



An APEX Accelerator

Acquisition Hour:

Understanding the US SBA and Department of Defense (DOD) Mentor Protégé Programs (MPP) – What You Need to Know

November 19 | 11:00 am - Noon

Presented by:

Ben Blanc, Wisconsin Procurement Institute

Shane Mahaffy, US SBA



Webinar Etiquette

PLEASE

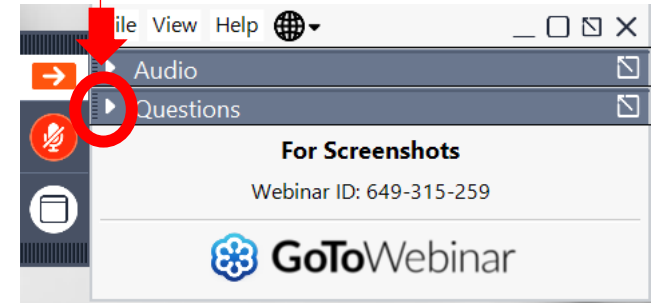
- Log into the GoToWebinar session with the name that you registered with online
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- Use the QUESTIONS option to ask your question(s).
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THANK YOU!



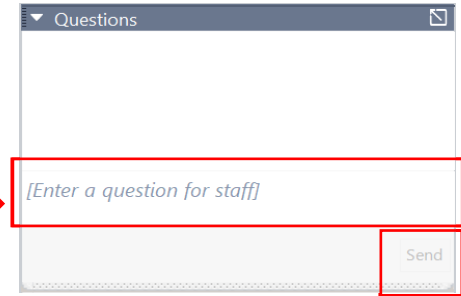
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USING THE QUESTIONS BOX

Type questions
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during a
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Click Send when ready to submit a question



Assisting Wisconsin businesses compete in the government marketplace.

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)*

■ 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

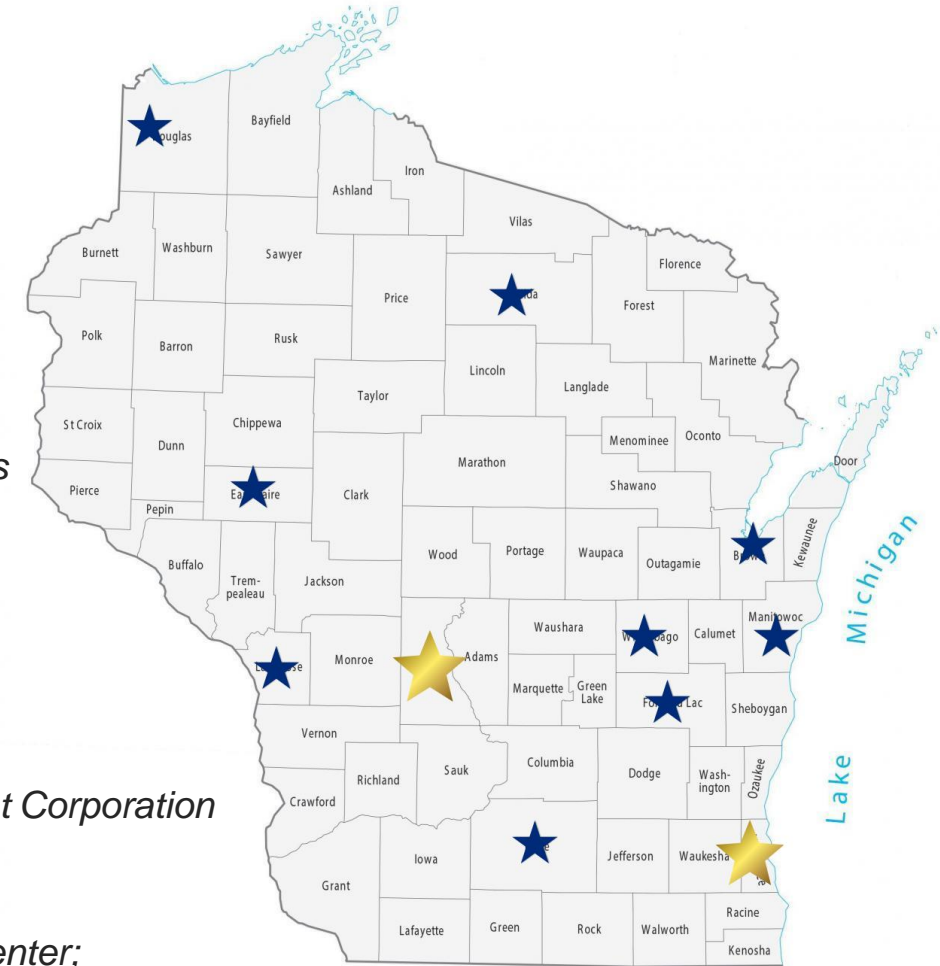
- *Progress Lakeshore*

■ OSHKOSH

- *Greater Oshkosh Economic Development Corporation*

■ SUPERIOR

- *Small Business Dev Center; UW Superior*



APEX ACCELERATORS

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UPCOMING EVENTS

- APR 1:00 pm - 2:00 pm
16 Acquisition Hour: SAM.gov – Tools for Contracting
- APR 9:00 am - 12:00 pm
24 Government Certification Workshop – State Certifications – Madison, WI
- APR 12:00 pm - 1:00 pm
24 Acquisition Hour: Overview of the Contractor Performance Assessment Reporting System (CPARS)
- APR April 30, 2024 - May 3, 2024
30 Lieutenant Governor's Small Business Academy
- MAY 8:00 am - 4:00 pm
16 10th Annual DoD Contract Management Update — Appleton, WI

Mentor protégé program

WHO WAS MENTOR?

- In the Odyssey, Mentor was the son of Alcimus. In his old age Mentor was a friend of Odysseus. When Odysseus left for the Trojan War, he placed Mentor in charge of his son Telemachus, and of Odysseus' palace.



Telemachus and Mentor (1847) John Doyle (Irish, 1797 – 1868)

WHO WAS MENTOR?

