



**Small Business  
Procurement Advisory  
Council (SBPAC)  
Report to Congress  
Fiscal Year 2017  
February 5, 2019**

The Small Business Procurement Advisory Council (SBPAC) was established by Section 7104(b) of the Federal Acquisition Streamlining Act of 1994 (15 U.S.C. 644 note). The SBPAC is required by Section 7104(b)(5) to submit an annual report to the Committee on Small Business of the House of Representatives and the Committee on Small Business and Entrepreneurship of the Senate. The annual report must include:

1. Comments submitted by SBPAC members to appropriate regulatory authorities reflecting positions on proposed procurement regulations affecting the small business community during the 1-year period ending on the date on which the report is submitted, including any outcomes related to the comments;
2. Results of reviews of each Office of Small and Disadvantaged Business Utilization (OSDBU) established under section 644(k) of the Small Business Act to determine the compliance of each Office with requirements under such section; and
3. Best practices identified for maximizing small business utilization in Federal contracting that may be implemented by Federal agencies having procurement powers during such 1-year period.

As the Chairman of the SBPAC, the Small Business Administration provides the annual report for Fiscal Year (FY) 2017.

During FY 2017, there were no comments submitted by SBPAC members to appropriate regulatory authorities reflecting positions on proposed procurement regulations affecting the small business community and consequently no reportable outcomes related to the comments.

For FY 2017, the SBPAC conducted peer reviews of each Office of Small and Disadvantaged Business Utilization established under section 644(k) of the Small Business Act to determine the

compliance of each Office with requirements using the FY 17 OSDBU Requirements Check List developed by SBA (Attachment A). The 22-page Compliance Worksheet allows the OSDBU Director to respond to 15 U.S.C. § 644(k) requirements in a "yes" or "no" question format. Also included, are short answer questions enabling the OSDBU Director to provide supportive documentation for Section 644(k) Code of Federal Regulations requirement. There are a total of 15 requirements for which a point value of 0.6 to 1 out of 1 is be awarded: 15(k) through 15(k)12, 15(k)15, and 15(k)16. Section 15(k)13 is scored only if this optional training occurred. Sections 15(k)14 and 15(k)17 are scored and awarded a 0.6 to 1-point value unless, respective to the question, the OSDBU Director receives no unsolicited proposals or notifications AND no policy / procedure is in place to manage such processes. If those two conditions apply in 15(k)14 and / or 15(k)17, the question(s) is not be scored.

The results of reviews of each agency OSDBU is summarized in Table 1(Attachment B) from agency responses on the checklist and the related SBPAC peer reviews of agency responses to 15 U.S. Code § 644(k) with a sample 15 U.S.C. § 644(k) Compliance Checklist summary (Figure 1) and a quick reference guide to the assessed 15 USC§ 644(k) subsections is provided in Table 2.





Figure 1

**15 U.S. Code § 644(k) FY 2017 Compliance Checklist**

	Requirement Title:	Statutory Reference:	Did Agency Satisfy Requirement? <i>(Column responses auto-populate from completed compliance worksheet)</i>
0)	Office and Director Experience	15(k)	___0.0___
1)	Director Title	15(k)1	___0.0___
2)	Compensation and Seniority	15(k)2	___0.0___
3)	Reporting (Head of Agency or Deputy Head)	15(k)3	___0.0___
4)	Implementation and Execution of Business Development and Federal Contracting Responsibilities of the Small Business Act	15(k)4	___0.0___
5)	Identify and Address Bundling of Contracts	15(k)5	___0.0___
6)	Provide Assistance on Payments	15(k)6	___0.0___
7)	Supervisory Authority	15(k)7	___0.0___
8)	Assign Small Business Technical Advisors	15(k)8	___0.0___
9)	OSDBU Cooperation and Consultation	15(k)9	___0.0___
10)	Recommendations to Contracting Officers	15(k)10	___0.0___
11)	Activity Conversion	15(k)11	___0.0___
12)	Advise CAO and SPE	15(k)12	___0.0___
13)	SBC and Contracting Specialist Training	15(k)13	<i>Optional (Not Mandatory) -</i> ___0.0___
14)	Receive Unsolicited Proposals	15(k)14	___0.0___
15)	Exclusive Duties and Title	15(k)15	___0.0___
16)	Congressional Reporting	15(k)16	___0.0___
17)	Respond to Undue Restriction Notifications	15(k)17	___0.0___
<b>TOTAL:</b>			+ ___0.0___

I, \_\_\_\_\_, as the \_\_\_\_\_ at \_\_\_\_\_ verify that this information is an accurate representation of my agency's compliance in FY 2017 with 15 U.S.C. § 644(k) and can, if requested, provide additional information to further corroborate responses.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Small Business Procurement Advisory Committee 15 U.S.C. § 644(k) Compliance Review  
Version: Jan-18-2018 (1)

Section I - Instructions	Section II - Compliance Checklist	Section III - Compliance Worksheet	15 U.S.C. § 644(k)
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TABLE 2 – Quick Reference Guide for 15 U.S. Code § 644(k) subsections

Subsection	Requirement
(k)	<p>Office of Small and Disadvantaged Business Utilization; Director</p> <p>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 <a href="#">637</a>, <a href="#">644</a>, <a href="#">657a</a>, <a href="#">657f</a>, or <a href="#">657q</a> of this title. Such officer or employee—</p>
(1)	<p>shall be known as the “Director of Small and Disadvantaged Business Utilization” for such agency;</p>
(2)	<p>shall be appointed by the head of such agency to a position that is a Senior Executive Service position (as such term is defined under <a href="#">section 3132(a) of title 5</a>), except that, for any agency in which the positions of Chief Acquisition Officer and senior procurement executive (as such terms are defined under <a href="#">section 657q(a) of this title</a>) are not Senior Executive Service positions, the Director of Small and Disadvantaged Business Utilization may be appointed to a position compensated at not less than the minimum rate of basic pay payable for grade GS–15 of the General Schedule under <a href="#">section 5332 of title 5</a> (including comparability payments under <a href="#">section 5304 of title 5</a>);</p>
(3)	<p>be responsible only to (including with respect to performance appraisals), and report directly and exclusively to, the head of such agency or to the deputy of such head, except that the Director for the Office of the Secretary of Defense shall be responsible only to (including with respect to performance appraisals), and report directly and exclusively to, such Secretary or the Secretary's designee;</p>
(4)	<p>be responsible for the implementation and execution of all of the functions and duties under sections 8, 15, 31, and 44 of the Small Business Act which relate to their agency;</p>
(5)	<p>Identified in the past fiscal year proposed solicitations that involve significant bundling of contract requirements; worked with agency acquisition officials and the Administration in the past year to revise procurement strategies for solicitations that involve significant bundling to increase the probability of participation by small businesses as prime contractors, or to facilitate small business participation as subcontractors and suppliers, if a solicitation for a bundled contract is to be issued; provided a brief example of a revised procurement strategy to mitigate the impact of significant bundling occurring in this past fiscal year. Provide statistics of significant bundling mitigation efforts;</p>
(6)	<p>in the past fiscal year assisted small business concerns to obtain payments, late payment interest penalties, or information due to such concerns from an executive agency or a contractor, in conformity with chapter 39 of title 31, or any other protection for contractors or subcontractors (including suppliers) that is included in the Federal Acquisition Regulation or any individual agency supplement to such Government-wide regulation;</p>

TABLE 2 – Quick Reference Guide for 15 U.S. Code § 644(k) subsections

Subsection	Requirement
(7)	shall have supervisory authority over personnel of such agency to the extent that the functions and duties of such personnel relate to functions and duties under sections 8 and 15 of this Act;
(8)	shall assign a small business technical adviser to each office to which the Administration has assigned a procurement center representative— (A) who shall be a full-time employee of the procuring activity and shall be well qualified, technically trained and familiar with the supplies or services purchased at the activity; and (B) whose principal duty shall be to assist the Administration procurement center representative in his duties and functions relating to sections 8 and 15 of this Act;
(9)	cooperate and consult on a regular basis with the Administration with respect to carrying out the functions and duties described in paragraph (4) of this subsection; describe the frequency and detail of efforts to consult and cooperate in execution of functions and duties as they pertain to sections 8, 15, 31, 36, and 44 of this Act;
(10)	make recommendations to Contracting Officers as to whether a particular contract requirement should be awarded pursuant to subsection (a), sections 8, 15, 31, or 36 of this Act, or section 2323 of title 10 United States Code, which shall be made with due regard to the requirements of subsection (m); have objective documentation that Contracting Officers document the official contract file for any failure to accept OSDDBU Director recommendation;
(11)	review and advise agency on any decision to convert an activity performed by a small business concern to an activity performed by a Federal employee;
(12)	provide to the Chief Acquisition Officer advice and comments on acquisition strategies, market research, and justifications related to section 44 of this Act; describe frequency and detail of efforts to provide the Chief Acquisition Officer advice and comments; provide Senior Procurement Executive of such agency advice and comments on acquisition strategies, market research, and justifications related to section 44 of this Act; describe the frequency and detail of efforts to provide the Senior Procurement Executive advice and comments;
(13)	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
(14)	receive unsolicited proposals and, when appropriate, forward such proposals to personnel of the activity responsible for reviewing such proposals;
(15)	shall carry out exclusively the duties enumerated in this Act, and shall, while the Director, not hold any other title, position, or responsibility, except as necessary to carry out responsibilities under this subsection; and
(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;



TABLE 2 – Quick Reference Guide for 15 U.S. Code § 644(k) subsections

Subsection	Requirement
(17)	<p>when notified by an SBC prior to award of a contract that the SBC believes that a solicitation, request for proposal, or request for quotation unduly restricts the ability of the SBC to compete for the award OSDBU Director submit the notice of the solicitation, request for proposal, or request for quotation may be altered to increase the opportunity for competition; when notified by an SBC prior to the award of a contract that the SBC believes that a solicitation, request for proposal, or request for quotation unduly restricts the ability of the SBC to compete for the award OSDBU Director inform the advocate for competition at the agency; when notified by an SBC prior to award of a contract that the SBC believes that a solicitation, request for proposal, or request for quotation unduly restricts the ability of the SBC to compete for the award OSDBU Director ensure that the small business concern is aware of other resources and processes available to address unduly restrictive provisions in a solicitation, request for proposal, or request for quotation, even if such resources and processes are provided by such agency, the Administration, the Comptroller General, or a procurement technical assistance program established under chapter 142 of title 10, United States Code;</p>

The SBPAC establishes a 2-year schedule for monthly best practice presentations to provide each agency with an opportunity to discuss agency best practices that were implemented by their agency and that might be implemented by other agencies having procurement powers. In FY 2017, SBPAC members provided nine best practice presentations for maximizing small business utilization in Federal contracting. A summary of the agency Best Practice presentations is provided in Table 3 and copies of the presentations are provided as an Enclosure to this report.

