
Acquisition Hour: Federal Spend to the End

August 15 | 1:00 – 2:00 pm
Presented by Marc Violante, WPI

Webinar Etiquette

PLEASE

§ Log into the GoToWebinar session with the name that you registered with online

§ Place your phone or computer on MUTE

§ Use the QUESTIONS option to ask your question(s).

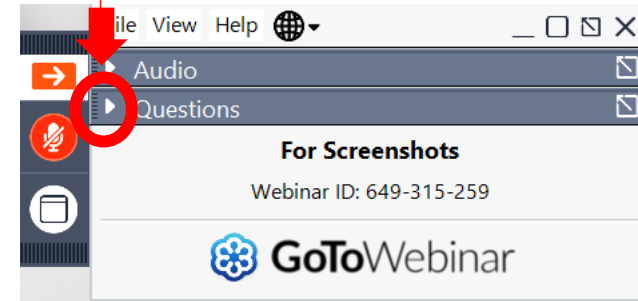
§ We will share the questions with our guest speaker who will respond to the group

THANK YOU!



OPENING THE QUESTIONS BOX

Click here to access
within the Control Panel



USING THE QUESTIONS BOX

Type questions
here at any time
during a
presentation



Click Send when ready to submit a question



WPI is Wisconsin's APEX ACCELERATOR

The APEX Accelerators program, under management of the Department of Defense (DOD) Office of Small Business Programs (OSBP), plays a critical role in the Department's efforts to identify and engage with a wide range of businesses entering and participating in the defense supply-chain. The program provides the education and training that all businesses need to participate to become capable of participating in DOD and other government contracts.

WPI provides services to all of Wisconsin's 72 counties

- Individual counseling at our offices, client's facility or virtually
- Small group training – webinars and workshops
- Conferences including one on one buyer meetings – Marketplace, The Contracting Academy, Small Business Academy, Wisconsin Federal Contractor Forum, Acquisition Hour, Cyber Fridays, DOD Roadmap series, Government Opportunities Business Conference, End of Year Federal Contractor Update, Annual DOD Contract Management Update, Evening FAR sessions and more.....

www.wispro.org

WPI OFFICE LOCATIONS

§ MILWAUKEE

§ *Technology Innovation Center*

§ MADISON

§ *FEED Kitchens*

§ *Dane County Latino Chamber of Commerce*

§ *Wisconsin Manufacturing Extension Partnership (WMEP)*

§ *Madison Area Technical College (MATC)*

§ ASHLAND

§ *Ashland Area Development Corporation*

§ CAMP DOUGLAS

§ *Juneau County Economic Development Corporation (JCEDC)*

§ EAU CLAIRE

§ *Western Dairyland*

§ FOND DU LAC

§ *Envision Greater Fond du Lac*

§ GREEN BAY

§ *NWTC Startup Hub*

§ LACROSSE

§ *Veterans in Professions*

§ MANITOWOC

§ *Progress Lakeshore*

§ OSHKOSH

§ *Greater Oshkosh
Economic Development Corporation*

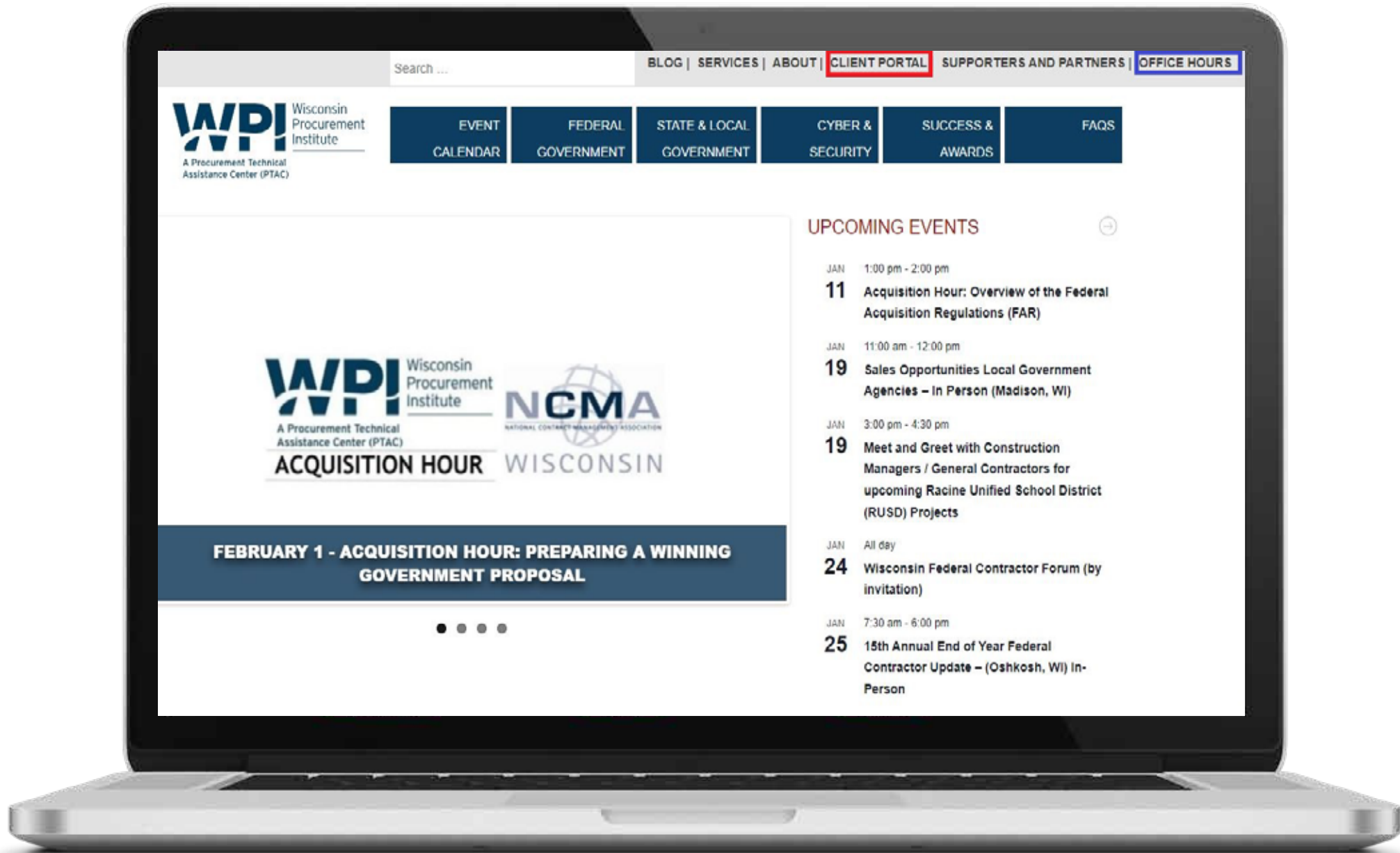
§ RHINELANDER

§ *Nicolet Area Technical College*

§ SUPERIOR

§ *Small Business Dev Center;
UW Superior*





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- CYBER & SECURITY
- SUCCESS & AWARDS
- FAQS



FEBRUARY 1 - ACQUISITION HOUR: PREPARING A WINNING GOVERNMENT PROPOSAL

UPCOMING EVENTS

- JAN 1:00 pm - 2:00 pm
11 Acquisition Hour: Overview of the Federal Acquisition Regulations (FAR)
- JAN 11:00 am - 12:00 pm
19 Sales Opportunities Local Government Agencies – In Person (Madison, WI)
- JAN 3:00 pm - 4:30 pm
19 Meet and Greet with Construction Managers / General Contractors for upcoming Racine Unified School District (RUSD) Projects
- JAN All day
24 Wisconsin Federal Contractor Forum (by invitation)
- JAN 7:30 am - 6:00 pm
25 15th Annual End of Year Federal Contractor Update – (Oshkosh, WI) In-Person

The End of the Fiscal Year is Here: What is Hot and What is Not

Marc N. Violante

Wisconsin Procurement Institute

August 15, 2023

What is the Spend to the End?

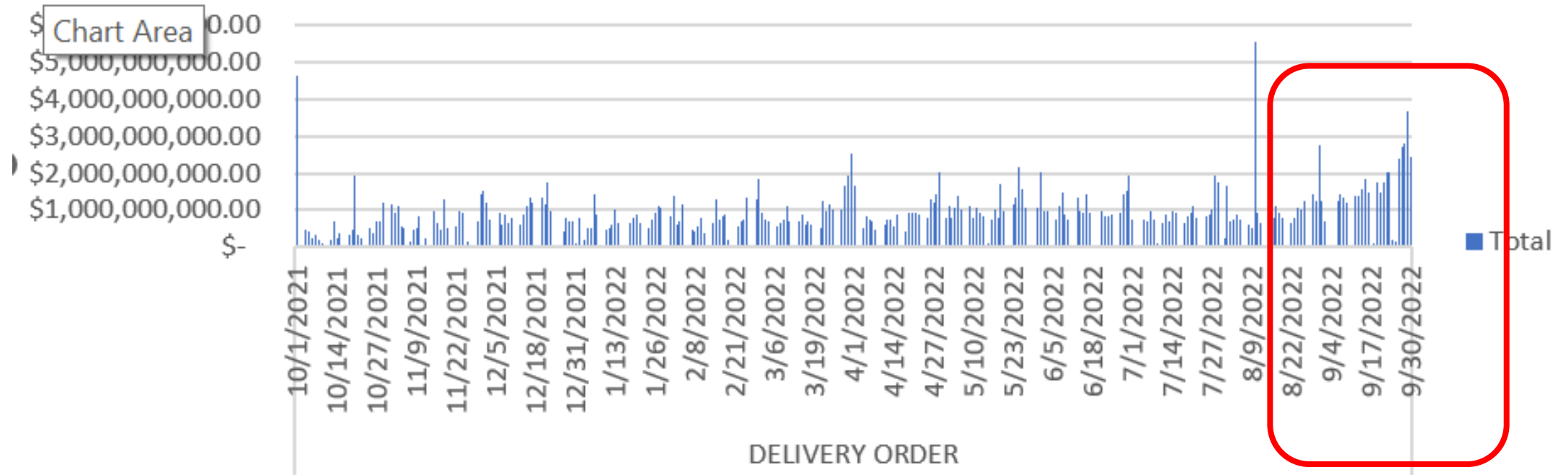
- Short period of intense procurement activity.
- Can include significant funds; implies larger procurements
- Activity is driven by the “use or lose” philosophy – rules.
 - Color of money – “one-year funds”
- Funds must be obligated – under contract, by end of Fiscal Year
 - E.g. - September 30, 2023.