- Because of Mentor's relationship with Telemachus, and the disguised Athena's encouragement and practical plans for dealing with personal dilemmas, the personal name Mentor has been adopted in Latin and other languages, including English, as a term meaning someone who imparts wisdom to and shares knowledge with a less-experienced colleague.
- Definition: an experienced and trusted adviser (Oxford Dictionary)

THE SBA MENTOR PROTÉGÉ PROGRAM

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THE DOD MENTOR PROTÉGÉ PROGRAM

MISSION
STATEMENTS

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THE DOD MENTOR PROTÉGÉ PROGRAM

DoD's Mentor-Protégé Program is the oldest continuously operating federal mentor-protégé program in existence. Originally established in the midst of the First Gulf War, the MPP helps eligible small businesses expand their footprint in the defense industrial base.

THE DOD MENTOR PROTÉGÉ PROGRAM

Under the MPP, small businesses are partnered with larger companies. In the past five years, DoD's MPP has successfully helped more than 190 small businesses fill unique niches and become part of the military's supply chain.

Many mentors have made the MPP an integral part of their sourcing plans. Protégés have used their involvement in the MPP to develop technical capabilities. Successful mentor-protégé agreements provide a winning relationship for the protégé, the mentor and the DoD.

THE DOD MENTOR PROTÉGÉ PROGRAM



HOME > PROGRAMS > MENTOR-PROTÉGÉ PROGRAM



<https://business.defense.gov/Programs/Mentor-Protége-Program/>

Mentor-Protégé Program (MPP)

DoD's Mentor-Protégé Program is the oldest continuously operating federal mentor-protégé program in existence. Originally established in the midst of the First Gulf War, the MPP helps eligible small businesses expand their footprint in the defense industrial base.

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Mentor-Protégé Program Application Process: Our new website portal is now accepting applications! Click the button below to create an account and begin the application process.

Additional Information

- [Mentor-Protégé Program Portal](#)
- [MPP Summit 2024](#)
- [How To Participate](#)
- [Eligibility Requirements](#)
- [MPP Resources](#)
- [DoD OSBP Contacts](#)
- [FAQs](#)
- [DoD Mentor-Protégé Program Approved Mentor List \(PDF\)](#)
- [DoD Mentor-Protégé Program](#)
- [DoD Mentor-Protégé Program 1-pager](#)

THE DOD MENTOR PROTÉGÉ PROGRAM

How to Participate

Step 1: Establish a Counterpart

- Mentors and Protégés are solely responsible for finding their counterpart. Legislatively, DoD Offices of Small Business Programs (OSBP) participation in the teaming of partnering Mentors and Protégés is prohibited.
 - A Mentor firm must be currently performing under at least one active approved subcontracting plan negotiated with DoD or another Federal agency pursuant to FAR 19.702, and be currently eligible for the award of Federal contracts.
 - New Mentor Applications must be approved and may be submitted to and approved by the OSBP of the cognizant Military Service or Defense Agency (if concurrently submitting a reimbursable Agreement) or to the DoD OSBP office prior to the submission of an Agreement.
 - A Protégé firm must be either a small disadvantaged business (SDB), a qualifying organization employing the severely disabled, a women-owned small business (WOSB), a service-disabled veteran-owned small business (SDVOSB), or located in a historically underutilized business zone (HUBZone).

THE DOD MENTOR PROTÉGÉ PROGRAM

How to Participate

Step 2: Determine the Type of Agreement

There are two types of agreements:

- Direct Reimbursed

Directly reimbursed agreements are those in which a mentor receives reimbursement for allowable costs of developmental assistance provided to a protégé.

- Credit

Credit agreements are those in which a mentor receives a multiple of credit toward their Small Disadvantaged Business (SDB) subcontracting goal based on the cost of developmental assistance provided to a protégé.

THE DOD MENTOR PROTÉGÉ PROGRAM

How to Participate

Step 3: Develop Agreement

An assessment of the needs of a protégé, which includes measurable milestones, is recommended prior to the development of an agreement. Developmental assistance should align with the protégé's strategic vision.

THE DOD MENTOR PROTÉGÉ PROGRAM

How to Participate

Step 4: Submit Agreement Proposal

Directly reimbursed agreement applications should be submitted to the defense agency's Office of Small Business Programs (OSBP).

Credit agreements should be submitted to the Defense Contract Management Agency (DCMA).

Step 5: Start Agreement

Credit agreements start on the date they are approved. Directly reimbursed agreements start on the date funds are obligated to the contract.

THE DOD MENTOR PROTÉGÉ PROGRAM

How to Participate

Step 6: Reporting and DCMA Review Requirements

Semi-annual reports, annual DCMA performance reviews and protégé two-year-out reports are required for each DoD MPP agreement. DCMA annual performance reviews are a major factor in determining the amount of reimbursement a mentor is eligible to receive in the remaining years of directly reimbursed agreements.

Step 7: Ask Questions

If you have any questions about the program process, protocol, requirements or benefits, please email dodmpp@osd.mil. Detailed MPP briefings are available by appointment.

THE DOD MENTOR PROTÉGÉ PROGRAM

To participate as a protégé, a small business must have less than half the size standard corresponding to its primary NAICS code, must not be owned or managed by individuals or entities that directly or indirectly have stock options or convertible securities in the mentor firm and must be:

- (A) a small business concern owned and controlled by socially and economically disadvantaged individuals;
- (B) a business entity owned and controlled by an Indian tribe;
- (C) a business entity owned and controlled by a Native Hawaiian Organization;
- (D) a qualified organization employing severely disabled individuals;
- (E) a small business concern owned and controlled by women;
- (F) a small business concern owned and controlled by service-disabled veterans;
- (G) a qualified HUBZone small business concern; or
- (H) a small business concern that —
 - (i) is a nontraditional defense contractor; or
 - (ii) currently provides goods or services in the private sector that are critical to enhancing the capabilities of the defense supplier base and fulfilling key Department of Defense needs

THE DOD MENTOR PROTÉGÉ PROGRAM

https://business.defense.gov/Programs/Mentor-Protége-Program/MPP-Resources/ 80% ☆
Official website of the United States government Here's how you know



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DEPARTMENT OF DEFENSE

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HOME > PROGRAMS > MENTOR-PROTÉGÉ PROGRAM > MPP RESOURCES



Mentor-Protégé Program Resources

Thank you for your interest in the DoD Mentor-Protégé Program and for visiting our Resources page. We assembled materials here to help answer questions you may have and to guide you in the process of submitting a Mentor application. If you have any questions that are not covered here, please contact us.

