



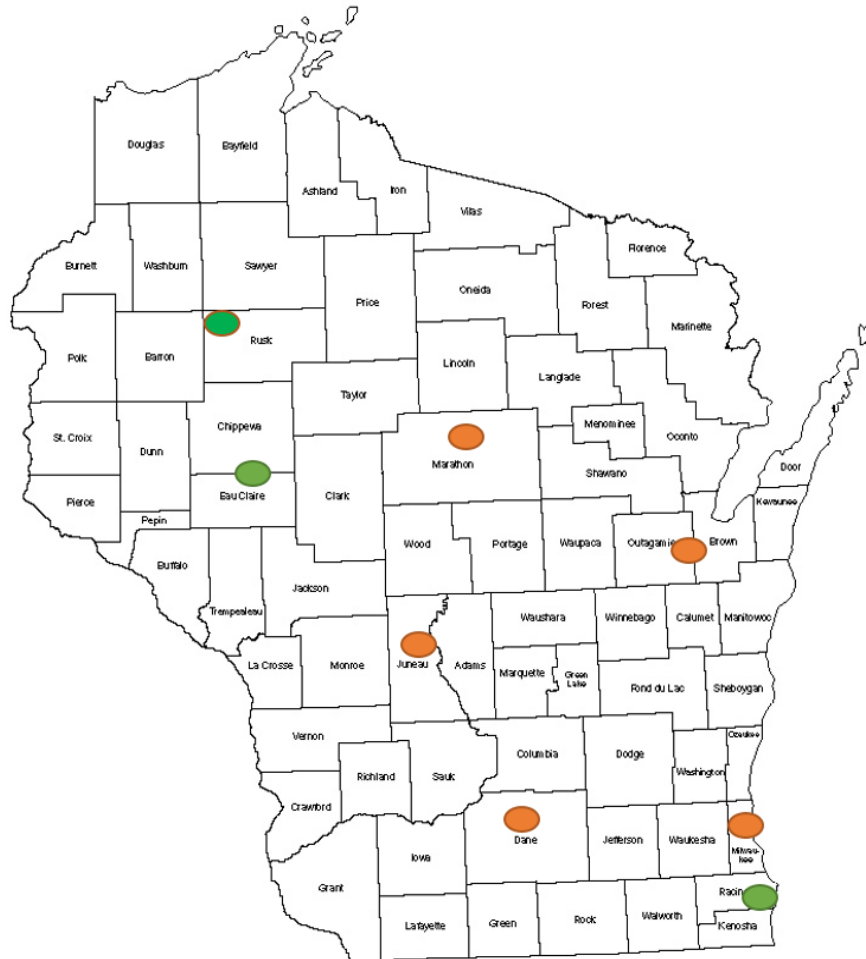
A Procurement Technical Assistance Center (PTAC)

A photograph of the Wisconsin State Capitol building at dusk. The building is illuminated with warm lights, and its green dome is a prominent feature. The sky is a deep blue, and trees with autumn foliage are visible in the foreground.

ACQUISITION HOUR: THE NEW SMALL MENTOR PROTÉGÉ PROGRAM – THE SBA PERSPECTIVE

November 15, 2016





LOCATIONS:

- **Primary office – Milwaukee** - Technology Innovation Center
- **Staffed Satellite offices**
 - Madison** (FEED – Food Enterprise & Economic Development / MEC – Madison Enterprise Center)
 - Camp Douglas** (Juneau County Economic Development Corporation)
 - Wausau** (Wausau Region Chamber of Commerce)
 - Appleton** (Fox Valley Technical College)
- **Active Partnerships**
 - Racine** – LaunchBox
 - Eau Claire** - Western Dairyland
 - Ladysmith** – Indianhead Community Action

MY ACCOUNT

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- 1. Olbrich Botanical Gardens Education Center and Production Greenhouse Construction - September 21, 2016** Architectural Consulting Services for Olbrich Botanical Gardens Education Center and Production Greenhouse
- 2. Milwaukee County Zoo planning \$44.6 million in exhibit upgrades - September 1, 2016** The Milwaukee County Zoo plans to spend about \$44.6 million on exhibit upgrades and construction projects over the next five years, according to an economic impact study completed this summer by a University of Wisconsin-Milwaukee economics professor. The study does not say how the projects will be paid for.

