



A University of Missouri Extension Partner



Presented by

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MO PTAC – Saint Louis, MO

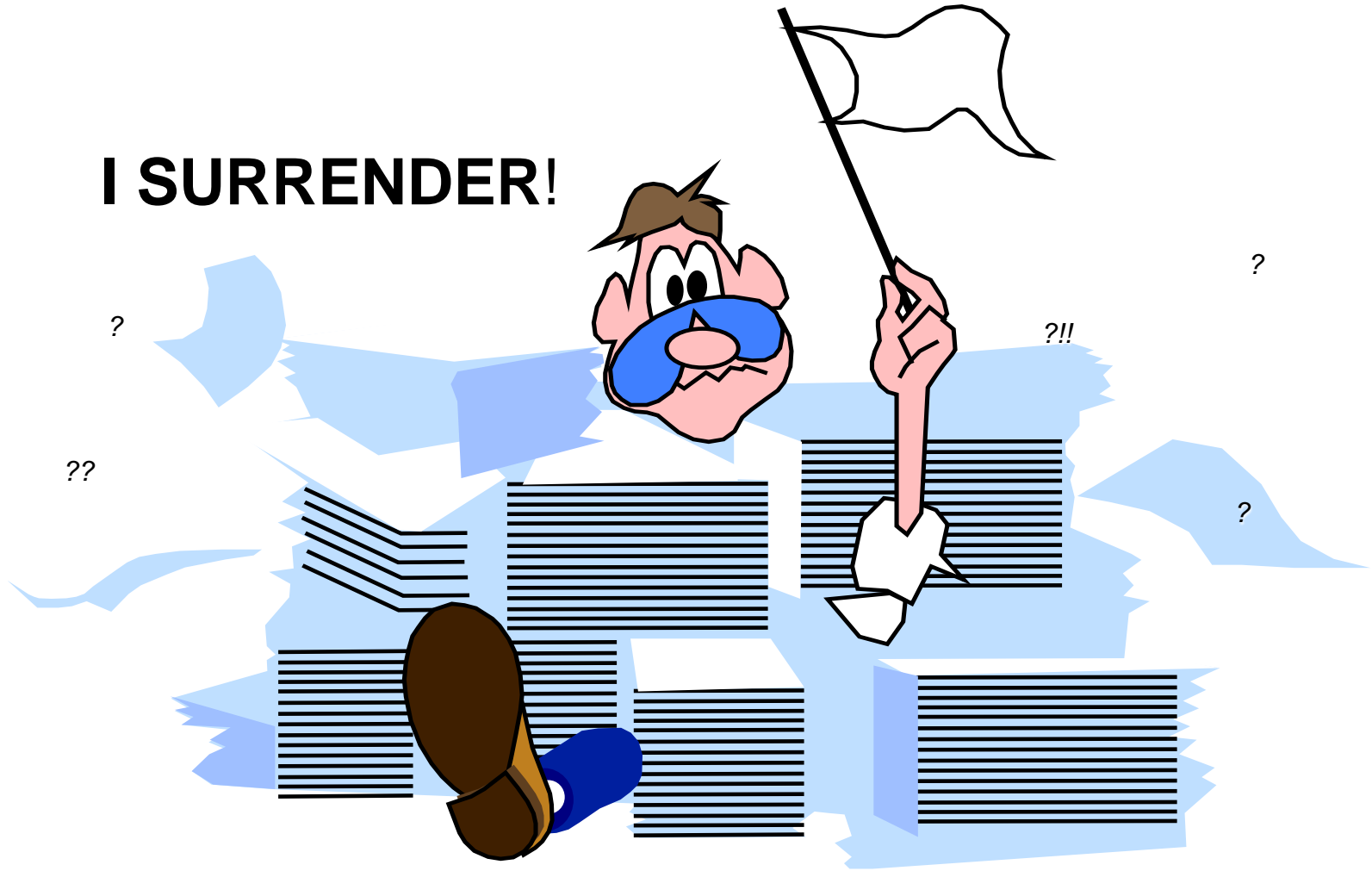
October 23, 2015

Why is selling to the government so confusing?





I SURRENDER!



MO TAC WAS CREATED TO HELP YOU!



Key Partnerships:

The MOPTAC grant from Defense Logistics Agency is held and matched by University of Missouri Extension



MO PTAC'S MISSION AND OBJECTIVE

- ❖ ***Mission: To increase the number of government contracts awarded to Missouri firms so that these firms can grow.***
- ❖ ***Objective: To assist businesses – including small, disadvantaged and women owned firms – in obtaining federal, state and local government contracts.***

PTAC's ARE NATIONWIDE

- ❖ *98 PTACS in over 300 offices*
- ❖ *All 50 states, District of Columbia, Puerto Rico*
- ❖ *Association of Procurement Technical Assistance Center (APTAC) <http://www.aptac-us.org>*

Find a PTAC

Select a State ▼

Find a Procurement Technical Assistance Center

Click on the map below or select your state above to find the Procurement Technical Assistance Center nearest you.

