



SPECIAL OPERATIONS FORCES ACQUISITION, TECHNOLOGY, & LOGISTICS

Trusted Experts

Surveillance Reviews: Strategies for Success

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Agenda

- What should you do?
- Timeline
- Work with the SBA
- Be Prepared
- Sell yourself/Put Best Foot Forward
- Summary

What Should You Do?

OK, NOW we can panic!





Timeline

- Notified the SBA wants to come in within the next 60 days (Jan 17)
 - We requested an extension because our contracting shop was going to be under an inspection the same time and we also were preparing for our major industry conference in that same timeframe
- Negotiated with the SBA a July review
 - Our internal contracting shop preferred an October review, after the FY
- Review lasted 3 days
- Results were provided in approximately 60 days after review

Work with the SBA

- Once surveillance team was provided reach out to the team leader
 - Had to work security clearances since SBA and DoD don't use the same system
 - Couldn't bring their laptops in our building so had to get internal laptops reserved
 - Reserve a private room for the team that had laptops, printers, internet access, telephone, white board etc
 - Provide requested information to the team, be sure to provide accurate and complete information on time! (Contract Data, SB Performance Data, Subcontracting Data, Protests etc)
 - Provide them with local hotels and restaurant information
 - Provide them base information, restaurants, BX, etc
 - Get reserved parking spots for the team
 - Make it as easy on them as possible!

Be Prepared

- If you wait until you get notified to get prepared it's TOO LATE!
- You can spot check files but there are far too many to review so...
 - Do the right thing everyday and then you can polish once notified
- If you're not sure you're ready get a copy of what they use to perform the surveillance review NOW and get ready!
 - Appendix 11 of the SBA's Standard Operating Procedures 60 02 8 dated October 2013 beginning on page 78
 - https://www.sba.gov/sites/default/files/sops/Prime_Contracts_SOP-60-02-8.pdf

If You're Not Prepared



Sell Yourself/Put Best Foot Forward

- We had a good story to tell and were pretty well prepared
- Have been exceeding all of our goals for several years
 - Was exceeding all goals in FY17 when they arrived
 - Senior Leader involvement (CEO Forum/SB Roundtables)
 - Strong Outreach Program
 - Updated our Portal (team didn't look at it, or at least didn't mention it)
 - We had been running our stats on building scroll prior to notification but really paid dividends
 - Small Business stats on the AE dashboard updated monthly
 - Small Business stats sent to workforce weekly through DDAE report

