VIRTUAL INDUSTRY DAY TIPS

Karen L. Baker U.S. Army Geospatial Center Chief, Office of Small Business Programs

"The views, opinions and findings contained in this report are those of the authors(s) and should not be construed as an official Department of the Army position, policy or decision, unless so designated by other official documentation."



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ESTRESSED CONCRET





COST / TIME





SECURITY / SAFETY





TRANSPARENCY





NO CONFERENCE PACKAGE





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INTERNAL TEAM EXTERNAL TEAM(S)





INTERNAL TEAM





SMALL BUSINESS PROFESSIONAL

CONTRACTING OFFICER

CONTRACT SPECIALIST

TECHNICAL SUBJECT MATTER EXPERTS

PUBLIC AFFAIRS OFFICE REPRESENTATIVE

STAKE HOLDERS/ CUSTOMERS

OFFICE OF COUNSEL





EXTERNAL TEAM(S)





PROCUREMENT TECHNICAL ASSISTANCE CENTERS (PTACS)

SBA DEVELOPMENT CENTERS

U.S. WOMEN CHAMBER OF COMMERCE

SAME, AFCEA, AGC, NOAC, ASCE, ASBCC







PICK A DAY DURING THE WEEK

TIME OF DAY

AVOID MAJOR HOLIDAYS







CONFERENCE/MEETING ROOM







REVIEW FBO VIRTUAL ANNOUNCEMENT



https://www.fbo.gov/?s=main&mode=list&tab=list





US Army Corps of Engineers.

CREATE A VIRTUAL CALENDAR





PUT A REQUEST IN WITH YOUR IT TEAM FOR A CENTRALIZED EMAIL ACCOUNT

UMCS-V@USACE.ARMY.MIL





NEED TO SET UP THE ATT- WEBXX FOR TELECONFERENCING





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https://go.usa.gov/

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Signed in as Karen L. Baker. Log out

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Export to CSV (Opens in most spreadsheet applications)

Info	Clicks	Date-
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https://www.fbo.gov/spg/USA/COE/DACA87/W912DY metrics http://go.usa.gov/xnuBa notes	336	3/05/2018
https://www.fbo.gov/spg/USA/COE/DACA87/PANHES metrics http://go.usa.gov/xnUHR notes	240	12/20/2017





V

U.S. ARMY CORPS OF ENGINEERS, ENGINEERING AND SUPPORT CENTER, HUNTSVILLE23

Virtual Industry Day For **Utility Monitoring and Control Systems** (UMCS) - V On 04 April 2017 At 1300 – 1700 hours CDT For registration and further information, go to https://go.usa.gov/xXXUg







US Army Corps of Engineers Huntsville Center

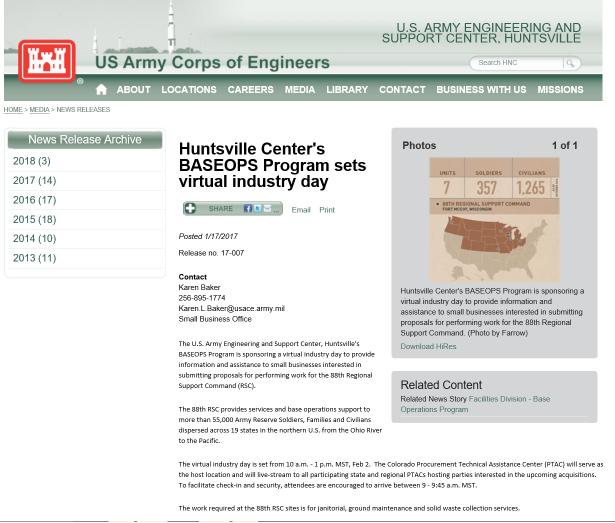
A ttendees receive information regarding the acquisition approach. The agenda consists of an overview of the scope of work, planned acquisition strategy, tips and best practices for small businesses and a question and answer session.

Register for the event at: https://go.usa.gov/xXXUg

For more information on Huntsville Center, visit: www.hnc.usace.army.mil Virtual Industry Day for Utility Monitoring and Control Systems (UMCS) - V

> April 4 1 - 5 p.m. CDT

SAMPLE MEDIA RELEASE







US Army Corps of Engineers.