[Find American Indian PTACs »](#)



ASSISTANCE FOR SMALL BUSINESSES

HELP FOR GOVERNMENT CONTRACTING

Procurement Technical Assistance Centers (PTACs)

Expert Government Contracting assistance at little or no charge – with **System for Award Management (SAM) registrations**, certifications, developing marketing strategies and everything you need to sell to federal state and local government agencies. Funded through Cooperative agreements between the US Department of Defense (DoD) and state/local non-profit entities.

Located near you – PTACs provide government contracting assistance in over 300 locations across the country, as well as the territories of Puerto Rico and Guam.

Workshops and Seminars on a wide range of government contracting topics teach what you need to know and help you connect with other small businesses.

One-on-One Counseling provides assistance tailored to the specific needs of your business – and **is always free** of charge!

Matchmaking Events connect you with agency officials who are buying your product.

Government Contracting Assistance for Businesses

A wealth of resources to help you sell to the government

[Learn More ▶](#)

APTAC Partners, Federal Colleagues & Friends

Working together to nurture small business gov't contractors

[Learn More ▶](#)



County Assignments - State Wide

Region 1 – Columbia
(Main Office)

- Jana Weitkemper

Region 2 – Kansas City

- Michelle Cunningham

Region 3 – St. Joseph

- Clint Dougherty

Region 4 – Springfield

- Allen Waldo

Region 5 and 6 – St Louis

- Mille Miller-Hoover and Carolyn Jones

Region 7 – West Plains

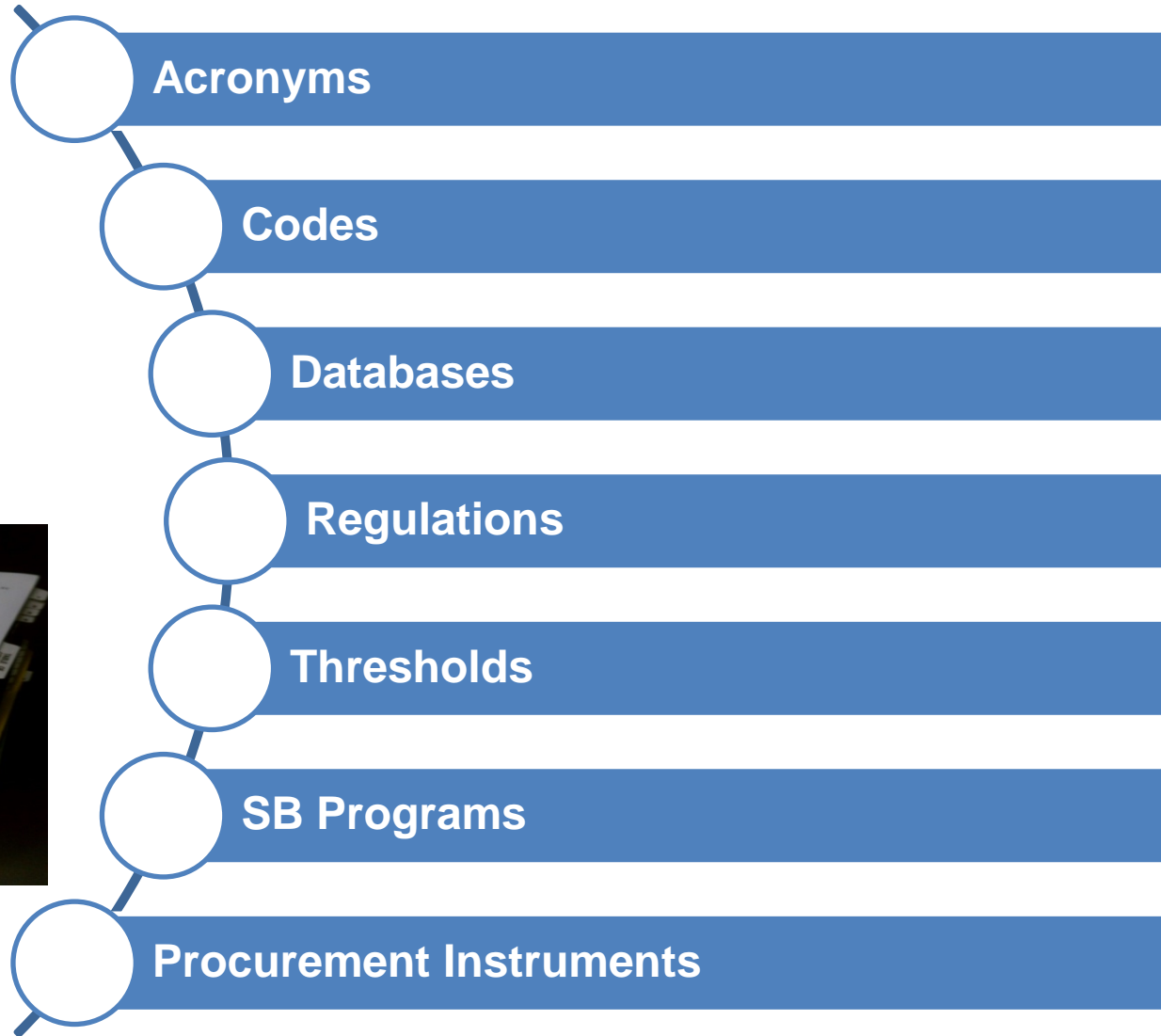
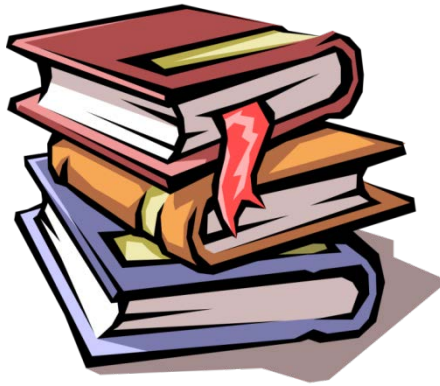
- Willis Mushrush