 The study, which was commissioned by the zoo to measure its annual economic impact on the four-county Milwaukee metropolitan area, includes a rough outline of planned construction projects through 2021.
- 3. Milwaukee County - Acquisition and Development of a Commercial/Building - August 15, 2016**
 Milwaukee County
 Request for Proposals
 Acquisition and Development of a Commercial/Industrial Building at 9150 Watertown Plank Road, Wauwatosa, WI 53226
 (Taxkey # 3729999017)
 RFP # 7131
 Issue Date: August 4, 2016

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WPI Acquisition Alert
September 6th 2016

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A Winning Approach to Contract Award: Preparation, Lead Generation, Follow-Up and Closing The Deal

November 15, 2016

Small Business Mentor – Protégé Program



Shane Mahaffy

Lead Business Opportunity Specialist



Small Business Mentor – Protégé Program

The small business mentor-protégé program is designed to enhance the capabilities of protégé firms by providing business development assistance and improving the protégé firms' ability to successfully compete for federal contracts.

Mentors

Any for profit concern that demonstrates a commitment and the ability to assist small business concerns may act as a mentor.

Mentors

- In order to qualify as a mentor, a concern must demonstrate that it:
 - Is capable of carrying out its responsibilities to assist the protégé firm under the proposed mentor-protégé agreement
 - Possesses good character
 - Does not appear on the federal list of debarred or suspended contractors; and
 - Can impart value to a protégé firm due to lessons learned and practical experience gained or through its knowledge of general business operations and government contracting.

Protégés

In order to initially qualify as a protégé firm, a concern must qualify as small for the size standard corresponding to its primary NAICS code;

Or identify that it is seeking business development assistance with respect to a secondary NAICS code and qualify as small for the size standard corresponding to that NAICS code.

Protégés

A protégé firm may generally have only one mentor at a time.

SBA may approve a second mentor for a particular protégé firm where the second relationship will not compete or otherwise conflict with the assistance set forth in the first mentor-protégé relationship.

Benefits

A protégé and mentor may joint venture as a small business for any government prime contract or subcontract, provided the protégé qualifies as small for the procurement

Benefits

SBA must approve the mentor-protégé agreement before the two firms may submit an offer as a joint venture on a particular government prime contract or subcontract in order for the joint venture to receive the exclusion from affiliation.

Benefits

- In order to raise capital, the protégé firm may agree to sell or otherwise convey to the mentor an equity interest of up to 40% in the protégé firm.
- No determination of affiliation or control may be found between a protégé firm and its mentor based solely on the mentor-protégé agreement or any assistance provided pursuant to the agreement.
- Where appropriate, procuring activities may provide incentives in the contract evaluation process to a firm that will provide significant subcontracting work to its SBA-approved protégé firm.

Written Agreement

The mentor and protégé firms must enter a written agreement setting forth an assessment of the protégé's needs and providing a detailed description and timeline for the delivery of the assistance the mentor commits to provide to address those needs.

Written Agreement

A firm seeking SBA's approval to be a protégé must identify any other mentor-protégé relationship it has through another federal agency or SBA and provide a copy of each such mentor-protégé agreement to SBA.

Written Agreement

The written agreement must be approved by the Associate Administrator for Business Development (AA/BD) or his/her designee.

Written Agreement

The agreement **will not** be approved if SBA determines that the assistance to be provided is not sufficient to promote any real developmental gains to the protégé, or if SBA determines that the agreement is merely a vehicle to enable the mentor to receive small business contracts.

Written Agreement

SBA will review the mentor-protégé relationship annually to determine whether to approve its continuation for another year.

Written Agreement

SBA must approve all changes to a mentor-protégé agreement in advance, and any changes made to the agreement must be provided in writing.

Term

The term of a mentor-protégé agreement may not exceed three years, but may be extended for a second three years.

SBA WISCONSIN DISTRICT OFFICE

For more information on SBA's programs and services

Please contact:

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Or visit our office web site at www.sba.gov/wi

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Milwaukee, WI

Phone: 414-297-3941

Wisconsin District Office

740 Regent Street

Suite 100

Madison, WI

Phone: 608-441-5261

Upcoming WPI Events – Acquisition Hour Webinars

- November 29, 2016 – [The New Small Mentor Protégé Program – A Lawyer’s Perspective](#) - Presented by Emily A. Constantine, Attorney, Husch Blackwell LLP
- November 30, 2016 – **Updates on the HUBZone program** – Presented by Shane Mahaffy, Lead Business Opportunity Specialist, U.S. Small Business Administration
- December 6, 2016 – [Preparing for CPSR Audit](#) – Presented by Phil Bail, Principal, Phil Bail & Associates
- December 7, 2016 – [10 Issues in Federal Government Construction Projects](#)

Other Upcoming WPI Events

- [What it Takes to WIN – Opportunities with the Department of Defense for Small Business Manufacturers](#) – November 17th, 2016 – Milwaukee – Presented by Jean Polka and Ken Kotloski, WPI
- [End of Year Federal Contractor Update](#) – January 17, 2017 - Milwaukee

Other Upcoming Events



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www.MarketplaceWisconsin.com



QUESTIONS?

Continuing Professional Education



CPE Certificate available, please contact:

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SURVEY



Today's Presentation was done by

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