Entrepreneurship of the Senate a report describing—

**(A)** the training provided by the Director under paragraph (13) in the most recently completed fiscal year;

In FY18, internal training was provided to Center Small Business Specialists (SBSs), Program/Technical and Acquisition personnel during an internal agency session. In addition, training was provided at local Chamber of Commerce events, Regional Outreach Events and HBCU/MSI Technology Infusion Road Tours.

**(B)** the percentage of the budget of the Director used for such training in the most recently completed fiscal year; and

In FY18, the percentage of the program budget used for training was 7.35%.

**(C)** the percentage of the budget of the Director used for travel in the most recently completed fiscal year;

In FY18 the percentage of the program budget that the NASA OSBP Associate Administrator used for travel was 0.57%.

**U.S. Agency for International Development (USAID)**  
**Fiscal Year (FY) 2018 Report on**  
**Small and Disadvantaged Business Training and Travel**

**Introduction**

The U.S. Agency for International Development (USAID) submits this report pursuant to Section 1691(c) of Public Law 112-239, which amended the Small Business Act, which requires a report to detail: “the training provided by the Director [of the USAID Office of Small and Disadvantaged Business Utilization]...in the most recently completed fiscal year; and the percentage of the budget of the Director used for travel in the most recently completed fiscal year.”

The Small Business Act requires training and education for Agency staff who are involved in the procurement process. The law emphasizes that training on small business programs is essential to ensure that acquisition and technical officials fully understand regulatory requirements, and that U.S. small businesses have maximum practicable opportunities to participate in USAID procurements.

For Fiscal Year 2018, preliminary data indicates that the Agency obligated 14.01% percent of its contracts dollars to U.S. small businesses, which exceeded the Agency goal of 12 percent. This equates to \$685.5 million, and marks the highest percentage and the amount of contract dollar obligations the Agency has ever awarded to U.S. small businesses within a single Fiscal Year.

**Overview of Training Provided**

In Fiscal Year 2018, USAID’s Office of Small and Disadvantaged Business Utilization (OSDBU) provided training sessions to educate 202 program and contracting officials on U.S. Small Business Programs. USAID conducted one training session in Washington, D.C., two sessions at the USAID Mission in Pakistan and one session each in Zambia, Malawi, Jordan, Ukraine and Kosovo. The training sessions included USAID’s small business utilization goals; the impact of U.S. small business utilization on the U.S. economy; statutory and regulatory requirements; market research; subcontracting; and contract bundling.

During visits to each overseas Mission, the OSDBU Director conducted briefings for the Mission Director, Deputy Mission Director, Office Directors, and other senior managers. Working level meetings were held with the mission’s Office of Acquisition and Assistance as well as the technical offices to discuss potential opportunities for small business engagement. Training sessions coupled with the senior and working level briefings have resulted in broader awareness of the small business program and its requirements; earlier exchanges of information with acquisition officials; and an increase in prime and subcontracting awards for small businesses.

## **Training Expenses**

In Fiscal Year 2018, USAID utilized a small business contractor with professional instructors to provide the training sessions. Our contract expenditures for the training sessions were \$111,037 inclusive of travel related costs of \$13,744 for instructor costs. OSDBU's Fiscal Year 2018 operational expense budget was \$263,000. Therefore, 42.2% of OSDBU's operational expense budget was utilized to provide small business programs training in Fiscal Year 2018.

At the end of Fiscal Year 2017, the contract expenditures for the training sessions were approximately \$98,541. The OSDBU training expenses for Fiscal Year 2018 represents an increase of approximately 13 percent from Fiscal Year 2017.

## **Training Related Travel Expenses for the OSDBU Director**

In Fiscal Year 2018, the OSDBU Director incurred \$17,495 in travel expenses to carry out OSDBU's small business outreach requirements and coordinate with senior USAID officials stationed in Pakistan, Zambia, Malawi, Jordan, Ukraine and Kosovo. This travel expense equates to 6.7 percent of OSDBU's Fiscal Year 2018 operational expense budget.

At the end of Fiscal Year 2017, the travel expenses were \$23,724. The OSDBU training expenses for Fiscal Year 2018 represents a decrease of approximately 35 percent from Fiscal Year 2017.