Resources

- [Mentor-Protégé Program Portal](#): Our new website portal is now accepting Mentor applications! Click this link to create an account and begin the Mentor application process. If you have any questions about how to complete the application, or experience any technical difficulties with submitting your application via the portal, please contact us.
- [Mentor-Protégé Agreement Template](#)
- [MPP Agreement Checklist](#)

Additional Information

- [Mentor-Protégé Program Portal](#)
- [MPP Summit 2024](#)
- [How To Participate](#)
- [Eligibility Requirements](#)
- [MPP Resources](#)
- [DoD OSBP Contacts](#)
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THE DOD MENTOR PROTÉGÉ PROGRAM



Department of Defense
Office of Small Business Programs
Mentor-Protégé Program
Agreement Template

Companies that have been approved as mentors in the DoD Mentor-Protégé Program must submit a signed mentor-protégé agreement to the Director, Office of Small Business Programs (OSBP), Office of the Technology and Logistics [OUSD (AT&L)] for approval. For developmental assistance costs, your submission should be made to the Department/Defense Agency OSBP. For companies seeking cost-share (including hybrid agreements), your submission should be made to the Department/Defense Agency (DCMA). Regardless of the agreement type, you must inform the

DoD OSBP Mentor-Protégé Program



Mrs. Kasey Diaz
Mentor-Protégé Program Director
3330 Defense Pentagon, Room 3B854
Washington DC, 20301-3330
Tel: (571) 372-6191
Email: osd.pentagon.ousd-all.mbx.dod-mentor-protége-program@mail.mil
Website: <https://business.defense.gov/Programs/Mentor-Protége-Program>

Mentor-Protégé Contacts for DoD Components



Office of the Secretary of the Army—OSBP
<https://osbp.army.mil/Programs/mentor-protége-program>

Attn: Ms. Gayna Malcolm
106 Army Pentagon, Room
Washington, DC 20310-01
Mobile: 571-234-7457
gayna.c.malcolm-packnett.civ@army.mil

DoD Mentor-Protégé Program Approved Mentor List

The Department of Defense Mentor-Protégé Program, established November 5, 1990 (Public Law 101-510) codified under the National Defense Authorization Act FY 2023 (10 USC 4902)

Advancia Technologies, LLC
AECOM Technical Services, Inc.
AGEISS, Inc.
All Points Logistics, LLC
Allegheny Science and Technologies Inc.

Global Resource Solutions, Inc. (GRS)
Guidehouse Inc. (Formally Grant Thornton)
Hornbeck Offshore Operators
IBM

THE DOD MENTOR PROTÉGÉ PROGRAM

→ ↻ <https://mpp.acq.osd.mil/mpp/#/> ☆ 📧 📄

MPPSUMMIT2024 Resources Login Register

WELCOME TO THE

Mentor-Protégé Program Portal

Easily access your **Mentor-Protégé Program** (MPP) dashboard here. Whether you are a Mentor or a Protégé, your dashboard gives you access to everything you need for tracking and maintaining your partnerships.

[LOGIN TO MY DASHBOARD →](#)

Updated SAM profile required. Need to update yours?

<https://mpp.acq.osd.mil/mpp/#/>

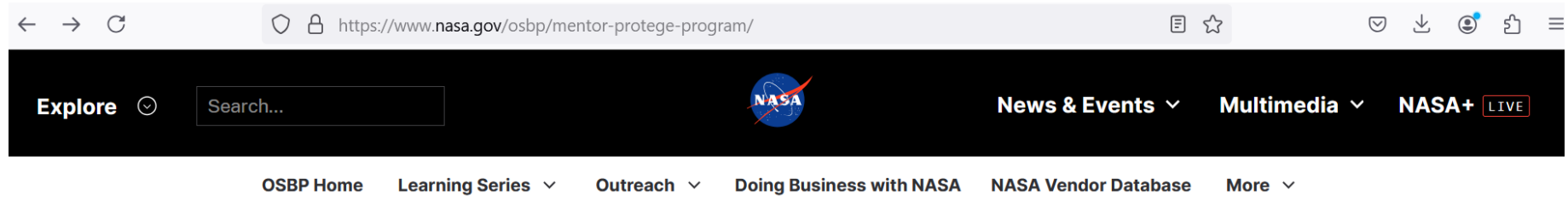
THE nasa MENTOR PROTÉGÉ PROGRAM

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THE NASA MENTOR PROTÉGÉ PROGRAM



Mentor-Protégé Program

- [Purpose](#) ↓
- [Eligibility Requirements](#) ↓
- [Benefits of Participation](#) ↓
- [Types of Agreements](#) ↓
- [NASA Responsibilities](#) ↓
- [NASA Mentor-Protégé Contacts](#) ↓
- [Agreement Evaluation](#) ↓
- [How To Participate](#) ↓
- [Approved NASA Mentors](#) ↓
- [SBIR and STTR Phase II Companies](#) ↓
- [Templates and Forms](#) ↓

<https://www.nasa.gov/osbp/mentor-protege-program/>



THE NASA MENTOR PROTÉGÉ PROGRAM

The NASA MPP encourages NASA prime contractors to assist eligible Protégés, thereby enhancing the Protégés' capabilities to perform on NASA contracts and subcontracts, fostering the establishment of long-term business relationships between these entities and NASA prime contractors, and increasing the overall number of these entities that receive NASA contract and subcontract award

THE NASA MENTOR PROTÉGÉ PROGRAM

Eligibility Requirements

To participate as a Protégé, an entity must meet one of the eligibility requirements as defined in NFS 1819.72 and must maintain that status for the life of the agreement. If the Protégé self-certifies that it meets the eligibility requirements, a separate written self-certification of its small business status must be provided with the MPA. (Note: If Protégé eligibility expires prior to the end of the agreement period, the agreement may still be approved for the remaining duration of the POP but must include the condition that any credit received is subject to the Protégé's recertification.)

