

# GSA Schedules and the Utilization of Small Business

*Student Guide*



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# List of Acronyms and Websites

Below are acronyms that appear in this guide. Corresponding website addresses and/or links are provided when applicable.

<b>BPA</b>	Blanket Purchase Agreement
<b>CAP</b>	Common Acquisition Platform <a href="https://hallways.cap.gsa.gov">https://hallways.cap.gsa.gov</a>
<b>CALC</b>	Contract Awarded Labor Category <a href="https://calc.gsa.gov/">https://calc.gsa.gov/</a>
<b>CO</b>	Contracting Officer <a href="#">CO</a>
<b>CTA</b>	Contractor Team Arrangement
<b>DAU</b>	Defense Acquisition University
<b>DFARS</b>	Defense Federal Acquisition Regulation Supplement
<b>DoD</b>	Department of Defense
<b>DPAP</b>	Defense Procurement Acquisition Policy
<b>EDWOSB</b>	Economically Disadvantaged Women-Owned Small Business
<b>FAI</b>	Federal Acquisition Institute
<b>FAITAS</b>	Federal Acquisition Institute Training Application System
<b>FAR</b>	Federal Acquisition Regulation <a href="http://www.acquisition.gov/far/index.html">www.acquisition.gov/far/index.html</a>
<b>FAS</b>	Federal Acquisition Service <a href="http://www.gsa.gov/fas">www.gsa.gov/fas</a>
<b>FFP</b>	Firm Fixed-Price
<b>FFP-EPA</b>	Firm Fixed-Price with Economic Price Adjustment
<b>FPDS</b>	Federal Procurement Data System
<b>FSS</b>	Federal Supply Schedules (aka <a href="#">Multiple Award Schedules</a> )
<b>GSA</b>	General Services Administration <a href="http://www.gsa.gov">www.gsa.gov</a>

<b>GSAR</b>	General Services Administration Acquisition Regulation
<b>GAO</b>	Government Accountability Office <a href="http://www.gao.gov/">http://www.gao.gov/</a>
<b>GWAC</b>	Governmentwide Acquisition Contract
<b>HUBZone</b>	Historically Underutilized Business Zone
<b>IDIQ</b>	Indefinite-Delivery/Indefinite-Quantity
<b>IFF</b>	Industrial Funding Fee <a href="#">IFF</a>
<b>IGE</b>	Independent Government Estimate
<b>LSJ</b>	Limited Sources Justification
<b>MAS</b>	Multiple Award Schedule <a href="http://www.gsa.gov/schedules">www.gsa.gov/schedules</a>
<b>MPT</b>	Micro-Purchase Threshold
<b>NAICS</b>	North American Industry Classification System <a href="#">NAICS</a>
<b>NMR</b>	Non-Manufacturer Rule
<b>ORCA</b>	Online Representations and Certifications
<b>PBA</b>	Performance-Based Acquisition
<b>PWS</b>	Performance Work Statement
<b>RFI</b>	Request for Information
<b>RFP</b>	Request for Proposal
<b>RFQ</b>	Request for Quotation <a href="#">RFQ</a>
<b>SAT</b>	Simplified Acquisition Threshold <a href="#">SAT</a>
<b>SBA</b>	Small Business Administration <a href="http://www.sba.gov/">http://www.sba.gov/</a>
<b>SIN</b>	Special Item Numbers <a href="#">SIN</a>
<b>SDB</b>	Small Disadvantaged Business

<b>SDVOSB</b>	Service-Disabled, Veteran-Owned Small Business <a href="#">SDVOSB</a>
<b>SOO</b>	Statement of Objectives
<b>SOW</b>	Statement of Work
<b>WOSB</b>	Women-Owned Small Business <a href="#">WOSB</a>
<b>VOSB</b>	Veteran-Owned Small Business <a href="#">VOSB</a>

*\*For additional websites, please see the end of this guide.*

## Course Introduction

Welcome to GSA's *GSA Schedules and the Utilization of Small Business* training. This course is designed for the Federal 1102 community working in both civilian and military agencies. The purpose of this course is to ensure that buyers in the Federal marketplace understand the treatment of small businesses when using the GSA Schedules program. The preference programs in FAR Part 19 do not apply. However, based on a change covered by FAR Subpart 8.405-5, Contracting Officers may, at their discretion, conduct set-asides at the BPA and order level.

## Course Outline

This course has six main topics.

- Topic 1: Introduction to the MAS Program**
- Topic 2: Benefits of the MAS Program**
- Topic 3: Types of Schedules and Characteristics**
- Topic 4: Overview of Socioeconomics**
- Topic 5: GSA's Role and MAS**
- Topic 6: Identifying Small Businesses**

## Course Objectives

Upon completion of this course, you should be able to:

- ❖ Describe the purpose and benefits of the Multiple Awards Schedule (MAS) program
- ❖ Define socioeconomics in the context of Government acquisition
- ❖ Identify the various small business types and how socioeconomic objectives work within the Government
- ❖ Recognize FAR and the Small Business Act requirements as they apply to the Multiple Award Schedules (MAS) program
- ❖ Utilize set-asides for both small businesses and subsets of small businesses, based on market research
- ❖ Identify contracting and competition requirements for the MAS program, including getting agency credit for awards to small businesses



### **NUTS AND BOLTS TIP**

These tips, identified by the icon shown here, are “how-to’s” designed to enhance the student’s learning experience.



### **MAS Desk Reference**

As you read through this manual, look for these references for more detailed information on a particular subject.

# Topic 1: Introduction to the MAS Program

## What Is a Multiple Award Schedule?

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- Governmentwide contract vehicle for **commercial** products, services, and solutions
- Also known as “Federal Supply Schedules (FSS),” “GSA Schedules” or “MAS”
- Standing solicitations posted on FedBizOpps
- Awarded using FAR Part 12 procedures

The MAS program provides eligible ordering activities with a simplified process for obtaining supplies and services. Schedule contracts are multiple award, indefinite delivery/indefinite quantity (IDIQ) contracts which are awarded to responsible companies that offer commercial supplies or services at fair and reasonable prices. Products and services are ordered directly from Schedule contractors.

Multiple Award Schedules are also known colloquially as “GSA numbers,” “GSA Schedules,” “GSA contracts,” “Federal Supply Schedules (FSS),” and the “GSA list”. All of these terms are used synonymously within the Federal contracting community to refer to the GSA MAS program. Through the MAS program, GSA contracts with thousands of commercial businesses that provide access to a vast array of professional services, such as management, financial, engineering, environmental, accounting, graphic design, and landscaping services. In addition to commercial services, commercial supplies range from computer hardware to office supplies.