Region 8 – Macon

- Chris Shoemaker



Help You Learn The Government Jargon!







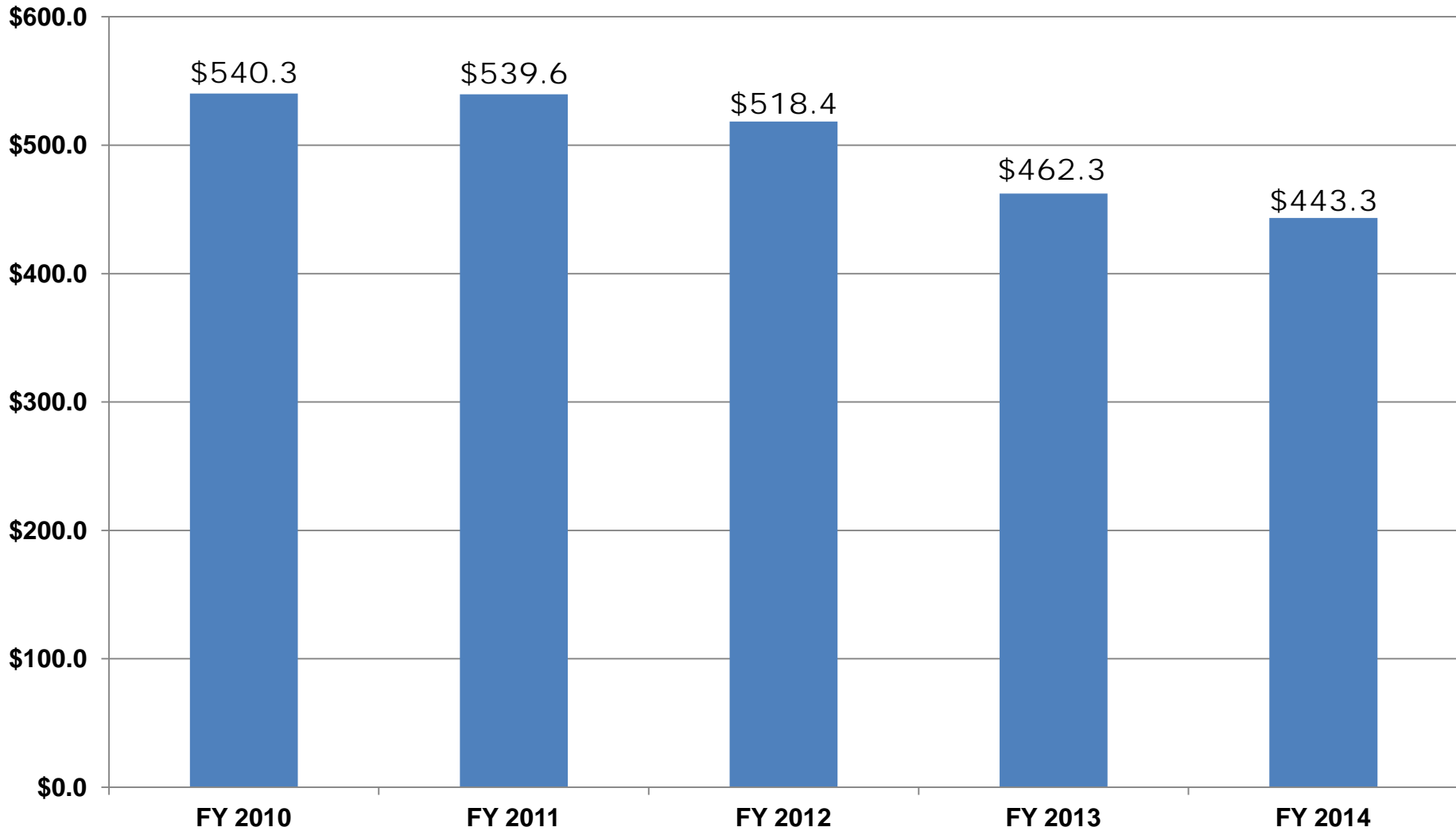
← Right Decision

Wrong Decision →

Why do you want to do business with the Government?



US Government is the largest purchaser in the world of goods and services



Federal Contract Spending Per FY in Billions

THE TOP TWELVE FEDERAL BUYERS

Dept. of Defense

- www.defense.gov

Dept. of Energy

- www.doe.gov

Health and Human Services

- www.hhs.gov

Dept. of Veterans Affairs

- www.va.gov

Dept. of Homeland Security

- www.dhs.gov

NASA

- www.nasa.gov

Dept. of Justice

- www.justice.gov

Dept. of Agriculture

- www.usda.gov

Dept. of State

- www.state.gov

U.S. General Services Admin.