TABLE 3 – Agency Best Practice Presentation Summary		
AGENCY	PRESENTER	BEST PRACTICE(S)
Department of Veterans Affairs	Thomas J. Leney, Executive Director, OSDBU	<b>Strategy:</b> Visibility into Small Business Goals on Managers’ Desktops; Providing Drill-Down Capability into VA Components;  <b>VETS First Contracting Program:</b> Provides unique VA set-aside and sole source authority to SDVOSBs and VOSBs; Prohibits awards to unverified SDVOSBs or VOSBs; Requires priority to SDVOSBs first and VOSBs second before other small business programs (instead of parity); Requires Secretary to establish VA-specific SDVOSB and VOSB goals.
General Services Administration	Karen Pool, Acting Associate Administrator	<b>Leadership:</b> Administrator’s “Making it Easier” Initiatives; Commitment to small business subcontracting; <b>Strategy:</b> GSA Forecast Tool; Quarterly Forecast Review meetings; Small Business Goal Projections; Review and recommend approval on Consolidation Determination and Bundling Determinations; Small Business Compliance Reviews;
National Aeronautics and Space Administration	Glen Delgado, Director OSDBU	<b>Strategy:</b> NASA Industry Forum Initiative; HBCU/MSI Technology Infusion Initiative; Small Business Improvement Plan; <b>Outreach:</b> Regional Outreach Initiative; Jeffco EDC Aerospace and Defense Small Business Industry Day; Stairway to the Stars for Small Business;

TABLE 3 – Agency Best Practice Presentation Summary

AGENCY	PRESENTER	BEST PRACTICE(S)
U.S. Agency for International Development	Mauricio P. Vera, Director, OSDBU	<p><b>Strategy:</b> Acquisition planning and review activities; Market Research assistance, and outreach; set regional mission-level small business targets;</p> <p><b>Leadership:</b> Former Administrator supported Small Business Indicator to track small business accomplishments worldwide;</p> <p><b>Organization:</b> OSDBU Director reports directly to Deputy Administrator</p> <p><b>Outreach:</b> SB Conference, Overseas SB Conference; Bi-Monthly SB Vendor Outreach Sessions; Industry Days and Pre-Proposal Conferences; Subcontracting Forum for Prime Contractors; and Veterans Int’l SB Opportunities Conference;</p>
Department State	George Price Director, OSDBU	<p><b>Systems:</b> Electronic Acquisition Review Form for streamlining processing; Sharepoint Site track small business firms matching unique DoS requirements such as overseas work permits and facilities clearances; Small Business inquiry routing to next available Analyst for efficiency;</p> <p><b>Strategy:</b> Monthly Goaling Reports and Order of Preference to drive agency commitment; Leverage DoS Strategic Sourcing;</p> <p><b>Outreach:</b> Industry Days; Outreach Events; and Vendor Meetings;</p>
Department of Agriculture	Michelle Warren, Deputy Director, OSDBU	<p><b>Organization:</b> OSDBU reports directly to the Deputy Secretary;</p> <p><b>Leadership:</b> Small Business performance briefings with Administrators and Under Secretaries discuss/strategize about SB participation/goal performance;</p> <p><b>Outreach:</b> Monthly Vendor Outreach sessions; Bi-monthly Small Business Connections; Rural Small Business Outreach Events;</p> <p><b>Strategy:</b> Update Procurement Forecast twice a year; Communication of Small Business Marketing information to various agency business units; Coordination of subcontracting opportunity processes and results reporting; Inquiry and follow-up to COs and PMs for Procurement Forecast;</p>

TABLE 3 – Agency Best Practice Presentation Summary (continued)

AGENCY	PRESENTER	BEST PRACTICE(S)
Department of Transportation	Leonardo San Roman, Director, OSDBU	<p><b>Strategy:</b> Market Research assistance, monthly trainings; promote small business set-asides; promote use of SBA’s SBDS to find certified HUBZone firms; industry analysis to find current DOT small business firms and share information among DOT OAs; Coordination with SPE and HCAs to stress importance of meeting small business goals;</p> <p><b>Outreach:</b> Activities to increase number of small business concerns participating in DOT opportunities;</p>
Department of Treasury	Pamela Wilson, Acting Director, OSDBU	<p><b>Leadership:</b> Comprehensive reports disseminated weekly, SB goals attainment discussed monthly, and regular reviews conducted quarterly;</p> <p><b>Strategy:</b> Utilization of MACs (i.e. TIPPS, other Treasury MACs, FSS/GWACs);</p> <p><b>Systems:</b> Online tools on the internal portal to assist Treasury Staff in identifying small businesses;</p> <p><b>Outreach:</b> Sponsor and participate in events to target specific NAICS; collaboration with resource partners; Collaboration with PTAC to have more HUBZONE and SDVOSB at vendor outreach sessions;</p>
Environmental Protection Agency	Denise Sirmons, Director, OSDBU	<p><b>Leadership:</b> Administrator’s commitment to small businesses;</p> <p><b>Strategy:</b> agency-wide dashboard; Dynamic OSDBU intranet site central repository for small business contracting information and resources; dissemination of identified best practices in maximizing small business contracting opportunities; Vendor Profile Database;</p> <p><b>Outreach:</b> Informal monthly and formal quarterly networking events; Annual HUBZone Summit; Participation in other agencies’ outreach;</p>

**ENCLOSURE**

# VA Goals Management Best Practices

A Briefing to the

Small Business Procurement Advisory Council

January 23, 2017



U.S. Department  
of Veterans Affairs



# Impact of Health Care Contracts to Support VA Mission

Fiscal Year	Small Business		SDVOSB		VOSB	
	SBA Goal %	VA Actual %	Secretary's Goal %	VA Actual %	Secretary's Goal %	VA Actual %
2016	32.50	29.87*	10.0	17.8*	12.0	19.1*
2015	32.00	30.80	10.0	16.8	12.0	18.6
2014	34.77	34.42	10.0	18.7	12.0	21.0
2013	34.00	36.21	10.0	19.4	12.0	21.6
2012	34.00	35.01	10.0	19.2	12.0	21.8
2011	33.50	33.66	10.0	18.2	12.0	20.5
2010	33.50	37.35	10.0	20.0	12.0	23.1
2009	28.71	34.94	7.0	17.0	10.0	20.0
2008	28.71	35.32	7.0	11.8	10.0	14.9
2007	27.77	32.85	3.0	7.1	7.0	10.4
2006	27.77	28.71	3.0	3.6	7.0	6.2
2005	27.00	23.70	3.0	2.3	7.0	4.5

\*VA analysis of contract actions reported to the Federal Procurement Data System, January 12, 2017.



# Department of Veterans Affairs

## FY2015 Small Business Procurement Scorecard

**B****97.12%**

FPDS-NG Prime Contracting Data as of Feb. 20, 2016

eSRS Subcontracting Data as of Mar. 14, 2016

Prime Contracting Achievement:			79.38%
	2014 Achievement	2015 Goal	2015 Achievement
Small Business	34.42%	32.00%	30.80% (\$6.2 B)
Women Owned Small Business	3.42%	5.00%	2.96% (\$594.2 M)
Small Disadvantaged Business	8.35%	5.00%	7.46% (\$1.5 B)
Service Disabled Veteran Owned Small Business	18.71%	3.00%	16.81% (\$3.4 B)
HUBZone	1.50%	3.00%	1.69% (\$338.5 M)

Subcontracting Achievement:			7.88%
	2014 Achievement	2015 Goal	2015 Achievement
Small Business	18.60%	17.50%	17.70%
Women Owned Small Business	2.70%	5.00%	2.80%
Small Disadvantaged Business	2.60%	5.00%	2.90%
Service Disabled Veteran Owned Small Business	0.60%	3.00%	1.50%
HUBZone	0.40%	3.00%	0.50%





# Veterans First Contracting Program (38 U.S.C. 8127-28)

- Provides unique VA set-aside and sole source authority to SDVOSBs and VOSBs
- Prohibits awards to unverified SDVOSBs or unverified VOSBs under these authorities
- Requires priority to SDVOSBs first and VOSBs second, before other small business programs (instead of parity)
- Requires Secretary to establish VA-specific SDVOSB and VOSB goals

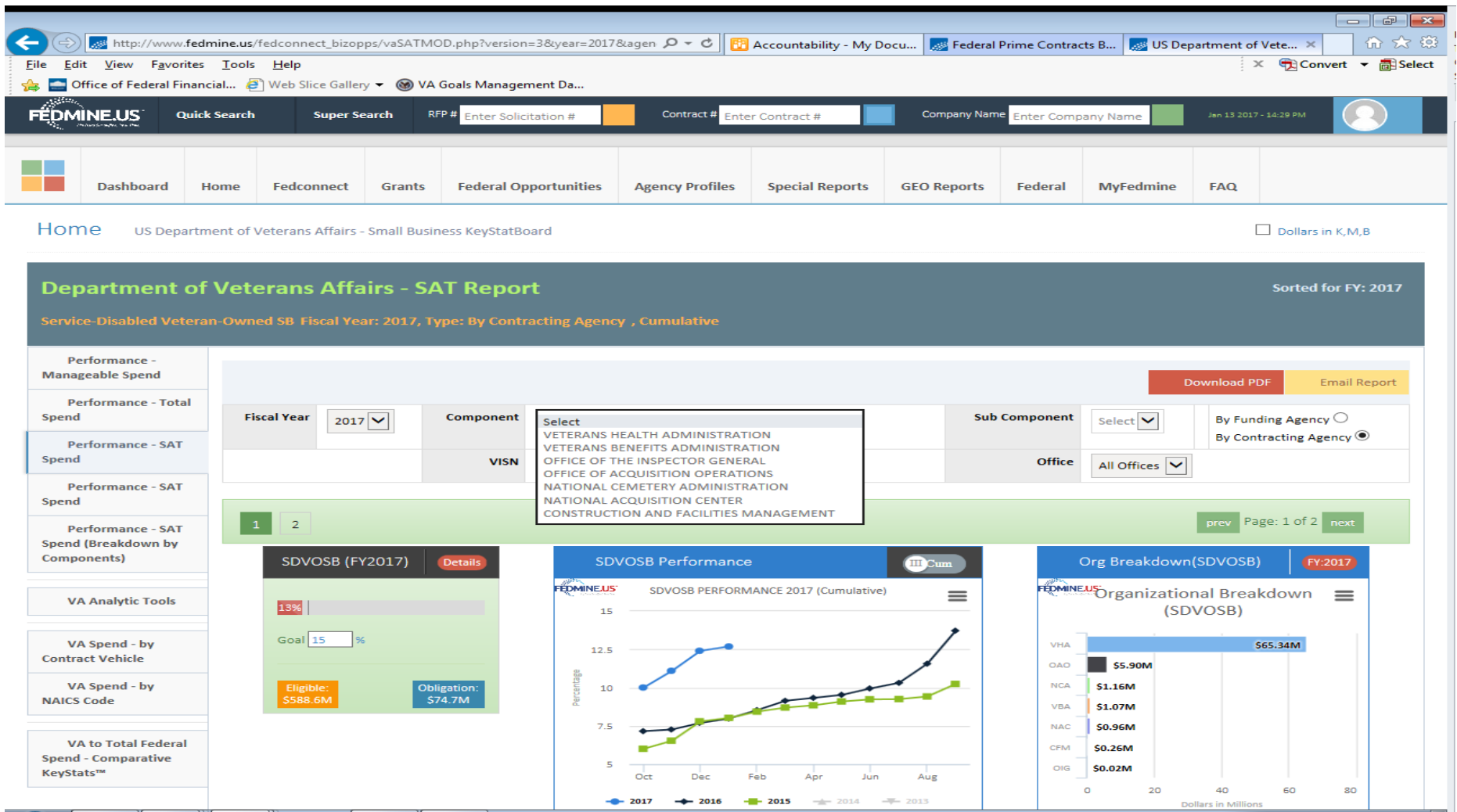


# *Kingdomware Technologies v. United States* (Supreme Court of the United States, June 16, 2016)

- Rejected VA argument that use of Veterans First authorities was tied to goal achievement
  - VA preference for SDVOSBs first and VOSBs second continues in effect regardless of meeting or exceeding those goals
- VA Rule of Two for set-asides applies to all competitive procurements, including Federal Supply Schedules
- Changes post-*Kingdomware*:
  - VA Procurement Policy Memorandum strengthens requirements for market research
  - Market research guide developed for program and acquisition personnel
  - OSDDBU Procurement Review Program requires review of any action not set-aside for SDVOSBs or VOSBs
  - Secretary's goal memorandum accepts Department-level responsibility for all SBA goals, but only SB, SDVOSB, and VOSB goals flow-down to VA components

# VA Goals Management System

## Putting Visibility into Small Business Goals on Managers' Desktops



The screenshot displays the VA Goals Management System interface. At the top, there is a navigation bar with options like 'Dashboard', 'Home', 'Fedconnect', 'Grants', 'Federal Opportunities', 'Agency Profiles', 'Special Reports', 'GEO Reports', 'Federal', 'MyFedmine', and 'FAQ'. Below this is a search bar with fields for 'RFP #', 'Contract #', and 'Company Name'. The main content area is titled 'Department of Veterans Affairs - SAT Report' and is sorted for FY: 2017. It shows a report for 'Service-Disabled Veteran-Owned SB Fiscal Year: 2017, Type: By Contracting Agency, Cumulative'. The report includes a table with columns for 'Fiscal Year', 'Component', 'Sub Component', and 'Office'. The 'Component' dropdown is set to 'VISN'. Below the table, there are two charts: 'SDVOSB Performance' (a line chart showing percentage performance from October to August for the years 2013-2017) and 'Org Breakdown (SDVOSB)' (a horizontal bar chart showing spend in millions for various VA components like VHA, OAO, NCA, VBA, NAC, CFM, and OIG). A sidebar on the left contains various tools and metrics, including 'Performance - Manageable Spend', 'Performance - Total Spend', 'Performance - SAT Spend', and 'VA Analytic Tools'.

