



## CONDUCTING MARKET RESEARCH

Fred Lagunas  
Procurement Center  
Representative  
SBA Office of Government  
Contracting  
4 Mar 09

---

---

---

---

---

---

---

---



## Policy

### FAR 19.502-2 Total Small Business Set-asides

- .....each acquisition of supplies or services that has an anticipated dollar value exceeding \$3,000(\$15,000 for acquisitions as described in 13.201(g)(1), but not over \$100,000 is automatically reserved exclusively for small concerns and shall be set-aside for small business.....
- The contracting officer shall set-aside any acquisition over \$100,000 for small business participation when there is a reasonable expectation that...
  - ....offers will be obtained from at least two responsible small business concerns

---

---

---

---

---

---

---

---



## Market Research Policy

- FAR Part 10.001 Policy
  - Agencies must conduct market research appropriate to the circumstances--
    - before soliciting offers for acquisitions with an estimated value in excess of the simplified acquisition threshold(SAT)
    - before soliciting offers for acquisitions with an estimated value less than the SAT when adequate information is not available and the circumstances justify its cost

---

---

---

---

---

---

---

---



## Market Research Policy cont'd

- market research should validate the acquisition strategy being used
- should back-up decision not to set-aside if a protest arises
- consolidate results of market research into a Market Research document

Agencies shall conduct market research on an ongoing basis

---

---

---

---

---

---

---

---



## CONDUCTING MARKET RESEARCH

Agencies should document the results of market research in a manner appropriate to the size and complexity of the acquisition

“Requirements personnel and contracting officers must WORK TOGETHER AS A TEAM TO GATHER MARKET DATA needed to make decisions. Market research utilized to justify sole source must be complete and not more than 6 months old. A statement that “the solicitation will be synopsisized and that all proposals received will be evaluated” is not a substitute for performing adequate market research and in itself does not support and justify sole source.”

---

---

---

---

---

---

---

---



## CONDUCTING MARKET RESEARCH

- When conducting market research agencies;
  - should not request potential sources to submit more than the minimum information necessary
  - should consult with the local SBA PCR as early as possible during the acquisition process
  - Market research is not just posting a Sources Sought or a RFI notice alone. You should also include results from a search in the Dynamic SB Search website.
- The extent of market research WILL VARY, depending on such factors as urgency, estimated dollar value, complexity, and past experience

---

---

---

---

---

---

---

---



## Market Research Document

- Document responses received from RFIs and Sources Sought notices
  - Identify the number of SBs responding and SB category
  - Document if they intend to participate as a prime, team member or subcontractor
  - Document results from Dynamic SB Search queries
    - Number of results from each category
    - Identify each SB contacted by name

---

---

---

---

---

---

---

---

## CONDUCTING MARKET RESEARCH

### References

FAR Part 10  
FAR Part 19

---

---

---

---

---

---

---

---

## CONDUCTING MARKET RESEARCH

QUESTIONS????

Fred Lagunas  
536-8685  
fred.lagunas@brooks.af.mil

---

---

---

---

---

---

---

---



## Office of Government Contracting

### Mission

The Office of Government Contracting's mission is to help enhance the effectiveness of small business programs by working with Government Contracting and Business Development (GC/BD) program offices and others to develop policies, regulations, and statutory changes.

---

---

---

---

---

---

---

---



## Basis for SBA Programs

### Small Business Act

- Implements Congressional Policy to aid, counsel, assist & protect the interests of small business concerns
- Goal of policy is to ensure that a fair proportion of purchases, contracts & subcontracts be placed with small businesses

---

---

---

---

---

---

---

---



## Small Business Contract Assistance Programs

### Prime Contract Assistance

- Small business set-aside program
  - Procurement Preference Goaling
  - Size Determination Program
  - Waivers to the Non-Manufacturer Rule
  - Natural Resources Program
  - Certificate of Competency (COC)
- Subcontracting Assistance

---

---

---

---

---

---

---

---



## Office of Government Contracting

### Procurement Center Representatives PCRs

---

---

---

---

---

---

---

---



## What PCRs Do

- Promote SBA Programs/8(a) BD
- Review Acquisitions, Bundling Cases & Solicitations
- Recommend Set-Asides
- Perform Market Research
- Provide & Attend Training Events
- Perform Surveillance Reviews
- Counsel Small, "Other Than Small" & Federal Agencies
- Perform Outreach



---

---

---

---

---

---

---

---



## What PCRs See

- |                                      |                                    |
|--------------------------------------|------------------------------------|
| •Small Business Review Form (DD2579) | •Source Selection Criteria         |
| •Government Estimate                 | •A-76 Information                  |
| •Sole Source                         | •Sensitive Information             |
| •J&As                                | •Set-aside appeals                 |
| •Statement of Work                   | •Certificate of Competency Request |
| •Acquisition Plan                    | •Subcontracting Plans              |
| •Market Survey                       | •Bid Abstracts                     |
| •Purchase Request                    |                                    |
| •Purchase History                    |                                    |
| •Synopsis                            |                                    |

---

---

---

---

---

---

---

---