A Protégé may participate in the NASA MPP as many times as they would like. However, a Protégé may engage in only one NASA MPA at any given time. In accordance with NFS 1819.72, the following entities are eligible to be chosen as Protégés:

- 1.Small Disadvantaged Businesses (SDBs)
- 2.Women-Owned Small Businesses (WOSBs)
- 3.Historically Underutilized Business Zone (HUBZone) concerns
- 4.Veteran-Owned Small Businesses (VOSBs)
- 5.Service-Disabled Veteran–Owned Small Businesses (SDVOSBs)
- 6.Historically Black College or University (HBCUs)
- 7.Minority Serving Institutions (MSI)
- 8.Small businesses with an active NASA Small Business Innovation Research (SBIR) or Small Business Technology Transfer (STTR) Phase II contract
- 9.Companies participating in the AbilityOne program

THE NASA MENTOR PROTÉGÉ PROGRAM

A "minority serving institution" (MSI) refers to a college or university in the United States that enrolls a significant percentage of students from minority groups, aiming to address historical inequalities in access to higher education by providing educational opportunities specifically for underrepresented populations;

Types of MSIs:

HBCUs (Historically Black Colleges and Universities)

HSIs (Hispanic-Serving Institutions)

TCUs (Tribal Colleges and Universities)

AANAPISIs (Asian American and Native American Pacific Islander-Serving Institutions)

THE NASA MENTOR PROTÉGÉ PROGRAM

Benefits of Participation

The MPP can transform a small business or minority-serving institution and enhance its capabilities to win contracts and subcontracts as a direct result of its participation. Some of the potential benefits of the program include the following:

For Mentors:

- Develop long-term business relationships with small business concerns.
- Develop a qualified small business subcontracting base.
- Accrue credit toward small business subcontracting goals.

For Protégés:

- Receive relevant technical and developmental assistance.
- Qualify for sole-source contracts from Mentors.

For All Participants:

- Cultivate teaming opportunities with their partners to win new contracts and/or subcontracts.
- Engage the MPP as a marketing tool.
- Foster networking opportunities.

THE NASA MENTOR PROTÉGÉ PROGRAM

Types of Agreements

Credit Agreements

- In a credit-based MPA, a Mentor receives credit on a one-to-one basis toward its subcontracting goals. The credit is reported on the Individual Subcontract Report for the specific contract, as identified prior to the approval of the agreement.

Award Fee Program

- In the Award Fee Program, a Mentor is eligible to receive an award fee at the end of the agreement period based upon the Mentor's performance in providing developmental assistance to its Protégé. Only NASA Small Business Innovation Research (SBIR) or Small Business Technology Transfer (STTR) Phase II Protégés are eligible to participate with Mentors in the Award Fee Program.

THE NASA MENTOR PROTÉGÉ PROGRAM

NASA Responsibilities

- NASA Contracting Officer's Representatives (CORs) act as liaisons between the Mentor and the Contracting Officer (CO). A signed endorsement letter from the COR must be added to the agreement package before submission to the CO.
- NASA COs are responsible for adding approved MPAs to existing contracts through a contract modification. A signed letter endorsing the MPA must be added to the complete package before submission to the relevant Center's SBS.
- NASA Small Business Specialist (SBSs) are responsible for the overall administration and management of their respective Centers' MPAs. As the Center's MPP point of contact, the SBS is responsible for reviewing and endorsing all agreements received at the Center before forwarding the complete applications for final approval to the NASA MPP Program Manager (PM) at Marshall Space Flight Center (MSFC) in Huntsville, AL. Additionally, the SBS ensures that all agreements endorsed by the Center fulfill the requirements of NFS 1819.72.
- NASA's MPP Program Manager (PM) at MSFC coordinates and manages the program from a Headquarters perspective with participating Centers to ensure successful program execution.
- The MPP PM is responsible for overall NASA MPP administration, policy, and oversight. The MPP PM will review all Mentor applications and conduct a semi-annual MPA performance review that highlights the progress and accomplishments gained under the approved MPA.

THE NASA MENTOR PROTÉGÉ PROGRAM

Agreement Evaluation

The evaluation of all proposed agreements will be based on the following criteria:

- Perceived benefit and/or value of the agreement to NASA
- Merit of the developmental assistance to the Protégé
- Developmental assistance cost ratio
- Potential subcontracting opportunities available to the Protégé
- Utilization of HBCU/MSI, APEX Accelerators and SBA Business Development Centers (SBDCs)
- Proposed cost

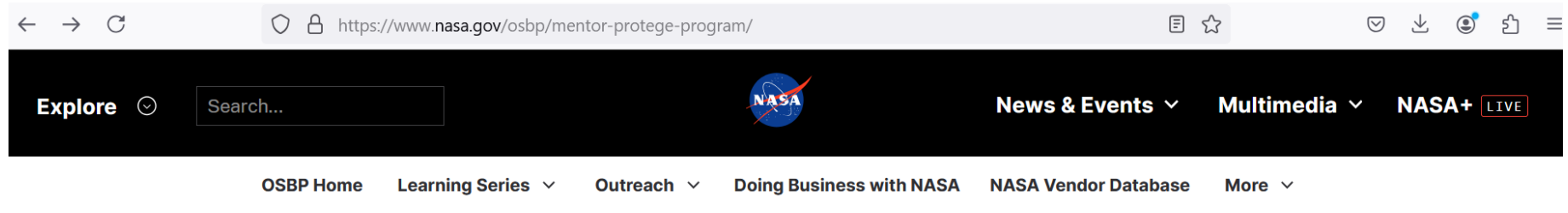
THE NASA MENTOR PROTÉGÉ PROGRAM

How to Participate

Below, you will find the basic steps necessary to establish a NASA MPA.