# VA Goals Management System

## Providing Drill-Down Capability into VA Components

Browser: [http://www.fedmine.us/fedconnect\\_bizopps/vaSATMOD.php?version=3&year=2017&agen](http://www.fedmine.us/fedconnect_bizopps/vaSATMOD.php?version=3&year=2017&agen)

Accountability - My Docu... Federal Prime Contracts B... US Department of Vete... Convert Select

File Edit View Favorites Tools Help

Office of Federal Financial... Web Slice Gallery VA Goals Management Da...

Performance - Total Spend

Performance - SAT Spend

Performance - SAT Spend

Performance - SAT Spend (Breakdown by Components)

VA Analytic Tools

VA Spend - by Contract Vehicle

VA Spend - by NAICS Code

VA to Total Federal Spend - Comparative KeyStats™

Fiscal Year: 2017

Component: VETERANS HEALTH ADMINISTRATION

Sub Component: SAO East

Office: All Offices

By Funding Agency

By Contracting Agency

Download PDF Email Report

1 2

prev Page: 1 of 2 next

**SDVOSB (FY2017)** Details

12%  %

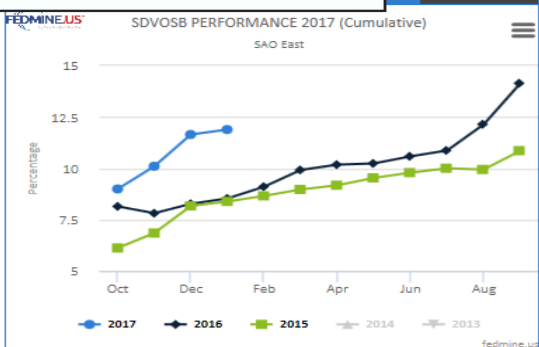
Eligible: \$193.7M Obligation: \$23.0M

**VOSB (FY2017)** Details

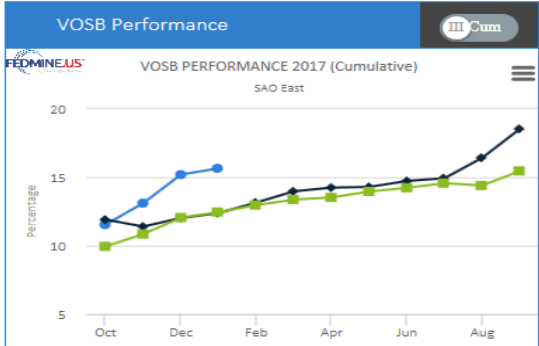
16%  %

Eligible: \$193.7M Obligation: \$30.3M

**SDVOSB PERFORMANCE 2017 (Cumulative)** SAO East



**VOSB PERFORMANCE** SAO East



**Org Breakdown(SDVOSB)** FY-2017 SAO East

VISN	Amount
VISN 4	\$4.79M
VISN 2	\$4.42M
VISN 8	\$3.47M
VISN 6	\$3.18M
VISN 7	\$2.71M
VISN 1	\$2.56M
VISN 5	\$1.69M
VISN 3	\$0.02M

**Org Breakdown(VOSB)** FY-2017 SAO East

VISN	Amount
VISN 6	\$5.53M
VISN 4	\$5.26M
VISN 2	\$5.01M
VISN 8	\$4.55M
VISN 7	\$4.52M
VISN 1	\$3.17M
VISN 5	\$2.01M
VISN 3	\$0.02M

Select

- VISN1 -VA New England Health Care System
- VISN2 -VA Healthcare Network Upstate New York
- VISN3 -NY/NJ Veterans Healthcare Network
- VISN4 -VISN4 network (PA, WV, DE, NJ, NY, OH)
- VISN5 -VA Capitol Healthcare Network
- VISN6 -VA Mid-Atlantic Health Care Network
- VISN7 -VA Southeast Network
- VISN8 -VA Sunshine Healthcare Network



# Information Resources

- VA Vendor Information Pages (VIP)
  - <https://www.vip.vetbiz.gov/>
- VA Business Intelligence Tool (VA BIT)
  - <https://vabit.mybusinessmatches.com/>
- VA Kingdomware Information
  - <https://go.usa.gov/xKsp5>
- VA NVSBE Information
  - <http://www.nvsbe16.com>
- OSDBU Web Site
  - <http://www.va.gov/OSDBU/>
    - Veteran Entrepreneur Portal (VEP)
      - <https://www.va.gov/osdbu/entrepreneur/index.asp>
    - Doing Business with VA Reference Guide
      - [https://www.va.gov/osdbu/docs/doingBusinessWithVA\\_ReferenceGuideFULL.pdf](https://www.va.gov/osdbu/docs/doingBusinessWithVA_ReferenceGuideFULL.pdf)
    - Procurement Readiness Reference Guide
      - [https://www.va.gov/osdbu/docs/procurementReadiness\\_FULL.pdf](https://www.va.gov/osdbu/docs/procurementReadiness_FULL.pdf)



# Contact

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(202) 461-4300



**U.S. General Services Administration**

# **Small Business Procurement Advisory Council Meeting**

## **Best Practices Presentation**

**Presenters:**

**Karen Poole, Acting Associate Administrator  
Nadine McCoy, Program Analyst**

**January 23, 2017**

# Office of Small Business Utilization (OSBU)

- Central Office, Washington, DC
- 11 Regional Offices:
  - Region 1 (Boston, MA)
  - Region 2 (New York, NY)
  - Region 3 (Philadelphia, PA)
  - Region 4 (Atlanta, GA)
  - Region 5 (Chicago, IL)
  - Region 6 (Kansas City, MO)
  - Region 7 (Ft. Worth, TX)
  - Region 8 (Denver, CO)
  - Region 9 (San Francisco, CA)
  - Region 10 (Auburn, WA)
  - Region 11 (Washington, DC)



# GSA Scorecard Achievements

## 4-year History

<b>Fiscal Year</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>
<b>Grade</b>	<b>A+</b>	<b>A</b>	<b>A</b>	<b>A+</b>

# GSA FY16 Preliminary Achievements To Date

## General Services Administration

<b>Prime Contracting Achievement</b>			
	<b>2015 Achievement</b>	<b>2016 Goal</b>	<b>2016 Achievement</b>
<b>Small Business</b>	44.16%	36.50%	39.15%
<b>Small Disadvantaged Business</b>	21.36%	5.00%	21.57%
<b>Women Owned Small Business</b>	9.30%	5.00%	9.37%
<b>HUBZone</b>	4.35%	3.00%	3.90%
<b>Service Disabled Veteran Owned Small Business</b>	4.79%	3.00%	5.28%

<b>Subcontracting Achievement</b>			
	<b>2015 Achievement</b>	<b>2016 Goal</b>	<b>2016 Achievement</b>
<b>Small Business</b>	26.30%	29.00%	26.52%
<b>Small Disadvantaged Business</b>	9.00%	5.00%	11.82%
<b>Women Owned Small Business</b>	6.90%	5.00%	5.80%
<b>HUBZone</b>	0.40%	3.00%	0.31%
<b>Service Disabled Veteran Owned Small Business</b>	0.70%	3.00%	0.80%

FPDS-NG Prime Contracting Data as of Jan. 3, 2017  
 eSRS Subcontracting Data as of Dec. 30, 2016

# GSA OSBU Organizational Structure

- Customer Care and Outreach
  - Prime/Subcontracting Small Business Development
  - Social Media and GSA OSBU Website
- Regional Small Business Management
  - Major Procurements and Schedules/PBS Capital Projects
  - Small Business Counseling/Events
  - Local Contracting Officer Support
- Policy and Forecasting
  - Subcontracting
  - Mentor Protégé-Program
  - Small Business Goals/Projections
  - Data Analysis
  - GSA Forecast of Contracting Opportunities
  - Forecast Tool
  - Acquisition Workforce Training
  - Policy Development

# **Successes & Best Practices Fiscal Year 2016**

# Office of Customer Care and Outreach

## Successes and Best Practices

- **Event Management:** Attend and Host events and meetings focused on small businesses to improve vendor awareness of programs provided through OSBU.
  - Host Spring, Summer, and Fall conferences focused on topics that would be most impactful to small businesses based on program performance.
- **Webinars:** Host monthly webinars to extend OSBU's reach to small business vendors and increase small business vendors' knowledge of the federal procurement processes. Hosted webinar topics include:
  - Becoming a GSA Schedule Vendor
  - Partnering for a Strategic Advantage
  - Understanding How to Access Procurement Opportunities
- **Social Media:** Use social media to improve GSA's Public Relations, manage customer expectations, and promote upcoming events along with highlighting how OSBU can help small businesses.
  - Between Twitter followers (5,100) and unique emails on both GovDelivery and Interact (19,536), we are reaching 24,636 recipients.
- **Standard Operating Procedures (SOPs):** Develop SOPs to standardize work flows and to improve program continuity.

# Office of Customer Care and Outreach

## Successes and Best Practices (Cont'd)

- **National Small Business Advocacy Program**
  - Launched a National Small Business Advocacy program that would include a 4-6 month cohort of 3-5 GSA employees to facilitate knowledge sharing and experimental learning among GSA's 1102 staff.
- **Satisfaction Surveys**
  - Surveyed internal and external customers to assess their satisfaction with OSBU's services and based on customer feedback made program adjustments to improve satisfaction scores in 2017.
- **"Making It Easier"**
  - Contributed to meeting the Administrator's "Making It Easier" initiatives by reaching out to small business vendors that were in danger of losing their GSA Schedule contract due to low sales and provided 1:1 counseling sessions to assist each business with maintaining their GSA Schedule contract.
- **Department of Veterans Affairs Non-Paid Work Experience (VRE) Program**
  - Utilized the VRE Program to fill talent gaps and reduce budget expenses related to FTEs.

# Policy and Forecasting

## FY 2016 Successes and Best Practices

- Small Business Compliance Reviews
- Small Business First Monthly Webinar Training
- Subcontracting Training
- Partnered with Acquisition Workforce to maximize small business participation in every procurement, engaged bi-weekly with GSA buying activities
- GSA Order APD 2800.12B, Change 77 issued to incorporate Consolidation and Bundling into the GSAM; revised Small Business Analysis Record, GSA Form 2689
- Review and recommend approval on Consolidation Determinations and Bundling Determinations

# Policy and Forecasting

## FY 2016 Successes and Best Practices Continued

- Small business participation included in source selection evaluation criteria
  - Templates and samples published
- Completed GSA OSBU Small Business Specialist Certification Program
- Developed GSA Forecast Tool and worked with developers to enhance product features
- Provided user training for the new GSA Forecast tool
- Provided deep dive analysis of Spend Data/Actionable Lists



# FY16 and FY17 Focus: Forecast Tool

- GSA Forecast Tool
- Quarterly Forecast review meetings
- Small Business Goal Projections

# GSA Forecast of Contracting Opportunities Tool

Acquisition Gateway | Hi, Nadine McCoy | About Us | Help | Sign Out

Showing 957 results of 957 | Rese | Share | 1 2 3 4 5 ... 39 » 25 50 100

## FORECAST OF CONTRACTING OPPORTUNITIES

Hide Disclaimer

Create Listing

Keyword Search

- Agency
  - General Services Administration
- Place of Performance
- Acquisition Strategy
- NAICS Code
- Projected Solicitation Quarter
- Contract Type

Results to CSV

### Welcome to the Forecast of Contracting Opportunities Tool!

The goal of this tool is provide a nationwide dashboard of upcoming federal contracting opportunities. All projected procurements are subject to revision or cancellation. Final decisions on the extent of competition, small business participation, estimated value, or any aspect of the procurement action will not be made until each procurement is posted to Federal Business Opportunities (FEDBIZOPPS). Forecast data is for planning purposes only and is not a commitment by the government to purchase the described products and services. Questions regarding a projected procurement should be addressed to the point of contact listed in the record. If you have any questions about the tool itself, contact us at [forecasthelp@gsa.gov](mailto:forecasthelp@gsa.gov).