Comparison of spending periods – all Federal

Fiscal Year		2022				
Row Labels	Sum of Dollars Obligated	Percentage				
Base	\$ 389,427,680,681.48			Q4	\$ 164,008,128,608.98	Percentage
BOA	\$ 15,295,866.55	0%		BOA	\$ 3,338,276.48	0%
BPA	\$ 7,975,306.54	0%		BPA	\$ 1,456,341.50	0%
BPA CALL	\$ 3,677,981,822.73	1%		BPA CALL	\$ 2,982,260,658.19	2%
DEFINITIVE CONTRACT	\$ 193,129,443,744.77	50%		DEFINITIVE CONTRACT	\$ 68,021,394,720.83	41%
DELIVERY ORDER	\$ 175,390,205,845.20	45%	★	DELIVERY ORDER	\$ 85,779,666,388.83	52%
FSS	\$ -	0%		FSS	\$ -	0%
GWAC	\$ 2,617,198.76	0%		GWAC	\$ (15,774.59)	0%
IDC	\$ 8,854,086,047.84	2%		IDC	\$ 2,262,690,942.25	1%
PURCHASE ORDER	\$ 8,350,074,849.09	2%		PURCHASE ORDER	\$ 4,957,337,055.49	3%

All Federal Delivery Order Activity

Delivery Order Activity - FY 22



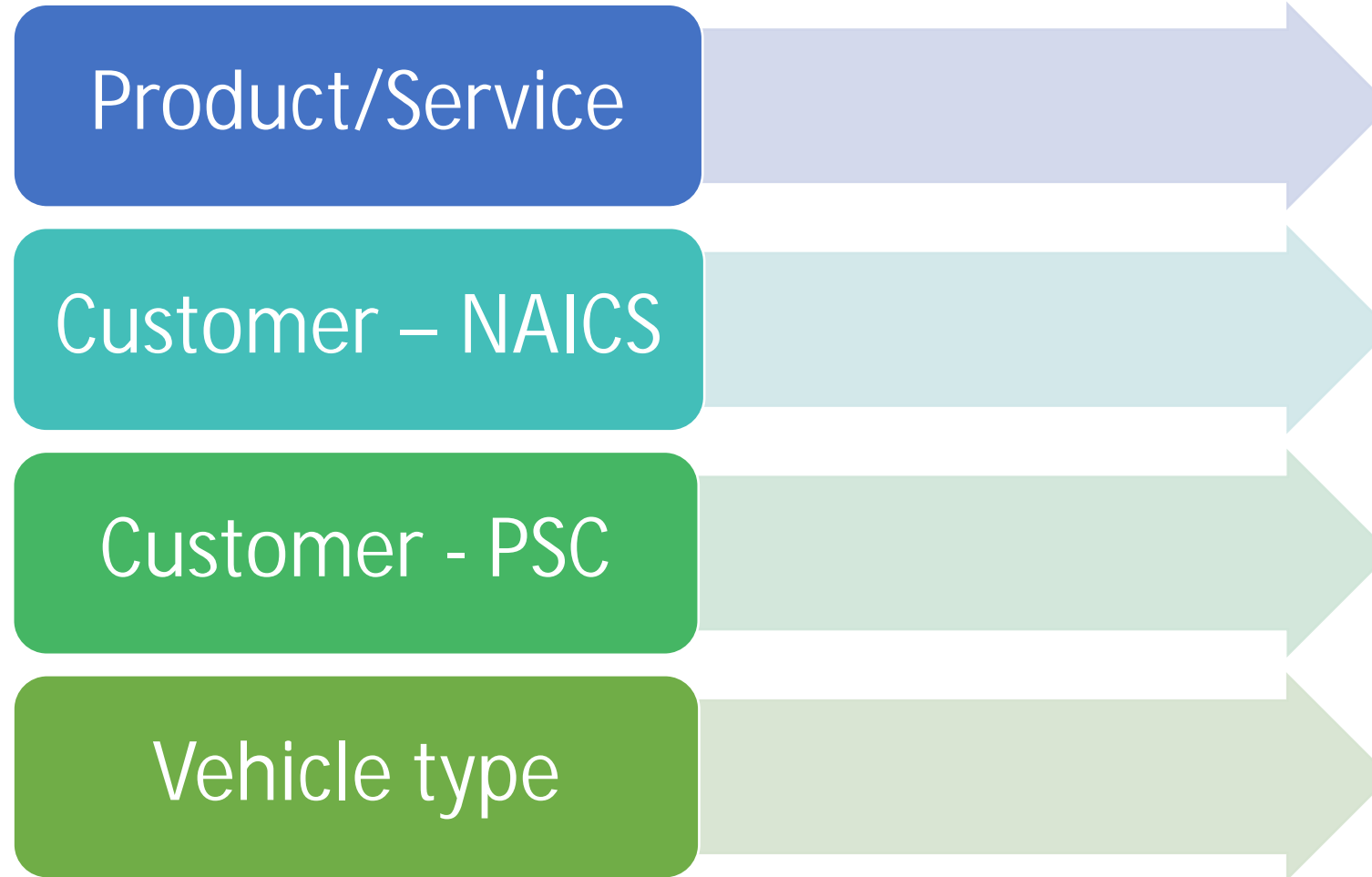
What is important to buying offices?

- Total obligation of funds
- Speed and access
- Accuracy – results | Award & go | No problems – special requests
 - Arguably – favors current contractors – (IDV's)
 - Those with positive performance
- Larger dollar amounts
- Relatively short performance period
- Probably not the time to “up sell” or attempt to sell new items – items out of their normal mix, use

General Information sources

- FAR
- Forecasts
- Trends
- Strategic Plan
- Targeted research
 - Conversations, competition, acquisition tendencies
- Contract Data Reports – SAM ad hoc or USAspending

Key Questions to answer



Buying Office process

Select Buying Office(s)

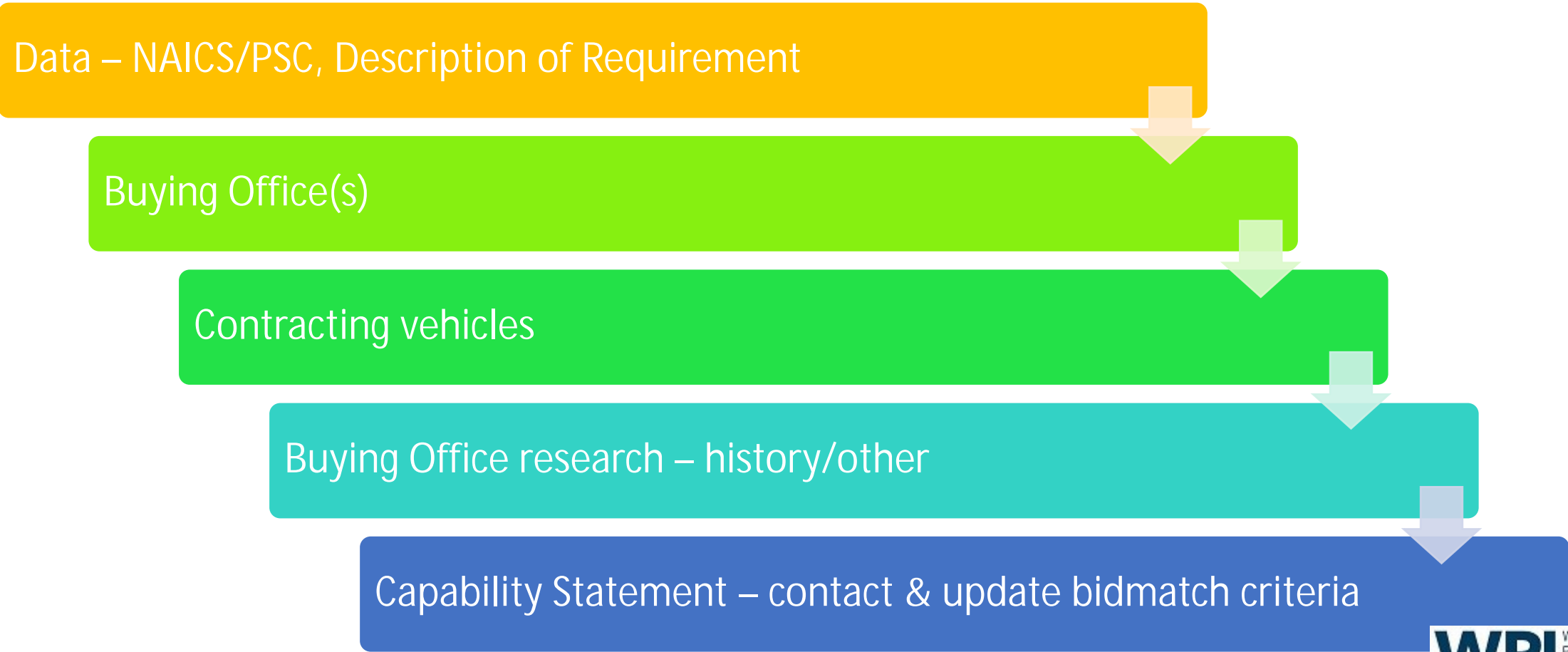
Data – understand purchase, determine fit, and level of opportunity

Match with capabilities / resources / supply chain

Identify barriers – contract vehicle / PIID / Socio-economic / other

Capability Statement – contact & update bidmatch criteria

Data process



Marketplace - entities



Marketplace overview NAICS & PSC

NAICS

- NAICS (6 digit) - 1,094 FY22 - used
- Sub-Sectors (3 digit) - 105

PSC's

- Product codes - 664
- Service codes – 1,870

Deciphering the PIID

- Unique identifier
- 20 year – uniqueness
- Assigned to all contracts
- Related to solicitations

DODAAC/UIC – FY – Type – Counter
From Defense.gov Contracts for July 6,
2023
SPRDL1 – 23 – C - 0065

DEFENSE LOGISTICS AGENCY

SEPAC Inc., Elmira, New York, has been awarded a maximum \$9,300,360 firm-fixed-price contract for M113 clutch engine fans. This was a sole-source acquisition using justification 10 U.S. Code 2304 (c)(1), as stated Federal Acquisition Regulation 6.302-1 (a)(2). This is a one-year base contract with one two-year option period. The delivery completion date is April 1, 2024. Using military service is Army. Type of appropriation is fiscal 2023 through 2024 Army working capital funds. The contracting activity is the Defense Logistics Agency Land and Maritime, Warren, Michigan (SPRDL1-23-C-0065).

DODAAC/UIC = SPRDL1
FY for Funds = FY 23
Contract type = C
Solicitation type = R, Q, B
Serial = 0065

Useful Research Tool

SAM.GOV Requests Notifications Workspace Sign Out

Home Search **Data Bank** Data Services Help

Show Reports For

- Assistance Listings
- Contract Opportunities
- Contract Data**
- Entity Information
- Federal Hierarchy

Report Type

- Static
- Standard
- Administrative
- Ad Hoc

Data Bank

SAM.gov reports support analysis of the federal award lifecycle. The DataBank allows you to download or run reports on various domains. Depending on the domain, different types of reports are available. Reports range from static pre-generated reports to fully customizable ad hoc reports. You must be signed in to run most reports, and roles assigned to you determine which reports are available for you to run.