FSS website: [www.gsa.gov/schedules](http://www.gsa.gov/schedules)

## MAS Contract Characteristics

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- ❑ Multiple Award IDIQ, 5 year base, three 5 year options
- ❑ Firm Fixed-Price or Firm Fixed-Price with Economic Price Adjustment (EPA)
- ❑ Fair and reasonable pricing
  - Price reductions can be requested and may be applied at the order level.
- ❑ Performance requirements established at the order level to meet the customer's specific needs

### Quantity and Delivery/Performance Requirements

As IDIQ contracts, the Schedules themselves contain no specific quantities, other than minimum and maximum threshold\* amounts that are applicable to single orders. The ordering activity is able to set specific order quantities and specific delivery/performance dates when issuing an order under the Schedule contract. When issuing an order:

- ❖ Delivery or performance periods and all other order requirements must conform to the applicable terms and conditions of the Schedule contract, but
- ❖ An ordering activity may add additional terms and conditions as long as they do not conflict with the Schedule contract.

\* The maximum order threshold is an amount over which the contractor has the right to refuse the order. There is no maximum limitation on Schedule contracts. The minimum threshold is an amount under which the contractor is not required to accept an order.

### Limits on Order Placement and Timing

In accordance with FAR Subparts 8.405-1 and 8.405-2, Schedule users:

- ❖ May issue orders for supplies or services not requiring a statement of work (SOW) orally, by fax, by paper order, or electronic commerce methods, depending on the ordering activity's specific ordering procedures.
- ❖ May not issue oral orders when an SOW is required. Orders by fax, hard copy, or electronic means are authorized.
- ❖ May place an order anytime during the effective period of the Schedule contract. Any order not completed within the period of the Schedule contract must be completed within the time specified in the order.
- ❖ May not issue oral orders for brand name items when the order exceeds \$25,000.
- ❖ May not place repetitive orders for the same items to attempt to avoid exceeding the Simplified Acquisition Threshold (SAT) and to hold a proper competition.

### **Negotiating Reductions to Published Schedule Prices**

- ❖ Requesting price reductions is permitted at any time. Vendors may offer reduced prices based on specific quantities, overall volume, delivery requirements, and/or other order-specific terms and conditions.
- ❖ The Government buyer is **required** to **request** reductions for any requirement (order or BPA) in excess of the SAT.
- ❖ The vendor has discretion in agreeing to price reductions proposed by the Government.

## Regulatory Foundation

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### The Federal Acquisition Regulation (FAR)

FAR	Provides	Applicability
Subpart 8.4	Ordering procedures for GSA Schedules	Federal Government Ordering Activities
Part 12	Acquisition of Commercial Items	GSA awards Schedule contracts under Part 12
Subpart 6.102(d)(3)	Defines orders placed against Schedules as a competitive procedure	All

The **Federal Acquisition Regulation (FAR)** provides the primary regulatory guidance for the GSA Schedules program. The **General Services Administration Acquisition Regulation (GSAR)** is the GSA FAR supplement. The GSAR provides guidance tailored to GSA acquisitions, including GSA Schedules contracting. GSAR guidance primarily affects GSA Schedules by providing supplementary guidance to the Contracting Officers awarding and administering GSA Schedule contracts.

**FAR Subpart 8.4, Federal Supply Schedules**, prescribes procedures that Federal Government ordering activities must follow when issuing orders using GSA Schedules. Orders placed following these procedures are considered to be issued using full and open competition. (See FAR 8.404(a)).

**FAR Part 12, Acquisition of Commercial Items**, prescribes policies and procedures unique to the acquisition of commercial items. It implements the Federal Government's preference for the acquisition of commercial items contained in Title VIII of the Federal Acquisition Streamlining Act of 1994 (Public Law 103-355) by establishing acquisition policies more closely resembling those of the commercial marketplace and encouraging the acquisition of commercial items and components.

**FAR 6.102(d)(3), Competition Requirements**, pertains to the use of competitive procedures. It states that use of MAS issued under the procedures established by the Administrator of General Services consistent with the requirement of 41 U.S.C. 259(b)(3)(A) for the MAS program of the General Services Administration, is a competitive procedure.

## FAR Applicability to Schedule Orders

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FAR	Title	Applicable
Part 13	Simplified Acquisition Procedures	NO (except allows for MAS BPAs)
Part 14	Sealed Bidding	NO
Part 15	Contracting by Negotiation	NO
Part 19	Small Business Programs	NO (except Bundling, Size Stds, Socioeconomic Descriptions)
Part 36	Construction and A&E	NO
Part 7	Acquisition Planning	YES
Part 10	Market Research	YES
Subpart 17.5	Interagency Acquisitions	YES
Subpart 33.1	Protests	YES
Subpart 37.6	Performance Based Acquisition	YES
Part 39	Acquisition of Information Technology	YES

The primary regulatory guidance is provided by the **Federal Acquisition Regulation (FAR)**:

- ❖ **FAR Subpart 8.4, Federal Supply Schedules**, prescribes procedures that Federal Government ordering activities **must** follow when issuing orders using GSA Schedules. Awards made following these procedures are considered competitive.
- ❖ The **General Services Administration Acquisition Regulation (GSAR)** is the GSA FAR supplement and is a subset of the General Services Administration Acquisition Manual (GSAM). GSAR provides guidance tailored to GSA acquisitions, including GSA Schedules contracting. GSAR guidance primarily affects GSA Schedules by providing supplementary guidance to the contracting activities awarding and administering GSA Schedule contracts.
- ❖ All GSA Schedule contracts are awarded using FAR Part 12, Commercial Items.

Any agency utilizing GSA Schedules **must** use the procedures described in FAR Subpart 8.4. Some agencies issue supplementary guidance to the FAR. For example, the DoD has the

Defense Federal Acquisition Regulation Supplement (DFARS); the Army has the Army Federal Acquisition Regulation Supplement (AFARS) in addition to the DFARS; and NASA has the NASA FAR Supplement (NFS). The competition requirements for civilian agencies and DoD are similar. The one exception is that the DoD requires the Contracting Officer to consider additional steps when only one response is received to a competitive solicitation over the SAT.

Notes:

- ❖ Acquisition planning is required for all acquisitions over the micro-purchase threshold.
- ❖ Responsibility determinations are made by GSA at the contract level.
- ❖ Terms and conditions are already set in the Schedule contracts.
- ❖ Pricing is determined to be fair and reasonable at the Schedule contract level, although on orders over the SAT, order level COs are required to request price reductions.