MASS E-MAIL NOTIFICATIONS

USE THE SBA SMALL BUSINESS DYNAMIC SEARCH

USE THE SBA ALL SMALL MENTOR PROTÉGÉ RESOURCE LIST

USE THE SBA 8(a) MENTOR PROTÉGÉ LIST

CONTACT YOUR LOCAL PROCUREMENT TECHNICAL ASSISTANCE CENTER REPRESENTATIVE

CONTACT THE VARIOUS ASSOCIATIONS





EVENTBRITE REGISTRATION

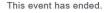
Search for events

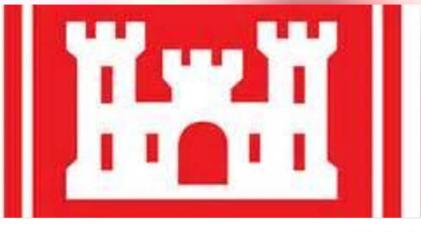
BROWSE EVENTS

SIGN IN

HELP

CREATE EVENT





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Medical Facilities Support Services II Virtual Industry Day

by U.S. Army Engineering and Support Center in Huntsville (CEHNC)

Free

Sales Ended

DETAILS

REGISTRATIONS ARE CLOSED

You are registered to attend. If you have any questions please email: mfss_ii@usace.army.mil.

DESCRIPTION

The U.S. Army Engineering and Support Center in Huntsville (CEHNC) Alabama is hosting a Virtual Industry Day via Facebook Live! This allows the Government to gather information for market research and provide valuable information to industry on the

DATE AND TIME

Thu, May 4, 2017 1:00 PM – 3:30 PM CDT Add to Calendar

LOCATION

Facebook Live https://www.facebook.com/Hunts





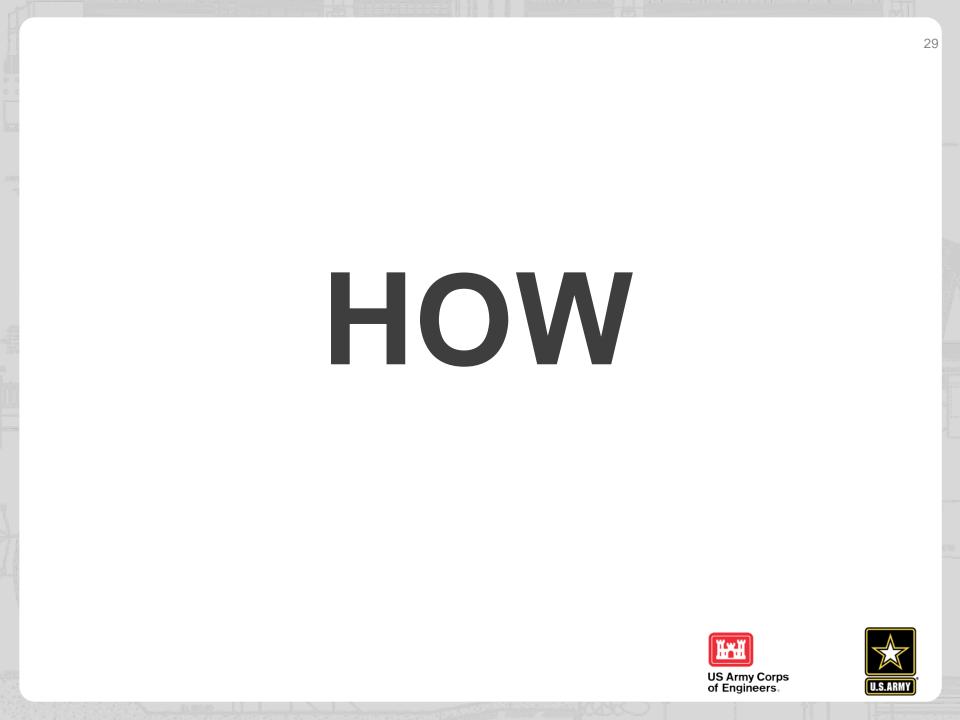
US Army Corps of Engineers.

OTHER RESOURCES

Spider Phone with speaker extensions Monitor Minimum 2 laptops Webinar capability (transcripts from webinar provider) Infomercials







SAMPLE OF WEBINAR PRESENTATION





ENERGY SAVINGS PERFORMANCE CONTRACTS (ESPC) SMALL BUSINESS ON-RAMP

OVERVIEW OF ESPC PROGRAM

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GOVERNMENT REPRESENTATIVES

- **NAME** Project Manager,
- NAME Technical SME,
- **NAME** Contracting Officer, Pre-Award
- NAME Contract Specialist, Pre-Award
- Karen Baker Office of Small Business Programs





RULES OF ENGAGEMENT

Everything discussed is subject to change!