Contract Data Reports

i Attention: The FPDS reports module is now in SAM.gov as the DataBank. If you need to search for contract data or specific contracts, please go to [FPDS.gov](https://www.fpds.gov) and use the ecSearch tool. The FPDS search and data entry functions have not yet been migrated to SAM.gov, but will be migrated in the future.

Many reports on acquisition awards are available to the public. These reports provide detailed information on awarded contracts and associated modifications. Reports can assist with analysis of federal spending and provide data by federal organization, geographical area, business demographics, and product or service type, among others.

Ad Hoc Reports

Ad hoc reports offer the ability to select specific fields from the data to create a customized report. Ad hoc reports are most informative for those with both knowledge of the data fields and an understanding of advanced reporting tools. You can pull up to 12 years and 150,000 rows of data in a single report. If you are interested in learning how to do ad hoc reporting, please see the [contract data landing page](#).

How does the Unique Entity ID appear in contract data ad hoc reports?

DUNS fields have been renamed, and Unique Entity ID fields have been introduced. [What are the columns BLANK 1 \(DEPRECATED\) and BLANK 2 \(DEPRECATED\) in contract data ad hoc reports?](#)

Showing 1-2 of 2 reports:

Award/IDV Information Report [of](#)

Construct a report of contract award data.

Other Transaction Information Report [of](#)

Construct a report of other transaction data.

Using the Contracting Office ID to ID opportunities

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The screenshot shows a search interface with a search bar containing 'e.g. 1606N020Q02'. Below the search bar, there are filters for 'Select Domain' (All Domains), 'Filter By', and 'Keyword Search' (Any Words, All Words, Exact Phrase). A red circle highlights the search input field, and a red arrow points from it to the search results. The results are sorted by 'Date Modified/Updated' and show 1 - 25 of 1,388 results. The first result is 'Motor, Direct Current' with Notice ID: SPRDL1-23-R-0089. The second result is 'Converter' with Notice ID: SPRDL1-23-Q-0059. The third result is 'PISTON ASSEMBLY' with Notice ID: SPRDL1-23-F-0165. Each result includes details such as NSN, Part Number, Department/Ind. Agency, Subtier, Office, and Notice Type.

Search: All Words e.g. 1606N020Q02 Search Results Saved Searches Actions

Select Domain: All Domains

Filter By

Keyword Search: For more information on how to use our keyword search, visit our help guide

Any Words All Words Exact Phrase

e.g. 1606N020Q02 sprdl1

Federal Organizations: Enter Code or Name Status: Active Inactive

Showing 1 - 25 of 1,388 results

Sort by: Date Modified/Updated

Motor, Direct Current

Notice ID: SPRDL1-23-R-0089

THIS PROCUREMENT PROVIDES FOR THE ACQUISITION OF MOTOR, DIRECT CURRENT.

NSN: 6105-01-443-8388

PART NUMBER: 1254409

GUARANTEE August 15, 2023

Department/Ind. Agency: DEPT OF DEFENSE Subtier: DEFENSE LOGISTICS AGENCY (DLA) Office: DLA LAND WARREN

Contract Opportunities

Current Response Date: September 07, 2023 at 04:00 PM CDT

Notice Type: Updated Presolicitation

Updated Date: Jul 11, 2023 (1)

Published Date: Jul 11, 2023

Converter

Notice ID: SPRDL1-23-Q-0059

Item: Converter, 2.0kW AC/DC. NSN: 6130-01-490-9998. Government Part Number: 17-1-5790. Quant

Department/Ind. Agency: DEPT OF DEFENSE Subtier: DEFENSE LOGISTICS AGENCY (DLA) Office: DLA LAND WARREN

Contract Opportunities

Current Date Offers Due: August 14, 2023 at 02:00 PM CDT

Notice Type: Original Solicitation

Updated Date: Jul 11, 2023

Published Date: Jul 11, 2023

PISTON ASSEMBLY

Notice ID: SPRDL1-23-F-0165

Delivery Order SPRDL1-23-F-0165 was awarded on JUL-10-2023 in the amount of \$821,546.00. This is against Indefinite Delivery Indefinite Quant

Notice Type: Original Award Notice

Updated Date: Jul 11, 2023



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Buying Office overview – SPRDL1

Sum of Dollars Obligated	Column Labels				
Row Labels	Base	Q4	Grand Total		
313320	\$ (87,325.00)		\$ (87,325.00)		
326199	\$ 103,015.00		\$ 103,015.00	Core	
326211	\$ 11,963,085.25	\$ 8,165,366.08	\$ 20,128,451.33	Core	
326220	\$ -		\$ -		
332311	\$ 492,319.98	\$ 24,000.00	\$ 516,319.98	Core	
332439	\$ 2,742,219.84	\$ 2,829.00	\$ 2,745,048.84	Core	
332510	\$ 347,391.32	\$ 11,400.00	\$ 358,791.32	Core	
332911	\$ (4,760.24)		\$ (4,760.24)		
332912	\$ (9,408.00)	\$ 344,689.68	\$ 335,281.68	Q4	
332919	\$ (1,000.01)		\$ (1,000.01)		
332991	\$ -	\$ 500,640.00	\$ 500,640.00	Q4	
332994	\$ 1,653,072.29	\$ 20,824,965.62	\$ 22,478,037.91	Core	
332999	\$ 838,053.14		\$ 838,053.14	Core	
333314	\$ 268,695.70		\$ 268,695.70	Core	
333318	\$ 1,089,871.26		\$ 1,089,871.26	Core	
333413	\$ (159,479.50)		\$ (159,479.50)		
333415	\$ 660,653.49		\$ 660,653.49	Core	
333611	\$ -		\$ -		

59 NAICS – Sectors 31 – 33, mfg
 35 – Core (Base – Base & Q4)
 8 – Q4 only
 16 – " "

Using the PIID to create a customer overview

Top 10 NAICS by Grand Total

Sum of Dollars Obligated		Contracting Officers Business Size Determination		
NAICS Code	NAICS Description	OTHER THAN SMALL BUSINESS	SMALL BUSINESS	Grand Total
336992	MILITARY ARMORED VEHICLE, TANK, AND TANK COMPONENT MANUFACTURING	\$ 54,220,994.20	\$ 123,273.70	\$ 54,344,267.90
334419	OTHER ELECTRONIC COMPONENT MANUFACTURING	\$ 43,786,799.10	\$ 289,969.98	\$ 44,076,769.08
332994	SMALL ARMS, ORDNANCE, AND ORDNANCE ACCESSORIES MANUFACTURING	\$ 16,758,847.35	\$ 5,719,190.56	\$ 22,478,037.91
326211	TIRE MANUFACTURING (EXCEPT RETREADING)	\$ 21,032,722.33	\$ (904,271.00)	\$ 20,128,451.33
335312	MOTOR AND GENERATOR MANUFACTURING	\$ 2,511,306.75	\$ 14,449,175.88	\$ 16,960,482.63
336350	MOTOR VEHICLE TRANSMISSION AND POWER TRAIN PARTS MANUFACTURING	\$ 9,817,203.40	\$ 5,685,631.30	\$ 15,502,834.70
333618	OTHER ENGINE EQUIPMENT MANUFACTURING	\$ 9,070,585.67	\$ 2,000,697.79	\$ 11,071,283.46
336320	MOTOR VEHICLE ELECTRICAL AND ELECTRONIC EQUIPMENT MANUFACTURING	\$ 65,033.40	\$ 7,243,636.69	\$ 7,308,670.09
336310	MOTOR VEHICLE GASOLINE ENGINE AND ENGINE PARTS MANUFACTURING	\$ -	\$ 4,099,250.49	\$ 4,099,250.49
335999	ALL OTHER MISCELLANEOUS ELECTRICAL EQUIPMENT AND COMPONENT MANUFACTURING	\$ (2,500.25)	\$ 3,031,459.16	\$ 3,028,958.91
Grand Total		\$ 157,260,991.95	\$ 41,738,014.55	\$ 198,999,006.50

Q4 Opportunities can be significant

Sum of Dollars Obligated Row Labels	Column Labels			Percentages	
	Base	Q4	Grand Total	Base	Q4
★ DEFINITIVE CONTRACT	\$ 57,209,805.00	\$ 77,303,232.90	\$ 134,513,037.90	50%	68%
DELIVERY ORDER	\$ 54,930,566.96	\$ 34,437,924.98	\$ 89,368,491.94	48%	30%
IDC	\$ -		\$ -	0%	0%
PURCHASE ORDER	\$ 2,339,192.02	\$ 1,473,985.31	\$ 3,813,177.33	2%	1%
Grand Total	\$ 114,479,563.98	\$ 113,215,143.19	\$ 227,694,707.17		



Issues with identifying good buying offices

- Numbers/data help to provide context
- 1 NAICS code – 236220 -- Commercial and Institutional Building Construction
- 177 PSCs used
- 395 Contracting Offices
- Extremely few that share psc purchasing

Source: SAM DataBank query/data

Services – activity and grouping

Row Labels	Count of PSC	Sum of Number of Actions	Sum of Dollars Obligated
A	4611	16,971	\$ 13,090,845,321.36
B	1348	3,718	\$ 837,063,641.59
C	1549	9,292	\$ 3,422,540,190.30
D	2915	39,612	\$ 11,777,670,929.13
E	80	87	\$ 14,586,042.21
F	1325	8,799	\$ 2,141,950,134.27
G	467	2,308,498	\$ 5,710,458,681.73
H	1925	2,803	\$ 640,534,505.04
J	3202	165,891	\$ 5,067,553,374.78
K	498	821	\$ 605,069,001.87
L	581	967	\$ 337,505,275.62
M	1169	3,024	\$ 6,738,056,091.65
N	951	3,683	\$ 980,530,057.04
P	180	310	\$ 218,803,955.75
Q	1753	53,292	\$ 1,666,252,807.96
R	3461	87,463	\$ 24,133,362,972.23
S	1431	21,622	\$ 2,665,340,407.48
T	411	925	\$ 62,618,034.28
U	701	6,253	\$ 1,161,052,568.76
V	1565	9,503,094	\$ 2,810,408,181.51
W	1207	3,706	\$ 113,014,134.86
X	570	1,378	\$ 66,156,301.92
Y	2032	8,580	\$ 12,335,738,180.90
Z	3865	18,371	\$ 8,186,476,162.73
Grand Total	37797	12269160	\$ 104,783,586,954.97

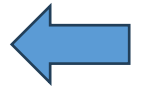
PSC Services Structure

Category A Research and Development
Category B Special Studies/Analysis, Not R&D
Category C Architect and Engineering Services
Category D - IT and Telecom - Information Technology and Telecommunications
Category E Purchase of Structures/Facilities
Category F Natural Resources Management
Category G Social
Category H Quality Control, Testing, and Inspection
Category J Maintenance, Repair, and Rebuilding of Equipment
Category K Modification of Equipment
Category L Technical Representative
Category M Operation of Structures/Facilities
Category N Installation of Equipment
Category P Salvage
Category Q Medical
Category R Support (Professional/Administrative/Management)
Category S Utilities and Housekeeping
Category T Photo/Map/Print/Publication
Category U Education/Training
Category V Transportation/Travel/Relocation
Category X Lease/Rental of Structures/Facilities
Category Y Construction of Structures/Facilities
Category Z Maintenance, Repair, Alteration of Structures/Facilities

Ex: PSC AC11 -

National
Defense R&D
Services;
Department of
Defense -
Military; Basic
Research

AB94	9/28/2022	\$0.00	1
AB96	7/26/2022	\$312,993.00	2
AB96	7/28/2022	\$0.00	1
AB96	8/24/2022	\$0.00	1
AB96	9/9/2022	\$16,998.55	1
AC11	7/1/2022	\$799,791.00	3
AC11	7/5/2022	\$1,488,684.00	9
AC11	7/6/2022	\$1,676,123.28	12
AC11	7/7/2022	\$2,743,312.00	17
AC11	7/8/2022	\$6,277,332.26	4
AC11	7/10/2022	\$0.00	4
AC11	7/11/2022	\$1,304,857.00	10
AC11	7/12/2022	\$732,172.45	5
AC11	7/13/2022	\$1,391,997.00	13
AC11	7/14/2022	\$1,486,539.18	14
AC11	7/15/2022	\$913,000.00	1
AC11	7/18/2022	\$2,197,988.72	13
AC11	7/19/2022	\$1,390,545.00	17
AC11	7/20/2022	\$429,075.67	10
AC11	7/21/2022	\$912,948.00	8
AC11	7/22/2022	\$1,062,074.84	5



Note: 330 "A" PSCs used during this time period.