## Topic 2: Benefits of the MAS Program

### FAR Subpart 8.4 Simplifies the Solicitation Process

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In contrast to FAR Part 15, *Contracting by Negotiation*, Schedule orders do not require:

- Conducting a formal “negotiated procurement” (Source Selection Evaluation Board (SSEB))
- Issuing a “solicitation” for thirty days (or any other pre-determined time)
- Conducting a “competition” by seeking contractors outside the Schedules program
- Synopsizing the requirement on FedBizOpps, unless it’s a limited sources acquisition over the SAT
- Conducting “discussions”
- Conducting formal “debriefings” or “competitive range determinations”
- Using FAR Subpart 15.3 concepts and procedures

FAR Subpart 8.4 provides ordering procedures for placing orders against a GSA Schedule. FAR Part 13, *Simplified Acquisition Procedures*, Part 15, *Contracting by Negotiation*, and FAR Part 19, *Small Business Programs* [except for 19.202-1(e)(1)(iii)], are **NOT** applicable to orders placed against Multiple Award Schedules (except that FAR 13.303-2(c)(3) allows for BPAs to be established with Multiple Award Schedule contractors, if not inconsistent with the terms of the applicable Schedule contract, but see FAR 8.405-3 for BPA procedures under Schedules).

Under FAR Part 8, as compared with FAR Part 15, ordering activities do not have to:

- ❖ Conduct a formal “negotiated procurement”
- ❖ Issue a “solicitation” for thirty days (or any other pre-determined time)
- ❖ Conduct a “competition” by seeking contractors outside the Schedules program
- ❖ Synopsize the requirement on FedBizOpps, unless it’s a limited sources acquisition over the SAT
- ❖ Conduct “discussions”
- ❖ Conduct formal “debriefings”
- ❖ Use FAR Subpart 15.3 concepts and procedures

When a Contracting Officer correctly chooses not to use FAR Subpart 15.3 concepts and procedures for a GSA Schedule-based order, the following are positive attributes of the task order selection process:

- ❖ There is no requirement to follow the FAR Subpart 15.305 requirement to “evaluate competitive proposals and then assess their relative qualities.” In other words, your evaluation system can immediately compare (and remember, we don’t say “compete”

because the Competition in Contracting Act (CICA) requirements have already been met under the GSA Schedule contract) one quote to another in order to determine the rank ordering for selection.

- ❖ You are not bound by the rules in FAR Subpart 15.3 for evaluating past performance, such as the requirement to provide a neutral rating to a quote without any past performance. Further, if you choose not to use past performance as an evaluation factor, there is no requirement to document the file with your rationale.
- ❖ There is no requirement to capture “the relative strengths, deficiencies, significant weaknesses, and risks supporting proposal evaluation...” as required in FAR Subpart 15.305. This means your evaluation system can be **very streamlined**. There is no requirement to set a competitive range using all the published evaluation factors. This means that you can save yourself and the Schedule contractor considerable time and money by phasing your procurement in a manner that uses the least costly factors to initially eliminate offerors.
- ❖ Because a competitive range is not established, there is no need to be overly focused on the nature of exchanges with the quoter. You can engage in detailed exchanges about any aspect of a quote at any time. Naturally, you should make every effort to treat each quoter equitably. You must not be biased, arbitrary, or capricious, and your decisions must be adequately (but not overly) documented.



### **NUTS AND BOLTS TIP**

**PROTEST RISK:** If an agency issues a Schedule order using FAR Part 15 terminology and procedures, protest review authorities, such as the GAO and the courts, may sustain a protest against the order using FAR Part 15 procedures.

(See the Finlen Complex, Inc. B-288280: Oct 10, 2001 <http://www.gao.gov/products/A02449>.)

## GSA Schedules Conform with Competitive Contracting

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Schedule users shall not:

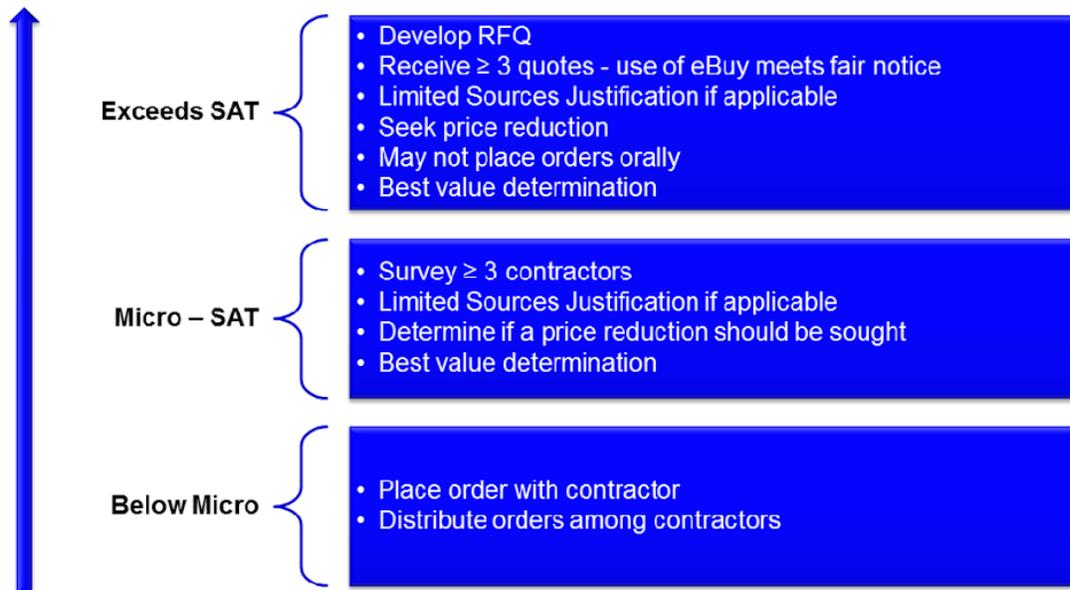
- Seek further competition outside of the MAS program
- Synopsise the requirement (unless Sole-Source greater than SAT with an LSJ – See 8.404(g))

Synopsis is not required if proposed contract action is made under the terms of an existing contract that was previously synopsized in sufficient detail to comply with requirements...  
(FAR 5.201(11))

## Ordering Procedures - FAR 8.405-1

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When ordering supplies or fixed-price services w/out SOW



### When Is an SOW Not Required?

FAR 8.405-1 states an SOW is not required for ordering supplies and fixed-price services for performance of a specific task such as installation, maintenance, and repair. When acquiring fixed-price services or supplies through GSA Schedules, an SOW is not required when the dollar value of the order or Blanket Purchase Agreement (BPA):

- ❖ **Is at or below the micro-purchase threshold.** You may place the order directly with the selected vendor. FAR procedures for acquisitions at or below the micro-purchase threshold emphasize simplicity and fair treatment. Supporting documentation, including extensive information collection and evaluation, is not required. However, the Schedule user should attempt to distribute orders among Schedule contractors.
- ❖ **Exceeds the micro-purchase threshold, but not the simplified acquisition threshold.** You should obtain at least three (3) quotes, always documenting your contract file and selecting the best value quote.
  - Survey at least three Schedule contractors, considering price and other identified best value factors.
  - Consider ordering from contractors that help you meet your agency's socioeconomic goals.