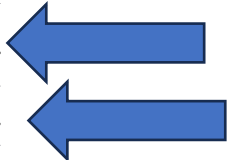
- 1. Locate a partner**—Mentors and Protégés are required to establish their own counterparts. Each company has its own internal processes and procedures for locating partners. These processes are not mandated by NASA.
- 2. Determine developmental assistance to be provided**—Prior to filling out the agreement template, the Mentor must perform a needs assessment of the Protégé to determine what type of developmental assistance is required. Typical examples of developmental assistance may be related to technical transfer or business infrastructure. The dollar value associated with the technical transfer tasks should be approximately 70 percent of the proposed hours and cost. The remaining 30 percent may be related to business development tasks.
- 3. Submit agreement for approval**—The agreements are submitted to one of the NASA Centers for review and endorsement. If the agreement is endorsed at the Center level, it will be forwarded to the MPP PM at MSFC in Huntsville, AL, for final review and approval within 30 business days of receipt. The agreement officially begins on the date of the incorporation of the agreement into a contractual vehicle via a contract modification signed by the CO. Once the agreement begins, the mentor may start providing the developmental assistance outlined and reporting credit is received.
- 4. Fulfill all reporting requirements**—The reporting requirements for the NASA MPP include the following:
 1. Annual reports
 2. Semi-annual reviews
 3. Protégé post-agreement reports

THE NASA MENTOR PROTÉGÉ PROGRAM



Mentor-Protégé Program

- Purpose ↓
- Eligibility Requirements ↓
- Benefits of Participation ↓
- Types of Agreements ↓
- NASA Responsibilities ↓
- NASA Mentor-Protégé Contacts ↓
- Agreement Evaluation ↓
- How To Participate ↓
- Approved NASA Mentors ↓
- SBIR and STTR Phase II Companies ↓
- Templates and Forms ↓



<https://www.nasa.gov/osbp/mentor-protege-program/>



Other MENTOR PROTÉGÉ PROGRAMs

MENTOR
PROTÉGÉ

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OTHER MENTOR PROTÉGÉ PROGRAMS

- Department of Energy (DOE)
 - The DOE's Mentor-Protégé Program (MPP) helps small businesses improve their ability to perform contracts and subcontracts for the DOE and other federal agencies. The program focuses on small disadvantaged businesses, women-owned businesses, and other groups.
- Department of the Treasury
 - The Treasury Bank Mentor-Protégé Program (TBMPP) helps minority-owned and women-owned banks and small financial institutions strengthen their balance sheets.
- Defense Logistics Agency (DLA)
 - The DLA's Mentor-Protégé Program focuses on strengthening the defense industrial base. The DLA can offer venues like matchmaking sessions to help participants find appropriate partners.

PRESENTED BY

Wisconsin Procurement Institute (WPI)

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U.S. Small Business
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U.S. Small Business Administration



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SBA Mentor-Protégé Program Background

Mentor-Protégé Program Overview

As of **November 16, 2020**, the 8(a) Mentor-Protégé program and the All Small Mentor-Protégé program have merged into one **SBA Mentor-Protégé Program (MPP)**.

Both programs **helped eligible small businesses gain capacity and win government contracts through partnerships** with more experienced companies (mentors).

Given the programs' identical purpose and benefits to participating businesses, the merger **creates efficiencies within SBA and reduces confusion**.

It also **makes the process easier for eligible businesses to navigate, saving time and resources**.



Additional Rule Changes



Requirements of the mentor-protégé relationship



Joint venture specifications



New requirements for certain multiple-award contracts

Program Purpose



Enhance the capabilities of the protégé



Help the protégé meet its business development and contracting goals



Improve the protégé's ability to compete for contracts



Eligibility Requirements and Benefits of the SBA Mentor-Protégé Program

Program Benefits for Protégés and Mentors



A **protégé** can get valuable assistance from a mentor in several areas, including:

- Technical and/or management assistance
- Financing in the form of equity investments and/or loans
- International trade
- Government contracting

A **mentor** benefits in several areas, including:

- Forming a joint venture with its protege, provided the protégé qualifies as small for that particular federal contract or subcontract
- Contract evaluation preferences where the mentor will subcontract significant work to its protégé, if authorized by the agency

Eligibility Requirements

Eligibility Requirements for **Protégé**

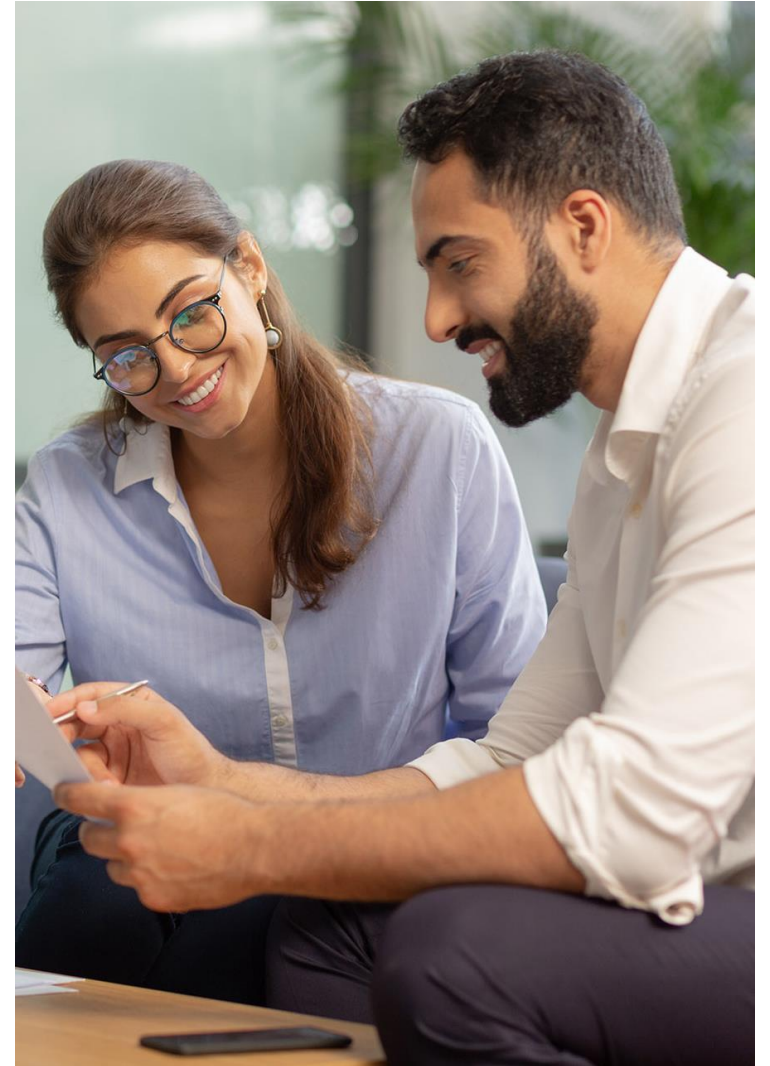
Firm must:

- Be a **small business** with industry experience
- Have a **proposed mentor prior to applying**
- Be organized **for profit** or as an **agricultural cooperative**
- Generally have **no more than two mentors** in the business's lifetime

Eligibility Requirements for **Mentor**

Firm must:

- Be organized **for profit** or as an **agricultural cooperative**
- Be able to **carry out its responsibilities** to assist the protégé
- **Not appear on the federal list** of debarred or suspended contractors
- Possess **good character**
- Have **no more than three proteges** at a time



Mentor-Protégé Agreement

For the SBA to approve the mentor-protégé agreement:

- The SBA must determine that the mentor-provided assistance will promote real developmental gains for the protégé, not just act as a vehicle to receive federal small business set-asides
- An SBA “determination of affiliation” must not exist between the mentor and the protégé applicant and its prospective mentor may not be affiliated at the time of application

This is not a matchmaking program.

The mentor and protégé should already have found each other before applying.

You must be approved by the SBA to participate in the MPP.

How to Apply



To begin the application process, you'll need to have a profile at [SAM.gov](https://sam.gov).

Before you apply to the MPP have these things done:

- ✓ Make sure both businesses are registered at SAM.gov
- ✓ Have your NAICS code on hand
- ✓ Both businesses must complete the SBA's online tutorial (save your completion certificates)
- ✓ Create and agree to a mentor-protégé agreement using the SBA guide

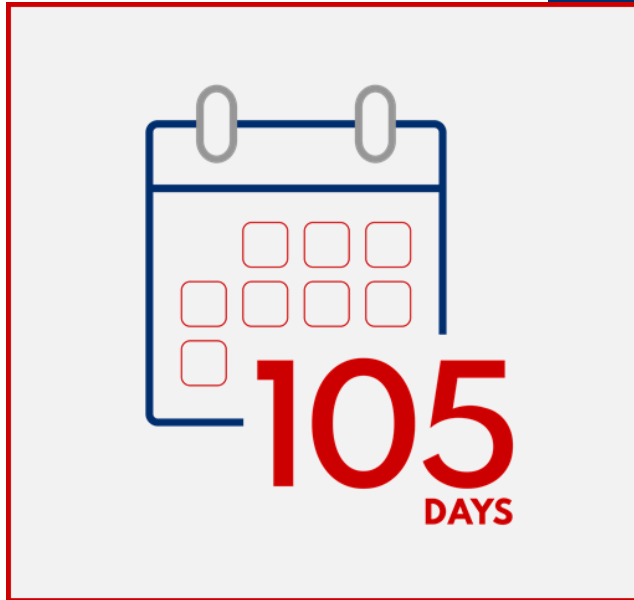
Processing Times

To apply go to certify.SBA.gov and join the MPP using the protégé's UEI number.

Our application processing timeframe is:

- 15 days screening (reviewed to determine application is complete) plus 90 days processing (if you do not withdraw your application).
- This totals **105 days**.

Please plan ahead to make sure all necessary items are prepared before applying.



Stay in Touch!



Make sure to frequently check the email address you used when applying in Certify.

MPP withdraws applications when applicants are non-responsive to the following items:

- ✓ Requests for additional information from SBA
- ✓ When issues raised by SBA are not rectified by the business



U.S. Small Business
Administration

Changes to Mentor and Protégé Requirements

Mentor and Protégé Requirements

Under certain circumstances, a protégé may have **more than two mentors** over the life of its business.

1

4 Generally, a prospective protégé must have experience in the **secondary NAICS code** for which they are seeking business development assistance.

SBA will decline an application if SBA determines that the mentor does not possess **good character**.

2

5 A protégé needs to provide information related to the mentor and protégé relationship. SBA may decide not to approve continuation of the relationship if SBA does not receive an **honest assessment** from the protégé.

The new rule eliminated the **reconsideration process**.

3



Mentor Protégé Annulments:

If a Mentor-Protégé Agreement (MPA) is terminated within 18 months from the date approved, that mentor-protégé relationship will not count against the proteges two per lifetime limit. Annulments are a matter of right. SBA will evaluate the protégé's request for annulment and determine whether the protégé has received benefit.

If a specific protégé appears to use the 18-month test as a means of circumventing the two per lifetime limit, SBA may determine that the business concerned has exhausted its participation in the MPP.

- Additionally, a protégé may request to substitute its current mentor for the time remaining in the MPA without counting against the two-mentor limit.



Regarding the requirement that a proposed mentor must demonstrate good character to qualify for the SBA MPP:

The MPP does not require SBA to make a determination of good character in every instance; instead, SBA will decline an application if SBA determines that the mentor does not possess good character.



Regarding the requirement that protégés can submit a request for reconsideration within 45 calendar days of receiving notice that their mentor-protégé agreement was declined:

The new rule eliminated the reconsideration process. The small business can submit a new (or revised) mentor-protégé agreement to SBA at any point after 60 days from the date of SBA's final decision declining a mentor-protégé relationship



Regarding the qualification that a small business can seek to form a mentor-protégé relationship in a secondary NAICS code if it qualifies as small and has prior experience or previously performed work in that NAICS code:

Under the MPP, work performed by the prospective protégé that is similar to that for which a mentor-protégé relationship is sought is sufficient, even if the previously performed work is in a different NAICS code than that for which an MPA is sought.

- Also, if the NAICS code in which a mentor-protégé relationship is sought is a logical progression from work previously performed by the intended protégé firm, that is also sufficient.
- The protégé must demonstrate, through work performed as a prime or subcontractor on federal, state, or commercial contracts, or through the owner, business management experience of at least one year performing or two years managing work in the secondary NAICS code or similar NAICS code.