- www.gsa.gov

Dept. of commerce

- www.commerce.gov/

Dept. of the Interior

- www.interior.gov

Set Asides

- ❖ Total Federal Acquisition Spending -- \$450+ Billion
- ✧ Small Business Market Share
 - SB (Small Business) Goal – 23% (\$103.5B)
 - Small Disadvantaged Business Goal (8a) 5% (\$22.5B)
 - WOSB (Woman-Owned Small Business) Goal -5% (\$22.5B)
 - HUBZone (Historically Underutilized Business) Goal – 3% (\$13.5B)
 - SDVOB (Service Disabled Veteran Owned Biz) Goal –3% (\$13.5B)



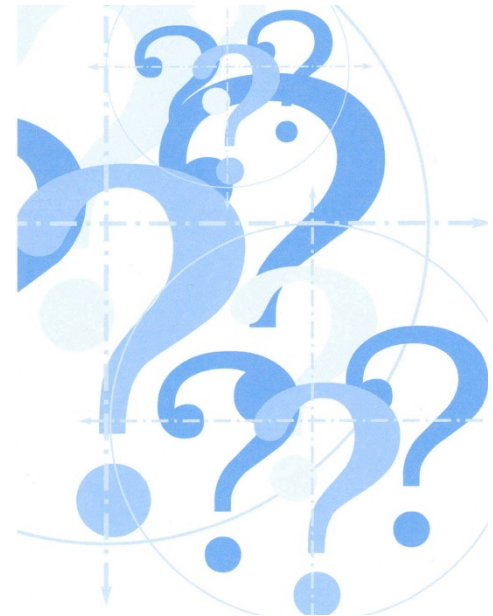
Get Ready

- to have these items in place.....

DUNS

SAM

Socio/economic certifications



GET READY TO REGISTER

- **DUNS NUMBER**
 - Data Universal Numbering System
- **Dun and Bradstreet online web form:**
 - <http://fedgov.dnb.com/webform>
 - or 1-866-705-5711
- **No charge for DUNS number.**

SAM

SYSTEM FOR AWARD MANAGEMENT



www.sam.gov

Existing capabilities, streamlined for efficiency.

Know your Business Status

- ❖ What determines whether a business is a Small Business Entity?
- ❖ Size standards are set by the Small Business Administration (SBA) North American Industrial Classification (NAICS) code:
- ❖ http://www.sba.gov/sites/default/files/files/Size_Standards_Table.pdf
- For example:
 - Manufacturers – up to 500 employees
 - Residential Remodelers - \$33.5 (236118)
 - Siding Contractors - \$14.0 (238170)
 - Environmental Consulting Services - \$7.0 (541620)

Know Your NAICS

- NAICS codes (North American Industrial Classification Code):
 - Classifies the type of product or service you provide, identifies primary line of business
 - <http://www.census.gov/epcd/www/naics.html>
- SIC Codes (Standard Industrial Classification Code)
 - <http://www.osha.gov/oshstats/sicser.html>

KNOW THE PROCUREMENT PROCESS!

Learn
the
Procurement
Process &
Your Role

PTACs
Can Help

PRE-SOLICITATION PHASE

```
graph TD; A[PRE-SOLICITATION PHASE] --> B[Determination of Need]; B --> C[Initiating the Procurement]; C --> D[Analysis of Requirement]; D --> E[Sourcing];
```

Determination of Need

Initiating the Procurement

Analysis of Requirement

Sourcing

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**SOLICITATION-AWARD
PHASE**

```
graph TD; A[SOLICITATION-AWARD PHASE] --> B[Solicitation]; B --> C[Evaluation - Responsiveness]; C --> D[Evaluation - Negotiation]; D --> E[Award - Responsibility to Execute];
```

Solicitation

**Evaluation –
“*Responsiveness*”**

Evaluation - Negotiation

**Award – “*Responsibility*”
to Execute**

KNOW THE PROCUREMENT PROCESS!

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**POST-AWARD ADMINISTRATION
PHASE**



```
graph TD; A[POST-AWARD ADMINISTRATION PHASE] --> B[Start-Up]; B --> C[Quality Assurance]; C --> D[Payment and Accounting]; D --> E[Closeout, Modification, Termination & Claims];
```

The diagram illustrates the Post-Award Administration Phase as a vertical sequence of five steps. Each step is contained within a light blue rounded rectangular box, and the boxes are connected by downward-pointing arrows, indicating a sequential flow from top to bottom.

