

VENDOR  
**OUTREACH**  
SESSIONS



Tips for a  
**Successful  
Vendor Outreach  
Session**





**Helpful  
tips**

## **PREPARING TO MEET WITH THE U.S. DEPARTMENT OF THE TREASURY**

As part of your government contracting efforts, small businesses should be prepared to market their businesses to the U.S. Department of the Treasury (Treasury) Small Business Bureau Specialists and IT Program Manager as well as to Treasury Prime Contractors and Resource Partners. These representatives are often extremely busy and it may be difficult for a small business to schedule a time to meet one on one with them. As such, one of the best ways to make contact with these representatives is to attend the Treasury Vendor Outreach Sessions. The following checklist was designed as a tool for small businesses to refer to prior to Meeting with Treasury Bureau Specialists and Prime Contractor representatives.

### **Are you ready to meet with a Government Agency or Prime Contractor Representative?**

1. Practiced 30 second "pitch"
2. Ample business cards
3. Do your homework

### **The Counselors you meet will be either:**

- Treasury Bureau Small Business Specialist
- IT Program Managers
- Prime Contractor small business liaison officers or Resource Partners (unless otherwise indicated).

### **Check out the links below to conduct research on the Bureaus you want to meet with. Thorough research includes:**

- Visit the Treasury Bureau Web sites to understand each Bureau's mission;
- Review Top 25 NAICS and Forecast of Contract Opportunities to see:
  - What the Bureau you want to meet with buys;
  - What existing or new contract opportunities are listed for your product or service.
- If you provide Information Technology products or services, visit the Treasury Chief Information Officer's website and click on the link entitled "Capital Planning & Investment Control".
- Go to FedBizOpps for a current list requirements valued at \$25,000 or more.
- Review the column entitled "Special Notes of Interest", for specific products/ services the Bureau buys or DOES NOT buy. If the Bureau/ company/agency does not buy what you sell, it would not be worth your valuable time to meet with them.



1. Target "hot prospects"
2. Target potential teaming partners for subcontracting or Joint Venture/Mentor Protégé opportunities
3. Will your competition be attending – what can you learn?

Bureau	Links	Special Notes of Interest
Comptroller of the Currency	<a href="https://go.usa.gov/xQNBZ">https://go.usa.gov/xQNBZ</a>	
Departmental Offices	<a href="https://go.usa.gov/xQNBW">https://go.usa.gov/xQNBW</a>	
Bureau of Engraving and Printing	<a href="https://go.usa.gov/xQNBZ">https://go.usa.gov/xQNBZ</a>	
Bureau of the Fiscal Service (Formerly the Financial Management Service and the Bureau of the Public Debt)	<a href="https://go.usa.gov/xQNBk">https://go.usa.gov/xQNBk</a>	
Internal Revenue Service	<a href="https://go.usa.gov/xQNB8">https://go.usa.gov/xQNB8</a>	Does not buy: Construction Temporary Services Staff Augmentation Services
US Mint	<a href="https://go.usa.gov/xQNB9">https://go.usa.gov/xQNB9</a>	
Alcohol and Tobacco Tax and Trade	<a href="https://go.usa.gov/xQNBX">https://go.usa.gov/xQNBX</a>	Does not buy: Construction
Financial Crimes Enforcement Network	<a href="https://go.usa.gov/xQNB5">https://go.usa.gov/xQNB5</a>	

- Be prepared to meet with and get assistance from resource representatives
- Know what you do not know – be ready to ask for help and guidance
- Evaluate your strengths and weaknesses
- Bring any business information that you may need help with or have questions on to support your discussions with attending resources – some will have Expo booths
- Follow up with resource leads that may help you build capacity
- Be prepared to NETWORK - hallways, meals, reception ...
- Bring business cards
- Bring positive attitude – Ready – Willing - Able message!
- Practiced 30 second sales “pitch”
- Be prepared to take advantage of educational opportunities:
- Be prepared for your 1-2-1 Sales Meetings:
- 20 copies of capability statement -- Make sure that your one page document includes:
  - Complete contact information including email and website
  - NAICS Codes [[www.census.gov/eos/www/naics/](http://www.census.gov/eos/www/naics/)]
  - Include Past Performance examples
  - Make sure registrations are up to date and complete (SAM, Small Business Dynamic Search, etc.)
  - Include current and pending Small Business Certifications – Federal, State, Tribal, Local, Corporate
  - Performance certifications – ex. ISO, LEED, Bio Preferred, other
  - Your Firm’s logo and any graphics that would add value
  - Information on what you are selling
  - Value proposition to customer
  - 30 Business cards - 2 sided to include your full contact information, NAICS codes, and certifications and clear “Tag Line” on your product or service
  - Practiced 1 – 2 minute presentation
  - Practiced response to potential questions and areas of discussion, for example:
    - Why should I choose your firm?
    - What experience do you have that would prepare you to work with our organization?