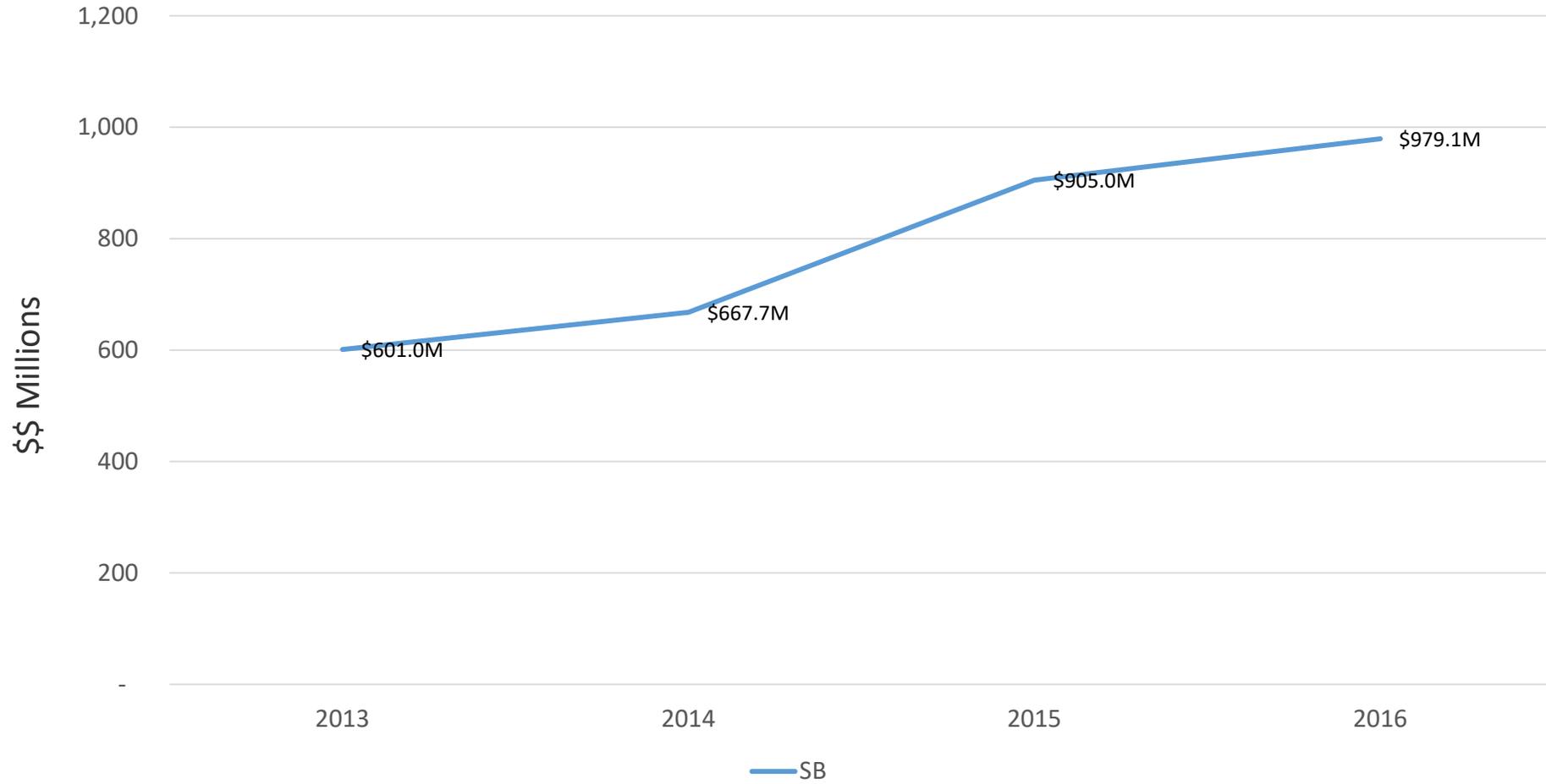
First Thing the Team Lead Saw



Sell Yourself/Put Best Foot Forward

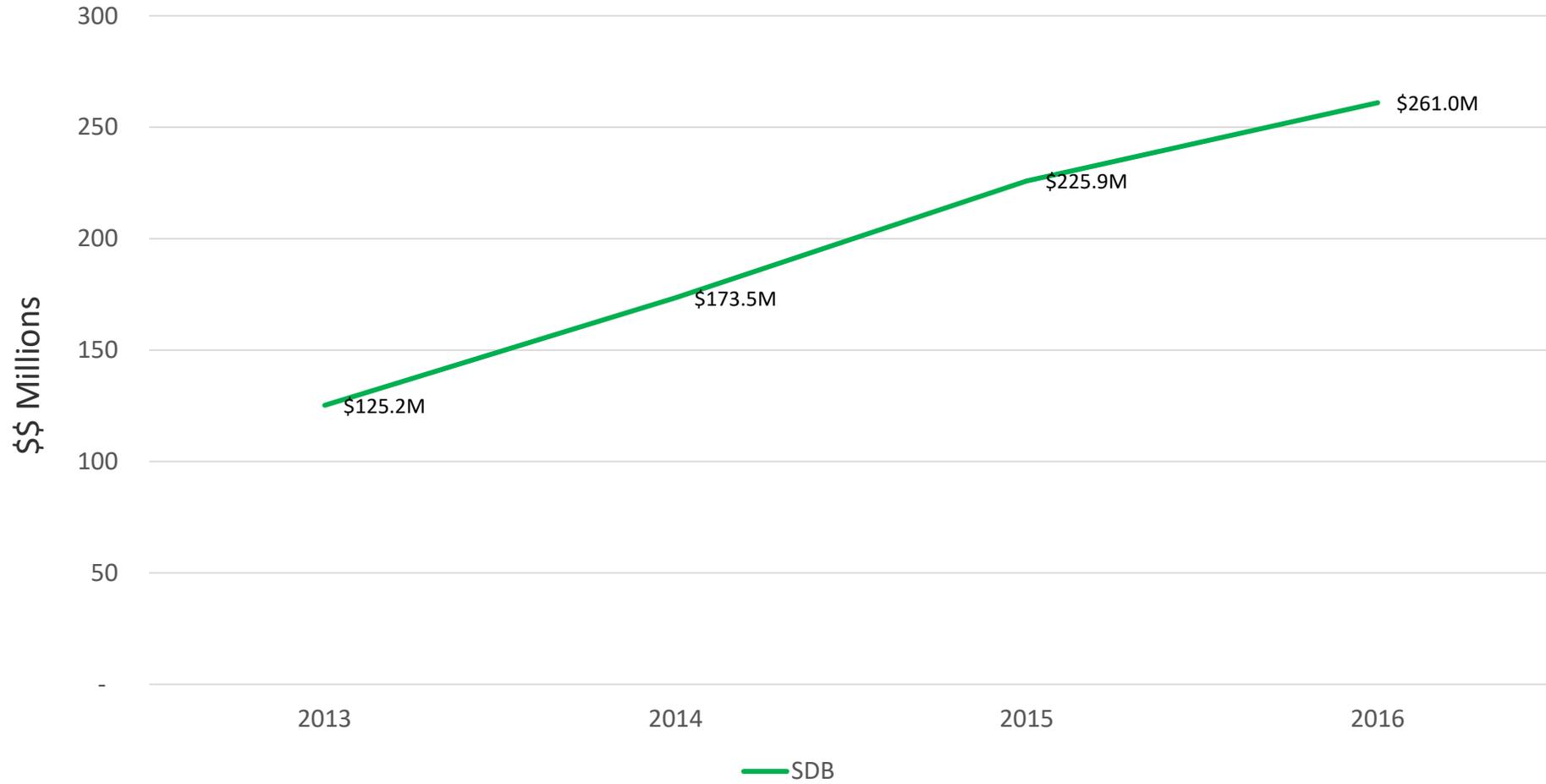
- SBA gives you an opportunity to do an in-brief
- In-brief is critical, sets the stage for the entire review
 - DoP, DDoP, KOs, KSs attend to show support
- Take the opportunity to highlight areas that you believe are noteworthy
- Explain not only why you're doing well but HOW you got there
- Team Lead was very impressed with what we were doing in our Small Business Program before he looked at one document