PSC - Structure

AC2X – Structure – last digit	
Basic Research	AC21 National Defense R&D Services; Atomic energy defense activities; Basic Research
Applied Research	AC22 National Defense R&D Services; Atomic energy defense activities; Applied Research
Experimental Development	AC23 National Defense R&D Services; Atomic energy defense activities; Experimental Development
R&D Administrative Expenses	AC24 National Defense R&D Services; Atomic energy defense activities; R&D Administrative Expenses
R&D Facilities and Major Equipment	AC25 National Defense R&D SVCS; Atomic energy defense activities; R&D Facilities and Maj Equip

Products – activity and grouping

Row Labels	Count of PSG	Sum of Number of Actions	Sum of Dollars Obligated
15	310	6796	\$ 13,188,857,409.80
65	783	483399	\$ 7,912,922,280.81
14	305	980	\$ 3,515,433,961.76
58	988	4815	\$ 3,114,999,642.86
19	312	1380	\$ 3,096,894,951.30
28	317	1678	\$ 2,625,330,683.71
89	935	85665	\$ 1,785,798,319.68
91	372	53799	\$ 1,690,726,905.92
16	606	7046	\$ 1,499,409,926.23
13	555	1549	\$ 1,483,449,086.43
23	441	12031	\$ 1,425,442,661.42
7A	169	5328	\$ 1,335,942,734.16
66	1203	55711	\$ 972,585,204.98

Products – groups

Group 10 Weapons

Group 11 Nuclear Ordnance

Group 12 Fire Control Equipment

Group 13 Ammunition and Explosives

Group 14 Guided Missiles

Group 15 Aerospace Craft and Structural Components

Group 16 Aerospace Craft Components and Accessories

Group 17 Aerospace Craft Launching, Landing, and Ground Handling,...

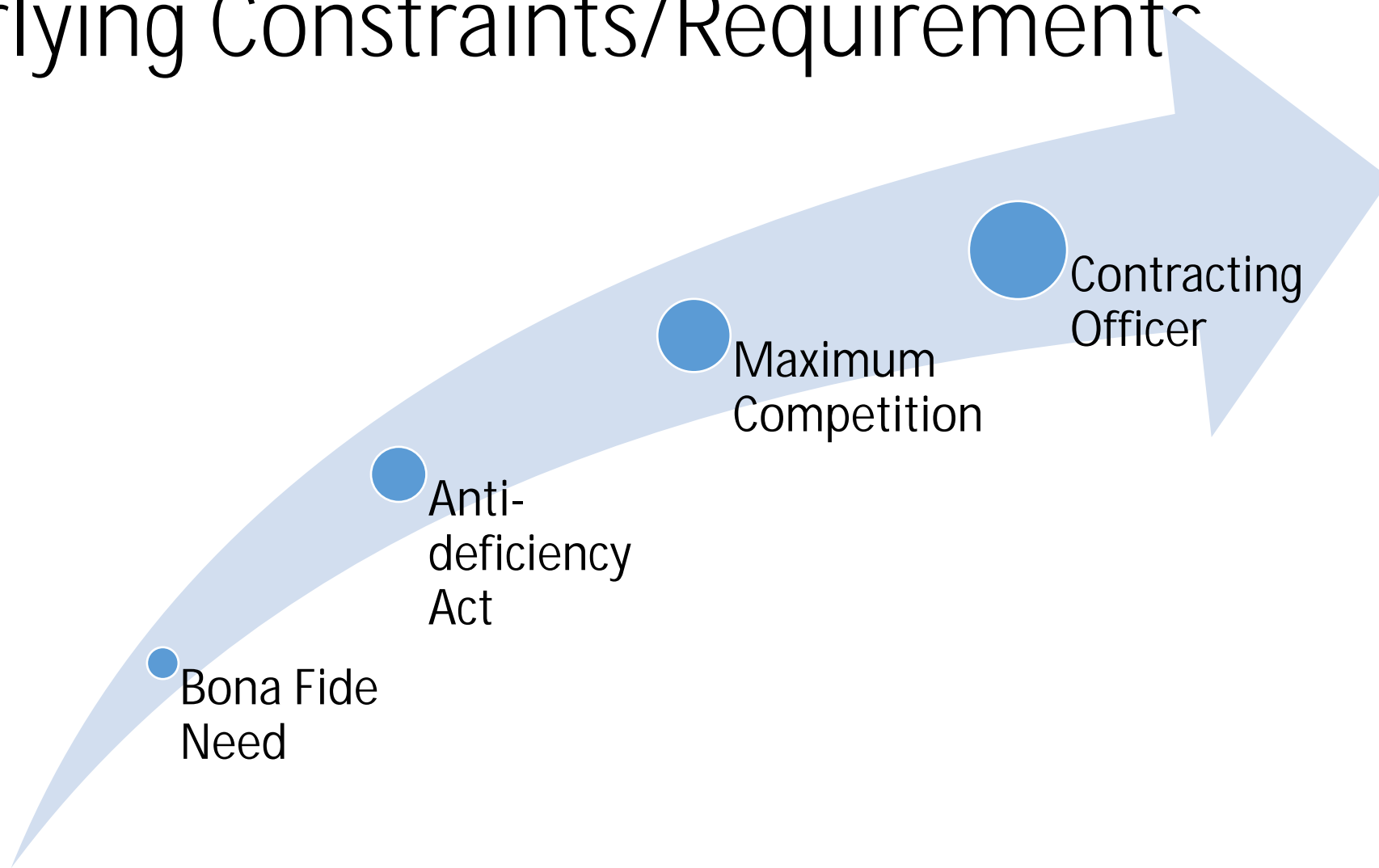
Group 19 Ships, Small Craft, Pontoons, and Floating Docks

Group 20 Ship and Marine Equipment

Products – group details (partial)

PSC	Description
6505	<p>Drugs and Biologicals</p> <p>Notes: Only items specifically formulated for human use are appropriate to this class.</p> <p>Includes: All drugs, medicinal grade chemicals, and Biologicals subject to the Federal Food, Drug and Cosmetic Act, listed in the Monograph section of the U.S. Pharmacopeia or the National Formulary or covered by the United States Adopted Names (USAN). Other nations may apply their own legal documents.</p> <p>Excludes: Medicated cosmetics and toiletries classifiable in FSC 6508 and in vitro diagnostic substances and reagents classifiable in FSC 6550, and Veterinary Drugs and Biologicals classifiable in FSC 6509.</p>
6508	<p>Medicated Cosmetics and Toiletries</p> <p>Includes: Medicated cosmetics and toiletries that have been determined to be drugs in accordance with the Federal Food, Drug, and Cosmetic Act.</p> <p>Excludes: Nonmedicated cosmetics and toiletries which are classifiable in Group 85.</p>
6509	<p>Drugs and Biologicals, Veterinary Use</p>

Underlying Constraints/Requirements



Red-tape considerations

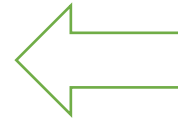
- Agencies may not spend, or commit themselves to spend, in advance of or in excess of appropriations. 31 U.S.C. § 1341 (Antideficiency Act).
- Appropriations may be used only for their intended purposes. 31 U.S.C. § 1301(a) (“purpose statute”).
- Appropriations made for a definite period of time may be used only for expenses properly incurred during that time. 31 U.S.C. § 1502(a) (“bona fide needs” statute).
- Unless authorized by law, an agency may not keep money it receives from sources other than congressional appropriations, but must deposit the money in the Treasury. 31 U.S.C. § 3302(b) (“miscellaneous receipts” statute)