**Do you have capacity, financial resources /bonding to take on a large contract?**

- Follow-up with Treasury Bureau Specialists, Small Business Liaisons and Resource Partners and build relationships with our organization

# CONTRACT

to by and between \_\_\_\_\_

begin on \_\_\_\_\_

in any \_\_\_\_\_  
achme \_\_\_\_\_  
nd \_\_\_\_\_

\_\_\_\_\_ shall continue

\_\_\_\_\_ in writing and sign  
\_\_\_\_\_ constitute the entire agreement  
\_\_\_\_\_ Parties, their successors, heirs

the State of \_\_\_\_\_  
\_\_\_\_\_ herein, the First Party covers

## **8(A) SOLE SOURCE DIRECT AWARD PROCESS** (CONTRACT AWARDS UP TO \$4,000,000)

### **1. Government Agency/Customer (Program Office/Agency) selects contractor.**

Customer determines that 8(a) firm meets the contract requirements and provide best value to the Government and recommends firm to the Small Business (SB) Specialist & Contracting Officer (CO)

### **2. Contracting Officer (CO) completes the Offer Letter.**

Contracting Officer (CO) completes an Offer Letter to be sent to the Small Business Administration (SBA) containing details regarding the procurement in accordance to (13 CFR 124.502(c) and FAR 19.804-2). These details could be brief information from the SOW or PWS.

### **3. CO submits Offer Letter (via email) to SBA representative.**

Agency CO submits (via email) the Offer Letter or Proposed Project for 8(a) firms District Office and references their respective case number

### **4. SBA review of company's standing in the 8(a) Program.**

The assigned SBA Business Development Specialist reviews the 8(a)-firm's status to determine its eligibility to receive the award as well as the firm's capability to perform the project. SBA has 5 working days to review and approve the request and send it back to the agency CO. This could be submitted as quickly as 24 hours if requested.

### **5. Acceptance Letter.**

SBA issues a formal notification to the CO that it accepts the requirement into the 8(a) program for Sole Source direct award.

### **6. Negotiate Requirement.**

Once SBA accepts the offer, the Agency CO is authorized to negotiate directly with the 8(a) firm and award the opportunity.

### **7. Issue contract to Firm with 8(a) clauses.**

Add SBA District Office to distribution list. 8(a) Clauses: DFARS 252.219-7009, and 252.219-7011 and FAR 52.219-17, 52.219-14, 52.219-8.

**NOTE:** The SBA Area Director may accept buys over \$4M for sole source if no other 8(a) participants are capable of providing the service/item at a fair price. (See 13 CFR 124.506(d))

# AWARDING HUBZONE SET ASIDE CONTRACTS

## Types of HUBZone Contracts

As the contracting officer, you will be responsible for determining what type of HUBZone contracting opportunity to conduct.

- A **competitive** HUBZone set-aside contract can be awarded if the contracting officer has a reasonable expectation that at least two responsible HUBZone small businesses will submit offers and that the resulting contract can be awarded at a fair market price.
- A **sole source** HUBZone contract can be awarded if the contracting officer does not have a reasonable expectation that two or more qualified HUBZone small businesses will submit offers, determines that the qualified HUBZone small business is responsible, and determines that the contract can be awarded at a fair price. The government estimate cannot exceed \$7.5 million for manufacturing requirements or \$4 million for all other requirements.
- A **full and open competition** contract can be awarded with a price evaluation preference. The offer of the HUBZone small business will be considered lower than the offer of a non-HUBZone/non-small business-providing that the offer of the HUBZone small business is not more than 10 percent higher.

## How can I find HUBZone contractors for the services or products we need?

Several market research tools are available to find certified HUBZone small businesses.

- You can search the list of HUBZone Small Business Concerns (SBCs) at SBA's Dynamic Small Business Search (DSBS) at this [link](#). DSBS serves as the official list of small businesses that SBA has certified as HUBZone SBCs.
- Personal assistance from the SBA's HUBZone Program Office is available at this email address: [hubzone@sba.gov](mailto:hubzone@sba.gov)([link sends e-mail](#)).
- Contact your OSDDBU or Agency Small Business Specialist for assistance.
- Issue a Sources Sought announcement in FedBizOpps seeking interested small businesses, including HUBZone small businesses.