#### GSAPBSRB Utah Operations and Maintenance/Custodial Services

Operations and maintenance, custodial and pest control services for federal buildings located in Salt Lake City, Ogden, and Provo, Utah

Listing ID: 6229	Agency: General Services Administration
Organization: PBS-Public Buildings Service	Award Status: Solicitation Issued
Place of Performance: Salt Lake City, UT	Type of Awardee: N
Minimum Value: \$5,000,000.00	Maximum Value: \$22,000,000.00
Contract Type: Firm Fixed Price	NAICS Code: 561210
Acquisition Strategy: Set-aside - Competitive 8(a) Program (Part of Small Disadvantaged Business)	Estimated Award Date (FY-QTR): 2017-2nd

[View Details](#)

#### Art in Architecture San Ysidro Land Port of Entry Phase 2

Art in Architecture San Ysidro Land Port of Entry 2

Listing ID: 6228	Agency: General Services Administration
Organization: PBS-Public Buildings Service	Award Status: Award Pending
Place of Performance: San Diego, CA	Type of Awardee:
Minimum Value: \$60,000.00	Maximum Value: \$60,000.00
Contract Type: Firm Fixed Price	NAICS Code: 711510
Acquisition Strategy: Set-aside - Total Small Business	Estimated Award Date (FY-QTR): 2017-2nd

[View Details](#)

#### Art in Architecture for the San Ysidro Land Port of Entry

# GSA Forecast Tool - Background

- Need for automated tool to eliminate manual, inefficient process
- Process allowed for high risk of error, duplication in data collection efforts, and outdated information
- OSBU and 18F collaborated to build automated Forecast tool
- Beta version of tool launched March 15, 2016
- Other agencies are encouraged to use this tool - let us know of your interest!

# GSA Forecast Tool – Benefits & Features

- Improved internal process
  - Flexibility to add/update information
  - Elimination of quarterly data calls
- Consistent information and improved data quality
- One automated tool used throughout the agency
- Focuses on acquisition planning
- Improved vendor communication and data transparency--Making It Easier (MIE) initiative
- Vendors can prepare market strategy before opportunities post in FedBizOpps
- Enhanced user experience
- One-stop-shop for agency Forecasts
  - Tool free for any agency looking for an automated process
  - Looking to be a pilot agency for this tool? Email [nadine.mccoy@gsa.gov](mailto:nadine.mccoy@gsa.gov) and [yolanda.johnson@gsa.gov](mailto:yolanda.johnson@gsa.gov)

# FY16 and FY17 Focus: Subcontracting and eSRS

- Enhance GSA leadership commitment to small business subcontracting
  - AAOSBU partnered with Service lines and issued memorandum in December
- Re-engineered training for the acquisition workforce advocating small business performance at the subcontracting level (Pre-Award and Post-Award)
- Increased ownership among contracting officers before award to increase small business participation in subcontracts
- Targeted messaging on status of eSRS reporting

# Contact Us

**U.S. General Services Administration  
Office of Small Business Utilization**

**1-855-OSBU-GSA  
[www.gsa.gov/sbu](http://www.gsa.gov/sbu)**

**Karen Poole  
Acting Associate Administrator  
[karen.poole@gsa.gov](mailto:karen.poole@gsa.gov)  
(202)694-2989**



Office of  
**Small Business Programs** (OSBP)  
where small business makes a **big** difference



David B. Grove, Program Manager

# NASA SMALL BUSINESS BEST PRACTICES

## SMALL BUSINESS PROCUREMENT ADVISORY COUNCIL (SBPAC) MEETING

October 25, 2016



# NASA Small Business Best Practices

- OSBP App
- NASA Industry Forum
- HBCU Roadshow
- SBIP
- Regional Outreach



# Office of Small Business Programs Mobile!

Developed so that small businesses and the general public can easily access information about NASA small business programs including:

- Latest News
- Metrics
- Active Contract Listings
- SBS Contact Information
- Events Calendar
- Small Business Quiz

*Available from the  
Apple iTunes store*





# *NASA Industry Forum Initiative*

- The NASA Industry Forum (NIF) is an Agency-wide endeavor to share Center level information that is of concern to both NASA and NASA's contractors.
- The NIF is comprised of contractor representatives from all NASA centers. Contractor representatives participate in Center-level non-consensus forum discussions at NIF meetings.
- The NIF includes representatives from both small and other-than-small businesses.
- The NIF is not expected to reach consensus decisions, nor to provide consensus advice or recommendations to the Agency.
- Centers recommend vendors that participate in their industry councils to the Office of Small Business Programs (OSBP) to participate in the NIF; and the Associate Administrator for Small Business Programs invites representatives from these recommendations to participate.



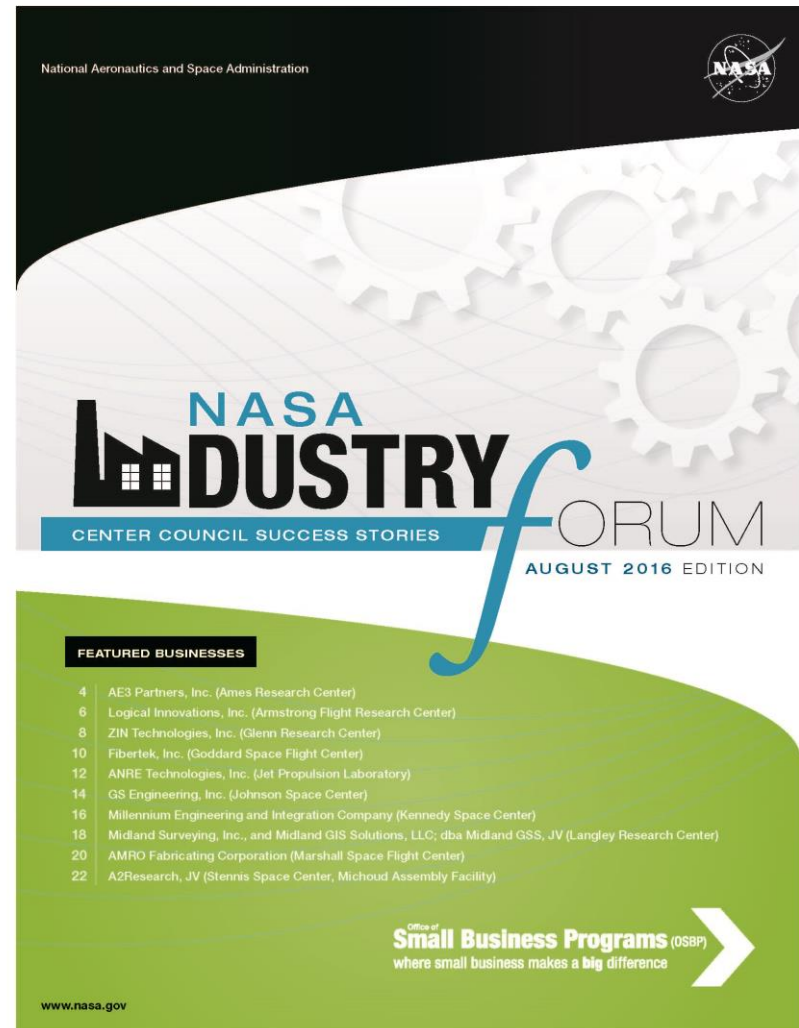
# *NASA Industry Forum Initiative Benefits*

## NIF Initiatives:

1. Help large businesses meet small business goals;
2. Help small businesses grow their business;
3. Provide NASA Procurement Specific Business FAR, SBA (regulation) updates to NIF;
4. Develop plans/ideas to assist Centers in meeting and/or exceeding small business goals;
5. Improve industry awareness and access to forecasted NASA acquisitions; and
6. Improve and develop communication and interaction between NIF and Center Contractor Councils.

# NASA Industry Forum Initiative Success Stories

- The NIF Success Stories publication is the outcome of the second NIF initiative to “Help small businesses grow their business,” and its purpose is to highlight successful partnerships between NASA vendors and share their stories.
- The booklet is published twice per year (summer and winter) and is available for download at <http://www.osbp.nasa.gov/publications.html>.
- OSBP POC:  
Truphelia M. Parker  
Tel: 202-358-1820  
[Truphelia.M.Parker@nasa.gov](mailto:Truphelia.M.Parker@nasa.gov)



# HBCU/MSI Technology Infusion Initiative

- **OSBP Pilot Initiative in collaboration with the Space Technology Mission Directorate (STMD) and Office of Education (OE)**
- Assist NASA and Large Prime Contractors meet and/or exceed the mandated HBCU/MSI subcontracting goals on their current contracts through utilization of the Mentor-Protégé Program, STMD's Small Business Innovative Research/Small Business Technical Transfer opportunities, as well as OE's grant and cooperative agreement opportunities
- Other NASA Offices that have supported the tour include the Office of Procurement and the Office of Strategic Infrastructure, in addition to other agencies such as the Department of the Army and Department of the Navy

FY17 Dates	Institution Designation	Host University
January 10-12, 2017	Minority Serving Institution	University of Nevada-Las Vegas
April 4-6, 2017	Historically Black Colleges and Universities	Tennessee State University
August 22-24, 2017	Historically Black Colleges and Universities	Jackson State University

# *Small Business Improvement Plan (SBIP)*

- Strategic Planning of Small Business Initiatives
  - OSBP has been doing SBIP for ten years - continuous improvement
  - Started out as annual meeting but now is done every two years to give the initiatives more time to succeed
  - All Centers submit 3 initiatives, Representatives from Procurement, Technical and the SBS consolidate the list to 3 Agency wide initiatives
  - NASA Administrator approves and signs out the initiatives
- SBIP initiatives must be measureable, achievable, affordable and accomplished during reporting period
- SBIP initiatives account for most of the “Best Practices”



# *Regional Outreach Initiative*

- Background:
  - Came out of the FY 2016/2017 NASA Small Business Improvement Plan
  - Outreach initiative to “promote small business awareness and participation, utilizing innovative techniques at nontraditional venues in geographically targeted areas, to enhance all categories of small business”



# *Regional Outreach Initiative*

- **NASA Participation:**
  - Representatives include HQ OSBP, HQ Missions Directorate, Center Small Business Specialists, Technical Advisors and Technical Coordinators
  - NASA involvement requires a Partnership Agreement (formally Space Act Agreement) between the Agency and event host
- **Other Participation:**
  - Federal, state, and local Organizations/Agencies
  - Procurement Technical Assistance Center (PTAC)
  - Chamber of Commerce
- **Event Overview:**
  - National and Local speakers
  - Presentations, breakouts and networking
  - Matchmaking





# *NASA Regional Small Business Outreach Events*

- **Jeffco EDC Presents: Aerospace and Defense Small Business Industry Day**
  - Denver CO – June 2016
  - Hosted by Jefferson County Economic Development Corporation
  - 324 attendees
  
- **Stairway to the Stars...for Small Business!**
  - Boston MA – September 2016
  - Hosted by Smaller Business Association of New England, Inc.
  - 150+ attendees

# ***OSBP Social Media***



**NASASmallBusiness**

Facebook Likes: 296, 432

Weekly Total Post Reach: 13,996

<http://www.facebook.com/NASASmallBusiness>



**@NASA\_OSBP**

Twitter Followers: 6,761

[http://twitter.com/NASA\\_OSBP](http://twitter.com/NASA_OSBP)



**NASAOSBP**

Blogger (Glenn Delgado's Blog)

Monthly Pageviews: 612

All time Pageviews: 24,623

<http://nasaosbp.blogspot.com/>



# Contact NASA OSBP

NASA Office of  
Small Business Programs  
300 E Street SW  
Washington, DC 20546

Tel: (202) 358-2088

Fax: (202) 358-3261

E-mail:

[smallbusiness@nasa.gov](mailto:smallbusiness@nasa.gov)

Web site:

[www.osbp.nasa.gov](http://www.osbp.nasa.gov)

NASA Vendor Database:

<https://vendors.nvdb.nasa.gov>



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**Best Practices Briefing  
to  
SBA Procurement Advisory Council**

**July 2017**

**Presented by:  
Mauricio P. Vera  
Director, OSDBU  
USAID**



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## Who We Are

The United States Agency for International Development (USAID) is the lead U.S. Government agency working in international development.





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## OUR MISSION

WE PARTNER TO END EXTREME  
POVERTY AND PROMOTE RESILIENT,  
DEMOCRATIC SOCIETIES WHILE  
ADVANCING OUR SECURITY  
AND PROSPERITY

## OUR APPROACH

PARTNER TO ADVANCE OUR MISSION.  
WORK AS ONE TEAM.  
MODEL OUR CORE VALUES.  
INNOVATE CONTINUOUSLY.  
DELIVER RESULTS.