- Use an RFQ only if it is the most efficient method for gathering the information needed to evaluate solutions available under GSA Schedules. When using an RFQ, the Schedule user must provide the RFQ, including the evaluation criteria, to any contractor under the appropriate Schedule that requests a copy.
  - The Schedule user should seek a price reduction when:
    - Market research reveals that the supply or service is available elsewhere at prices lower than those available from Schedule contractors.
    - The Schedule contractor has been or will be selected to provide recurring requirements, and the size of the recurring orders appears to merit a price reduction.
    - Market research identifies other information indicating that a price reduction is appropriate.
- ❖ **Exceeds the simplified acquisition threshold**, or when establishing a BPA. The ordering activity shall seek a price reduction, survey more than three contractors, and select the best value quote. If further price reductions are not offered, an order may still be placed. *eBuy* shall be used as one method to ensure at least three written quotations are received. If fewer than three are received, the Contracting Officer must document the file as to the actions taken to ensure competitive quotations, and what can be done in future acquisitions to enhance competition. Procedures also apply for DoD agencies when the value of the order exceeds the simplified acquisition threshold and only one offer was received (DFARS 208.404 and 208.405–70). If fewer than 30 days for offer submission was allowed, the CO must consider promoting competition by revising the requirements document to eliminate any barriers and by permitting more time for receipt of offers when fewer than 30 days was initially allowed. The Contracting Officer must either resolicit for 30 days or more or request a waiver. If the Contracting Officer still receives only one offer, he/she must determine prices to be fair and reasonable through price or cost analysis or enter negotiations with the offeror. Remember, under the Schedules program, you cannot compete outside of the program, so the Contracting Officer should consider whether or not there are any valid sources available or if sources have been exhausted through the use of *eBuy*.



### **NUTS AND BOLTS TIP**

Schedule contractors are not required to pass on to all GSA Schedule users a one-time spot price reduction provided to a single agency.



### **NUTS AND BOLTS TIP**

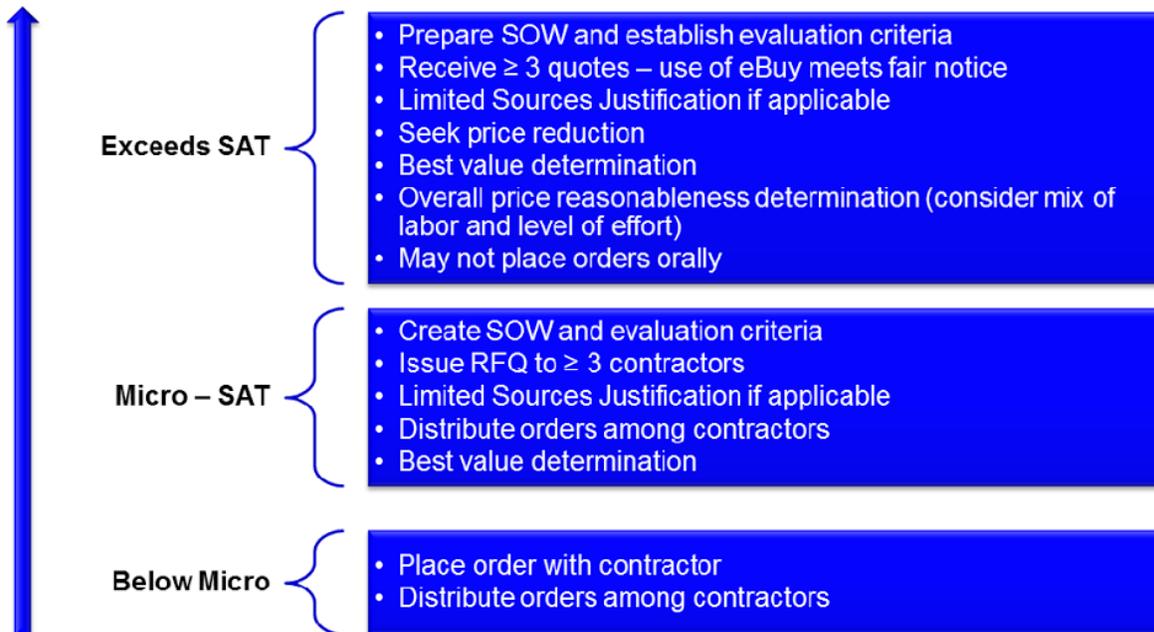
FAR 9.405-1(b) prohibits ordering from any Schedule contractor that is debarred, suspended, or proposed for debarment unless the agency head makes a written determination of the compelling reasons for such action.

A Schedule user can review the contractor's information page in GSA *eLibrary* (<https://www.gsaelibrary.gsa.gov/>) to determine whether the prospective contractor is listed in the Excluded Parties List System (EPLS). The System for Award Management (SAM) at [www.sam.gov](http://www.sam.gov) provides information about debarment or suspension, along with more detailed information about a contractor.

## Ordering Procedures - FAR 8.405-2

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When ordering services requiring an SOW



### When Is an SOW Required?

For services offered in Schedule contracts at hourly rates, Schedule users must create Requests for Quotations (RFQs) and include the SOW and evaluation criteria to Schedule contractors that offer services that will meet the agency's needs. The RFQ requirements differ by dollar value. The RFQ may be posted through *eBuy*.

If an order requires an SOW, the first step in the award decision process is to review the quotes. The price quote review focuses on the quality of the vendor's capabilities or products, the proposed solution, the prices, and any other pre-determined evaluation criteria.

If the order requires an SOW/PWS/SOO, the ordering activity has the option to ask quoters to give oral presentations after quotation submission in lieu of some or all of the written proposal submission requirements. The oral presentations can help the ordering activity clarify details, become acquainted with the contractors' personnel, and provide additional comparison points for decision making.

After comparing prices and other factors, the ordering activity chooses the contractor who can provide the best value to the Government.

## Topic 3: Types of Schedules and Characteristics

### **MAS Schedule Facts**

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- ❑ GSA offers over 20 million supplies and services
- ❑ 23 open and standing solicitations published on FedBizOpps (including those managed by VA)
- ❑ Over 15,000 Schedule contracts
  - 80% are small businesses
  - Orders and BPAs can be set aside for small businesses
- ❑ \$33.4B MAS + \$13.8B VA = \$47.2B Total Sales (Spend)

GSA Schedules provide access to over 20 million commercial supplies (products) and services at volume discount pricing. The Schedule List in the *GSA eLibrary* contains a list of all GSA and VA Schedules. The generic categories of supplies and services available under each Schedule may be viewed by clicking on the Schedule number in the Source column. Supplies and services are identified in each Schedule by SIN.

### **Special Item Numbers (SINs)**

Within each Schedule are specific SINs. SINs are used to group or categorize similar supplies and services.