## **FREQUENTLY ASKED QUESTIONS PROVIDED BY SBA**

### **When does SBA get involved on a HUBZone solicitation?**

The decision to do a HUBZone set-aside may not involve SBA directly; instead it is an independent contracting officer's decision to proceed with a HUBZone set-aside based on proper market research. SBA's Procurement Center Representatives (PCRs) may become involved if the agency decides to procure the goods or services using full and open competition. SBA's HUBZone program office will get involved in the event of a challenge to the successful offeror's HUBZone status.

### **How can I ensure that small businesses, including HUBZone small businesses, respond to the sources sought?**

Consider using language in your sources sought announcement that specifically encourages HUBZone small businesses to respond, along with the other federal small business categories if applicable. Also, consider structuring the sources sought announcement by asking only for the key pieces of information you need to make the set-aside determination along with a page limit, thus making it easier for HUBZone small businesses to respond.

### **Why can't I just issue a small business set-aside or a full and open solicitation? Then, if a HUBZone SBC is the successful offeror, my agency can still take the HUBZone credit.**

Both SBA's regulations and the FAR require that for acquisitions exceeding the Simplified Acquisition Threshold, the contracting officer must first consider a set-aside or sole source award (if the sole source award is permitted by statute or regulation) under the 8(a) BD, HUBZone, SDVO SBC or WOSB programs before setting aside the requirement as a small business set-aside (see 13 C.F.R. §§ 124.503(j), 125.2(f), 125.19(b), 126.607(b), 127.503(d); FAR 19.502-2(b)). There is no order of precedence among the 8(a) BD, HUBZone, SDVO SBC or WOSB programs. The contracting officer must document the contract file with the rationale used to support the specific set-aside, including the type and extent of market research conducted. In addition, the contracting officer must document the contract file showing that the apparent successful offeror's certifications in the System for Award Management (SAM) (or successor system) and associated representations were reviewed.

SBA believes that progress in fulfilling the various small business goals, as well as other factors such as the results of market research, programmatic needs specific to the procuring agency, anticipated award price, and the acquisition history, should be considered in making a decision as to which program to use for the acquisition. Although agencies can take HUBZone small business credit if a HUBZone small business is awarded a contract using a general small business set-aside or full and open competition, this strategy significantly reduces an agency's chance to meet the statutory 3% HUBZone goal.

**You should also check with your Agency Small Business Specialist to see how making HUBZone procurements can assist them in meeting their agency goals.**

**Can I do formal HUBZone set asides using the GSA schedule?**

Yes. A number of HUBZone small businesses participate in the GSA Schedule program and Contracting Officers can use this tool to target HUBZone small businesses.

**Can a HUBZone firm self-certify? I know that under the FAR, small businesses and small disadvantaged businesses can do so.**

Firms cannot self-certify as a HUBZone. Only the SBA has the authority to certify a firm as a HUBZone small business concern. You can verify a firm's HUBZone certification at SBA's Dynamic Small Business Search at this [link](#). Contracting Officers must ensure that an apparent awardee is HUBZone certified prior to making an award under a HUBZone set-aside process or an award where a price evaluation preference was applied. Please see FAR 19.1303(a).

**News Update as of January 4, 2018**

The 2018 National Defense Authorization Act ("NDAA"), signed last week, made some significant changes to the HUBZone Program. Most of the changes will not take effect until January 1, 2020, but one important change is effective immediately: the current HUBZone maps will be "frozen" and will not change until at least January 1, 2020. This means that areas that currently are designated as HUBZone (or in redesignated status) will remain HUBZones until 2020. Under the 2018 NDAA, SBA is charged with creating a publicly accessible online tool to depict the HUBZones. The current HUBZone areas will remain the same until the new online tool is created – which will be no sooner than January 1, 2020, and potentially longer.

# AWARDING SERVICE-DISABLED VETERAN OWNED SMALL BUSINESS (SDVOSB) SET ASIDE CONTRACTS

## Types of SDVOSB Contracts

As the contracting officer, you will be responsible for determining what type of SDVOSB contracting opportunity to conduct.

1. The requirement is not exempted from SDVO contracting, the Contracting Officer (CO) considers setting aside the requirement for 8(a), HUBZone, or SDVO SBC participation before considering setting aside the requirement as a small business set-aside.
2. There is a reasonable expectation that at least two responsible SDVO SBC will submit offers; and
3. The award can be made at a fair market price.