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## What We Do

- Humanitarian Assistance
- Global Health
- Education
- Economic Growth and Trade
- Food Security
- Environment
- Democracy and Governance
- Global Development Lab





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# Where We Work

USAID FROM THE AMERICAN PEOPLE

USAID LEADERSHIP

WHO WE ARE WHAT WE DO WHERE WE WORK RESULTS & DATA NEWS & INFORMATION WORK WITH USAID

HOME - WHERE WE WORK - INTERACTIVE MAP

1919

LOCATIONS >

SECTORS >

INITIATIVES >

START DATES >

Reset Filters

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Disclaimer: The geographic names and boundaries may not reflect the views of the United States Government on the sovereignty over geographic features. A subset of USAID's field offices participated in the initial rollout of the map. Over time the intent is to display a comprehensive portfolio of USAID projects from all international locations.

- Afghanistan and Pakistan
- Africa
- Asia
- Europe and Eurasia
- Latin America and the Caribbean
- Middle East





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# Agency

## Profile

- Agency Budget: Approx. \$23 Billion in FY 2016
- Program Funding: \$16.4B in FY 16, of which \$11.3B was assistance, \$4.7B was acquisitions
- Of the \$4.7B in acquisitions, \$2.5B awarded overseas, \$1.8B awarded in the U.S.
- 7,900 employees includes 1,580 FS; 1,220 CS; 4,230 FSN; 860 non-direct hire
- USAID operates in 85 countries overseas, primarily on a decentralized basis



- OSDBU Director is a key member of the senior staff; reports directly to the Deputy Administrator, and meets with senior leadership at least twice per week
- Detailed SB Briefing to senior leadership twice a year
- SB accomplishments are included in SES performance plans (not currently in SFS plans)
- Support of the annual internal small business goaling process
- OSDBU Director meets one on one with the Senior Procurement Executive every other week



## Recent SB Related Initiatives

- USAID Forward – Implemented Small Business Operational Reforms
  - Congressional Interest to Decrease USAID Reliance on Large Contractors to Implement our Programs Overseas
  - Provided additional resources to OSDBU (\$ and FTEs)
- Mandatory SB Training for Contracting and Program Officials
- Former Administrator supported a Small Business Indicator to track small business accomplishments worldwide
- Administrator, OSDBU Director, and other senior officials meet to review/approve pre-solicitation documentation for actions >\$50M
- OSDBU participates in Acquisition Planning meetings with all major Bureaus in Washington



## OSDBU Engagement with Missions

- Overseas acquisitions now count towards USAID's official small business goals; USAID's official FY 2017 goal is 11.5 percent
- Regional mission-level SB targets are now set in consultation with OSDBU and reported on quarterly at the Administrator's Leadership Council
- Attempting to set mission level SB targets starting in FY 2018, in consultation with Regional Bureaus and OSDBU
- OSDBU continues to train mission staff on the use of SB programs; Latin America, Asia, Africa & Middle East TDY's being planned; more than 900 COs, CS', CORs trained so far
- Enhanced OSDBU assistance to missions on conducting market research, outreach, accessing qualified SBs, using existing instruments (IDIQs, etc.)



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# SB Goals vs Accomplishments

## FY 2015 - Domestic

	Goal	Achieved
<b>Small Business</b>	14%	17.65%
<b>Disadvantaged</b>	5%	11.45%
<b>Women-owned</b>	5%	<b>3.68%</b>
<b>Service Disabled Vet-Owned</b>	3%	3.38%
<b>HUBZone</b>	3%	<b>0.16%</b>

## FY 2016 - Worldwide

	Goal	Achieved
<b>Small Business</b>	11%	13.12%
<b>Disadvantaged</b>	5%	5.50%
<b>Women-owned</b>	5%	<b>3.36%</b>
<b>Service Disabled Vet-Owned</b>	3%	<b>1.19%</b>
<b>HUBZone</b>	3%	<b>0.19%</b>



## USAID Grades on the SBA Scorecard:

FY'2009 = F

FY'2010 = C

FY'2011 = A

FY'2012 = B

FY' 2013 = A

FY' 2014 = A+

FY 2015 = A

FY 2016 = B \*

\* FY 2016 was the first year that goals included contracts awarded overseas



# WORLDWIDE SMALL BUSINESS INDICATOR REPORT (SBI) FY 14-16 SUMMARY

REGION	FY 2014 - Goal 6.5%			FY 2015 - Goal 10%			FY 2016 - Goal 11%				% ACHIEVED TOWARDS INDIVIDUAL SB GOAL
	Total Dollars	SB Dollars	SB%	Total Dollars	SB Dollars	SB%	Total Dollars	SB Dollars	SB%	Goal	
AFGHANISTAN & PAKISTAN	478,062,597	11,083,154	2.32%	618,258,076	6,922,959	1.12%	332,033,260	2,041,119	0.61%	2.00%	30.74%
AFRICA	830,937,574	44,807,760	5.39%	911,069,674	42,933,528	4.71%	1,007,578,350	47,467,599	4.71%	6.00%	78.52%
ASIA	350,487,890	43,578,034	12.43%	368,300,812	19,214,547	5.22%	369,336,431	24,383,328	6.60%	9.00%	73.35%
EUROPE & EURASIA	125,836,181	10,706,956	8.51%	93,445,447	10,867,812	11.63%	97,956,615	11,662,394	11.91%	8.00%	148.82%
LATIN AMERICA AND THE CARIBBEAN	258,462,279	34,152,199	13.21%	372,129,614	11,732,571	3.15%	338,964,894	34,131,363	10.07%	6.00%	167.82%
MIDDLE EAST	97,690,840	609,282	0.62%	217,399,353	2,794,998	1.29%	317,253,417	3,937,068	1.24%	2.00%	62.05%
UNITED STATES (DOMESTIC)	1,349,732,058	280,895,694	20.81%	1,896,955,636	343,881,784	18.13%	1,874,230,488	446,669,061	23.83%	No Goal	
<b>TOTAL</b>	<b>3,811,877,161</b>	<b>461,401,890</b>	<b>12.10%</b>	<b>4,840,885,604</b>	<b>451,249,778</b>	<b>9.32%</b>	<b>4,354,262,841</b>	<b>571,105,191</b>	<b>13.12%</b>	<b>11.00%</b>	<b>119.24%</b>

1. The data is obtained from the Federal Procurement Data System (FPDS), and the dollars reported are figures for obligations.



# Ranking of Missions (Regional & Worldwide) by percentage of Acquisitions Awarded to Small Businesses

## FY 16

(Total Contracts Obligated Minimum: \$5,000,000 )

RANKING	COUNTRY	BUREAU	TOTAL	SMALL BUSINESS	SB %
1	CONGO, DEMOCRATIC REPUBLIC OF THE (KINSHASA)	Africa	30,633,998	14,760,795	48.18%
2	NICARAGUA	LAC	7,661,843	2,555,425	33.35%
3	BANGLADESH	Asia	38,936,483	10,189,869	26.17%
4	SENEGAL	Africa	20,000,197	5,021,527	25.11%
5	HONDURAS	LAC	54,986,073	13,378,368	24.33%
6	MOROCCO	ME	13,936,512	3,210,938	23.04%
7	EL SALVADOR	LAC	37,250,396	7,977,711	21.42%
8	BOSNIA AND HERZEGOVINA	EE	9,320,225	1,931,296	20.72%
9	GUATEMALA	LAC	31,738,187	6,386,472	20.12%
10	VIETNAM	Asia	41,778,414	7,410,788	17.74%
11	UKRAINE	EE	27,820,403	4,663,457	16.76%
12	KOSOVO	EE	26,030,029	4,278,660	16.44%
13	RWANDA	Africa	7,934,872	1,111,505	14.01%
14	PERU	LAC	14,460,972	1,852,987	12.81%
15	TANZANIA	Africa	57,418,891	6,868,486	11.96%
16	ZIMBABWE	Africa	8,521,470	933,986	10.96%
17	SOMALIA	Africa	48,494,391	4,892,740	10.09%
18	PHILIPPINES	Asia	52,300,320	4,866,723	9.31%
19	GHANA	Africa	47,543,281	3,451,557	7.26%
20	NIGERIA	Africa	34,948,550	2,425,550	6.94%
21	DOMINICAN REPUBLIC	LAC	12,471,523	848,665	6.80%
22	ETHIOPIA	Africa	33,567,444	1,375,159	4.10%
23	ALBANIA	EE	7,564,225	247,228	3.27%
24	SERBIA	EE	6,258,974	198,246	3.17%
25	MALI	Africa	39,143,352	1,141,615	2.92%



## Major Outreach Activities

- USAID Tenth Annual Small Business Conference at RRB held on June 28, 2017, 350+ SB reps attended
  - - Awards Recognition Program (Internal and External)
  - - Lunch with the Leaders & Exhibit Hall
- First USAID Overseas Small Business Conference held in South Africa in November 2016; major success!
  - - Included USAID reps from 22 missions in Africa
- Bi-Monthly SB Vendor Outreach Sessions
- Industry Days & Pre-Proposal Conferences
- Subcontracting Forum for Prime Contractors in June
- Veterans Int'l SB Opportunities Conference IV in October



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# What's New for FY 2017

- OSDBU continues to focus on expanding use of SBs at overseas missions: SB training program enhancements, mission level SB goals to be piloted in FY 18; 2 OSDBU staff assigned to work F/T with missions
- Increased focus on subcontracting due to changes in scorecard formula
- OSDBU participates in OAA's "Business Forecast" & "Ask the Procurement Executive" conference calls to engage with industry; OSDBU meets regularly with Small Biz Associations
- Engaging with new political leadership to gain their support for SB initiatives



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# Questions??

**Mauricio Vera, OSDBU Director**

**[mvera@usaid.gov](mailto:mvera@usaid.gov)**

**Kimberly Ball, OSDBU Deputy Director**

**[kball@usaid.gov](mailto:kball@usaid.gov)**

**(202) 567-4730**

**USAID OSDBU Website:**

**[www.usaid.gov/partnership-opportunities/small-business](http://www.usaid.gov/partnership-opportunities/small-business)**



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# Best Practices Briefing for SBPAC

George Price, Director  
Office of Small and Disadvantaged Business  
Utilization (OSDBU)

*August 2017*

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# Agenda

- DoS OSDBU Profile
- Challenges and Strategic Response
- Best Practices
- Future Ideas

# DoS OSDBU Profile

- Culture is “Mission first” –consultative vs. roadblock
- Support 46 Bureaus with \$9B annual spend
- 7 total staff (FTE and contractor)
- A+ FY16 SBA Scorecard
  - Hosted 3 industry days
  - Attended 40+ outreach events
  - Provided over 20 internal trainings
  - Participated in over 1K vendor meetings
  - Conducted 698 acquisition reviews

# Challenges and Strategic Response

1. Complex Program Offices with Diverse Spend and Suppliers
2. Limited resources and 300% increase in Small Business Eligible Dollars

- Leverage staff expertise through autonomy
- Target activity for maximum return
- Build strong relationships with contracting

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# Best Practices: People

- Expertise of Senior staff for increased autonomy and impact
- Deputy Director position to lead continuous improvement
- Telework for efficiency and work life balance
- Regular communication and staff input to improve operations
- Partner with acquisition to support administrative and subcontracting review positions



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# Best Practices: Process

- Implemented selection criteria for outreach events to maximize investments
- Launched monthly goaling reports and Order of Preference to drive agency commitment
- Regular trainings and capabilities briefings to program offices, Acquisition and Overseas Posts to build relationships
- Host targeted events like Overseas Contracting with small business community partners including the Virginia PTAP and Women's Chamber of Commerce
- Community involvement via OSDBU Council and ACT/IAC to capture and share knowledge

---

# Best Practices: Technology

- Implemented new electronic acquisition review form for streamline processing and improve reporting capability
- Developed SharePoint site to track small business firms matching unique DoS requirements such as overseas work permits and facilities clearances
- Small Business inquiry routing to next available Analyst for efficiency

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# Future Ideas

- Proactive program engagement via Bureau-level small business liaison role
- Increase supplier engagement via data analytics
- Procurement Forecast automation
- Leverage DoS strategic sourcing, i.e. small business contract inventories
- Internal and external website refresh for increased engagement and collaboration



# Small Business Best Practices at the U.S. Department of Agriculture

Michelle Warren, Deputy Director

USDA/OSDBU

April 25, 2017

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**USDA'S Mission is to Enhance the  
Quality of Life for the American People  
by Supporting Production and  
Agriculture**

President Abraham Lincoln founded the  
Department of Agriculture in 1862 - Calling it the  
"People's Department"

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USDA is committed to helping America's  
Farmers and Ranchers.