Each Schedule is comprised of multiple SINs. For example, *Schedule 874, Mission Oriented Business Integrated Services (MOBIS)*, has the following SINs:

874-1, Integrated Consulting Services

874-4, Training Services: Instructor Led Training, Web Based Training and Education Courses, Course Development and Test Administration Learning Management, Internships

874-5, Ancillary Supplies and/or Services

874-6, Acquisition Management Support

874-7, Integrated Business Program Support Services

874-8, DAU and FAI Certified DAWIA and FAC Acquisition Workforce Training for GS-1102 and non-1102 Personnel

874 9, Off-the-Shelf Training Devices and Training Materials: Print, Electronic, Audio-Visual, Multi-Media, and Simulation Training Devices

874 99, New Services

GSA Schedules are awarded on an indefinite delivery/indefinite quantity (IDIQ) basis. The total quantity of services or supplies that will be acquired under the Schedule contract and the specific time for delivery of those items are not set in the contract. Schedule solicitations include only estimated total Schedule acquisition dollars for each SIN.

The quantity and names of Schedules and SINs change from time to time. *GSA eLibrary* ([www.gsaelibrary.gsa.gov](http://www.gsaelibrary.gsa.gov)) provides a current listing of all Schedule contracts and links to additional information about each Schedule.

## What Services Are Available on Schedule?

(slide)

- |   |   |
|---|---|
| <input type="checkbox"/> Energy Services              | <input type="checkbox"/> Professional Services        |
| <input type="checkbox"/> Environmental Services       | <input type="checkbox"/> Security and Law Enforcement |
| <input type="checkbox"/> Facility Management Services | <input type="checkbox"/> Technology Services          |
| <input type="checkbox"/> Furniture Services           | <input type="checkbox"/> Transportation Services      |
| <input type="checkbox"/> Human Capital Services       | <input type="checkbox"/> Travel Services              |
| <input type="checkbox"/> Office Services              | <input type="checkbox"/> Vehicle Buy/Lease Services   |

**Note:** For a comprehensive list of services, please visit GSA eLibrary. [www.gsaelibrary.gsa.gov](http://www.gsaelibrary.gsa.gov)

### GSA Schedule Contract Fundamentals

Solicitations for GSA Schedule contracts are standing solicitations issued through FedBizOpps. Vendors wishing to become GSA Schedule contractors may submit an offer at any time. More information on Schedule solicitations may be found at

<https://www.gsa.gov/acquisition/purchasing-programs/gsa-schedules/industry-partners/gsa-schedule-solicitations>.

GSA Schedule contracts have a base period of five years, with three additional five-year option periods. Options are exercised in accordance with FAR 17.207.

Ordering activities issue delivery or task orders against the GSA Schedule contract. For services, the task orders specify the scope, milestones, timeframe, and price for the requirements. Options may be included on orders placed against Schedule contracts, and options may be exercised provided that:

- ❖ Funds are available.
- ❖ The requirement covered by the option fulfills an existing Government need.
- ❖ Prior to exercising an option, the ordering activity ensures that it is still in the Government's best interest, with price and other factors considered.

Note: . Orders against a Schedule contract must be placed during the contract's effective period. Orders placed during the effective period but not completed within that period "shall be completed by the Contractor within the time specified in the order. The Schedule contract shall govern the contractor's and Government's rights and obligations with respect to that order to the same extent as if the order were completed during the contract's effective period, provided that the contractor shall not be required to make any deliveries under the contract after the

completion of the customer order, including options, 60 months following the expiration of the Schedule contract ordering period.” Options on orders are not exercised beyond the ordering period of the Schedule contract, including Schedule contract option year periods, unless the Schedule contract includes clause 52.216-22 (Oct 1995) with fill-in language which provides for orders to extend up to 60 months beyond contract expiration. Before placing an order, it is advisable to verify that the FSS Schedule contract has FAR 52.216-22 (Oct 1995) fill-in language to allow for the exercise of options on orders beyond the contract period. However, no orders or options on orders may extend more than 60 months after the expiration of the FSS Schedule contract.

### **Acquisition of Commercial Services**

FAR 11.002(a)(2)(iii) requires that, to the maximum extent practicable, offerors of commercial items be provided an opportunity to compete for any Government contract acquisition. If the use of commercial services is precluded, purchasers may lose the benefits of commercial item innovations. Failure to define a service requirement as a commercial item will also prevent purchasers from using Schedule contracts and participating in the related benefits.

Purchasers should describe service requirements in a way that permits vendors providing commercial services to compete. Preferably, a performance-based approach should be used in accordance with FAR Subpart 37.6, so that results sought (rather than how the work should be done) are stated.

**Note: For a comprehensive list of services, please visit GSA eLibrary.**

[www.gsaelibrary.gsa.gov](http://www.gsaelibrary.gsa.gov)

## What Supplies Are Available on Schedule?

(slide)

- |   |  |
|---|--|
| <input type="checkbox"/> Building & Industrial                        | <input type="checkbox"/> Disaster Relief Products          |
| <input type="checkbox"/> Furniture and Furnishings                    | <input type="checkbox"/> Hospitality, Cleaning & Chemicals |
| <input type="checkbox"/> IT Electronics                               | <input type="checkbox"/> Laboratory, Scientific & Medical  |
| <input type="checkbox"/> Law Enforcement, Fire, and Security Products | <input type="checkbox"/> Office Solutions                  |
| <input type="checkbox"/> Recreation & Apparel                         | <input type="checkbox"/> Security Solutions                |
| <input type="checkbox"/> Travel & Transportation Supplies             | <input type="checkbox"/> Tools, Hardware & Machinery       |
| <input type="checkbox"/> Wildland & Fire Equipment                    | <input type="checkbox"/> Vehicles & Watercraft             |

**Note:** For a comprehensive list of supplies, please visit GSA eLibrary. [www.gsaelibrary.gsa.gov](http://www.gsaelibrary.gsa.gov)

### Commercial Items and MAS

The FAR definition of “commercial items” as found at FAR 2.101(b) includes both supplies/commodities and services. It is very broad and encompassing and includes all of the following types of items as commercial items:

**Nongovernmental items:** A supply of a type customarily used by the general public or by nongovernmental entities for other than governmental purposes and has been sold, leased, or licensed to the general public; or has been offered for sale, lease, or license to the general public.

**Evolved nongovernmental items:** A nongovernmental item that:

- ❖ Evolved from an item customarily used for nongovernmental purposes through advances in technology or performance; and
- ❖ Will be available in the commercial marketplace in time to satisfy the delivery requirements under a solicitation

**Modified versions of either of these item types:** An item that would be considered a nongovernmental item or an evolved nongovernmental item if it were not for one of the following:

- ❖ Modifications of a type customarily available in the commercial marketplace
- ❖ Minor modifications of a type not customarily available in the commercial marketplace that must be made to meet Federal Government requirements

A minor modification does not significantly alter the nongovernmental function or essential physical characteristics of an item or component, or change the purpose of a process. Factors to be considered in determining whether a modification is minor include the value and size of the modification and the comparative value and size of the final item. Dollar values and percentages may be used as guideposts, but are not conclusive evidence that a modification is minor.