Overall Small Business



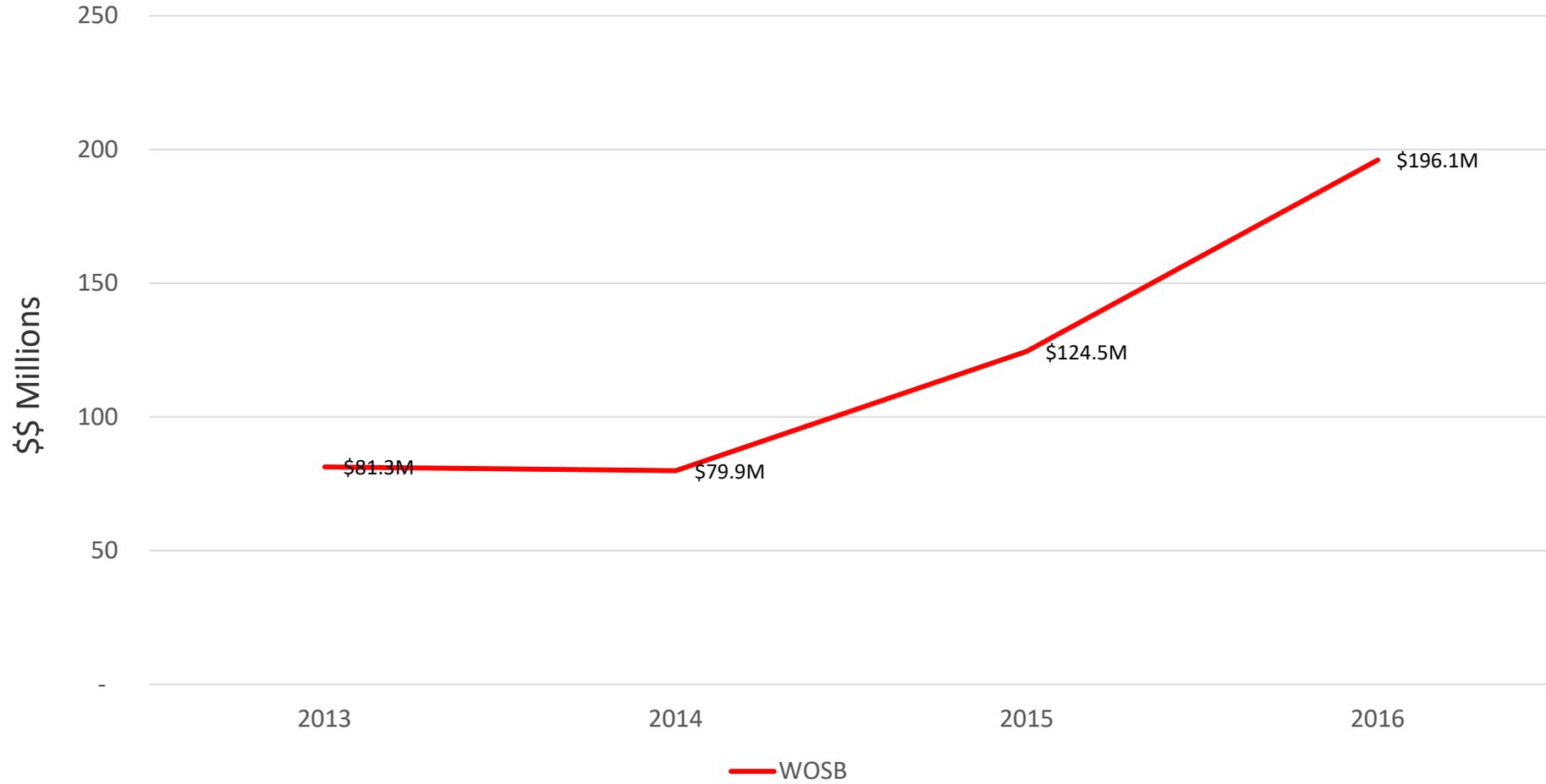
Total dollar increase from FY13 to FY16: \$378.1M (62.91%)