Regarding the requirement for the annual evaluation of each mentor-protégé relationship:

It is important that SBA receives an honest assessment from the protégé of how the mentor-protégé relationship is working, whether the protégé has received the agreed-upon business development assistance, and whether the protégé would recommend their mentor to be a mentor for another small business in the future.

- Under the SBA MPP, protégés are required to complete an annual evaluation within 30 days of its anniversary date. If a protégé does not provide information relating to the M/P relationship, SBA may decide not to approve continuation of the M/P relationship.
- A protégé may request SBA to intervene on its behalf with the mentor if it thought it was not receiving the assistance promised by the mentor or if it thought that the assistance provided was not of the quality it anticipated.
 - SBA would notify the mentor that SBA had received adverse information regarding its participation as a mentor and allow the mentor to respond to that information.
 - If the mentor did not overcome the allegations, SBA would terminate the mentor-protégé agreement.



U.S. Small Business
Administration

Changes to Joint Ventures (JV) Requirements

Overview of Joint Ventures

- Mentors and protégés can continue to form joint ventures (JVs), allowing both parties to compete together for government contracts reserved for small businesses.



- Based on the protégé’s small business certification(s), JVs can qualify for contracts set aside for 8(a), SDVOSB, WOSB, and HUBZone businesses.
- The JV must be separately identified with its own name, DUNS number, and CAGE number with SAM. At SAM, define the entity type as a joint venture, with individual partners listed.
- A protégé firm may enter into a JV with its SBA-approved mentor and be eligible for any contract opportunity for which the protégé qualifies.
- SBA no longer reviews or approves competitive 8(a) joint ventures. SBA’s District Offices only review and approve 8(a) sole source joint ventures

Overview of Joint Ventures (continued)



- JV benefits to mentors and protégés include:
 - Increasing their capacity and capability to do business with the federal government
 - Collective representation of past performance;
 - Shared costs and resources, such as accounting software; and
 - Leveraging the other partner’s experience and market share.
- Specific to mentors, serving as a mentor to an 8(a) firm will continue to count toward any subcontracting requirements to which the mentor firm may be subject under Section 8(d) of the Small Business Act.
- These program improvements will help protégés see the value of the program and grow the opportunities for them to do business with the federal government.

How to Set up Joint Ventures



The proposed mentor and protégé must draft a written agreement to submit to the SBA. The mentor-protégé agreement must meet the following requirements:

- Address how the mentor's assistance will help the protégé meet the goals established in its SBA-approved business plan
- Establish a single point of contact from the mentor who is responsible for managing and implementing the mentor/protégé agreement
- Provide that the mentor will assist the protégé for at least one year

Regarding the requirement that 8(a) Program participants seeking to be awarded an 8(a) contract as a JV submit the JV agreement to SBA for review and approval prior to contract award:

SBA felt this rule imposed an unnecessary burden on 8(a) Program participants due to the time required to submit the required application and respond to questions. As such, the final rule eliminates the need for participants to seek and receive approval from SBA for every initial JV agreement and each addendum to a JV agreement for competitive 8(a) contracts.

Regarding the “Three in Two Rule” requiring that a JV can be awarded to no more than three contracts over a two-year period:

- This rule is eliminated for any joint venture (within or outside the MPP) to reduce the burden and cost of establishing a new joint venture to perform additional contracts during the two-year period.
- However, to ensure that joint ventures operate as entities of limited scope and purpose, the final rule continues to provide that a joint venture’s duration cannot exceed two years from the date of the first contract award or novation. If the same joint venture partners wish to pursue contract opportunities after this two-year period expires, they must form a new joint venture.
- SBA believes this change will make it easier for businesses to pursue contracts as JVs, while still preserving SBA’s belief that a JV is not intended to be an ongoing business entity.

Regarding the requirement that a small business JV entity possess a facility security clearance:

Generally, this is no longer required under the MPP as long all parties to the JV possess the required clearance. Alternatively, the small business JV entity may not possess a clearance when the lead JV member has the required clearance. Specifically:

- Where a facility security clearance is required to perform primary and vital requirements of a contract, the lead small business partner to the JV must possess the required clearance.
- Where the security portion of the contract requiring a facility security clearance is ancillary to the principal purpose of the procurement, the partner to the JV that will perform that work must possess the required clearance.

This change will ensure that the government remains adequately protected without placing undue burden on small businesses.

Regarding determination of profits from the JV:

As with all contracts, SBA does not exclude revenues generated by subcontractors from the revenues deemed to be received by the prime contractor. Where a JV is the prime contractor, 100 percent of the revenues will be apportioned to the JV partners, regardless of how much work is performed by other subcontractors.

- The share of revenues assigned to each joint venture partner is the percentage figure corresponding to the partner's share of work performed by the joint venture, unless these revenues are already accounted for in the partner's own receipts.
- For example, a prime joint venture contract must generally perform 50 percent of work under a services contract. In an MPP joint venture, the protégé must perform at least 40 percent of the work done by the joint venture. Assuming the joint venture and the protégé perform the minimum work share requirements, the protégé will perform 20 percent of the contract.
- However, for purposes of determining the protégé's size, 40 percent of the revenues under the contract must be appropriated to the protégé.

Regarding the changing of size of a small business in a JV through a merger or acquisition:



Under the new rule, if the merger, sale, or acquisition occurs after the offer but prior to award, the firm must recertify its size to the contracting officer prior to award. If the merger, sale, or acquisition occurs within 180 days of the date of offer and the firm is unable to recertify as small, it will not be eligible as a small business for the award of the contract. If the merger, sale, or acquisition occurs more than 180 days after the date of offer, award can be made, but it will not count as an award to a small business.



U.S. Small Business
Administration

Additional Information



MPP Resources

- What to include in your Mentor-Protégé Agreement
- Active Mentor-Protégé Agreements
- MPP tutorial

How to learn more about the program?