- > We are looking for your INPUT!
- Submit your questions to: <u>HNC-Preaward-Division@usace.army.mil</u> CC: <u>ContractSpeci@usace.army.mil</u>
- Look for the Questionnaire, Presentation Slides, and Attendees List on FedBizOpps.gov
- NOTE: Until all required acquisition related documents are approved, the expectations shared herein are subject to change.



AGENDA

Program Overview

Acquisition Approach

Small Business and Resources

➢Questions and Wrap up





ESPC OVERVIEW:

The Energy Savings Performance Contracts (ESPC) are the primary tool that supports intended to promote the use of renewable energy technologies, acquire energy and water conservation services, reduce energy and water consumption and/or associated utility costs, may reduce energy and water related operations and maintenance costs, and perform other holistic approach site specific project activities.

The energy service company (ESCO) shall be responsible for providing all labor, material, and capital to install energy and water conservation projects, renewable energy projects, operations and maintenance (O&M), and Measurement and Verification (M&V) as specified in each issued task order.





ESPC OVERVIEW:

Cont..

- The cost of an energy savings performance contract (ESPC) TO project (hereafter referred to as TO project) must be covered by the energy, water, ancillary, and related cost savings that will accrue to the Federal facility. The TO project cost savings must be verified and documented annually.
- ESPCs utilize private capital to make infrastructure improvements on military installations
- Allows Energy Services Companies (ESCOs) to provide Federal customers:
 - Energy and water efficiency improvement projects
 - Renewable energy projects
 - Demand reduction services
 - Energy security and resiliency





- Improved energy infrastructure at Army Garrisons
- Reduced energy consumption (Btu)
- Reduced O&M needs
- Lower maintenance costs
- Meeting Army energy reduction goals
- Increased reliability of systems, equipment, and components





Cont.

- Continue to meet and exceed the Army's PPCC execution goals
- Provide innovative solutions to reduce customer's energy consumption
- Partner with other DoD and Federal agencies to leverage USACE's proven, streamlined approach to developing and awarding ESPC projects
- Streamline our development approach further to achieve savings quicker
 - Firms must have experience with third party financing.





Cont.

- Implementation and development costs are financed for up to 25 years at competitive interest rates.
 - Contractors under this MATCO must be able to obtain financing of large multimillion dollar project and sustain their business without receiving payment for multiple years while the ESPC project is developed and implemented.
 - Contractors must be able to support the project, provide maintenance and perform M&V over the life of the project.
- Payment is derived from the savings generated by the improvements
 - Savings must occur or contractor does not get paid.







Cont.

The geographic scope of the contracted services under this acquisition will cover the United States (CONUS), including Alaska, Hawaii, and all U.S. Territories and possessions, and may include overseas locations of Germany and Korea.





Cont.

Typical ESPC Energy Conservation Measures (ECMs):

- Boiler Improvements
- Chiller Improvements
- Air Handling Equipment
- Controls
- Motors and Drives
- Upgrade of HVAC Systems
- Lighting Retrofits
- Renewable Energy Systems
- Building Envelope
- Water & Steam Distributions
- Electrical Peak Sharing
- Solar, Photovoltaic
- Ground Source Heat Pumps

- Generators
- Variable Frequency Drives
- Upgrade of Central Power Plants
- Metering & Energy Information Systems
- Gas-fired Infrared Heaters
- Primary/Secondary Pumping Systems
- Decentralization of Domestic Hot Water Systems
- Decentralization of Central Power Plants
- Wind





ESPC MEASUREMENT & VERIFICATION

- Critically important to ESPC Program success
- Must follow Army guidance
- Must conform to FEMP M&V protocols
- No stipulated savings
- ESCOs must see M&V as a way to promote what ESPC has provided:
 - Use M&V to show benefit
 - Schedule M&V briefings with the customer
 - Use M&V to identify issues and alert the customer to any field problems they may not be aware of





ESPC CUSTOMERS:

- Rock Island Arsenal JMTC
- Rock Island Arsenal
- White Sands Missile Range
- FT Carson
- McAlester AAP
- Daegu Korea
- Yongsan Korea
- Ft McCoy
- SPAWAR Pacific (Navy)
- SPAWAR Atlantic (Navy)
- Fleet Readiness Center SW (Navy)
- Mobile District (USACE)
- Ft Buchanan
- Ft Bragg
- Camp Humphries (Korea)
- Aberdeen Proving Grounds

- Letterkenny Army Depot
- Michigan National Guard
- Puerto Rico National Guard
- Ft Bliss
- Corpus Christi Army Depot
- Hohenfels (Germany)
- Wiesbaden (Germany)
- Ft Lee
- Adelphi Laboratory Center
- Ft Leavenworth
- FT Irwin
- Soldier System Center Natick
- West Point
- Ft Greely





ENERGY SAVINGS PERFORMANCE CONTRACTS (ESPC) SMALL BUSINESS ON-RAMP

ACQUISITION APPROACH

Overview of our expected procurement strategy for the contracts and how we will select for task orders



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MATOC ON-RAMP EXPLAINED

- The On-Ramp provision allows for new contractors to be added to the MATOC pool, thereby increasing competition.
- On-Ramps create a unique opportunity for the Government to accept and evaluate new proposals during the period of performance with the intention of adding additional contractors to a competition pool when it is in the best interest of the Government. This allows increased competition and new and / or improved technologies and technical approaches to be realized by the Government.





MATOC ON-RAMP EXPLAINED

Cont..

- There are cases in which market research shows a high response from small businesses; however, few possess the ability to perform the entire scope. An On-Ramp provision provides an avenue to increase the competition pool with small businesses who have developed the required capabilities during the contract period of performance.
- Occasionally small business MATOC holders may become a large businesses during the performance period. Becoming a large business reduces the small business pool of the MATOC.





MATOC ON-RAMP EXPLAINED

Cont..

- The goal of this on-ramp is to add a minimum of one (1) and up to a maximum of three (3) additional small business contractor(s) to the existing ESPC MATOC pool.
- The evaluation for award shall be conducted in accordance with the original solicitation.
- All contract terms and conditions under the MATOC shall be applicable to the new awarded MATOC contract.





ESPC - ACQUISITION APPROACH:

- North American Industry Classification System (NAICS) Code – 541330, Engineering Services
- Small business size standard \$15.0 million
- Anticipated capacity \$1.5 billion, shared capacity under the current MATOC.
- Current Capacity: \$1.321B (as of 26 February 2018).





ESPC - ACQUISITION APPROACH:

Cont.

- Period of Performance The period of performance of the awarded contract shall coincide with the existing MATOC period of performance.
- > Existing MATOC period of performance.
 - Base Period: 4 April 2014 through 3 April 2019
 - Option Period: 4 April 2019 through 3 April 2024
- Selection of the firm(s) for the award shall be qualifications-based.





SOURCE SELECTION – BASE CONTRACTS

- All proposals will be evaluated against the following factors (in descending order of importance with Factors 3 and 4 equal in importance):
 - Factor 1: Corporate Technical Experience and Management Approach
 - Factor 2: Financial Capability
 - Factor 3: Past Performance
 - Factor 4: Small Business Participation Plan
 - Factor 5: Technology Markups and Financing Markups
 - Basis of Award Best Value
 - Non-price related factors, when combined, are significantly more important than the price-related factor.





SMALL BUSINESS PARTICIPATION FACTOR

- All Offerors, both large and small, must submit a Small Business Participation Plan to be evaluated by the SSEB.
- A separate Small Business Subcontracting Plan will be submitted by large firms only and will be evaluated on a pass / fail basis prior to award. The Subcontracting Plan should be consistent with the efforts proposed in the Small Business Participation Plan.
- Offerors will be required to propose their best effort for meeting the following small business participation percentages:
 - Small Business: 20%
 - Small Disadvantaged Business: 3%
 - Women-Owned Small Business: 3%
 - HUBZone Small Business: 2%
 - Veteran-Owned Small Business: 2%
 - Service-Disabled Veteran-Owned Small Business: 2%





ESPC TASK ORDER SELECTION

- Task orders will be issued as firm fixed-price (FFP) and may include performance periods of up to 25 years.
- Task orders will either be set aside exclusively for small business competition or will be competed among all contractors (both large and small business).