SDB



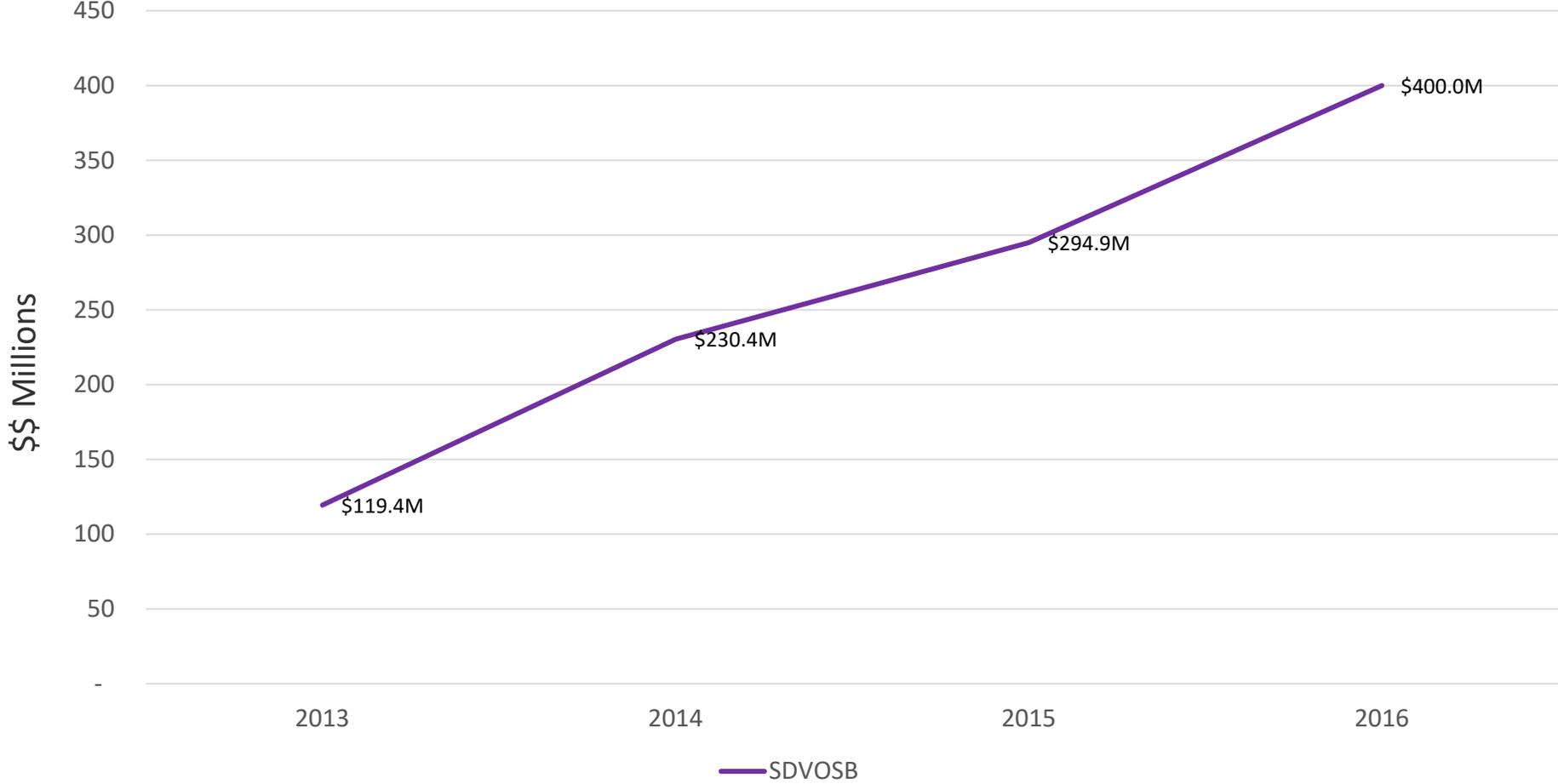
Total dollar increase from FY13 to FY16: \$135.8M (108.47%)