**Note:** *For a comprehensive list of supplies, please visit GSA eLibrary.*

[www.gsaelibrary.gsa.gov](http://www.gsaelibrary.gsa.gov)

## Topic 4: Overview of Socioeconomics

### **MAS Supports Small Business Utilization**

*(slide)*

- ❑ MAS program promotes small business through socioeconomic preference or set-asides.
- ❑ FAR Part 19, *Small Business Programs*
  - Applies to Schedule contracts
  - Does NOT apply to orders
- ❑ Exception to FAR 19 applicability at the order level:
  - Bundling (FAR19.202-1(e)(1)(iii))
  - Size standard criteria

FAR Part 19 provides guidance to Federal agencies on how to implement facets of the Small Business Act, as amended. However, Part 19, with a few small exceptions (bundling, size standards, and socioeconomic descriptions), does **not** apply when using the GSA Schedules' ordering procedures. Part 19 does apply when those Schedule contracts are being negotiated and awarded. However, based on a recent statutory change and associated FAR implementation, Contracting Officers may now elect, at their discretion, to apply the set-aside process to the placement of Schedule orders and establishment of Schedule BPAs.

## MAS Supports Small Business Utilization, Cont.

*(slide)*

- Consider at least one small business prior to placing an order (8.405-5(c))
- Should give preference to small business if you have at least two (2) quotes at same delivered price from small business; not required to
- Encourages use of Contractor Team Arrangements (CTAs)
- No limitation on subcontracting
- Ordering activity receives socioeconomic credit (8.405-5(b))
- Consider socioeconomic status as a primary evaluation factor (8.405-5(c))
- May choose small business subcontracting as an evaluation factor

Ordering activities have a variety of means to foster achieving small business goals. When considering sources to solicit, always consider at least one small business.

Another effective means, especially when one contractor may not be able to provide the full range of products/services, is the use of Contractor Team Arrangements (CTAs). CTAs allow a team of firms to provide a complete response or total solution.

If the evaluation/source selection is made on a best value tradeoff basis, socioeconomic status can be an effective factor to incorporate. That allows small firms to compete and receive favorable consideration based on their status.

## MAS Supports Small Business Utilization, Cont.

(slide)

If available, ordering activities should consider at least one:

- Small business
- Veteran-owned small business
- Service disabled veteran-owned small business
- HUBZone small business
- Women-owned small business
- Small disadvantaged business

When soliciting sources, consider inclusion of one or more of these categories. It's easy to find these firms when you perform market research using *GSA Advantage!* and *eLibrary*.

In accordance with FAR Subpart 8.405-5(c), ordering activities may consider socioeconomic status when identifying contractor(s) for consideration or competition for award of an order or BPA. At a minimum, ordering activities should consider, if available, at least one:

- ❖ Small Business
- ❖ Veteran-Owned Small Business
- ❖ Service-Disabled Veteran-Owned Small Business
- ❖ HUBZone Small Business
- ❖ Women-Owned Small Business
- ❖ Small Disadvantaged Business

## FAR Part 19: Small Business Programs

(slide)

- ❑ Part 19 does not entirely apply to Schedule orders – (See 8.404(a))
  - FAR 8.405-5 provides policy for set-asides at the Schedule order level.
- ❑ **19.502-4 Multiple-award contracts and small business set-asides...**

Contracting officers may, at their discretion—

  - (c) Set aside orders placed under multiple-award contracts for any of the small business concerns identified in FAR 19.000(a)(3)...
    - “For Federal Supply Schedules Program orders see FAR 8.405-5.”
- ❑ **19.508(c)** requires certain clauses for total and partial set-asides as well as limitations on subcontracting to be added to orders under MAS.

FAR 19.508(c) requires use of the following FAR 52.219-6 clause when a MAS set-aside is involved:

Notice of Total Small Business Set-Aside (Nov 2011)

(a) *Definition.* “Small business concern,” as used in this clause, means a concern, including its affiliates, that is independently owned and operated, not dominant in the field of operation in which it is bidding on Government contracts, and qualified as a small business under the size standards in this solicitation.

(b) *Applicability.* This clause applies only to—

(1) Contracts that have been totally set aside or reserved for small business concerns; and

(2) **Orders set aside for small business concerns under multiple-award contracts as described in 8.405-5 and 16.505(b)(2)(i)(F).**

(c) General.

(1) Offers are solicited only from small business concerns. Offers received from concerns that are not small business concerns shall be considered nonresponsive and will be rejected.

(2) Any award resulting from this solicitation will be made to a small business concern.

(d) *Agreement.* A small business concern submitting an offer in its own name shall furnish, in performing the contract, only end items manufactured or produced by small business concerns in the United States or its outlying areas. If this procurement is processed under simplified

acquisition procedures and the total amount of this contract does not exceed \$25,000, a small business concern may furnish the product of any domestic firm. This paragraph does not apply to construction or service contracts.

## FAR Subpart 8.405-5 – Small Business

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- ❑ **8.405-5(a)** – Preference programs of Part 19 are not mandatory.
- ❑ **8.405-5(a)(1)** – Set-asides are discretionary for orders and BPAs against Multiple Award Schedules.
- ❑ **8.405-5(a)(2)** – Follow the ordering procedures at:
  - 8.405-1, Products and services without SOW
  - 8.405-2, Services with an SOW
  - 8.405-3, BPAs
  - The specific small business program eligibility requirements identified in Part 19 apply.

### 8.405-5 Small business.

(a) Although the preference programs of part 19 are not mandatory in this subpart, in accordance with section 1331 of Public Law 111-240 (15 U.S.C. 644(r))—

- (1) Ordering activity contracting officers may, at their discretion—
  - (i) Set aside orders for any of the small business concerns identified in 19.000(a)(3); and
  - (ii) Set aside BPAs for any of the small business concerns identified in 19.000(a)(3).
- (2) When setting aside orders and BPAs—
  - (i) Follow the ordering procedures for Federal Supply Schedules at 8.405-1, 8.405-2, and 8.405-3; and
  - (ii) The specific small business program eligibility requirements identified in part 19 apply.

(b) Orders placed against Schedule contracts may be credited toward the ordering activity's small business goals. For purposes of reporting an order placed with a small business Schedule contractor, an ordering agency may take credit only if the awardee meets a size standard that corresponds to the work performed. Ordering activities should rely on the small business representations made by Schedule contractors at the contract level. This information is found on the "Contractor Information" page in GSA eLibrary at [www.gsaelibrary.gsa.gov](http://www.gsaelibrary.gsa.gov).

