Small Business Professional Bootcamp

Key Parts of Your Small Business Program

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2017 DoD Small Business Training Week | April 3-7, 2017 | #SBTW17
KEY PARTS OF YOUR SMALL BUSINESS PROGRAM

- Mission
- Training
- Outreach
- Compliance

PARTNERSHIPS FOR SUCCESS

HCA
Contracting Officers
Program Offices and Activity Acquisition Leaders

SBA
Program Center Representative

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Agency
OSBP
Small Business Professionals
MISSION

- Small Business Professionals are always “battle-book ready”
- Know your role and how to communicate to:
  - Internal stakeholders
  - External stakeholders
    - Industry wants to know about your activity & who you are,
    - what you do/do not procure,
    - how to do business with you, and
    - how to find opportunity
- Collect what you need to tell your story

Educate – Change the Culture
MISSION

Why do we have a separate small business program?

• Statutorily required (including SBP office separate & distinct from contracting)
  • All agencies are “graded” on compliance (your report card)
• High Visibility Politically:
  • Numbers are the political story
  • Your activity’s accountability for key performance goals
    • Flows up the chain of command to SBA/Executive, Congress, and OSB

What the Small Business Program is not...

• Not a social welfare program,
• Not a socioeconomic program, and
• Not just about goals
• Not contracting/AQ
TRAINING

- Identify the career field training you need to take
  - Ensure your own readiness
  - Complete SBP career program training
  - Get smart with DAU Small Business Community of Practice: https://acc.dau.mil/smallbusiness

- Mentor – Train – Equip
  ...ensure the readiness of your multifunctional team...
  - Acquisition professionals
  - Leaders in your organization
  - Industry
  - Are you getting what you need?
OUTREACH
You are the premier advocate for government customers and industry

- How you maintain your outreach program will determine your success... *build your network*
- Vendor library tools to assist both small businesses and the contracting office
- Vendor visit requests
- Relationships and partnerships with the contracting office decision makers
OUTREACH & BUILDING YOUR NETWORK

- Contracting Offices and Program Managers
- Director - Consolidation/Bundling
- Ombudsman - SB Complaints/Questions
- Competition Advocate - Resolve program differences
- Contracting Officers - Where rubber meets the road
OUTREACH & BUILDING YOUR NETWORK

• Procurement Technical Assistance Centers (PTACS) http://www.aptac-us.org/

• DOD Regional Councils
  • http://www.acq.osd.mil/osbp/sbs/councils/index.shtm

• Small Business Program Offices
  • Located at every DoD & Federal buying activity
  • All DoD: www.acq.osd.mil/osbp

• Introduce yourself to other Federal, State, and Local SB Advocacy personnel
OUTREACH & VENDOR VISITS

• Are you going to schedule visits on an ad-hoc basis or a certain day of the week?
• Capabilities – “Do we buy what they sell”
• Would vendor benefit from PTAC assistance?
• Does vendor need a base pass/directions?
• GWAC/GSA/Mandatory Use contracts
• Can they perform a current or future requirement?
• One page capability sheet
• SB name, website, contact info, locations.
• Socioeconomic Certifications
• DoD/Federal/State contracts with POC info
COMPLIANCE

- Regulatory Guidance: FAR/DFARS Part 19: the small business specialist shall review & make recommendations for all acquisitions....

- DoD Instruction 4205.01, DoD Small Business Programs, (June 8, 2016)

- DoD Instruction 5134.04, Director of Small Business Programs (SBP), (Sept 27, 2005), *update pending*

- As SBP’s how do you work with your activity to ensure that a fair proportion of DoD total purchases, contracts, and other agreements for property and services be placed with small business programs?
COMPLIANCE

• How will you ensure compliance?
  • Inspection checklists
  • Program management reviews
  • Collaboration with your activity OSBP
  • Consensus with the SBA PCR
• Do you have a plan of operations?
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**ADVICE**  
15 U.S.C. §644(k)

- Acquisition Planning/Strategy Review  
- Program Reviews
- Set Aside Advice  
- Assist SB to Obtain Late Payments  

**MARKET RESEARCH**  

- FAR 10.002  
  - Contracting officer conducts
  - SB Specialist assists - Helps identify capability
- Qualitatively  
  - Good Market Research is thorough
  - SB and CO need to know the business
  - Informs decisions
  - High quality and reliable

**TRAINING**  

- Internal  
  - Small Business Specialist
  - Contracting Officer
  - Program Manager
  - SES/GO/SL Training
- External  
  - Acquisition Training
  - Interagency
  - For Small Businesses

**ADVOCACY & LIAISON**  

- Outreach  
  - Conferences
  - Industry Days
  - Website
  - Materials/ Information
  - Tie with Market Research
  - Understand Agency Requirements & SB Capabilities
- Inreach  
  - Pentagon Leadership
  - Commands
  - ASARC AOIPT Attendance
  - Procurement Planning Meetings
  - Dashboard
  - Communication

- Consult & Cooperate with SBA on duties – in Sections 8 and 15 of the SB Act  

- Unsolicited Proposal Processing  

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**Agency Statutory Requirements**  

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**COMPLIANCE**  
- Bundling  
  15 U.S.C. §644(k)(5)  
- Consolidation Determinations  
- Procurement Forecast  
- Subcontracting Plans  
- FPDS-NG

**POLICY**  
- Policy Development  
  - FAR/ DFARS/ DoDD/ AGENCY SUPPLEMENTS  
  - Interaction with SBA/ OSD  
- Partnering/Meetings  
  - ASA(ALT), AGENCY AQ, DPAP PROCUREMENT LEADERS  
  - OSD/OSBP  
  - SBA

**REPORTING**  
- External Reporting  
  - Goaling Reports  
  - SBA Reporting  
  - Other Reporting  
  - GAO  
  - OSD

**AGENCY/ OFFICE OPERATIONS**  
- Supervisory Authority over Agency SB Personnel  

**Policy Development**  
- FAR/ DFARS/ DoDD/ AGENCY SUPPLEMENTS  
- Interaction with SBA/ OSD

**Partnering/Meetings**  
- ASA(ALT), AGENCY AQ, DPAP PROCUREMENT LEADERS  
- OSD/OSBP  
- SBA

**Guides**  
- Procurement Guides  
- SB Handbook  
- Training Guide  
- Unsolicited Proposals Guide  
- SBIR  
- Mentor-Protégé

**External Reporting**  
- Goaling Reports  
- SBA Reporting  
- Other Reporting  
- GAO  
- OSD

**Internal Reporting**  
- Periodic/Weekly Reports  
- SB Specialist Reports  
- High Level Reporting

**Other**  
- Short Notice Taskers  
- Dashboard  
- Newsletter  
- Leadership Messaging

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LES SONS LEARNED...TIPS FOR SUCCESS

• Always do your homework before advocating your position
• Use sugar before vinegar
• Make yourself relevant
• Be aware of hidden agendas (i.e. vendor preference)
• Know your strengths and weaknesses – consider a mentor
• Get top cover early – engage your HQ OSBP
• Rekindle your human spirit – when you leave the office...leave the work there
• YOU ARE APPRECIATED
QUESTION AND ANSWER SESSION
FOR MORE INFORMATION
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