Start-Up

Quality Assurance

Payment and Accounting

**Closeout, Modification,
Termination & Claims**

Know the Federal Purchasing Thresholds

- ❖ \leq \$3,500 : Micro Purchase with a “P” Card
- ❖ \$3,500 to \$15,000: No requirement to post: CO may just contact vendors
- ❖ \$15,000 to \$25,000: Advertised in a public place
- ❖ $>$ \$25,000 – Electronic posting in www.fbo.gov

KNOW HOW TO IDENTIFY YOUR PRODUCT OR SERVICE

- Select your North American Industry

Classification System (NAICS) Code:

- ▶ Six-digit codes identify types of business
 - ▶ 238220 – Heating ventilation and air conditioning (HVAC)
 - ▶ 238160 - Roofing
- <http://www.census.gov/naics>

KNOW RULE OF TWO AND SMALL BUSINESS SET-ASIDES

- ❖ FAR 19.502-2
- ❖ Acquisitions >\$3,000 <\$150,000 shall be set-aside for SB
- ❖ “Rule of Two” (reasonable expectations that offers will be obtained from at least two responsible small business concerns that are competitive in terms of market prices, quality and delivery)
- ❖ Types of Socio-Economic Programs
 - ★ 8(a) Program
 - ★ HUBzone (Historically Underutilized Business Zone)
 - ★ SDVOSB (Service Disabled Veteran Owned Small Bus)
 - ★ WOSB (Women Owned Small Business)

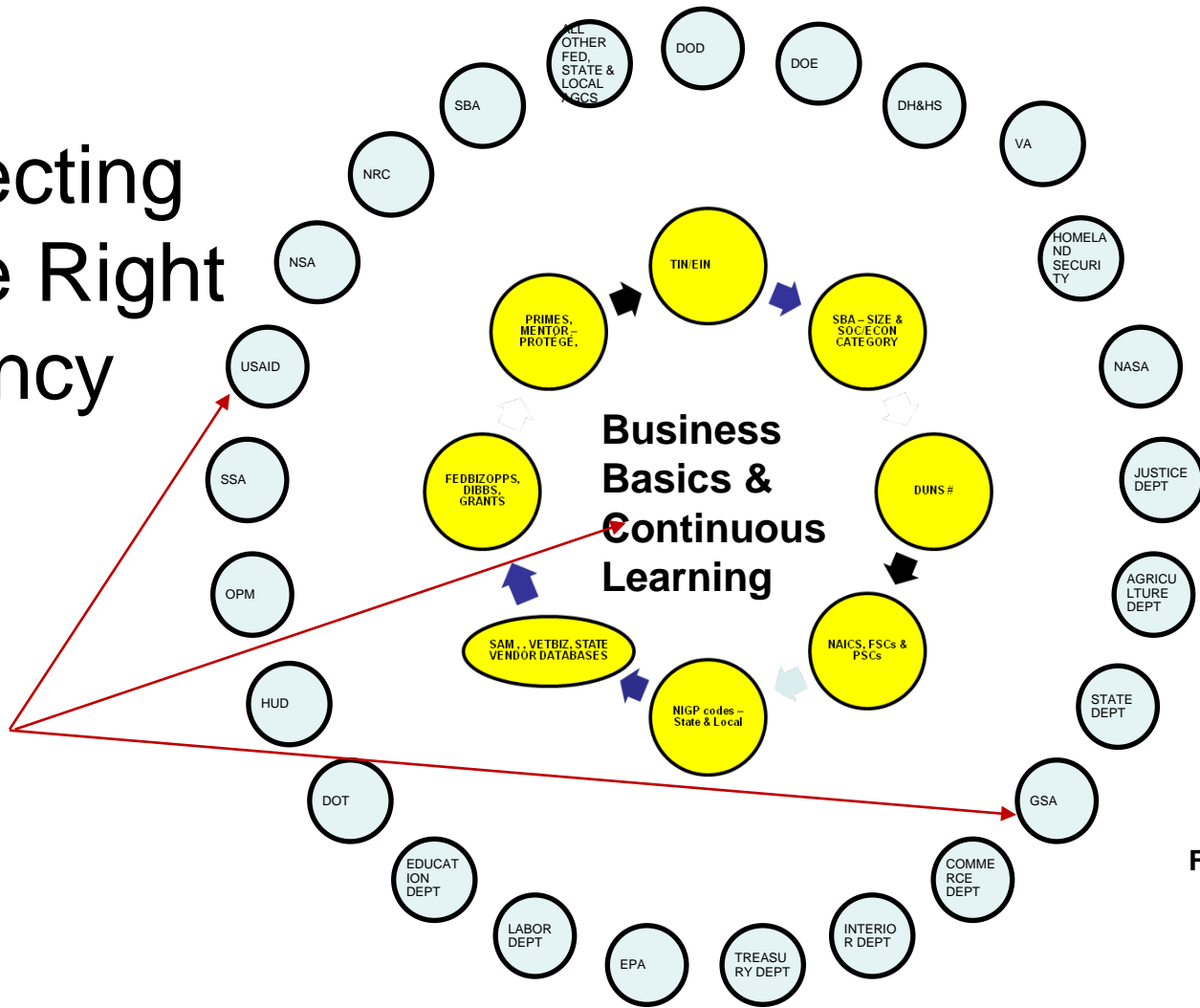
Know the key concepts of Certifications

- ❖ Owns at least 51% of the business
- ❖ Skills needed for business
- ❖ Normally highest title and salary
- ❖ Day-do-Day operations including financial
- ❖ Long term strategic control



Connecting with the Right Agency

It's a Process!