(c) Ordering activities may consider socioeconomic status when identifying contractor(s) for consideration or competition for award of an order or BPA. At a minimum, ordering activities should consider, if available, at least one small business, veteran-owned small business, service disabled veteran-owned business, HUBZone small business, women-owned small business, or small disadvantaged business schedule contractor(s). *GSA Advantage!*

([www.gsaadvantage.gov](http://www.gsaadvantage.gov)) and *eLibrary* ([www.gsaelibrary.gsa.gov](http://www.gsaelibrary.gsa.gov)) contain information on the small business representations of Schedule contractors.

(d) For orders exceeding the micro-purchase threshold, ordering activities should give preference to the items of small business concerns when two or more items at the same delivered price will satisfy the requirement.

## FAR Subpart 8.405-5 – Small Business, Cont.

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- ❑ 8.405-5(b) – Orders placed against Schedule contracts may be credited toward the ordering activity's small business goals.
  - For purposes of reporting, an ordering agency may take credit only if the awardee meets a size standard that corresponds to the work performed.
  - Ordering activities should rely on the small business size representations made at the Schedule contract level. (Size standard is found in *eLibrary*)
- ❑ Agencies do not need to make a separate size determination at the order level, however...
  - GAO has upheld agencies' right to request a recertification at the order level (CMS Information Services Inc., B-290541, Aug. 7, 2002).

## Certification Requirements for MAS Contracts

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- MAS contracts size standard certification is generally valid for 5 years.
- Firms must recertify:
  - Within 60 to 120 days prior to the end of the fifth year of the contract
  - Within 60 to 120 days prior to the time of an option exercise
  - Within 30 days of a novation
  - Within 30 days of a merger or acquisition
- See FAR 19.301-2

In accordance with SBA regulations and the FAR, the size determination made at contract award applies for the life of that contract unless one of three events occurs:

1. Novation
2. Merger or acquisition
3. Option exercise of the Schedule contract

In these cases, the contractor is required to update its size.

FAR 19.301-2(b)(3) includes the following requirements for recertification prior to exercise of options as well as for novations and mergers or acquisitions:

“A contractor that represented itself as a small business concern before contract award must rerepresent its size status for the North American Industry Classification System (NAICS) code in the contract upon the occurrence of any of the following:

(1) Within 30 days after execution of a novation agreement or within 30 days after modification of the contract to include the clause at 52.219-28, Post-Award Small Business Program Rerepresentation, if the novation agreement was executed prior to inclusion of this clause in the contract.

(2) Within 30 days after a merger or acquisition of the contractor that does not require novation or within 30 days after modification of the contract to include the clause at 52.219-28, Post-Award Small Business Program Rerepresentation, if the merger or acquisition occurred prior to inclusion of this clause in the contract.

(3) For long-term contracts—

- (i) Within 60 to 120 days prior to the end of the fifth year of the contract; and
- (ii) Within 60 to 120 days prior to the date specified in the contract for exercising any option thereafter.”

## What Is Considered a Small Business?

(slide)

- ❑ SBA establishes small business size standards.
- ❑ Industries are classified using the North American Industry Classification System (NAICS).
  - There are separate NAICS codes for various products and services.
- ❑ For GSA Schedules – NAICS codes are applied at the Schedule and order level.
- ❑ Agencies receive small business credit only if the business concern awarded the order has represented its status as small for the underlying Multiple Award contract for the same NAICS code as that assigned to the order, provided recertification has not been required or occurred for the contract or order (see 13 CFR 121.402(c)(2)(ii)).

“Small business concern” means a concern, including its affiliates, that is independently owned and operated, not dominant in the field of operation in which it is bidding on Government contracts, and qualified as a small business under the criteria and size standards in 13 CFR part 121 (see 19.102). Such a concern is “not dominant in its field of operation” when it does not exercise a controlling or major influence on a national basis in a kind of business activity in which a number of business concerns are primarily engaged. In determining whether dominance exists, consideration must be given to all appropriate factors, including volume of business, number of employees, financial resources, competitive status or position, ownership or control of materials, processes, patents, license agreements, facilities, sales territory, and nature of business activity. (See 15 U.S.C. 632 and FAR Part 2.1, Definitions.)

The GAO is of the opinion that size may be re-validated/determined at the time of quote submission. There will be more on this later in the course.

The general size standards are often based on number of employees for products or based on company revenue for services (each NAICS code has a different standard). Many other factors come into play as well. Data on North American firms is gathered and analyzed by Census and by SBA.

## Special Subcategories of Small Business

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- ❑ Veteran-owned small businesses (VOSB)
  - One or more veterans own at least 51%, and they manage and control daily business operations
- ❑ Service-disabled, veteran-owned small businesses (SDVOSB)
  - Veteran-owned small business with disability incurred or aggravated in line of duty in the active military, naval, or air service
- ❑ Women-owned small businesses (WOSB)
  - One or more women own at least 51%, and they manage and control daily business operations
- ❑ Economically disadvantaged women-owned small business (EDWOSB)
  - One or more women own at least 51%, and they manage and control daily business operations, and
  - Are economically disadvantaged in accordance with 13 CFR Part 127

“Veteran-owned small business concern” means a small business concern—

- (1) Not less than 51 percent of which is owned by one or more veterans (as defined at 38 U.S.C. 101(2)) or, in the case of any publicly owned business, not less than 51 percent of the stock of which is owned by one or more veterans; and
- (2) The management and daily business operations of which are controlled by one or more veterans.

SDVOSB firms are owned by one or more members of the military that incurred a disability while serving his or her country. Under the Veterans Benefit Act of 2003, the Federal Government seeks to provide contracting assistance to SDVOSBs.

Note that there is a statutory goal only for SDVOSBs, not for other types of veteran-owned small business concerns. Set-asides under the MAS program are now permissible, if market research indicates there are enough firms in the same socioeconomic category. Additionally, if an award is made to one of these small business types either through a set-aside or not, your agency will get credit for the award in FPDS.

“Women-owned small business concern” means a small business concern—

- (1) That is at least 51 percent owned by one or more women; or, in the case of any publicly owned business, at least 51 percent of the stock of which is owned by one or more women; and
- (2) Whose management and daily business operations are controlled by one or more women.

In addition to the long standard category of small businesses owned by women, SBA recently added two new related classifications. These are Women-Owned Small Businesses (WOSB) and Economically Disadvantaged WOSBs (EDWOSB). A women-owned small business that meets the new requirements can apply for WOSB or EDWOSB status and may either self-certify to their qualifications or be certified by a designated third party. These new categories also permit agencies to conduct set-asides, including ones done under MAS, for either category. This differs from the previous general small business women-owned status that did not permit set-asides. Regardless of whether awarded through set-asides or through a non-restricted, open competition basis, agencies are given credit towards women-owned small business goals if the award is made to a WOSB or EDWOSB.