Bona Fide Needs Rule

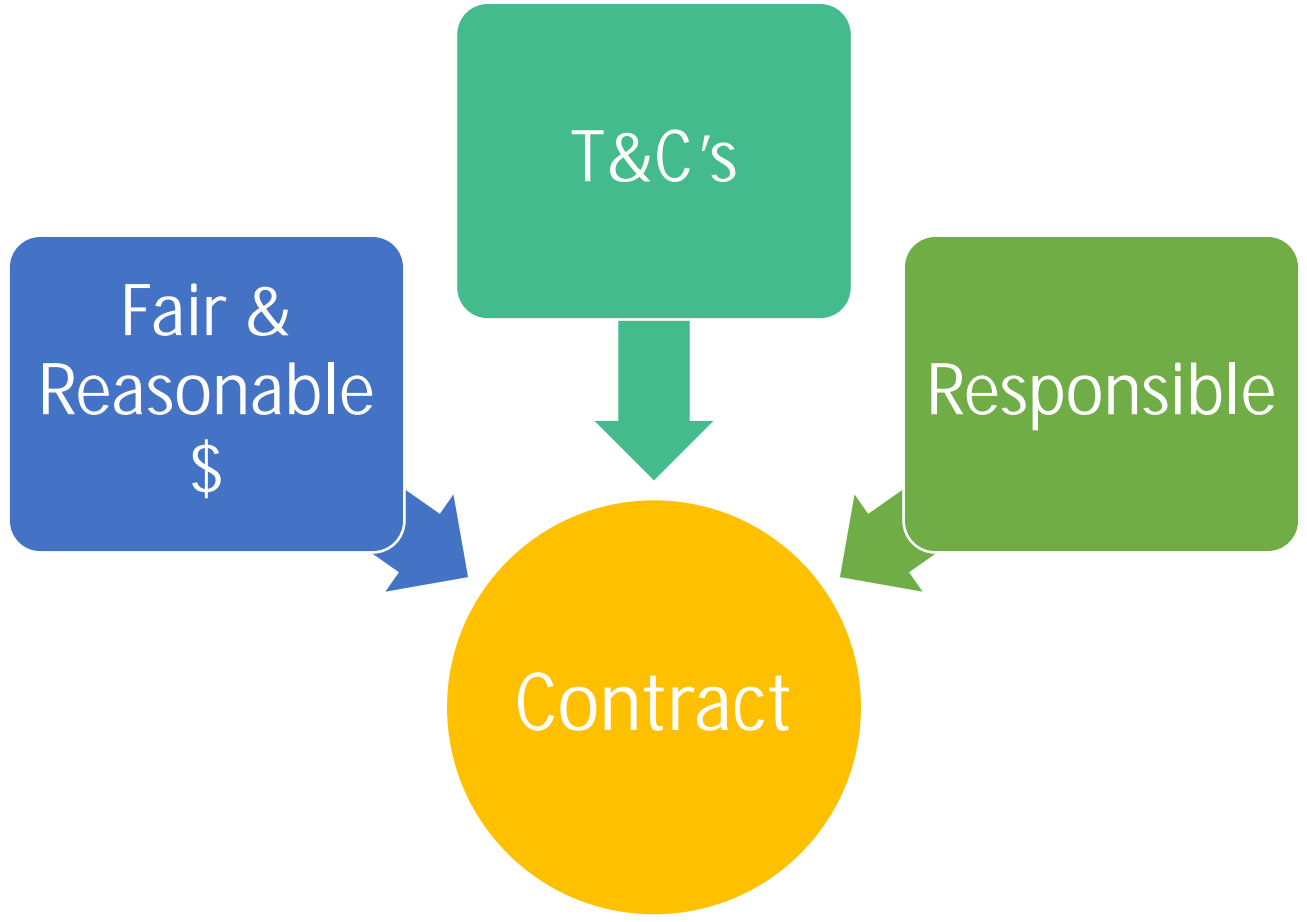
- Over a century ago, the Comptroller of the Treasury stated, “An appropriation should not be used for the purchase of an article not necessary for the use of a fiscal year in which ordered merely in order to use up such an appropriation.” 8 Comp. Dec. 346, 348 (1901).
- The bona fide needs rule is one of the fundamental principles of appropriations law:
 - A fiscal year appropriation may be obligated only to meet a legitimate, or bona fide, need arising in, or in some cases arising prior to but continuing to exist in, the fiscal year for which the appropriation was made.

Anti-deficiency Act

- Must have funds in place prior to spending
- Funding in place = appropriation
- Cannot exceed amount of funds appropriated for a purchase
- Pricing – costs can be critical
 - Requirements v. funds may not allow for modifications
- Cannot exceed total funds budgeted for a year
- Use or lose philosophy
- Don't leave the KO in a bad spot!

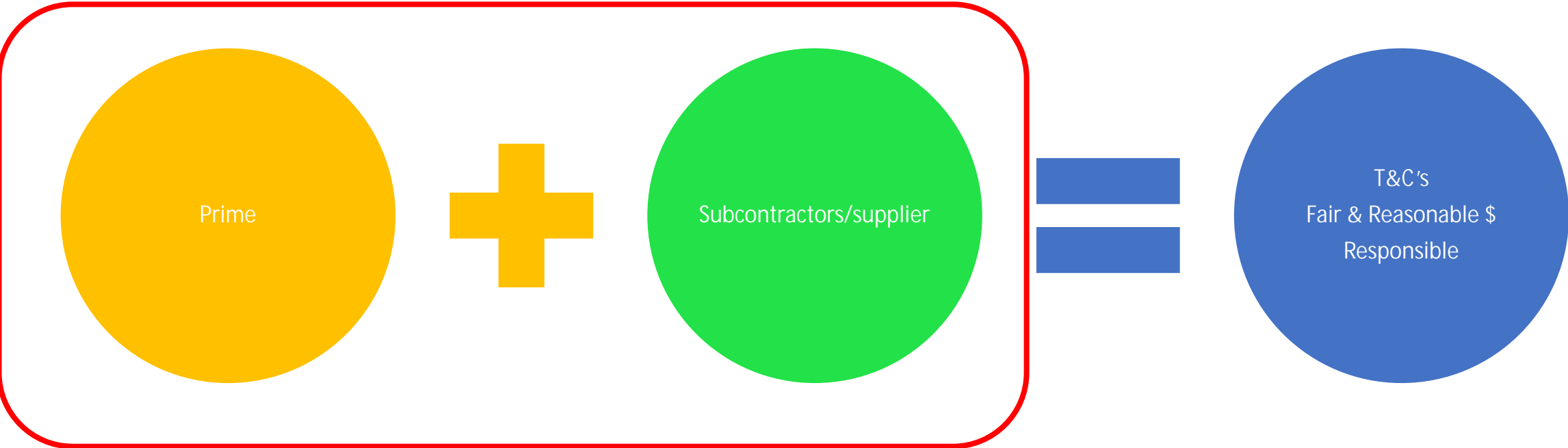


Contracting Triangle



Contracting Equation

“Packaged Deal”



Know/communicate with your supply chain

- Define issues and vetting topics/procedures
 - SAM as required
 - Cyber
 - Export Controls – JCP, ITAR
 - DPA/DPAS ability
 - Surge/Sustainment
 - Quality
 - Cost/pricing
 - Reporting requirements
 - Other – as required



Documents

- System for Award Management (SAM)
- Dynamic Small Business Search
- Capabilities Statement – tailored
- WPI – bidmatch profile
 - Review!
 - Update
- SAM profile, if used
- GSA schedule holders; determine if **Sale/Sale pricing is justified**
- Non-GSA IDV's

Communication

- Maintained
- Timely
- Documentation
- All parties
- Consistency/standardized

Security – Cyber/Export Controlled/Other

- Identify programs and their requirements
- Determine communications channels
 - Email
 - In-person
 - On-line meeting platforms
- Identify risks
 - Encryption
 - Server location
 - Eligibility
 - Compliance (FAR 52.204-21 / DFARS 252.204-7012/ DFARS 252.204-7019 & 7020)
- Establish vetting procedures – apply
- Document

Contract Modifications

- **43.102 Policy.**
- (a) Only contracting officers acting within the scope of their authority are empowered to execute contract modifications on behalf of the Government. Other Government personnel shall not-
 - (1) Execute contract modifications;
 - (2) Act in such a manner as to cause the contractor to believe that they have authority to bind the Government; or
 - (3) Direct or encourage the contractor to perform work that should be the subject of a contract modification.
- (b) Contract modifications, including changes that could be issued unilaterally, shall be priced before their execution if this can be done without adversely affecting the interest of the Government. If a significant cost increase could result from a contract modification and time does not permit negotiation of a price, at least a ceiling price shall be negotiated unless impractical.

General Approaches



Why it is important to know your customer

- What they buy.
- How they buy.
- What categories receive priority.
- Perceived risk of new (unknown) vendors.

Why it is important to know - resources

- Contract Data Reports
 - Metrics - > values
 - Attributes -> elements that characterize Metrics
 - Provides information on Award/Contract Type
 - Allows – Obligation filtering (>\$0.00 and <= \$10,000)
 - Number of bids submitted

Understand the data

PSC	Description
6505	<p>Drugs and Biologicals</p> <p>Notes: Only items specifically formulated for human use are appropriate to this class.</p> <p>Includes: All drugs, medicinal grade chemicals, and Biologicals subject to the Federal Food, Drug and Cosmetic Act, listed in the Monograph section of the U.S. Pharmacopeia or the National Formulary or covered by the United States Adopted Names (USAN). Other nations may apply their own legal documents.</p> <p>Excludes: Medicated cosmetics and toiletries classifiable in FSC 6508 and in vitro diagnostic substances and reagents classifiable in FSC 6550, and Veterinary Drugs and Biologicals classifiable in FSC 6509.</p>
6508	<p>Medicated Cosmetics and Toiletries</p> <p>Includes: Medicated cosmetics and toiletries that have been determined to be drugs in accordance with the Federal Food, Drug, and Cosmetic Act.</p> <p>Excludes: Nonmedicated cosmetics and toiletries which are classifiable in Group 85.</p>
6509	<p>Drugs and Biologicals, Veterinary Use</p>

Contracting Officers PSC 8730 (# = 81)

NAICS Code 	NAICS Description	Product or Service Code 	Product or Service Description	Number of Offers Received	Dollars Obligated 	Number of Actions
111110	SOYBEAN FARMING	6550	IN VITRO DIAGNOSTIC SUBSTANCES, REAGENTS, TEST KITS AND SETS	3	\$45,000.00	3
111110	SOYBEAN FARMING	6720	CAMERAS, STILL PICTURE	3	\$191.00	1
111110	SOYBEAN FARMING	7050	INFORMATION TECHNOLOGY COMPONENTS	5	(\$2,461.91)	1
111110	SOYBEAN FARMING	7360	SETS, KITS, OUTFITS AND MODULES, FOOD PREPERATION AND SERVING		\$0.00	1
111110	SOYBEAN FARMING	7510	OFFICE SUPPLIES	1	\$11,290.00	1
111110	SOYBEAN FARMING	7810	ATHLETIC AND SPORTING EQUIPMENT	11	\$0.00	1
111110	SOYBEAN FARMING	8730	SEEDS AND NURSERY STOCK	6	\$121,144.00	1
111110	SOYBEAN FARMING	8940	SPECIAL DIETARY FOODS AND FOOD SPECIALTY PREPARATIONS		\$9,279.76	2
111110	SOYBEAN FARMING	F009	NATURAL RESOURCES/CONSERVATION- SEED COLLECTION/PRODUCTION	1	\$16,720.88	2
111110	SOYBEAN FARMING	F108	ENVIRONMENTAL SYSTEMS PROTECTION- ENVIRONMENTAL REMEDIATION	1	(\$28,726.00)	1
111110	SOYBEAN FARMING	J023	MAINT/REPAIR/REBUILD OF EQUIPMENT- GROUND EFFECT VEHICLES, MOTOR VEHICLES, TRAILERS, AND CYCLES		\$0.00	1
111110	SOYBEAN FARMING	R701	SUPPORT- MANAGEMENT: ADVERTISING	1	\$208,998.00	2
111110	SOYBEAN FARMING	S201	HOUSEKEEPING- CUSTODIAL JANITORIAL		\$0.00	1
111110	SOYBEAN FARMING	U005	EDUCATION/TRAINING- TUITION/REGISTRATION/MEMBERSHIP FEES	1	\$10,190.00	1
111110	SOYBEAN FARMING	V999	TRANSPORTATION/TRAVEL/RELOCATION- OTHER: OTHER		\$0.00	