FAR 9.01

CAPABILITY STATEMENT

Sample Template

Show your logo and contact information, with a specific person's name, phone and email.

TargetGov Tip: This is a CONTENT template, not a design template. Add color & graphic elements!

Title this document: Capability Statement

Core Competencies

Short introduction statement relating the company's core competencies to the **agency's specific needs** followed by **key-word heavy bullet points**

TargetGov Tips:

- No long paragraphs.
- Use short sentences followed by keyword heavy bullet points
- Create a new document for each agency, prime or teaming opportunity
- Tailor each Capability Statement to the agency mission or specific opportunity
- Call this document a Capability Statement
- Preferably, this Capability Statement is one page, one side
- Go to two sides only if absolutely necessary
- Save and distribute as a PDF, not a Word, PowerPoint or other format

Past Performance

List past customers for whom you have done *similar* work. **Prioritize** by related agency, to all federal to other government to commercial contracts. If the past projects do not relate to the targeted agency's needs, do not list it.

TargetGov Tip: Ideally, include specific contact information for immediate references. Include name, title, email, phone.

Differentiators

Identify what makes you different from your competitors and how this benefits the targeted agency

TargetGov Tip: Relate your key differentiators to the needs of the agency, prime or teaming partner.

COMPANY DATA

One very brief company description detailing *pertinent* data.

TargetGov Tip: Readers will visit your web site for additional information. Make sure your web site is constantly updated *and* government-focused.

List Specific Pertinent Codes

- DUNS
- Socio-economic certifications: 8(a), HUB Zone, SDVOB, etc.
- NAICS (all)
- CAGE Code
- Accept Credit and Purchase Cards
- GSA Schedule Contract Number(s)
- Other federal contract vehicles
- BPAs and other federal contract numbers
- State Contract Numbers

Your logo, address, phone numbers (voice, mobile and fax) email, web site and other related contact information

Marketing Capability Statement

“Door Opener” Targets

- ← Federal Agencies, Prime Contractors, Teaming Partners
- ← Small business representatives
 - ⑩ OSDBU, SADBUI, SBLO
- ← Contracting and acquisition staff
 - ⑩ CO, KO, COTR
- ← Program and technical managers
 - ⑩ PM, end-user



5 Key Elements

1. Call it a Capability Statement
2. Core Competencies
3. Past Performance
4. Differentiators
5. Company Data



4 Differentiators Defined

- ← Unique features and/or benefits of a product, or aspects of a brand, that set it apart from competing products or brands



Differentiators

← Identify **what makes the firm different** from its competitors

- ⑩ Location
- ⑩ Training
- ⑩ ISO
- ⑩ Exclusives
- ⑩ Relationships
- ⑩ Experience



← And **how this benefits** the targeted:

- ⑩ Agency
- ⑩ Prime
- ⑩ Team

5 Company Data

- ← Federal: DUNS & CAGE Code
- ← **NAICS (grouped)**
- ← **DOD: PSC & FSC codes**
- ← GSA Schedule Contract Number(s)
- ← BPAs and other contract numbers
- ← Socio-economic certifications: SB, WOSB, 8(a), HUB Zone, SDVOB
- ← Contract Numbers



KNOW HOW TO BUILD RELATIONSHIPS!

Contracting Officer (CO)

- The ***ONLY*** person who can buy, administer, or terminate contracts for the Government

Contract Administrator

- Assists the CO



KNOW HOW TO BUILD RELATIONSHIPS!



❖ *DOD Small Business Specialists or SADBUS (Small and Disadvantaged Business Utilization Specialists)*

- ❖ Advises Small Business of Available Government Acquisition Contracts
- ❖ Serves as a conduit to technical person or buyer
- ❖ Acts as liaison between supplier and buyer
- ❖ Does not buy anything
- ❖ Online email contact information: www.acq.osd.mil/osbp/

KNOW HOW TO BUILD RELATIONSHIPS!



SBA Procurement Center Representatives (PCRs)

- ✧ **Assist small businesses in obtaining federal contracts**
- ✧ **Are located at various SBA area offices and major federal buying centers around the country**
- ✧ **Assist increase the small business share of federal procurement awards & coordinate during contracting activities and review procurements**
- ✧ **Recommend set aside requirements for Small Business, 8A, HUBZone, Service Disabled Veteran Owned, or Women-Owned Small Business concerns**
- ✧ **Initiate appeals (Form 70s) of contracting officers' decisions**
- ✧ **Have facts and will provide training, outreach, and research**
- ✧ **Review proposed small business subcontracting plans, may recommend to the contracting officer various small business goals and subcontracting options.**

Ref: www.sba.gov/content/procurement-center-representatives

KNOW HOW TO BUILD RELATIONSHIPS!

- ❖ **Prime Government Contractors & Subcontracting Opportunities**
- ❖ **Small Business Liaison Officer (SBLO) – Prime Contractor Employee**
- ❖ **Subcontracting plans required, in advance of award, in federal contracts in excess of \$650,000 –commodities and \$1,500,000 for construction contracts.**
- ❖ **Primes must establish a plan designed to maximize participation by small, 8(a), SDBs, SDVOSBs, and women-owned small business concerns.**



KNOW HOW TO BUILD RELATIONSHIPS!