Dollar Value	Task Order Competition	Caveats
\$5 Million or Greater	Unrestricted Competition	
Less than \$5M	The Contracting Officer will first consider reserving the Task Order for small businesses. The determination will examine the size of the project, complexity of the project and level of financing required.	Before making the determination on a particular project, the Contracting Officer will request a letter of interest from all SB firms. If fewer than two responses are received, the Task Order will open for Unrestricted Competition.





OFFICE OF SMALL BUSINESS PROGRAMS

Ms. Karen L. Baker Deputy, HNC Office of Small Business Programs



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FEDERAL ACQUISITION REGULATION (FAR)

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NORTH AMERICAN INDUSTRY CLASSIFICATION SYSTEM (NAICS)

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NAICS Search: Introduction to NAICS Enter keyword or 2-6 digit code The North American Industry Classification System (NAICS) is the standard used by Federal statistical ag 2017 NAICS Search The North American Industry Classification System (NAICS) is the standard used by Federal statistical ag Enter keyword or 2-6 digit code NAICS was developed under the auspices of the Office of Management and Budget (OMB), and adopted Policy Committee (ECPC). Statistics Canada []+, and Mexico's Instituto Nacional de Estadística y Geografiance	encies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the in 1997 to replace the <u>Standard Industrial Classification (SIC) system</u> . It was developed jointly by the <u>U.S. Economic Classification</u> In <u>CP</u> , to allow for a high level of comparability in business statistics among the North American countries. ell as access to various NAICS reference files and tools. Additional information on the background and development of NAICS is	Announcements Natos 2017 Prof. 50008 North American Industry Classification System—Revision for 2017; Notice. Vol. 81, No. 152 2017 NAICS Structure [XLSX 94K8] 2017 NAICS to 2012 NAICS [XLSX 59K8] 2012 NAICS to 2017 NAICS [XLSX 59K8] 2012 NAICS to 2017 NAICS [XLSX 59K8] 2012 NAICS to 2017 NAICS [XLSX 59K8] 2013 North American Industry Classification System (NAICS) + Updates for NAICS 2017; Notice. Vol. 80, No. 149 2014 North American Industry Classification System (NAICS) Revision - Notice Regarding Inflementation of the Factoryless Goods Producer Classification in NAICS 2017; Notice. Vol. 90, No. 159 2017 North American Industry Classification in NAICS 2017; Notice. Vol. 79, No. 153 2017 North American Industry Classification in NAICS 2017; Notice. Vol. 79, No. 153 2017 North American Industry Classification in NAICS 2017; Notice. Vol. 79, No. 153 2017 North American Industry Classification System (NAICS) - Updates for 2017; Notices. - Updates for 2017; Notices. - Updates for 2017; Notices. - Updates for 2017; Notices. - Updates for 2017; Notices.

http://www.census.gov/eos/www/naics/index.html





NORTH AMERICAN INDUSTRY CLASSIFICATION SYSTEM (NAICS)

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2017 NAICS Search	T = Canadian, Mexican, and United States industries are comparable.
Enter keyword or 2-6 digit code	541330 Engineering Services This industry comprises establishments primarily engaged in applying physical laws and principles of engineering in the design, development, and utilization of
2012 NAICS Search	machines, materials, instruments, structures, processes, and systems. The assignments undertaken by these establishments may involve any of the following activities; provision of advice, preparation of feasibility studies, preparation of preliminary and final plans and designs, provision of technical services during the
	construction or installation phase, inspection and evaluation of engineering projects, and related services.
Enter keyword or 2-6 digit code	Illustrative Examples:
2007 NAICS Search	Civil engineering services
	Environmental engineering services Construction engineering services
Reference Files	Mechanical engineering services Engineers' offices
2017 NAICS	
2012 NAICS	Cross-References. Establishments primarily engaged in
2007 NAICS	Planning and designing computer systems that integrate computer hardware, software, and communication technologiesare classified in U.S. Industry
2002 NAICS	<u>541512</u> , Computer Systems Design Services;
1997 NAICS	 Performing surveying and mapping services of the surface of the earth, including the sea floorare classified in Industry <u>541370</u>, Surveying and Mapping (except Geophysical) Services;