A contracting activity may not make a requirement available for a SDVO contract if and be exempted if:

1. The requirement would be fulfilled through the award of Federal Prison Industries, Inc. or Javits-Wagner-O'Day Act participating non-profit agencies for the blind and severely disabled.
2. The requirement is currently being performed by an 8(a) participant or SBA has accepted that requirement for performance under the authority of the Section 8(a) Program.

## Sole Source Contracts

A Contracting Officer (CO) may award a sole source contract if:

1. If the requirement is not exempted from SDVO contracting and cannot be set-aside.
2. The CO does not have a reasonable expectation that at least two responsible SDVO SBCs will submit offers.
3. The anticipated award price of the contract, including options, will not exceed:
  - o \$6.5M for manufacturing requirements
  - o \$4.0M for all other requirements
4. Award can be made at a fair market price.

## **Simplified Acquisition Threshold**

If the requirement is at or below the simplified acquisition threshold, the CO may set-aside the requirement for consideration among SDVOSBCs using simplified acquisition procedures or may award a sole source contract to a SDVOSBC. A sole source award is only permissible where there is only one SDVO SBC that perform the contract in accordance with Federal Acquisition Regulations § 19.406 (a)(3).

## **Additional Contract Requirements**

There are some limitations on subcontracting that a SDVO SBC Prime or Sub-contractor can subcontract for:

- Services Contracts (Except Construction):
  - 50% of the contract performance incurred for SDVO SBC personnel
- Supply Contract:
  - 50% of the cost of manufacturing the supplies
- General Construction:
  - 15% of the contract performance incurred for SDVO SBC personnel
- Construction by Special Trade:
  - 25% of the contract performance incurred for SDVO SBC personnel

## **Executive Order 13360**

Executive Order 13360 signed in October 2004, requires each agency to:

- Develop a strategy to significantly increase its contracting and subcontracting with small businesses owned and controlled by service-disabled veterans;
- Designate a senior-level official to be responsible for developing and implementing the agency's strategy; and
- Report its progress annually to the SBA.

## **AWARDING WOMEN-OWNED SMALL BUSINESS (WOSB) SOLE-SOURCE CONTRACTS**

Women-Owned Small Businesses (Section 825) – Permits sole-source contracts for Women-Owned Small Businesses (WOSBs) and Economically-Disadvantaged Women-Owned Small Businesses (EDWOSBs) if there is only one WOSB or EDWOSB who can perform the work and the value of the contract is below \$ 4 million, or \$6.5 million for manufacturing. This provides WOSBs and EDWOSBs with the same sole-source authority currently available to HUBZone and Service-Disabled Veteran-Owned Small Businesses firms. Originated as the Women's Procurement Program Equalization Act of 2013.

### **FOUR REQUIREMENTS FOR WOSB SOLE SOURCE CONTRACTS**

#### **1. Is the contract in a WOSB/EDWOSB eligible NAICS code?**

The WOSB program is unique in that it is only applicable to contracts in certain NAICS codes. In addition some NAICS codes are open to all WOSBs, while some are only available to Economically- Disadvantaged WOSBs (EDWOSBs). A list of all NAICS codes in the program, and their WOSB/EDWOSB designation is readily available at: [https://www.sba.gov/sites/default/files/files/2012\\_WOSB\\_EDWOSB\\_NAICS\\_Codes.pdf](https://www.sba.gov/sites/default/files/files/2012_WOSB_EDWOSB_NAICS_Codes.pdf).

#### **2. Is the contract (including options) valued at \$6.5 million or less for manufacturing contracts or \$4 million or less for all other contracts?**

Similar to other small business contracting programs, WOSB sole source contracts are limited to certain sizes. For manufacturing contracts (the 31-33 NAICS codes) that cap is \$6.5 million, while all other contracts have a cap of \$4 million. This is including all options on the contract. More on the specifics of the NAICS manufacturing codes can be found at: <http://www.census.gov/econ/manufacturing.html>.

#### **3. Can the contract be awarded to the WOSB/EDWOSB at a fair and reasonable price?**

The statute and regulations also require that the contract can be awarded at a "fair and reasonable price." This common term in federal contracting is described in the Federal Acquisition Regulation (FAR) Subpart 15.4 available at: <https://www.acquisition.gov/?q=/browse/far/15>.

**4. In the estimation of the contracting officer, is there a reasonable expectation that only one WOSB will submit an offer?**

The final requirement for a sole-sourced contract in the WOSB contract is the contracting officer's estimation that only one WOSB will submit an offer. Determining the number of WOSB/EDWOSBs likely to submit offers can be done through market research, as noted in the regulations.

Note: If 2 or more WOSB/EDWOSBs are expected to submit an offer for an opportunity, the contract can be set-aside through the WOSB program.