❖ Others

State and Local Purchasing & Procurement Departments

• Know the Procurement Officers & Area Procurement Specialists and How to Contact Them

- All US States
- Hospitals
- Academic and Educational Institutions
- Transit Systems
- Municipalities
- Police Departments
- Housing Authorities

KNOW THE DIFFERENCE BETWEEN RESPONSIVE AND RESPONSIBLE



- **RESPONSIVENESS**



–Comply with all material aspects requested and particularly, when responding to a RFP ... at bid opening.

To Be Deemed Responsible (FAR 9.104)



- ❖ Have adequate financial resources
- ❖ Comply with the delivery schedule
- ❖ Satisfactory performance record (<https://www.cpars.gov/>) – Contractor Performance Assessment Reporting System
- ❖ Record of Integrity and Business Ethics
- ❖ Necessary organizational, experience, accounting/operational controls, & technical skills (or can obtain them)
- ❖ Have the necessary production, construction, and technical equipment
- ❖ Eligible to receive an award under applicable laws (FAR 9.108)

A successful contractor has:

- ❖ A product/service that the government needs
- ❖ Satisfactory Past Performance
- ❖ Adequate financial resources
- ❖ The ability to make schedules
- ❖ Committed personnel and time
- ❖ Committed to quality & safety





- ***CONTRACTOR RESPONSIBILITY***

- *Execute and fulfill the contract. For*
- *example, ensure you, as the awarding*
- *company has the necessary facilities,*
 - *personnel, financing, etc. or ability*
 - *to obtain them.*

KNOW WHERE TO FIND BUSINESS OPPORTUNITIES

- SYNOPSISIZE: Give notice of...
- WHERE: (www.fedbizopps.gov)
- WHAT: Requirements > \$25K must be publicized at least 15 days before issuance of a solicitation.

HOW: Various Contracting Methods



Define your opportunities

If you can't do it well, don't bother with it. It's taking you away from what you should be doing.

NOTICE/SYNOPSIS TYPES

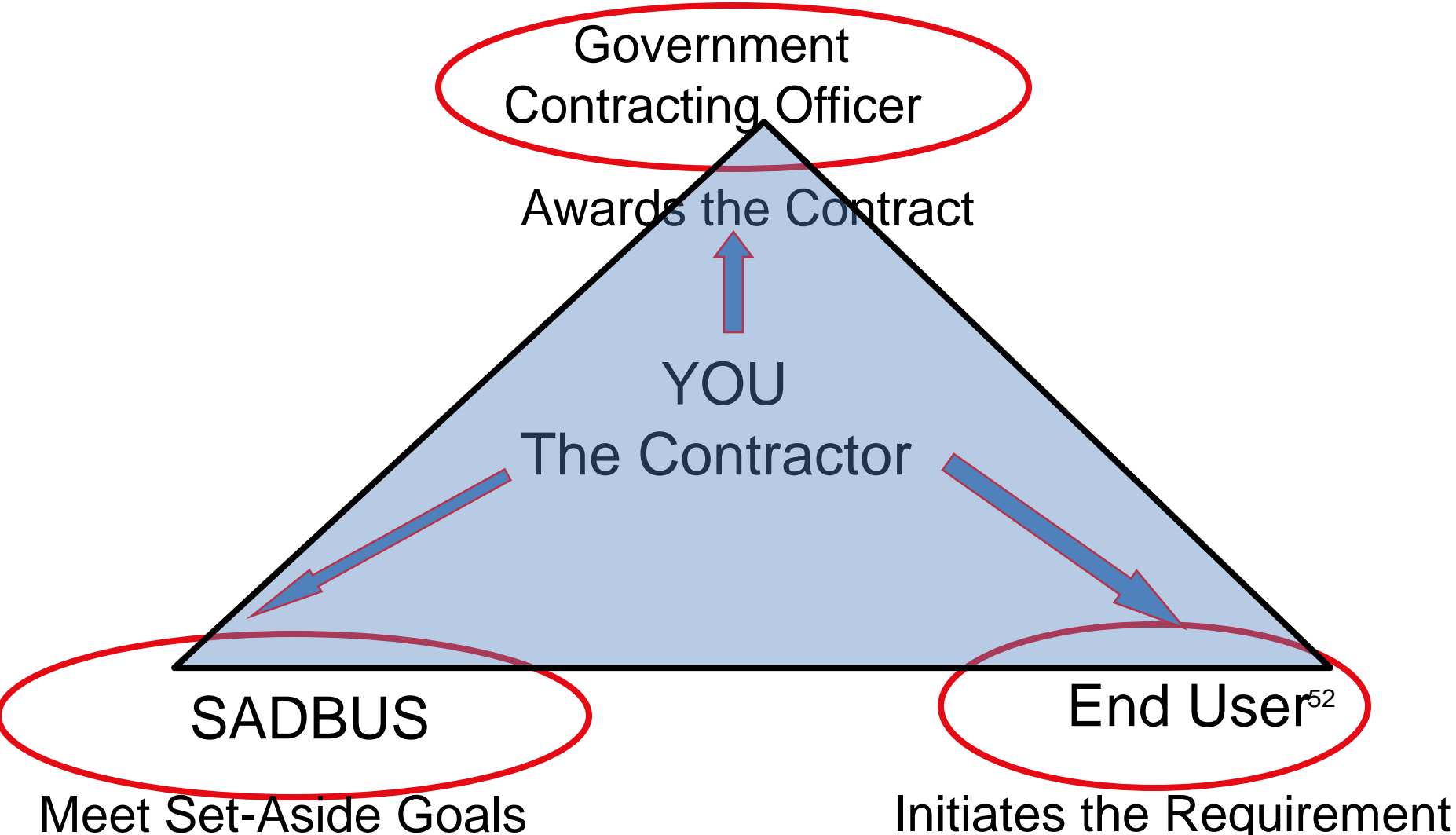
- ❖ Pre-Solicitation – Heads up
- ❖ Solicitation – Looking for a response and to award a contract
- ❖ Combined Synopsis/Solicitation – Looking for a response and to award a contract
- ❖ Sources Sought – Usually for a Set Aside: Rule of Two
- ❖ Special Notice - Perhaps telling about being a sole source
- ❖ Award – Which contractor received the work
- ❖ Justification and Approval (J&A) – Why this needs to be a sole source, etc.