Buying Office



MWR MIDWEST REGION(60000)	111421	8730	SEEDS AND NURSERY STOCK	\$0.00	1
NATIONAL CEMETERY ADMIN (36C786)	111421	8730	SEEDS AND NURSERY STOCK	\$133,298.50	7
NATIONAL CEMETERY ADMIN (36C786)	111998	8730	SEEDS AND NURSERY STOCK	\$22,035.20	1
NATIONAL CEMETERY ADMIN (36C786)	339999	8730	SEEDS AND NURSERY STOCK	\$95,811.36	6
NATIONAL CEMETERY ADMIN (36C786)	444130	8730	SEEDS AND NURSERY STOCK	\$165,886.00	1
NATIONAL CEMETERY ADMIN (36C786)	484220	8730	SEEDS AND NURSERY STOCK	\$4,000.00	1
NATIONAL CEMETERY ADMIN (36C786)	561730	8730	SEEDS AND NURSERY STOCK	\$7,270.40	2
NATIONAL INTERAGENCY FIRE CENTER	111998	8730	SEEDS AND NURSERY STOCK	\$4,721,662.12	47
NATIONAL INTERAGENCY FIRE CENTER	113210	8730	SEEDS AND NURSERY STOCK	\$6,517,550.10	59
NATIONAL OPERATIONS CENTER	111998	8730	SEEDS AND NURSERY STOCK	\$0.00	3
NCR REGIONAL CONTRACTING(30000)	561730	8730	SEEDS AND NURSERY STOCK	\$18,900.00	1
NGA PROCUREMENT CONTRACTS	111421	8730	SEEDS AND NURSERY STOCK	\$7,500.00	1
OREGON STATE OFFICE	115310	8730	SEEDS AND NURSERY STOCK	\$302,974.15	3
PWR PORE MABO (84000)	115112	8730	SEEDS AND NURSERY STOCK	\$23,982.97	1
ROGUE RIVER-SISKIYOU NATL FOREST	113210	8730	SEEDS AND NURSERY STOCK	(\$30,483.79)	1
SF SMITHSONIAN FACILITIES	334512	8730	SEEDS AND NURSERY STOCK	\$6,950.00	1
SF SMITHSONIAN FACILITIES	424910	8730	SEEDS AND NURSERY STOCK	\$28,965.43	2
SF SMITHSONIAN FACILITIES	424930	8730	SEEDS AND NURSERY STOCK	\$52,026.63	3

Understand – How the customer buys

Contracting Department Name	Contracting Department ID	Contracting Agency Name	Contracting Agency ID	Contracting Office Name	Contracting Office ID	Dollars Obligated
HEALTH AND HUMAN SERVICES, DEPARTMENT OF	7500	ADMINISTRATION FOR CHILDREN AND FAMILIES	7590	ACF OFFICE OF GOVERNMENT CONTRACTING SERVICES	75ACF1	\$3,868,102,359.93
ADMINISTRATIVE CONFERENCE OF THE U. S.	9515	ADMINISTRATIVE CONFERENCE OF THE U. S.	9515	ACUS	954403	\$194,608.16
HEALTH AND HUMAN SERVICES, DEPARTMENT OF	7500	AGENCY FOR HEALTHCARE RESEARCH AND QUALITY	7528	AHRQ/HEALTHCARE RESEARCH QUALITY	75Q801	\$124,070,429.94
AGENCY FOR INTERNATIONAL DEVELOPMENT	7200	AGENCY FOR INTERNATIONAL DEVELOPMENT	7200	AMER EMBASSY NAIROBI- USAD/KENYA	720615	\$49,264,856.01
AGENCY FOR INTERNATIONAL DEVELOPMENT	7200	AGENCY FOR INTERNATIONAL DEVELOPMENT	7200	AMERICAN EMBASSY- NAIROBI/USAD/KEA	720623	\$10,145,848.42
AGENCY FOR INTERNATIONAL DEVELOPMENT	7200	AGENCY FOR INTERNATIONAL DEVELOPMENT	7200	BUREAU FOR HUMANITARIAN ASSISTANCE	720BHA	\$163,118,433.24

Department

Contracting Office
75ACF1

DEPARTMENT OF HEALTH AND HUMAN SERVICES			
Contracting Department ID	Award or IDV Type	Dollars Obligated	Percent
7500	BOA	\$0.00	0%
7500	BPA	\$16,664.40	0%
7500	BPA CALL	\$1,187,477,354.29	3%
7500	DEFINITIVE CONTRACT	\$15,359,362,835.46	44%
7500	DELIVERY ORDER	\$11,821,719,005.03	34%
7500	GWAC	\$1,500.00	0%
7500	IDC	\$4,496,287,839.63	13%
7500	PURCHASE ORDER	\$2,084,754,406.82	6%
		\$34,949,619,605.6	

Award type/number – shift – KO 75ACF1

ACF OFFICE OF GOVERNMENT CONTRACTING SERVICES

Contracting Office ID	Award or IDV Type	Dollars Obligated	Number of Actions	% \$	% Actions
75ACF1	BPA	\$0.00	11	0%	3%
75ACF1	BPA CALL	\$1,274,788.54	4	0%	1%
75ACF1	DEFINITIVE CONTRACT	\$2,803,046,717.00	186	72%	57%
75ACF1	DELIVERY ORDER	\$72,261,321.67	60	2%	18%
75ACF1	IDC	\$0.00	3	0%	1%
75ACF1	PURCHASE ORDER	\$991,519,532.72	62	26%	19%
		\$3,868,102,359.93	326	100%	100%

October - June

July - September

ACF OFFICE OF GOVERNMENT CONTRACTING SERVICES

Contracting Office ID	Award or IDV Type	Dollars Obligated	Number of Actions	% \$	% Actions
75ACF1	BPA	\$0.00	2	0%	1%
75ACF1	BPA CALL	\$987,747.46	3	0%	1%
75ACF1	DEFINITIVE CONTRACT	\$1,973,627,129.68	130	70%	65%
75ACF1	DELIVERY ORDER	\$25,117,031.17	21	1%	10%
75ACF1	IDC	\$0.00	1	0%	0%
75ACF1	PURCHASE ORDER	\$810,278,437.79	44	29%	22%
		\$2,810,010,346.10	201	100%	100%

SPE4A6 v. SPE4A5 Last 3 2021


























Buying requirements of buying offices can vary greatly even within an Agency

ACF OFFICE OF GOVERNMENT CONTRACTING SERVICES					
Contracting Office ID	Award or IDV Type	Dollars Obligated	Number of Actions	% \$	% Actions
75ACF1	BPA	\$0.00	8	0%	7%
75ACF1	BPA CALL	\$287,041.08	1	0%	1%
75ACF1	DEFINITIVE CONTRACT	\$822,802,653.22	49	81%	46%
75ACF1	DELIVERY ORDER	\$39,458,068.30	37	4%	35%
75ACF1	IDC	\$0.00	2	0%	2%
75ACF1	PURCHASE ORDER	\$155,392,982.13	10	15%	9%
		\$1,017,940,744.73	107	100%	100%



Contracting Office Name	Contracting Office ID	Award or IDV Type	Dollars Obligated	Number of Actions
DLA.AVIATION	SPE4A8	DEFINITIVE CONTRACT	\$7,711,424.80	33
DLA.AVIATION	SPE4A8	DELIVERY ORDER	\$48,582,259.42	6,696
DLA.AVIATION	SPE4A8	IDC	\$0.00	1,018
DLA.AVIATION	SPE4A8	PURCHASE ORDER	\$27,815,737.83	5,726

Information sources

Contracting Office Name 	Contracting Office ID 	Award or IDV Type 	Dollars Obligated 	Number of Actions 
   	   	   	   	   
DLA AVIATION	SPE4A5	DEFINITIVE CONTRACT	\$5,661,808.70	13
DLA AVIATION	SPE4A5	DELIVERY ORDER	\$71,275,588.04	2,048
DLA AVIATION	SPE4A5	IDC	\$0.00	28
DLA AVIATION	SPE4A5	PURCHASE ORDER	\$18,181,652.38	1,416

Micro-purchase

- *Micro-purchase threshold* means \$10,000, except it means-
 - (1) For acquisitions of construction subject to [40 U.S.C. chapter 31](#), subchapter IV, Wage Rate Requirements (Construction), \$2,000;
 - (2) For acquisitions of services subject to [41 U.S.C. chapter 67](#), Service Contract Labor Standards, \$2,500;
 - (3) For acquisitions of supplies or services that, as determined by the head of the agency, are to be used to support a contingency operation; to facilitate defense against or recovery from cyber, nuclear, biological, chemical or radiological attack; to support a request from the Secretary of State or the Administrator of the United States Agency for International Development to facilitate provision of international disaster assistance pursuant to [22 U.S.C. 2292](#) et seq.; or to support response to an emergency or major disaster ([42 U.S.C. 5122](#)), as described in [13.201\(g\)\(1\)](#), except for construction subject to [40 U.S.C. chapter 31](#), subchapter IV, Wage Rate Requirements (Construction) ([41 U.S.C. 1903](#))—
 - and (i) \$20,000 in the case of any contract to be awarded and performed, or purchase to be made, inside the United States;
 - and (ii) \$35,000 in the case of any contract to be awarded and performed, or purchase to be made, outside the United States;
 - (4) For acquisitions of supplies or services from institutions of higher education ([20 U.S.C. 1001\(a\)](#)) or related or affiliated nonprofit entities, or from nonprofit research organizations or independent research institutes—
 - (i) \$10,000; or
 - (ii) A higher threshold, as determined appropriate by the head of the agency and consistent with clean audit findings under 31 U.S.C. chapter 75, Requirements for Single Audits; an internal institutional risk assessment; or State law.

Sole Source – navigation considerations

- FAR Guidance –
 - **13.104 Promoting competition.**
 - The contracting officer must promote competition to the maximum extent practicable to obtain supplies and services from the source whose offer is the most advantageous to the Government, considering the administrative cost of the purchase.
 - **6.303-1 Requirements.**
 - (a) A contracting officer shall not commence negotiations for a sole source contract, commence negotiations for a contract resulting from an unsolicited proposal, or award any other contract without providing for full and open competition unless the contracting officer- ~ (Justifies, Certifies, Obtains approval as required)
 - J&A – Justification and Approval - posted to SAM, post decision
- **Subpart 6.3 - Other Than Full and Open Competition**
 - (c) Application for brand-name descriptions.
 - (1) An acquisition or portion of an acquisition that uses a brand-name description or other purchase description to specify a particular brand-name, product, or feature of a product, peculiar to one manufacturer-
 - (i) Does not provide for full and open competition, regardless of the number of sources solicited; and
 - (ii) Shall be justified and approved in accordance with [6.303](#) and [6.304](#).

