



What I Didn't Know and What You Need to Know About the SBA

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Project Overview

- ❑ Project Overview
- ❑ Communicating With The SBA
- ❑ What I Didn't Know
- ❑ What You Need To Know
- ❑ Q&A



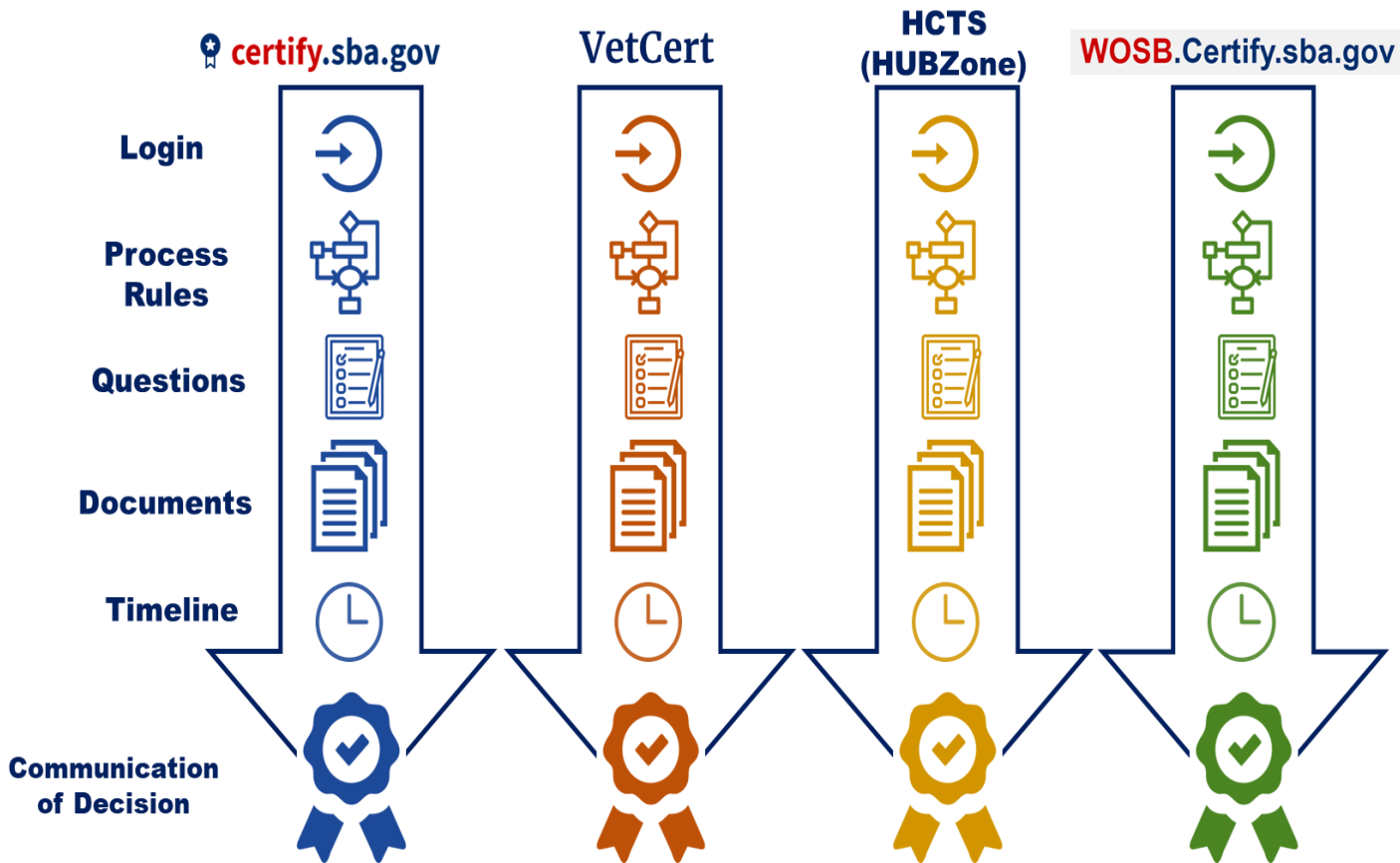
Project Overview

- ❑ Training Plan
 - ❑ Objective, Background, and Scope
 - ❑ Target Audience/Stakeholders
 - ❑ Internal (GCBD Staff and OFO/Field Staff)
 - ❑ External (Small Business Owners, Entrepreneurs, and Resource Partners)
 - ❑ Resources
 - ❑ Content Developers/Subject Matter Experts
 - ❑ Training Methodology
 - ❑ Instructor-Led
 - ❑ E-Learning



- ❑ Team Collaboration
 - ❑ Kickoff Meetings
 - ❑ Weekly Meetings
 - ❑ Training Schedule
- ❑ Launch Training
- ❑ Evaluation Metrics

SBA Set-Aside Certifications Previous



Previous Customer Experience

- Four different systems
- Four different logins
- Four processes with varying rules
- Four sets of the same questions
- Four sets of the same documents to upload
- Four different processes and approval cycle times
- Four different notification methods
- Four different leadership teams for reviews/decisions