<http://www.fedbidspeed.com/cracking-the-code/#sthash.ZI4XOI7y.dpbs>



A University of Missouri Extension Partner

The Triangle Relationship for Success



MO PTAC Services



- ❖ Developing marketing strategy
- ❖ Capabilities Statement
- ❖ Identifying buying offices
- ❖ Contacts (visits, phone calls, brochures)



Contract Specialist
Corps of Engineer



PTAC Counselor



The Corps of Engineer Contracting personnel and MO PTAC work together in resolving issues,

- Sam registrations
- Expired status in SAM
- NAICS
- Dynamic Small Business Search
- DUNS
- CAGE



Contract Specialist
Corps of Engineer



MO PTAC Counselor



Payment (DFAS) issues, filling out invoices properly, etc.



Solicitations

The screenshot displays the FEDBIZOPPS.GOV website interface. At the top, the logo "FEDBIZOPPS.GOV" is accompanied by the text "Federal Business Opportunities" and the "eGOV USA.gov" logo. A navigation bar includes links for Home, Getting Started, General Info, Opportunities, Agencies, and Privacy.

The main content area features a search bar with the text "Search more than 28,700* active federal opportunities." Below this, several filters are available: Posted Date (Last 90 Days), Set-Aside Code (Any), Place of Performance (Any State or Territory), Type (Any), Keyword / Solicitation #, and Agency. A "Search" button is located below the filters. A note indicates that additional criteria and multiple selections are available on the advanced search form.

An attention notice states: "ATTENTION: Agency users are responsible for properly uploading controlled, unclassified materials to FBO using the access control procedures for document packages and attachments detailed in the FBO Buyers Guide. Do not upload ANY classified materials to FBO."

The page is divided into two main sections for user registration:

- Buyers / Engineers:** Government users may post, manage, and award opportunities. Registration fields include Username and Password. Links for "View Opportunities", "Register Now", and "Clearance Required" are provided.
- Vendors / Citizens:** Vendors and citizens may search, monitor, and retrieve opportunities. Registration fields include Username and Password. Links for "Find Opportunities", "Register Now", and "Clearance Required" are provided.

On the right side of the page, there are several promotional banners and links:

- RECOVERY:** Local actions funded by the American Recovery and Reinvestment Act. Includes links for "SEARCH RECOVERY AWARDS" and "FED RECOVERY REPORTS".
- SMALL BUSINESS EVENTS:** Learn more about the Small Business Central Event Listing or SBEOG.org for events. Includes a "SEARCH SMALL BUSINESS EVENTS" link.
- VENDOR COLLABORATION:** FBO now contains the Vendor Collaboration Central Event Listing. Learn more at search. Includes a "SEARCH VENDOR COLLABORATION" link.
- USER GUIDES:** Includes a "Start" link.

BIDS & QUOTES

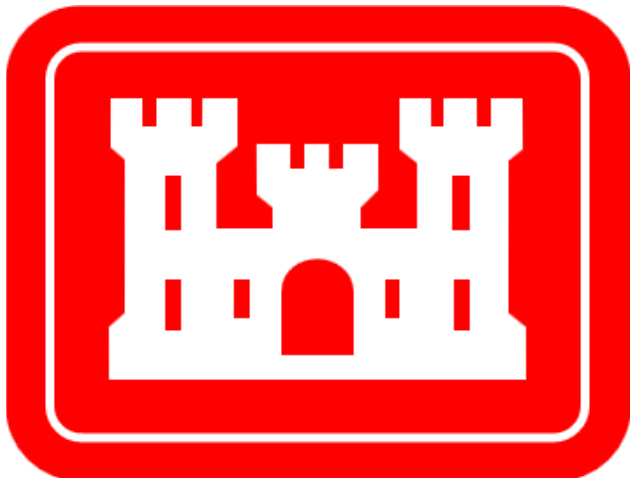


Request for Proposal



PRICE HISTORY







Thank you