- Visit our website: <https://www.sba.gov/mpp>
- Email for general MPP questions: sbampp@sba.gov
- Email for annual evaluation reporting: mppevaluations@sba.gov
- Email for joint venture certificates of completion and quarterly financial information: mppjvreporting@sba.gov
- Email for when the application is in the screening process: mppscreening@sba.gov

SBA Certify - Mentor-Protégé Program (MPP)



Mentor-Protégé Program (MPP)

[Get Started](#)

MPP helps small businesses (protégés) partner with more experienced businesses (mentors) to gain capacity and win government contracts. For more information, visit [SBA Mentor-Protégé Program](#).

[MPP User Guide](#)

- [Program Benefits](#)
- [Requirements](#)
- [Prepare](#)

[Export Page](#)

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Closing Remarks

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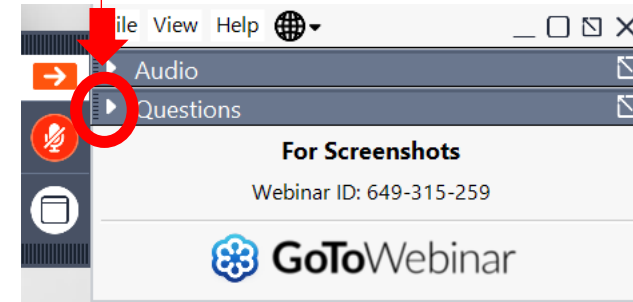
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QUESTIONS?



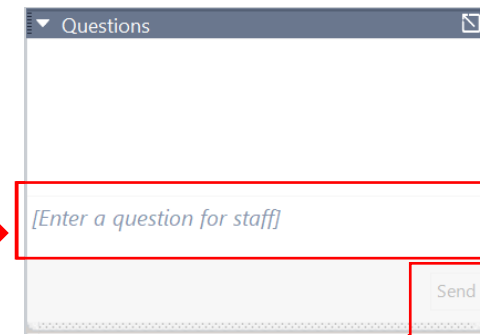
OPENING THE QUESTIONS BOX

Click here to access
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USING THE QUESTIONS BOX

Type questions
here at any time
during a
presentation



Click Send when ready to submit a question



UPCOMING TRAINING - EVENTS

ACQUISITION HOUR LIVE WEBINAR SERIES

The Acquisition Hour webinar series covers a range of topics from market entry, sales growth, small business certifications, compliance, and more. Attendees receive 1 CPE credit for attending.

- **November 19** – Understanding SBA and DOD Mentor Protégé Programs (MPP)
- **November 22** – CMMC Update – November 2024
- **December 20** - CMMC Update – December 2024

CYBER FRIDAY LIVE WEBINAR SERIES

Cyber Friday is a series of one-hour webinars focusing on critical topics for DOD contractors and subcontractors in cyber security, data security, and CMMC. Attendees receive 1 CPE credit for attending.

- ~~October 18, 3.1.7 System Maintenance Policy~~
- **November 22, 3.1.8 Media Control Policy, Media Destruction Policy and Personnel Security**
- **January 24, 3.1.11 Risk Assessment Policy, Security Assessment Reports**

EMERGING ISSUES WEBINAR SERIES

This series is intended as an information tool and resource for contract managers and those with a compliance function. Attendees receive 1 CPE credit for attending.

- ~~Oct 24 – Innovation – What Does Innovation Look Like from DoD's Perspective?~~
- **Nov 21** – The Critical Role Your Accounting System Plays in SBIR/STTR Success

- Save the Date -



**The
Contracting
Academy**

*Developing and Growing
Government Contractors*

Dec 10

Virtual | 9:00 am - 4:00 pm

The Contracting Academy (TCA) is an opportunity for businesses to grow their technical knowledge of contracting with Federal Government, State/Local Government, and Government Prime Contractors. The series of workshops will benefit established businesses looking to grow and develop their government sales.

...More information and registrations at wispro.org/events



Dec 11-12

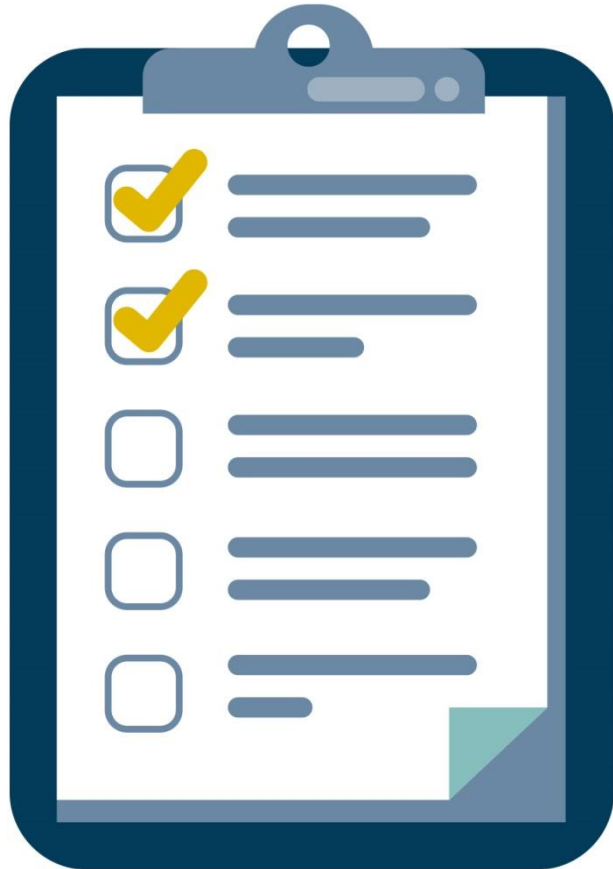
The Baird Center

400 W Wisconsin Ave. Milwaukee WI 53203

Presented by the Wisconsin Economic Development Corporation, MARKETPLACE is the Governor's Annual Conference on Diverse Business Development. This event connects business owners from across Wisconsin seeking to do business with state, federal and local governments as well as the private sector. The conference provides the opportunity for established minority-, woman-, veteran- and LGBTQ+-owned businesses and small businesses to learn from and connect with resource providers, government representatives, corporate buyers and business professionals to lay a foundation for new partnerships and business opportunities.

MarketplaceWisconsin.com

SURVEY



November 19, 2024

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For a certificate of this credit please contact:

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