....and this is just for first application, it doesn't address re-certification or changes to the business

SBA Certification Today



Vision

Eligible small businesses will more effectively compete in the federal marketplace by quickly accessing multiple set-aside program certifications through a simple unified system

SBA Certification Customer Experience

- ✓ **One log-in**
- ✓ **One common application**
- ✓ **One document repository**
- ✓ **Common terminology**
- ✓ **Common processing business rules**
- ✓ **Common decision timeline**
- ✓ **Streamlined, timely review process**
- ✓ **Single portal customer service support**
- ✓ **Same team processing all 4 certifications**



Communicating with the SBA

Certified Firms Need to Know

- Ensure company contact information is current
- Be responsive
- Know eligibility requirements of the program



What I Didn't Know

- ❑ Diverse Eligibility Criteria
- ❑ Benefits Beyond Contracts
- ❑ Restrictions To Fees For Applicant and Participant Representatives
- ❑ Certified Small Businesses and Federal Contracts
- ❑ SBA Mentor Protégé Joint Venture
- ❑ SBA Learning Platform
- ❑ Procurement Center Representatives
- ❑ Commercial Market Representatives



What You Should Know

- ❑ Diverse Eligibility Criteria
 - ❑ Unique requirements – Some Based On Ownership, Others On Location Or Socio-Economic Status
- ❑ Benefits Beyond Contracts
 - ❑ Access to Networking Opportunities, Mentorship Programs, and Funding Sources
- ❑ Preparation is Key
 - ❑ Gather Documents Needed



What You Should Know

- ❑ Leverage Resources
 - ❑ SBA Resources, Local Work Shops, and Mentors
- ❑ Market Your Certification
 - ❑ Promote Your Status
- ❑ Restrictions To Fees For Applicant and Participant Representatives
 - ❑ Must Be Reasonable In Light Of Services
 - ❑ Cannot Receive A Fee That Is A Percentage Of The Gross Contract Value



What You Should Know

- Certified Small Businesses and Federal Contracts
 - Procurement Ready
 - Statistic Overview
 - 8(a) Certification
 - Veteran/Service-Disabled Veteran
- HUBZone
- WOSB
- Market Competition
 - Highly Competitive

What You Should Know

- ❑ SBA Mentor Protégé Joint Venture
 - ❑ Objective
 - ❑ Help Small Business Gain Technical and Management
 - ❑ Eligibility
 - ❑ Must Be Eligible As A Small Business Under SBA Size Standard
 - ❑ Mentors Can Be Other Than Small Or Small Businesses That Exceed Size Standard In Primary NAICS Code
 - ❑ Joint Venture Formation
 - ❑ MPP Allows Protégé Firms To Form JV With Mentor
 - ❑ Enables Proteges to Compete for Federal Contracts
 - ❑ Shared Expertise
 - ❑ Mentor Provides Guidance On Project Management, Proposal Development And Compliance
 - ❑ Protégé Gains Valuable Experience And Credibility

What You Should Know

- ❑ SBA Mentor Protégé Joint Venture
 - ❑ SBA Approval
 - ❑ JV Formed Under MPP Must Be Approved By SBA
 - ❑ Ensures Partnership Meets Regulatory Requirement And Public Interest
 - ❑ Performance Requirements
 - ❑ 40% Must be Performed By The Protege
 - ❑ Strategic Growth
 - ❑ Allows Small Businesses Opportunity For Growth And Scaling
 - ❑ Ability To Take On Larger Projects
 - ❑ Limitation
 - ❑ Maximum Of Three Years
 - ❑ Networking Opportunities
 - ❑ Protégé Gains Access To The Mentor's Network
 - ❑ Increases Opportunities For Subcontracting and Business Development.

What You Should Know

- ❑ SBA Learning Platform
 - ❑ Accessible Resources
 - ❑ Online, Webinars, Educational Materials
 - ❑ Diverse Topics
 - ❑ Business Planning, Marketing, Financing, Compliance
 - ❑ Expert Guidance
 - ❑ Industry Experts, SBA Professionals



What You Should Know

- ❑ Self-Paced Learning
 - ❑ Learn At Your Own Pace
 - ❑ Balance Education With Running A Business
- ❑ Networking Potential
 - ❑ Forums And Community Groups
 - ❑ Connect With Peers, Mentors, And Potential Collaborators
- ❑ Cost-Effective
- ❑ Practical Tools
- ❑ Continuous Learning



What You Should Know

Procurement Center Representatives

- Facilitate Federal Contracting
- Market Opportunities
- Advocate for Small Businesses
- Conduct Outreach and Training
- Tailored Guidance
- Access to Resources
- Provide Counseling On The Contracting Process
- Assist Small Businesses With Payment Issues

Commercial Market Representatives

- Ensure Small Businesses Are Receiving Maximum)Practicable Opportunity To Participate As Federal Subcontractors
- Ensure Other Than Small Federal Contractors Comply With Goals in Their Sub-Contracting Plan
- Provide training On Sub-Contracting Plan Reporting Requirements



U.S. Small Business
Administration

WOSB CERTIFIED

Q&A