But we do much more ---

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- Leads the Federal Anti-Hunger effort with the SNAP, School Lunch, School Breakfast, and the WIC Programs
  - Is the Steward of our Nation's 192 million acres of National Forests and Rangelands
  - Is the Country's largest conservation agency, encouraging voluntary efforts to protect soil, water, and wildlife on the 70% of America's lands that are in private hands
  - Is responsible for the safety of meat, poultry, and egg products
  - Helps ensure open markets for U.S. agricultural products and provides food aid to people in need overseas
  - Brings housing, modern telecommunications and safe drinking water to Rural America
-



- Large, decentralized cabinet level agency
- Over 100,000 employees
- 29 agencies and staff offices
- Offices located throughout the U.S. & major embassies around the world





*USDA is a Strong Supporter  
of Small Business:*

*56.24% of total contract spending  
in 2016 was with Small Business.*

*USDA's goal was 52.50% and we  
received an A from SBA.*

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## USDA's Purchasing Environment

- Purchases a broad array of products and services
- 11 major buying agencies
- Spend approximately \$6 billion annually
- Large buyer of:
  - Commodities & Food Products – approx. 60%
  - Information Technology – 20%
  - Environmental Services – 5%
  - Architecture & Engineering/Construction/Real Property 10%
  - Other Services and Supplies, including Professional/Administrative/Management Services - 5%



## USDA's Best Practices - Leadership

- The Secretary is briefed annually; and the Deputy Secretary is briefed quarterly.
  - The OSDBU reports directly to the Deputy Secretary.
  - Civil Rights Agency Head Assessment is completed annually, which includes 2 elements related to small business participation.
  - Annual small business performance briefings with Administrators and Under Secretaries to discuss/strategize about small business participation/goal performance.
  - Quarterly meetings held with Small Business Specialists.
-



## USDA's Best Practices – OSDBU

- Monthly Vendor Outreach Sessions
  - Bi-monthly Small Business Connections
  - Update Procurement Forecast two times per year.
  - Rural Small Business Outreach Events – 3 times per year
  - OSDBU attended/hosted over 25 events in FY16
  - Training on Clearance, Subcontracting, Procurement Forecast for the Agency COs and PMs
-



## USDA's Best Practices – Agencies

- Inquiry and follow-up to COs and PMs for Procurement Forecast.
  - Coordination of agency's acquisition unit's participation in local/regional small business matchmaking events.
  - Communication of small business marketing information to various agency business units.
  - Coordination of subcontracting opportunity processes and results reporting.
  - Participate in Roundtables and Industry Days with Department's Agencies
  - Webinars
  - MOU's with various Chambers of Commerce
  - MOU's with Buying Agencies
-



## USDA & Small Business

For additional information regarding USDA's Small Business Programs visit

- website at [www.dm.usda.gov/osdbu.index.php](http://www.dm.usda.gov/osdbu.index.php) or
  - contact us at (202) 720-7117
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U.S. Department of Transportation  
**Office of the Secretary of Transportation**  
Office of Small Business  
[www.dot.gov/osdbu](http://www.dot.gov/osdbu)

# **DOT BEST PRACTICES PRESENTATION**

**Leonardo San Roman**  
**SBPAC MEETING**  
**WASHINGTON, DC**  
**SEPTEMBER 26, 2017**



U.S. Department of Transportation  
**Office of the Secretary of Transportation**  
Office of Small Business  
[www.dot.gov/osdbu](http://www.dot.gov/osdbu)

## **DOT's MISSION & ORGANIZATION**

- Serve the United States by ensuring a fast, safe, efficient, accessible and convenient transportation system that meets our vital national interests and enhances the quality of life of the American people, today and into the future.
- DOT top priorities - keep the traveling public safe and secure, increase their mobility, and have our transportation system contribute to the nation's economic growth.
- DOT has 10 Operating administrations including Federal Aviation Administration (FAA), Federal Highway Administration (FHWA), Federal Transit Administration (FTA), among others.



U.S. Department of Transportation  
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## GOALS AND ACHIEVEMENTS

### PRIME CONTRACTING ACHIEVEMENT

Category	GOAL	2014	2015	2016
SB	43.16% - 49.50%	44.58%	50.94%	51.77%
WOSB	5%	12.41%	9.11%	10.65%
SDB	5%	21.15%	22.76%	21.89%
SDVOSB	3%	3.20%	3.60%	3.11%
HUBZONE	3%	4.98%	10.73%	10.86%





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## HIGHLIGHTS

- DOT received A or A+ RATING on the SBA scorecard for its small business contracting achievements since 2009
- FY15 and FY16 SB concerns achievement over 50%.
- Only federal agency with HubZone double digit achievement in FYs 2015 and 2016.



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## BEST PRACTICES

### COMMUNICATION AND COORDINATION

- SBA PCR, Office of the Senior Procurement Executive and HCAs
- Monthly trainings with SBS
- Brown bag sessions
- Market research assistance to COs and SBS
- OSDBU Director participates in Acquisition Strategic Resource Board (ASRB) and Strategic Acquisition Council (SAC)



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## BEST PRACTICES (cont)

### Subcontracting Goals and Prime Contractor Reporting

- Communication with acquisition community
- Constant communication with primes before ISR/SSR reports are due
- Monthly progress reports to OAs
- Encourage use of SAM, DSBS, HUBZone database and VETBIZ
- Active participation in Presolicitation conferences
- Technical Assistance to prime contractors



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## BEST PRACTICES (cont)

- Periodic small business achievement data analysis.
- Identify underperforming OAs and assist COs during market research.
- Industry analysis to find current DOT small business firms and share information among DOT OAs.
- Coordination with SPE and HCAs - OSDBU Director meets regularly with the OSPE, and OA leadership to stress the importance of meeting small business goals, address any issues, or challenges to meet goals.
- Industry analysis in NAICS Code, 237310, Highway, Street, and Bridge Construction. Over 60% of these projects are located in a Qualified Census Tract (QCT). FHWA's Western and Central Lands Divisions.



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## BEST PRACTICES (cont)

- Promote use of small business set asides within the acquisition community. Majority of FY16 SB awards were set asides.
- Promote the use of SBA's Small Business Dynamic Search (SBDS) engine within our acquisition community to find certified HUBZone firms during market research.
- Data quality. Quarterly FPDS data review to ensure contracts had accurate information and CO business size selection.
- Outreach activities to increase the number of small business concerns participating in DOT opportunities.



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**U.S. Department of the Treasury**  
**Office of Small and Disadvantaged Business**  
**Utilization (OSDBU)**

**May 23, 2017**

**Presented to: SBPAC**

**Washington DC**

**Presented by: Pamela Wilson, Acting OSDBU Director**

**[Pamela.wilson@treasury.gov](mailto:Pamela.wilson@treasury.gov)**

**202-622-1071**



# Mission of the Treasury

- **Manage the U.S. Government's finances effectively, promoting economic growth and stability, and ensuring the safety, soundness, and security of the U.S. and international financial systems.**
- **Acts as the steward** of the U.S. economic and financial systems.
- An **executive level agency** that's responsible for promoting economic prosperity and ensuring the financial security of the United States.
- Treasury encourages growth through the use of small businesses to achieve its mission.





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# Small Business Goals:

- Government-Wide Goals:

- ❖ SB – 23%
- ❖ SDB – 5%
- ❖ WOSB – 5%
- ❖ HUBZone – 3%
- ❖ SDVOSB – 3%

***Note: Set by Congress***

- Treasury's FY 17 Goals:

- ❖ SB – 35%
- ❖ SDB – 5%
- ❖ WOSB – 5%
- ❖ HUBZone – 3%
- ❖ SDVOSB – 3%

***Note: Set by SBA***

# FY 16 - Goal Achievements

## Scorecard Grades

### Small Business Goal Achievements:

### Scorecard Grades:

	Government-Wide Goal	Treasury's FY 16 Goals	Treasury's Goal Accomplishments: (Unofficial)
SB	23%	37%	36.29%
SDB	5%	5%	15.32%
WOSB	5%	5%	11.71%
HUBZone	3%	3%	4.50%
SDVOSB	3%	3%	4.13%

FY	Grade
FY 16	<b>A</b>
FY 15	<b>A</b>
FY14	<b>A</b>

# FY 14-16 (Prime Goals)

## Small Business Goal Achievements

*Note: FY 16 Scorecard Grade in process*

Statutory Goal	FY 14 Goal	Achievement	FY 15 Goal	Achievement	FY 16 Goal	Achievement (Official)
<b>SCORECARD GRADE</b>	<b>A</b>		<b>A</b>		<b>A</b>	
SB – 23%	35.07 %	36.67%	35%	34.69%	37%	36.80%
SDB – 5%	5%	14.37%	5%	15.27	5%	15.31%
WOSB – 5%	5%	9.52%	5%	9.09%	5%	11.61%
HUBZone – 3%	3%	3.36%	3%	4.08%	3%	4.50%
SDVOSB – 3%	3%	4.07%	3%	3.84%	3%	4.15%

# Treasury's Good News!!



- I want to start out by sharing Treasury's good news.
- For four consecutive years (FY 12, 13, 14), Treasury not only met, but exceeded all five of its small business contracting goals! However, in FY 15 and 16, we met 4 out of the 5 prime goals and missed our overall SB goal by .31 and .20% (less than 1%), consecutively.
- Although we missed the mark on our overall SB goal of 37%, Treasury not only met but exceeded both of our two most challenging goals for HUBZone goal by 1.50% and the SDVOSB by more than 1.15%.
- We almost doubled our goal for contracting with women-owned small businesses, and tripled our small and disadvantaged business goal. **(WOSB: 9.09% - SDB: 15.27%)**
- Treasury also earned an A or A+ rating on the SBA scorecard for its small business contracting achievements for fiscal years 2011 through 2016. We are very proud of our scorecard grade!!

# Treasury's Best Practices!!



## I. Leadership Accountability

Treasury has 3 levels of leadership accountability:

1. Comprehensive reports are disseminated weekly to Treasury's acquisition community.
  2. The small business goal attainments are discussed monthly during Treasury Acquisition Council (TAC) meetings.
  3. Regular reviews are conducted quarterly by the Deputy Secretary, and the Senior Procurement Executive, during Senior Level Management meetings.
- Beginning in FY 11, the small business goals were included in the performance plans for Treasury's Procurement Staff, Senior Executive Service and the acquisition staff.
  - It is noteworthy to mention that Treasury hold its non-appropriated bureaus to the same standards as the appropriated bureaus to accomplishing the same goals.

# Treasury's Best Practices!!



## II. Utilization of MACS

TIPSS (Total Information Processing Support Services) is Treasury's largest IT MAC and the **Cyber Security component is exclusively held for small businesses**

### Other Treasury MACS:

- Scrubbed these MACS for target rich Hubzone opportunities

### Federal Supply Schedules /GWACS:

- Performed and analysis of historical spending in HZ opportunities and searched for target rich Product Service Codes (PSCs) and will push for FSS HZ set-asides.

## III. Tools and Resources

Treasury expanded its online tools on the internal portal to assist Treasury staff in identifying small businesses; particularly those who are HZ certified (i.e., an authorized HZ software/hardware, HZ categorized by PSCs).

# *Treasury's Best Practices!!*



## **III. Communication**

Treasury's best practices are shared by our Procurement Office and OSDDBU via a Treasury-wide comprehensive vendor database.

## **IV. Incentives**

Some of our bureaus have instituted incentives, special recognition and celebrations to acknowledge achievements and Treasury headquarters sponsors an annual Small Business Awards Program.

## **V. Targeted Outreach and Outreach Events**

Continue to sponsor and participate in outreach events to bring visibility to new and current Treasury vendors where we target specific NAICS. We collaborate with our resource partners, inviting them to our vendor outreach sessions and they host tables and counsel the vendors and bring in guest speakers from across government particularly for our special emphasis groups

## **VI. Collaborations**

This year, we are collaborating with local DC resource partners (PTAC) to drive more HZ and SDVOSB vendors to our vendor outreach sessions.





## Moving Forward to FY 2016:

As Treasury moves into FY 18, we will continue to improve upon these things that proved vital to our successes, i.e., leadership accountability, communication, incentives, and targeted outreach.