WOSB



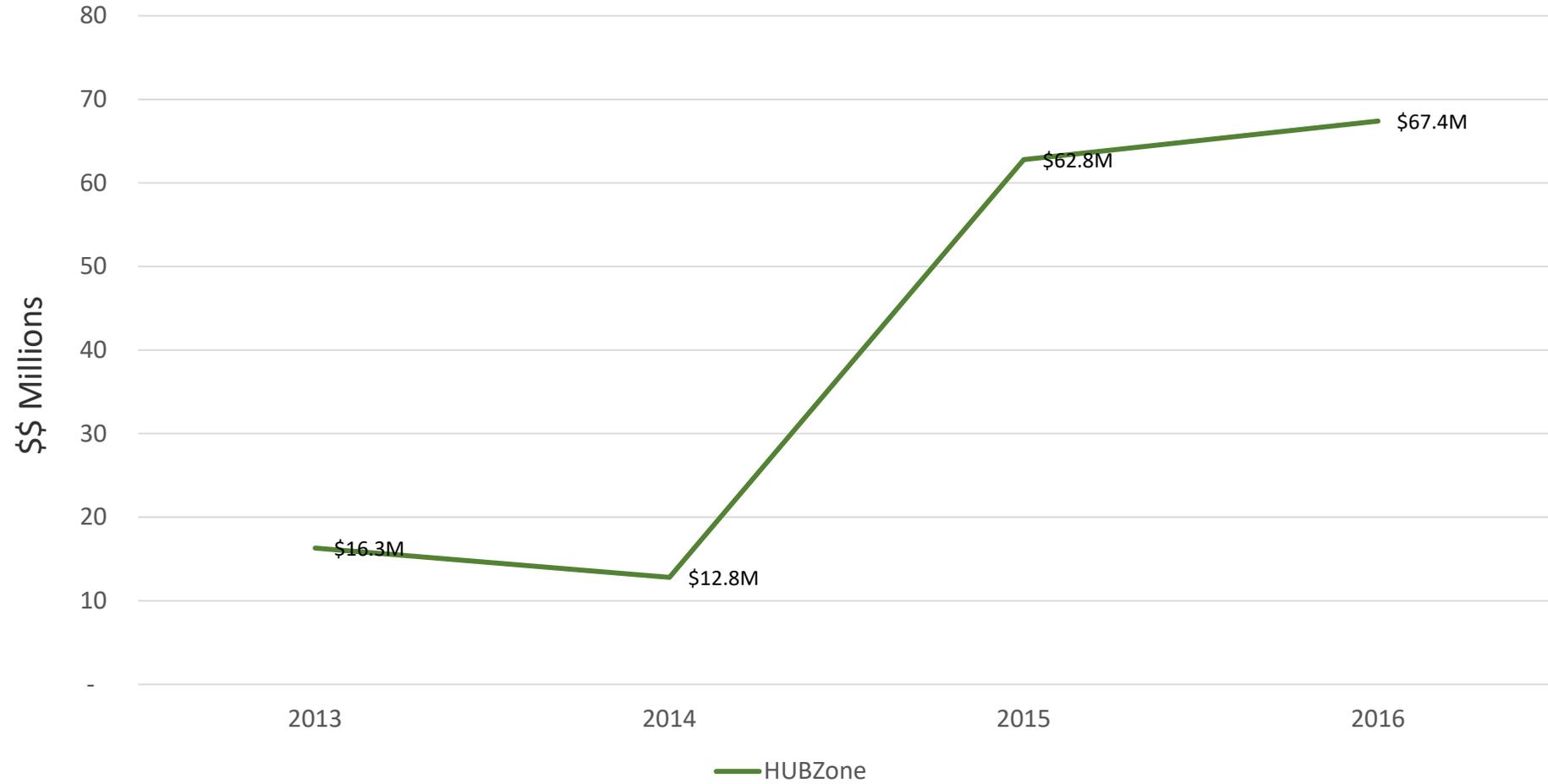
Total dollar increase from FY13 to FY16: \$114.8M (141.20%)

SDVOSB



Total dollar increase from FY13 to FY16: \$280.6M (234.62%)

HUBZone



Total dollar increase from FY13 to FY16: \$51.1M (313.50%)

FY16 Was a Banner Year

- Most Dollars Ever Awarded to SBs – \$979.1M
- Most Dollars Ever Awarded to WOSB - \$196.1M
- Highest Goal Achievement for WOSB – 6.08%
- Most Dollars Ever Awarded to SDVOSB - \$400M
- Highest Goal Achievement for SDVOSB – 12.4%
- Most Dollars Ever Awarded to HUBZone - \$67.4M

Summary

- Be Prepared PRIOR to notification
- Be helpful, make the team's job as easy as possible
- Be prepared to help (we had to help them find contract file documentation)
- Tell your story
- If you want a copy of our in-brief send me an e-mail
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