Sole Source – “rule of 2”

- FAR Guidance –
- **19.502-2 Total small business set-asides.**
- (a) Before setting aside an acquisition under this paragraph, refer to [19.203\(b\)](#). Each acquisition of supplies or services that has an anticipated dollar value above the micro-purchase threshold, but not over the simplified acquisition threshold, shall be set aside for small business unless the contracting officer determines there is not a reasonable expectation of obtaining offers from two or more responsible small business concerns that are competitive in terms of fair market prices, quality, and delivery. **If** the contracting officer **receives only one acceptable offer from a responsible small business concern** in response to a set-aside, the contracting officer **should make an award to that firm.**

General Environment – current to EOY

- Fast paced
- Need based
- High volume
- Outcome based
- Too much work – not enough time; contracting community
- Want sources that can perform
- Results oriented

Subsector perspective

Show Reports For

Assistance Listings
Contract Opportunities
Contract Data
Federal Hierarchy

Report Type

Static

Standard

Administrative

Ad Hoc

Data Bank

Sam.gov reports can be used to support analysis of federal spending including geographical analysis, market analysis, and analysis on the impact of the congressional and presidential initiatives in socio-economic areas such as small business spending. The data is also a reliable basis for measuring and assessing the impact of Federal acquisition policy and management improvement.

Contract Data Reports

Reports on acquisition awards are available to the public. Your reports provide detailed information on awarded contracts and associated modifications. Reports can assist with market analysis including data by federal organization, geographical area, business demographics, and product/service type.

Ad Hoc Reports

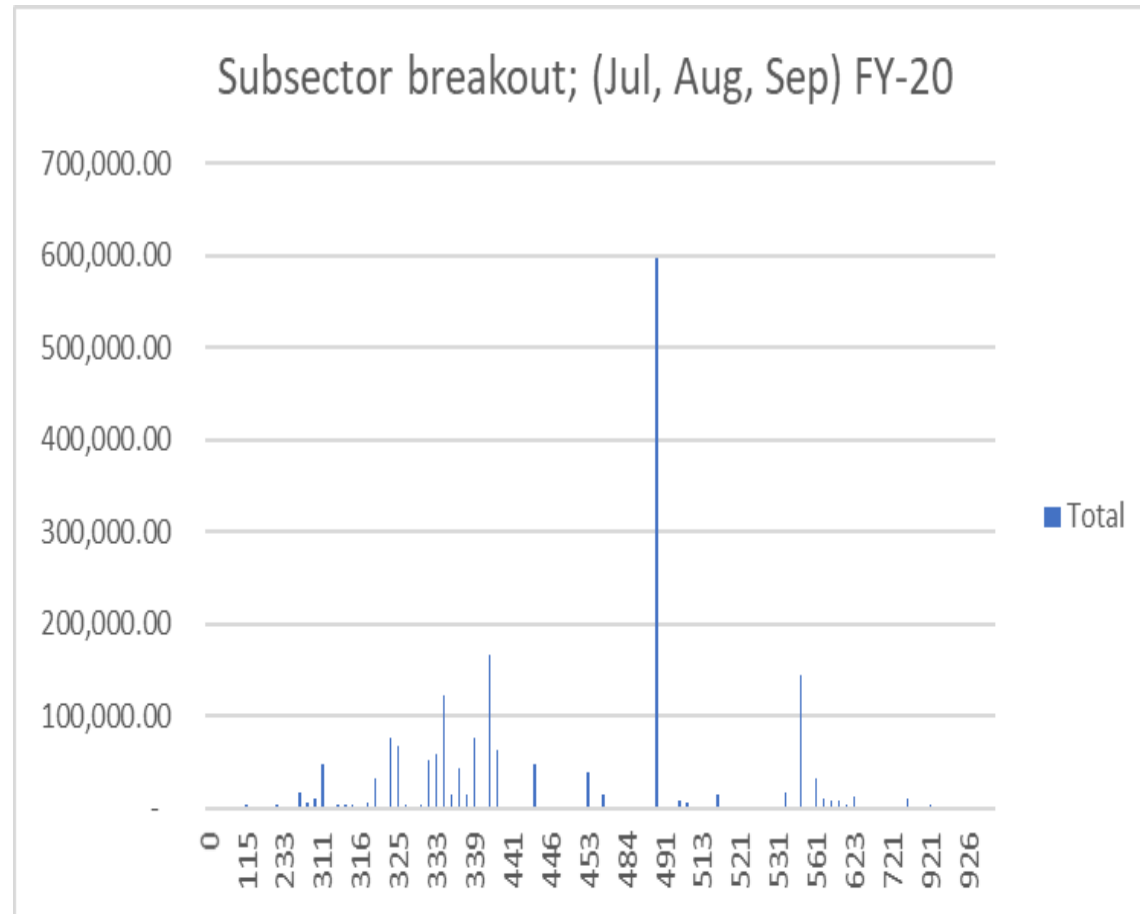
The Ad Hoc Reports feature offers the ability to select individual fields from the database to run a query. Please note that the ideal users of the Ad Hoc Reports feature have both knowledge of the data fields and understand how to use an advanced reporting tool.

Showing 1-2 of 2 reports

[Award/IDV Information Report](#)

NAICS: Sector (2) > Subsector (3) > Code (6) – 1,055 Codes

Departments for NAICS 488XXX



NAICS: 488XXX = 488000 – 488999 FY 20
naics 488 band fy 20

Contracting Offices for NAICS 488XXX

Row Labels	Sum of Dollars Obligated
DEPT OF DEFENSE	\$ 4,917,706,765.20
TRANSPORTATION, DEPARTMENT OF	\$ 296,264,315.25
HOMELAND SECURITY, DEPARTMENT OF	\$ 242,570,838.36
STATE, DEPARTMENT OF	\$ 217,786,569.94
GENERAL SERVICES ADMINISTRATION	\$ 52,845,894.77
NATIONAL AERONAUTICS AND SPACE ADMINISTRATION	\$ 36,357,426.95
HEALTH AND HUMAN SERVICES, DEPARTMENT OF	\$ 22,491,089.80
JUSTICE, DEPARTMENT OF	\$ 18,952,237.26
AGRICULTURE, DEPARTMENT OF	\$ 18,108,455.72
ENERGY, DEPARTMENT OF	\$ 7,301,812.04
INTERIOR, DEPARTMENT OF THE	\$ 6,210,090.61
COMMERCE, DEPARTMENT OF	\$ 4,161,600.18
VETERANS AFFAIRS, DEPARTMENT OF	\$ 167,335.34
NATIONAL GALLERY OF ART	\$ 90,720.00
TREASURY, DEPARTMENT OF THE	\$ 76,879.08
SMITHSONIAN INSTITUTION	\$ 65,771.85
SECURITIES AND EXCHANGE COMMISSION	\$ 43,870.00
GOVERNMENT ACCOUNTABILITY OFFICE	\$ 37,000.00
FEDERAL MINE SAFETY AND HEALTH REVIEW COMMISSION	\$ 35,486.65
ENVIRONMENTAL PROTECTION AGENCY	\$ 25,000.00
NATIONAL TRANSPORTATION SAFETY BOARD	\$ 5,925.00
UNITED STATES AGENCY FOR GLOBAL MEDIA, BBG	\$ (0.80)
AGENCY FOR INTERNATIONAL DEVELOPMENT	\$ (1,468,738.61)
Grand Total	5839836345

633
Offices

NAICS: 488XXX = 488000 – 488999 FY 20

naics 488 band fy 20 w KO

Subsector perspective

Row Labels		Sum of Dollars Obligated
USTRANSCOM-AQ	\$	580,682,508.33
W6QM MICC-FT RUCKER	\$	557,789,924.48
W6QK ACC-RSA	\$	513,759,330.81
DCMA AIMO ST AUGUSTINE	\$	436,611,181.55
NAVAL AIR WARFARE CENTER AIR DIV	\$	391,997,964.58
FA4890 HQ ACC AMIC	\$	294,469,251.24
NAVAL AIR SYSTEMS COMMAND	\$	229,031,150.08
ACQUISITIONS - AQM MOMENTUM	\$	203,669,494.99
FA8106 AFLCMC WLK	\$	190,699,115.08
FA8726 AFLCMC HNK C3IN	\$	184,990,745.95
Grand Total	\$	3,583,700,667.09

NAICS: Sector (2) > Subsector (3) > Code (6) – 1,055 Codes

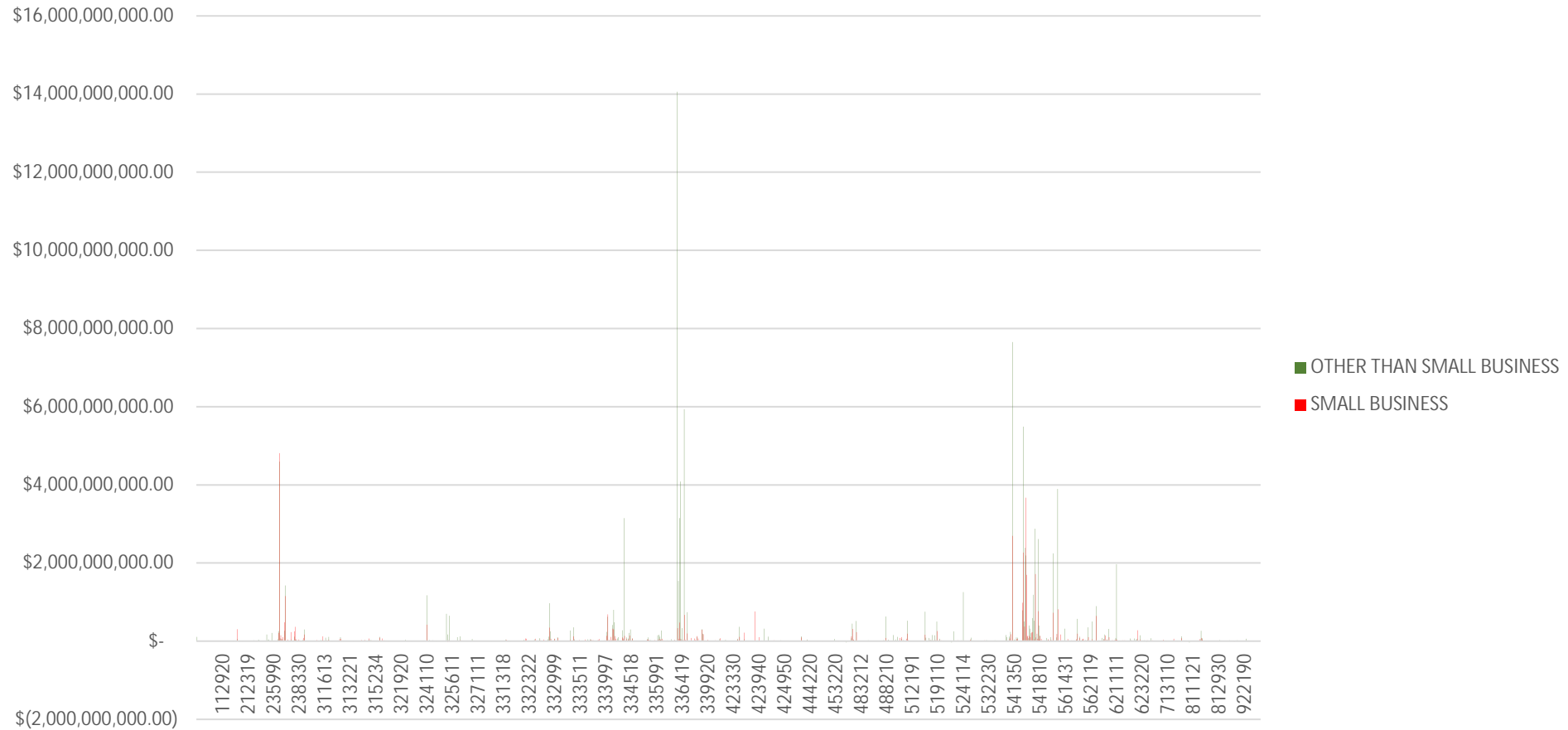
111 – Crop Production
 112 – Animal Production and Aquaculture
 113 – Forestry and Logging
 114 – Fishing, Hunting and Trapping
 115 – Support Activities for Agriculture and Forestry
 211 – Oil and Gas Extraction
 212 – Mining (except Oil and Gas)
 213 – Support Activities for Mining
 221 – Utilities
 236 – Construction of Buildings
 237 – Heavy and Civil Engineering Construction
 238 – Specialty Trade Contractors
 311 – Food Manufacturing
 312 – Beverage and Tobacco Product Manufacturing
 313 – Textile Mills
 314 – Textile Product Mills
 315 – Apparel Manufacturing
 316 – Leather and Allied Product Manufacturing
 321 – Wood Product Manufacturing
 322 – Paper Manufacturing
 323 – Printing and Related Support Activities
 324 – Petroleum and Coal Products Manufacturing
 325 – Chemical Manufacturing
 326 – Plastics and Rubber Products Manufacturing
 327 – Nonmetallic Mineral Product Manufacturing
 331 – Primary Metal Manufacturing
 332 – Fabricated Metal Product Manufacturing
 333 – Machinery Manufacturing
 334 – Computer and Electronic Product Manufacturing