To enhance, we are expanding our tools and resources, including training and education with creative uses of technology. (SBRS – SubK Plan reviews, SBS Qtrly and Annual Training)

The U.S. Department of the Treasury, thank you for giving us this opportunity to share our “good news” and best practices.



# Best Practices for Small Business Utilization



Denise Sirmons, Director  
Office of Small and Disadvantaged Business Utilization  
U.S. Environmental Protection Agency

June 27, 2017

# Overview

- OSDBU organizational structure
- Snapshot of EPA small business contracting
- Emerging best practices

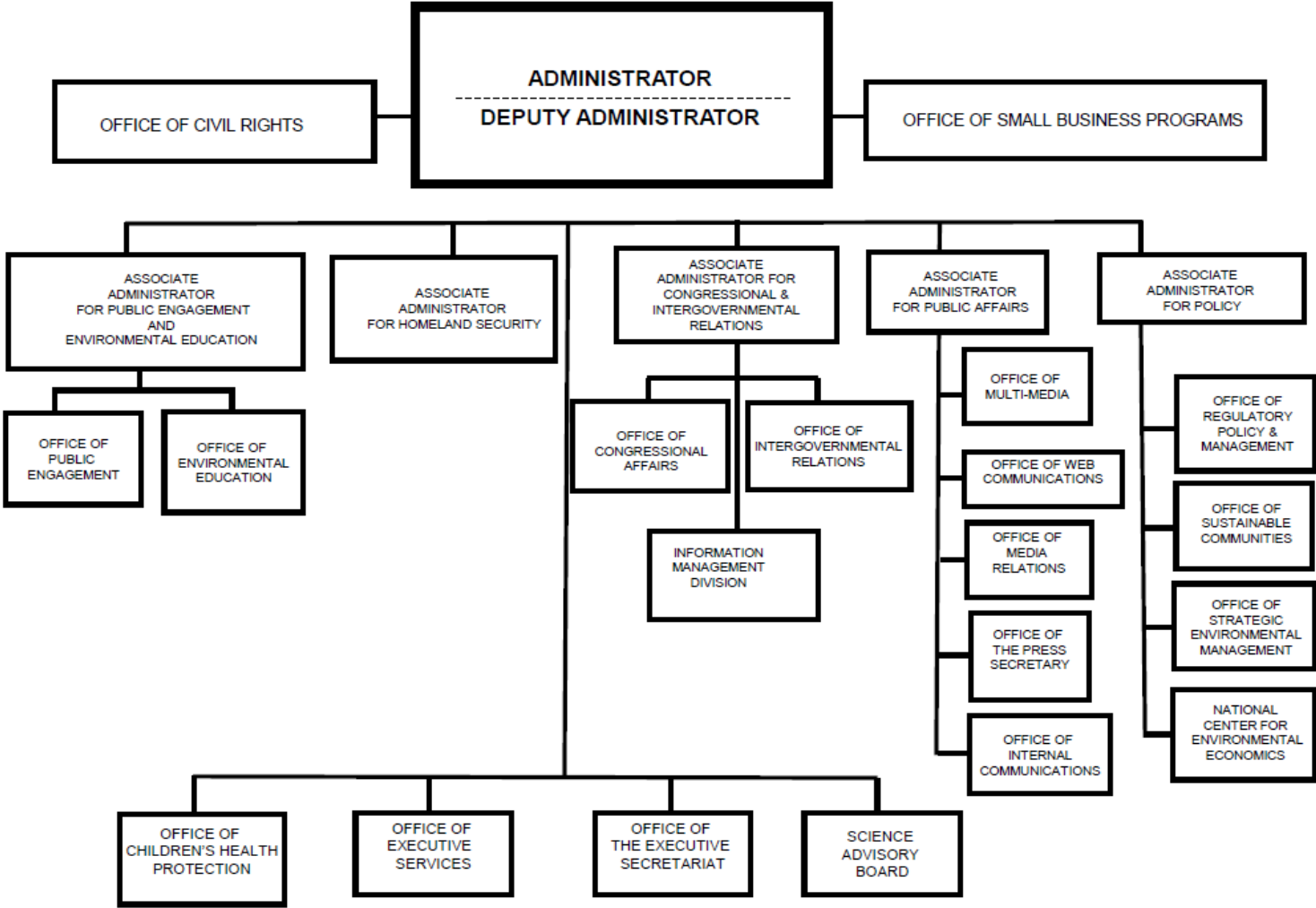


# Office Mission

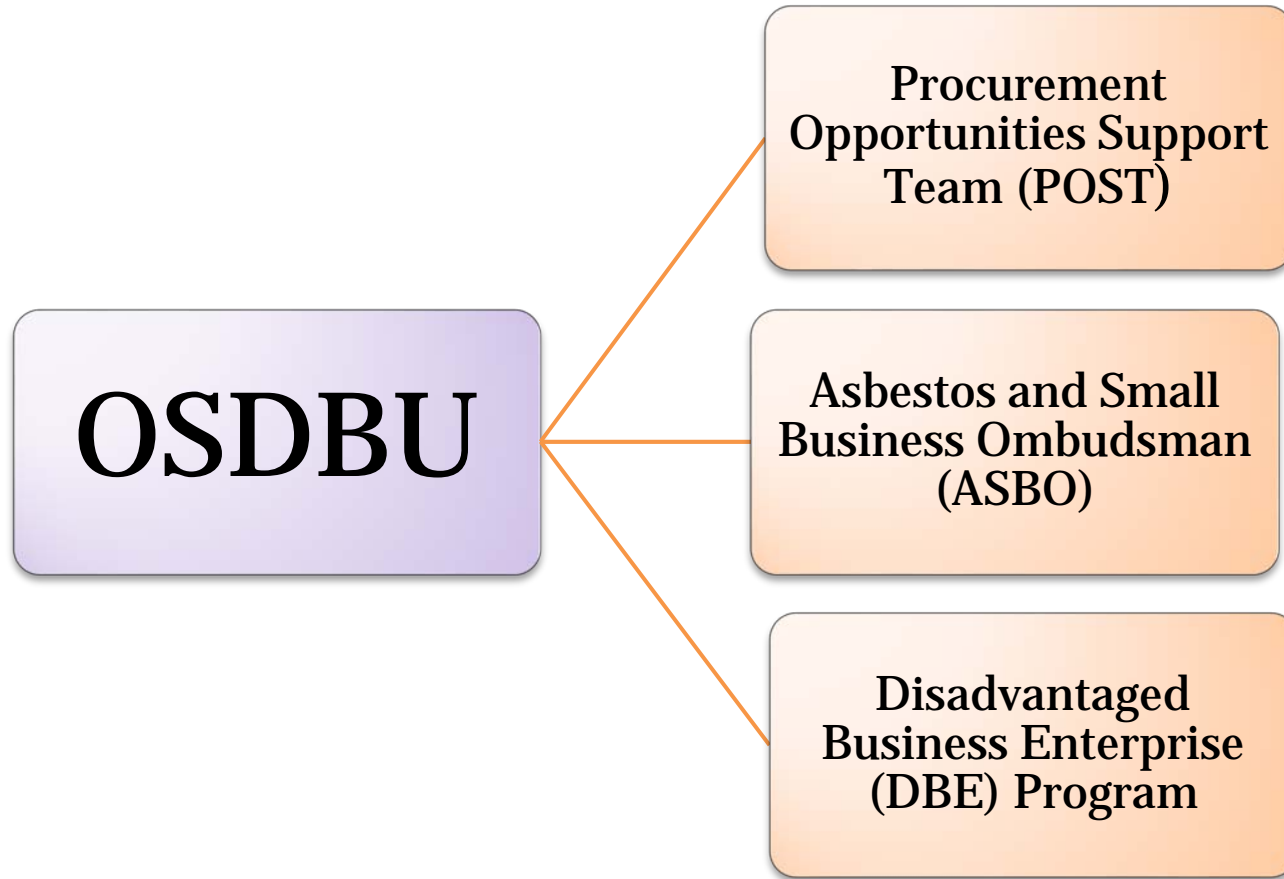
*Support the protection of human health and the environment by advocating for and advancing the business, regulatory, and environmental compliance concerns of small businesses*



# OSDBU Alignment



# Program Components



# Program Functions

## Procurement Opportunities Support

- Monitor prime and subcontracting goal achievements, and develop related internal policies and procedures
- Review and approve proposed acquisitions and subcontracting plans
- Provide outreach, training and technical assistance to small businesses, and EPA Program and Regional Offices

## ASBO

- Serve as a small business liaison and provide technical assistance to small businesses
- Advocate for small business during the EPA rulemaking process
- Support national network of Small Business Environmental Assistance Programs

## DBE Program

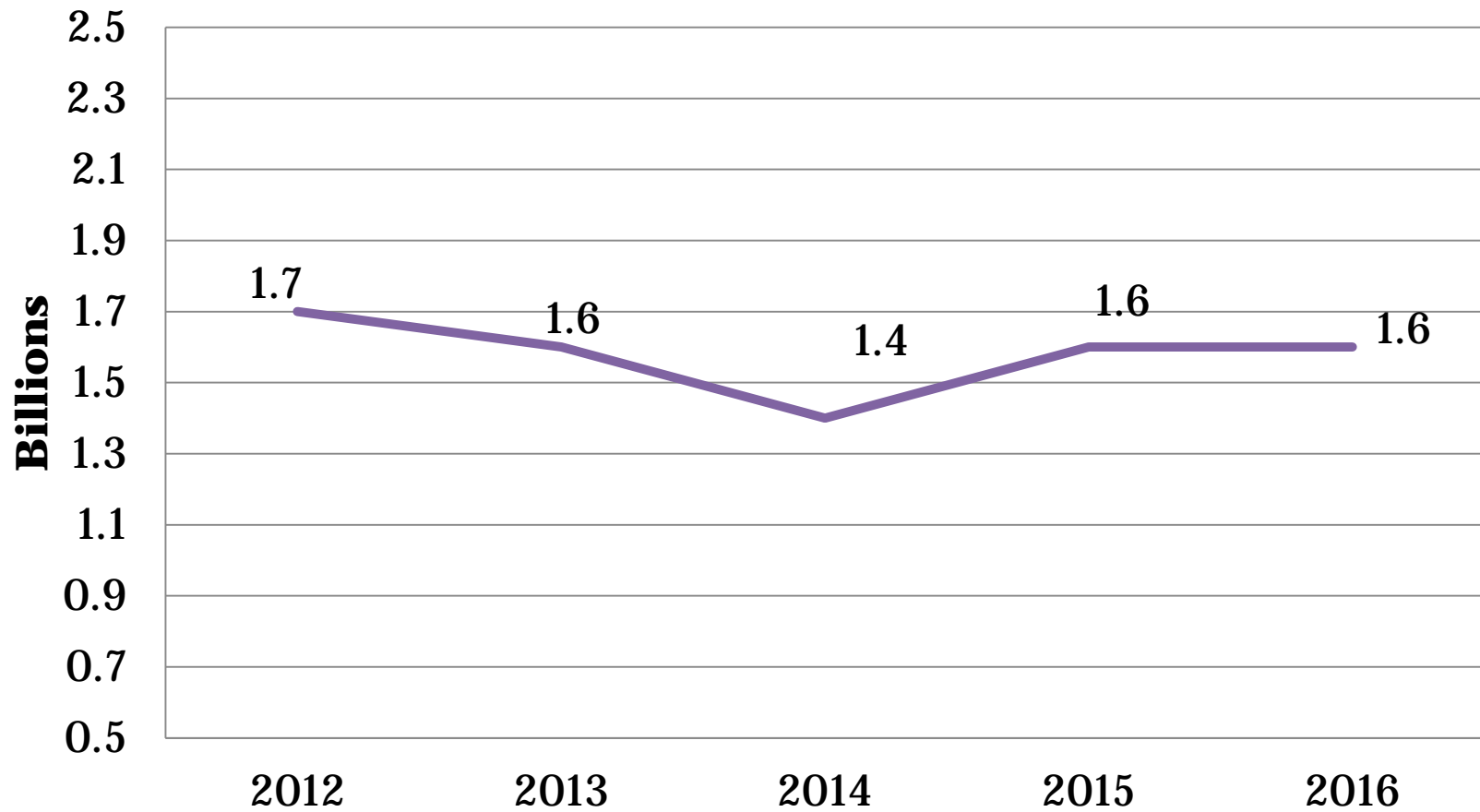
- Develop and monitor DBE Program policy and procedures
- Provide outreach, technical and programmatic assistance to internal and external stakeholders
- Analyze data on DBE utilization under financial assistance agreements and interagency agreements