SMALL BUSINESS ADMINISTRATION (SBA) TABLE OF SMALL BUSINESS SIZE STANDARDS

The Size_Standards_Table_2017 (1).pdf - Adobe Acrobat Pro П Х File Edit View Window Help TerraGo × 🗩 😼 🗟 🙆 🔁 Create -6 Customize . $(\mathbf{1})$ 1 / 45 58.9% -Fill & Sian (__) Tools Comment SBA **U. S. Small Business Administration** Table of Small Business Size Standards Matched to North American Industry Classification System Codes This table lists small business size standards matched to industries described in the North American Industry Classification System (NAICS), as modified by the Office of Management and Budget, effective January 1, 2017. The latest NAICS codes are referred to as NAICS 2017. The size standards are for the most part expressed in either millions of dollars (those preceded by "\$") or number of employees (those without the "\$"). A size standard is the largest that a concern can be and still qualify as a small business for Federal Government programs. For the most part, size standards are the average annual receipts or the average employment of a firm. How to calculate average annual receipts and average employment of a firm can be found in 13 CFR § 121.104 and 13 CFR § 121.106, respectively. SBA also includes the table of size standards in the Small Business Size Regulations, 13 CFR § 121.201. This table includes size standards that have changed since the last publication of 13 CER § 121 For more information on these size standards, please visit http://www.sba.gov/size. If you have any other questions concerning size standards, contact a Size Specialist at your nearest SBA Government Contracting Area Office (list at the end of the table), or contact the Office of Size Standards by email at sizestandards@sba.gov or by phone at (202) 205-6618. These size standards are effective October 1, 2017

https://www.sba.gov/sites/default/files/files/ Size_Standards_Table_2017.pdf





SMALL BUSINESS ADMINISTRATION (SBA) TABLE OF SMALL BUSINESS SIZE STANDARDS ×

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	541199	All Other Legal Services	\$11.0					
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	541213	Tax Preparation Services	\$20.5					
	541214	Payroll Services	\$20.5					
	541219	Other Accounting Services	\$20.5					
	541310	Architectural Services	\$7.5					
	541320	Landscape Architectural Services	\$7.5					
	541330	Engineering Services	\$15.0					
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	Except,	Contracts and Subcontracts for Engineering Services Awarded Under the National Energy Policy Act of 1992	\$38.5					
	Except,	Marine Engineering and Naval Architecture	\$38.5	1				
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US Army Corps of Engineers.



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FEDERAL BUSINESS OPPORTUNITIES (FBO)

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	planning, solicitation and bid document preparation, commissioning, and AE construction phase services. These services intended to be procured through task orders using Indefinite Delivery Contracts (IDC). These IDCs will primarily support the USACE Medical Center of Expertise & Standardizabin (MCX) and the Defense Health Agency (DHA) as well as other DoD and non-DoD	
	customers. The contracts addressed by this notice will provide A-E services	

https://www.fbo.gov





SMALL BUSINESS ADMINISTRATION (SBA) DYNAMIC SMALL BUSINESS SEARCH

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RESOURCES

- Small Business Administration (SBA) Programs (www.sba.gov) and (certify.SBA.gov)
- ✤ 8(a) Program
- HUBZone
- Women-Owned Small Business Program
- Service-Disabled Veteran-Owned Small Business Program
 SUB-Net
- Mentor-Protégé Programs
- Teaming Arrangements
- Federal Procurement Data System-Next Generation (<u>www.fpds.gov</u>)
- Association of Procurement Technical Assistance Centers (PTACs)
- SBA Small Business Development Centers



of Engineers



QUESTIONS & WRAP UP

- Everything discussed is subject to change!
- > We are looking for your INPUT!

Submit your questions to -<u>HNC-Preaward-</u> <u>Division@usace.army.mil</u>

- Look for the Questionnaire, Presentation Slides, and Attendees List on FedBizOpps.gov
- Thank you!





LEAR BULKHEADS CAN BE CKS & DAM

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POST SLIDES, LIST OF ATTENDEES, AND ANSWERS TO THE Q&A ON FBO





SEND A SHORT SURVEY OUT TO THE PARTICIPANTS AFTER THE VIRTUAL EVENT





SAMPLE SURVEY QUESTIONS

Identify your current socioeconomic status. Circle all that apply

Overall, how would you rate the Virtual Industry day?

How likely are you to attend a future virtual Industry Day?

How helpful was the content in the presentation?

How engaging were the presenters/speakers?

Was sufficient time allotted for each agenda item?





CONCLUSION