335 – Electrical Equipment, Appliance and Component Manufacturing
 336 – Transportation Equipment Manufacturing
 337 – Furniture and Related Product Manufacturing
 339 – Miscellaneous Manufacturing
 423 – Merchant Wholesalers, Durable Goods
 424 – Merchant Wholesalers, Nondurable Goods
 425 – Wholesale Electronic Markets and Agents and Brokers
 441 – Motor Vehicle and Parts Dealers
 442 – Furniture and Home Furnishings Stores
 443 – Electronics and Appliance Stores
 444 – Building Material and Garden Equipment and Supplies Dealers
 445 – Food and Beverage Stores
 446 – Health and Personal Care Stores
 447 – Gasoline Stations
 448 – Clothing and Clothing Accessories Stores
 451 – Sporting Good, Hobby, Book and Music Stores
 452 – General Merchandise Stores
 453 – Miscellaneous Store Retailers
 454 – Nonstore Retailers
 481 – Air Transportation
 482 – Rail Transportation
 483 – Water Transportation
 484 – Truck Transportation
 485 – Transit and Ground Passenger Transportation
 486 – Pipeline Transportation
 487 – Scenic and Sightseeing Transportation
 488 – Support Activities for Transportation
 491 – Postal Service
 492 – Couriers and Messengers

493 – Warehousing and Storage
 511 – Publishing Industries (except Internet)
 512 – Motion Picture and Sound Recording Industries
 515 – Broadcasting (except Internet)
 517 – Telecommunications
 518 – Data Processing, Hosting, and Related Services
 519 – Other Information Services
 522 – Credit Intermediation and Related Activities
 523 – Financial Investments and Related Activities
 524 – Insurance Carriers and Related Activities
 525 – Funds, Trusts and Other Financial Vehicles
 531 – Real Estate
 532 – Rental and Leasing Services
 533 – Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)
 541 – Professional, Scientific and Technical Services
 551 – Management of Companies and Enterprises
 561 – Administrative and Support Services
 611 – Educational Services
 621 – Ambulatory Health Care Services
 622 – Hospitals
 623 – Nursing and Residential Care Facilities
 624 – Social Assistance
 711 – Performing Arts, Spectator Sports and Related Industries
 712 – Museums, Historical Sites and Similar Institutions
 713 – Amusement, Gambling and Recreation Industries
 721 – Accommodation
 722 – Food Services and Drinking Places
 811 – Repair and Maintenance
 812 – Personal and Laundry Services
 813 – Religious, Grantmaking, Civic, Professional and Similar Organizations

NAICS – Subsectors – SBA's Table of Size Standards

SB v. OTSB V. NAICS



How to prepare – government side

1. SAM Registration – insure registration is active
2. Verify access to login.gov
3. Other registrations – verify access / update credentials
 - E.g. DIBBS – new requirements
 - Must log into DIBBS account within 35 days
 - Log in > 60 days – account may be terminated
 - Suggestion – log into DIBBS every 30 days
 - Enhanced requirements
 - DoD Basics Assessment – upload to SPRS
4. Familiarity with password requirements
5. Certificates

Preparations - commercial

- Check in with suppliers
 - Determine operating status
 - Limitations
 - Delays
 - Ability to support/respond
- Loans – finances
- Terms – Regulations
 - FOB | Inspection | Acceptance

General considerations – ad hoc research

- Use a consistent date range – fiscal years
- Account for DoD delay 90 days
- Account for limitation of results – time and number
- Create usable file names
- Document file names on slides and/or research
- Results will vary based on terms selected –
 - NAICS
 - PSC
 - Type Award
 - Size
 - Buying Organization

Company - internal

- Subcontracts | P.O.'s – language, consideration
- Insurance
- Business Continuity
- Information management
- Project management
- Managing terms and conditions
- Key areas –
 - Cyber – especially for DoD/DFARS 252.204-7012 (NIST 800-171)
 - FAR 52.204-21 - Basic Safeguarding of Covered Contractor Information Systems
 - DFARS 252.204-7019 & 252.204-7020 DoD Basic Assessment
 - Limitation on Subcontracting/Non-manufacturer Rule/Ostensible Subcontracting

Additional resources -

- Defense.gov – large/newsworthy contract awards and other info
- sam.gov – opportunities | awards | other notices
- Forecasts
- Strategic Plans
- FPDS & USAspending** – award information
 - Contract Data Reports transition to sam.gov
- Google alerts
- Various online news sources with free feeds/subscriptions
- **Equally as important – tracking information for use**

Sam.gov Notices

- Sources Sought notices
 - Typically are numbered independently of RFQ's and/or RFP's
 - Input is market research and documentation
 - Responding does not imply any further contact or notification
 - Watch this opportunity – will not link to a separately numbered RFQ/RFP notice even though the items/services are the same
 - The next information may be unfortunately viewing an Award notice of a missed opportunity

NAICS Selection Criteria

- The contracting officer shall select the NAICS code which best describes the principal purpose of the product or service being acquired.
- Primary consideration is given to the industry descriptions in the U.S. NAICS Manual, the product or service description in the solicitation and any attachments to it, the relative value and importance of the components of the procurement making up the end item being procured, and the function of the goods or services being purchased.
- A procurement is usually classified according to the component which accounts for the greatest percentage of contract value.

NAICS Selection Criteria

- A concern that submits an offer or quote for a contract where the NAICS code assigned to the contract is one for supplies, and furnishes a product it did not itself manufacture or produce, **is categorized as a nonmanufacturer and deemed small if it meets the requirements of 19.505 (c)(1).**
- As a result, some NAICS are not to be used to classify procurements. Identified on the next slide.
- The nonmanufacturer rule allows for SB performance (extends & ease) which would not be possible if adherence to Limitations on Subcontracting was required.

Small Businesses -

- Refresh understanding of and requirements – regulations governing the nonmanufacturer rule.
- Limitations on Subcontracting

NAICS Selection - reminder

Sector – 42 Wholesale Trade

(These NAICS codes shall not be used to classify Government acquisitions for supplies. They also shall not be used by Federal government contractors when subcontracting for the acquisition for supplies. The applicable manufacturing NAICS code shall be used to classify acquisitions for supplies. A Wholesale Trade or Retail Trade business concern submitting an offer or a quote on a supply acquisition is categorized as a nonmanufacturer and deemed small if it has 500 or fewer employees and meets the requirements of 13 CFR 121.406.)

Sectors 44-45 Retail Trade

(These NAICS codes shall not be used to classify Government acquisitions for supplies. They also shall not be used by Federal government contractors when subcontracting for the acquisition for supplies. The applicable manufacturing NAICS code shall be used to classify acquisitions for supplies. A Wholesale Trade or Retail Trade business concern submitting an offer or a quote on a supply acquisition is categorized as a nonmanufacturer and deemed small if it has 500 or fewer employees and meets the requirements of 13 CFR 121.406.)

Source: SBA Table of Size Standards: <https://www.sba.gov/contracting/getting-started-contractor/make-sure-you-meet-sba-size-standards/table-small-business-size-standards>

Commercial Item response time

- The contracting officer must **establish** a solicitation **response time** that **will afford potential offerors a reasonable opportunity to respond** to each proposed contract action, (including actions where the notice of proposed contract action and solicitation information is accessible through the GPE), in an amount estimated to be greater than \$25,000, but not greater than the simplified acquisition threshold; or each contract action for the acquisition of commercial items in an amount estimated to be greater than \$25,000.
- May be a couple of days.
- Opportunity may be directly related to the ability to respond with the required information within the time frame established.

Other considerations

- Review SAM – specifically
 - FAR 52.204-24, FAR 52.204-25, FAR 52.204-26 and FAR 52.204-27
- Refresh understanding of requirements for Actions below the micro-purchase threshold.
- In many cases, during this time of year response time is essential.
 - Being able to source and provide either TAA or BAA compliant items
 - Planning and identification of sources may be beneficial
- Awards identify potential customers; RFPs/RFQs will occur prior to the award date.
- IDV's will require more research and timing

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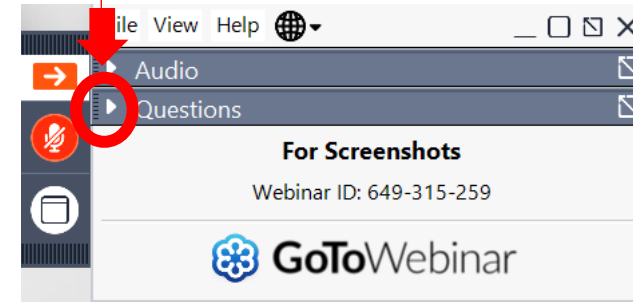


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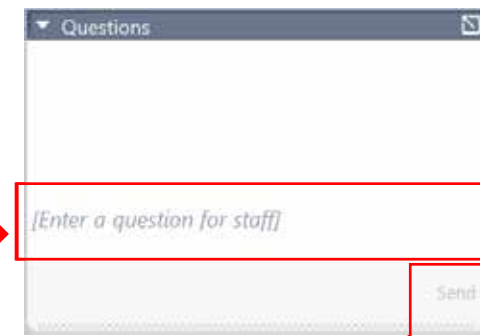
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