# EPA Small Business Contracting





# Annual Procurement Budget



# Government-wide Procurement Scorecard

## FY 2009 – 2016

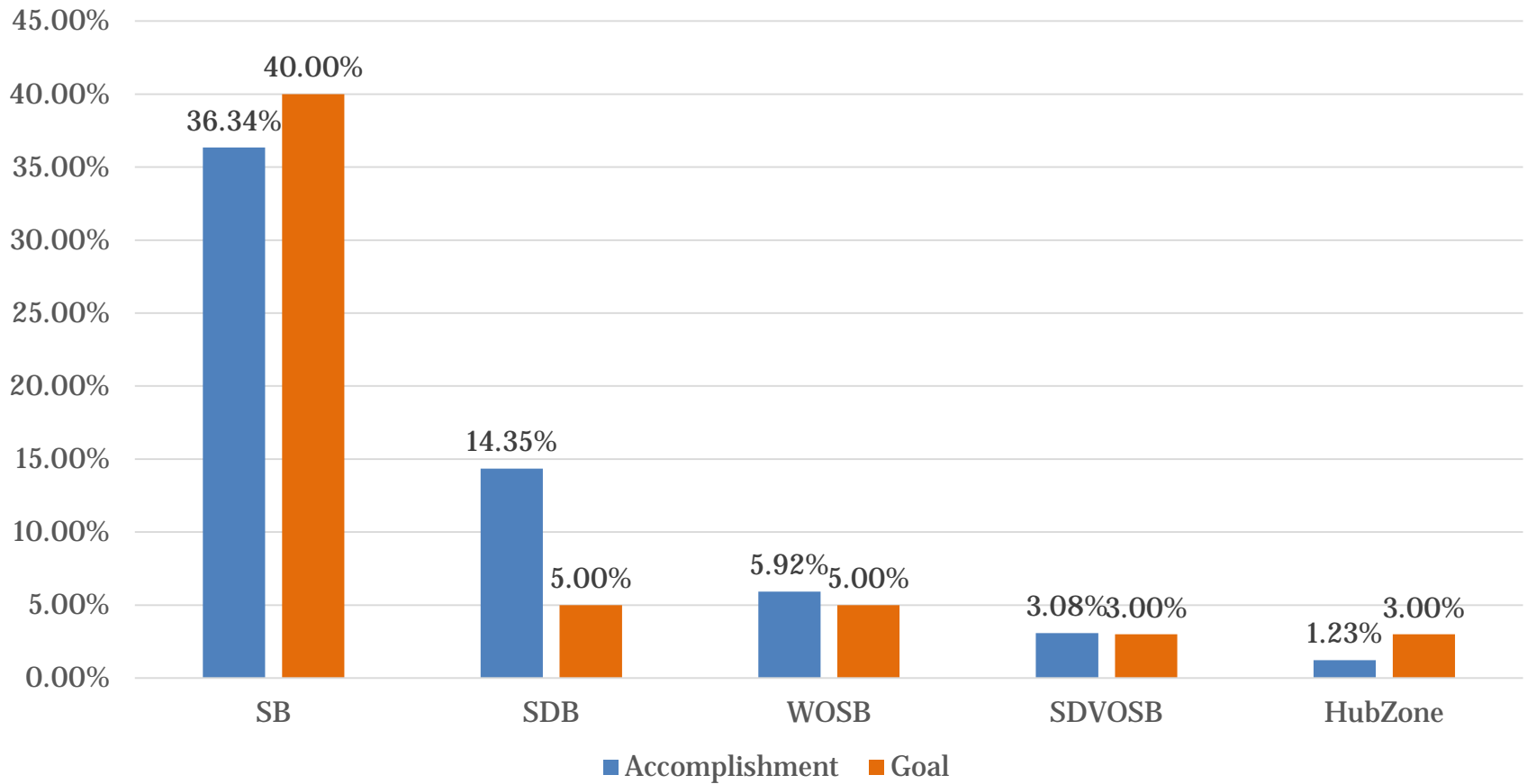
Agency	Spending Rank	FY 2009 Grade	FY 2010 Grade	FY 2011 Grade	FY 2012 Grade	FY 2013 Grade	FY 2014 Grade	FY 2015 Grade	FY 2016 Grade	Grade of "A" or "A+" eight years in a row
DoD	#1	B	B	B	B	B	A	A	A	No
DOE	#2	A	B	F	F	F	F	A	A	No
HHS	#3	C	A	A	A	A	B	B	B	No
VA	#4	A	A	B	A	A	B	B	B	No
NASA	#5	C	C	B	A	A	C	B	B	No
DHS	#6	A	A	A	A	A	A+	A	A+	Yes
DOJ	#7	D	B	C	A	B	A	A	A	No
USDA	#8	A	A	A	A	A	A	A	A	Yes
DOC	#9	C	A	A	A	A	A+	A	A+	No
DOS	#10	B	A	A	A	A	A	A	A+	No
GSA	#11	C	A	A+	A+	A	A	A+	A	No
DOI	#12	A	A	A	A	A+	A	A	A+	Yes
DOTreas	#13	B	A	A+	A+	A	A	A	A	No
DOEduc	#14	A	C	B	C	A	A	A	C	No
DOL	#15	A	A	A	A	A	A	A	A	Yes
USAID	#16	F	C	A	B	A	A+	A	B	No
SSA	#17	B	A	A	B	A	A	A	A	No
DOT	#18	A	A	A	A	A+	A	A+	A	Yes
EPA	#19	A	A	A	A	A	A	A	A	Yes
HUD	#20	B	D	C	A	A	A	A	A+	No
OPM	#21	F	D	C	B	A+	A	A	A	No
NSF	#22	F	C	B	C	B	A	A	A+	No
NRC	#23	B	B	A	A	A	A	A	A+	No
SBA	#24	A	B	A	A	A	A	A+	A	No
All	N/A	B	B	B	B	A	A	A	A	No

# FY 2017 Goals

Category	Prime Contract		Subcontract	
	Dollar*	Goal	Dollar	Goal
Small Business (SB)	\$600 M	40%	\$220 M	55%
Small Disadvantaged Business (SDB)	\$75 M	5%	\$20 M	5%
Women-Owned Small Business (WOSB)	\$75 M	5%	\$20i M	5%
HUBZone Small Business (HUBZone)	\$45 M	3%	\$12 M	3%
Service-Disabled Veteran-Owned Small Business (SDVOSB)	\$45 M	3%	\$12 M	3%

\*Dollar Values Based on Estimated Obligations of \$1.5 Billion for Prime Contracts and \$400 Million for Subcontracts

# Small Business Accomplishments As of June 26, 2017

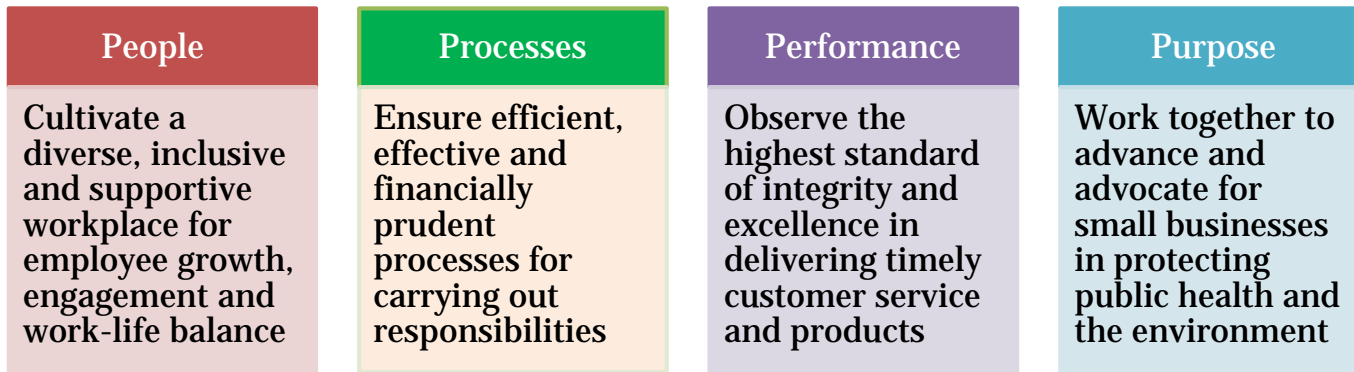


# Emerging Best Practices

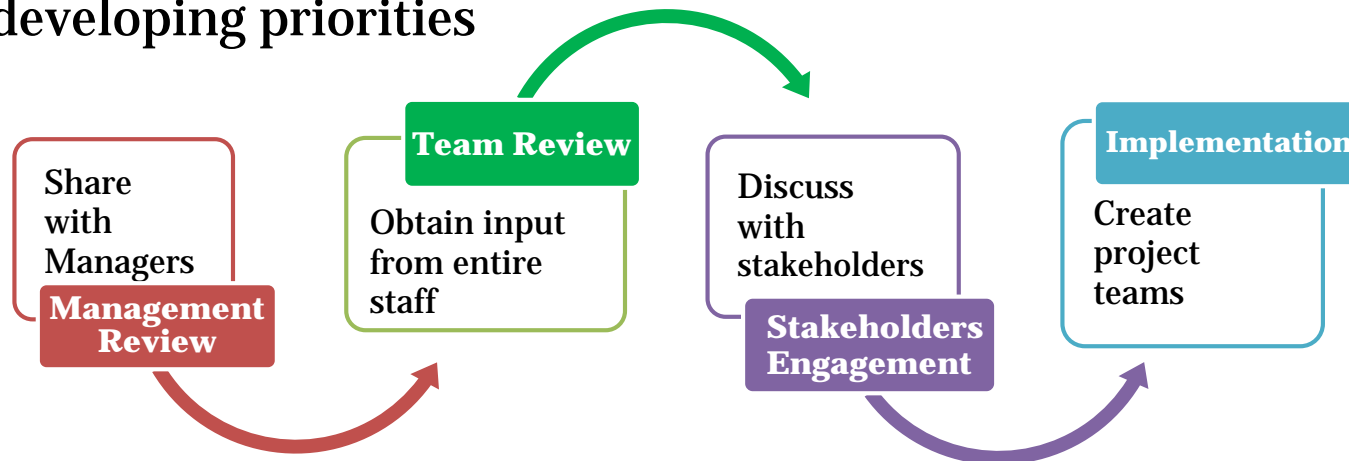


# 1. Conduct Assessment to Ensure Efficient Organizational Alignment & Operational Effectiveness

- Guiding principles for organization and operations



- Engagement of staff and EPA contracting community in developing priorities



## 2. Ensure Meaningful and Sustained Leadership Engagement at all Levels of the Agency

- EPA Administrator's annual statement reiterating the agency's commitment to small businesses
- Periodic small business spend updates at the Administrator's weekly senior staff meetings
- Individual small business status meetings with leadership in each program and regional office
- Small business awards ceremony to recognize outstanding small business champions
- Small business performance measures In Chief of Staff executive dashboard



### **3. Maintain High Program Visibility to Cultivate a *Small Business First* Culture**

- Agency-wide dashboard to institutionalize small business contracting transparency, accountability and data-driven solutions
- Dynamic OSDBU intranet site to serve as a central repository for small business contracting information and resources
- Quarterly bulletin to spotlight notable small business updates and communications
- Agency-specific, week-long activities and events celebrating National Small Business Week
- Broad dissemination of identified best practices in maximizing small business contracting opportunities



## **4. Maintain a Dynamic Training and Outreach Program**

- One-EPA outreach strategy, including a comprehensive internal outreach and training calendar to empower offices to remain informed and engaged in outreach activities
- Informal monthly and formal quarterly outreach and networking events tailored to targeted industries, NAICS codes and business experience
- Annual National HUBZone Summit co-sponsored with the HUBZone Council
- Vendor Profile Database of vendors ready, willing and able to do businesses with EPA

## **5. Support Federal Initiatives to Leverage Resources Government-Wide**

- Sharing of information, experiences and lessons learned to foster an OSDBU community of practice
- Participation in outreach of other agencies and resource partners to optimize effectiveness
- Promotion of SBA monthly training webinars within EPA
- Involvement in OSDBU Council and SBPAC meetings to remain informed and engaged in policy development and implementation

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