## Special Subcategories of Small Business, Cont.

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- ❑ HUBZone small businesses
  - HUBZone businesses are located in historically underutilized business zones within qualified census tracts, qualified nonmetropolitan counties, qualified base closure areas, or redesignated areas, or lands within the external boundaries of an Indian reservation.
  - The phrase “HUBZone small business” appears on SBA’s List of Qualified HUBZone Small Businesses next to firm names who qualify
- ❑ Small disadvantaged businesses and 8(a)s
  - One or more socially and economically disadvantaged individuals own at least a 51% interest and control management and daily business
  - African Americans, Hispanics, Native Americans, Asian-Pacific and Subcontinent Asian Americans, and women are presumed to be socially and economically disadvantaged

HUBZone means a **historically underutilized business zone** that is an area located within one or more qualified census tracts, qualified nonmetropolitan counties, BRAC former military bases, or lands within the external boundaries of an Indian reservation.

“HUBZone small business concern” means a small business concern that appears on the List of Qualified HUBZone Small Business Concerns maintained by the Small Business Administration. HUBZone firms will also be visible at [www.sam.gov](http://www.sam.gov) and on [www.gsaadvantage.gov](http://www.gsaadvantage.gov).

8(a) firms are called this because they were identified in Section 8(a) of the Small Business Act. The term 8(a) is often used in place of “Disadvantaged,” but they are not synonymous. Only disadvantaged businesses meeting certain criteria can be accepted by SBA into the 8(a) program, which is used to develop and grow the business over time.

Section 8(a) of the act authorizes SBA to contract for goods and services with Federal agencies. SBA then subcontracts actual performance of the work to socially and economically disadvantaged small businesses, which have been certified by SBA as eligible to receive these contracts. This program allows the Government to contract, on a noncompetitive basis, with socially and economically disadvantaged small businesses for amounts not to exceed \$7 million if the acquisition has an assigned NAICS code, and \$4 million for all other acquisitions. SBA also offers managerial, technical and financial support to participating firms,

Remember that orders and BPAs can be set aside for 8(a) firms. All orders to an 8(a) Schedule holder will count as credit towards the agency's small disadvantaged business goals.

## Nonmanufacturer (NMR) Rule

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### What Is the Nonmanufacturer Rule?

- ❑ On a supply contract, a firm must perform at least 50% of the cost of manufacturing the supplies (not including the cost of materials).
- ❑ The NMR provides that...
  - a firm that is not a manufacturer may qualify as a small business on a supply contract that has been set aside for small business if it supplies the product of a domestic small business manufacturer.

For additional information: <http://www.sba.gov/content/non-manufacturer-waivers>

The Small Business Act and SBA's regulations impose performance requirements (limitations on subcontracting) on firms that are awarded set-aside contracts.

Regulations:

- ❖ On a supply contract, a firm must perform at least 50% of the cost of manufacturing the supplies (not including the cost of materials).
- ❖ The Nonmanufacturer Rule (NMR) at FAR Subpart 19.102(f) is an **exception** to the performance requirements and provides that a firm that is **not** a manufacturer may qualify as a small business on a supply contract set aside for small business if, among other things, it supplies a small business product made in the United States.

## Nonmanufacturer (NMR) Rule, Cont.

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### Nonmanufacturer Rule Reminders

- ❑ As the Contracting Officer applying the Nonmanufacturer Rule to your acquisition strategy, there are some things to remember:
  - The NMR does not apply to service contracts.
  - The NAICS code and size standard will flow down from the Schedule contract.
- ❑ SBA may grant waivers to the NMR in industries where there are no small business manufacturers.
  - Nonmanufacturer waivers are not granted for HUBZone procurements.
  - Nonmanufacturer waivers cannot be granted after quotes on a solicitation have been received.

SBA may grant waivers for NMR. In order to qualify as a small business on a small business set-aside for the acquisition of supplies, an offeror must either manufacture the item in accordance with the Limitations on Subcontracting or supply a small business product made in the United States. The Small Business Act also contains provisions that allow the Administrator of the SBA to waive this requirement when there are no small business manufacturers or processors available to supply the product to the Federal Government.

SBA can provide the following types of waivers:

- ❖ **Individual waiver.** After reviewing a determination by a Contracting Officer that no small business manufacturer or processor can reasonably be expected to offer a product meeting the specifications (including period of performance) required of an offeror or by the solicitation; or
- ❖ **Class waiver.** For a product or class of products after determining that no small business is available to participate in the Federal procurement market.

## Nonmanufacturer (NMR) Rule, Cont.

(slide)

Language applying the NMR to set-aside Schedule orders can be found in the following clauses:

Clause	Title
52.219-3	<i>Notice of HUBZone Set-Aside or Sole Source Award (Nov-2011)</i>
52.219-6	<i>Notice of Total Small Business Set-Aside (Nov-2011)</i>
52.219-27	<i>Notice of Service-Disabled Veteran-Owned Small Business Set-Aside (Nov-2011)</i>
52.219-29	<i>Notice of Set-Aside for Economically Disadvantaged Women-Owned Small Business (EDWOSB) Concerns (Nov-2011)</i>
52.219-30	<i>Notice of Set-Aside for Women-owned Small Business Concerns Eligible Under the Women-Owned Small Business Program (Nov-2011)</i>

## Required Clauses

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Clause	Title
52.219-3	<i>Notice of HUBZone Set-Aside or Sole Source Award (Nov-2011)</i>
52.219-6	<i>Notice of Total Small Business Set-Aside (Nov-2011)</i>
52.219-13	<i>Notice of Set-Aside of Orders (Nov-2011)</i>
52.219-14	<i>Limitations on Subcontracting (Nov-2011)</i>
52.219-27	<i>Notice of Service-Disabled Veteran-Owned Small Business Set-Aside (Nov-2011)</i>
52.219-29	<i>Notice of Set-Aside for Economically Disadvantaged Women-Owned Small Business (EDWOSB) Concerns (Nov-2011)</i>
52.219-30	<i>Notice of Set-Aside for Women-owned Small Business Concerns Eligible Under the Women-Owned Small Business Program (Nov-2011)</i>

GSA Schedules contain the following clauses, which are applicable at the order level when a set-aside is conducted. Note: Clause applicability varies based on the type of set-aside being conducted.

52.219-13, Notice of Set-Aside of Orders (NOV 2011)

52.219-3, Notice of HUBZone Set-Aside or Sole Source Award (NOV 2011)

52.219-6, Notice of Total Small Business Set-Aside (NOV 2011)

52.219-14, Limitations on Subcontracting (NOV 2011)

52.219-27, Notice of Service-Disabled Veteran-Owned Small Business Set-Aside (NOV 2011)

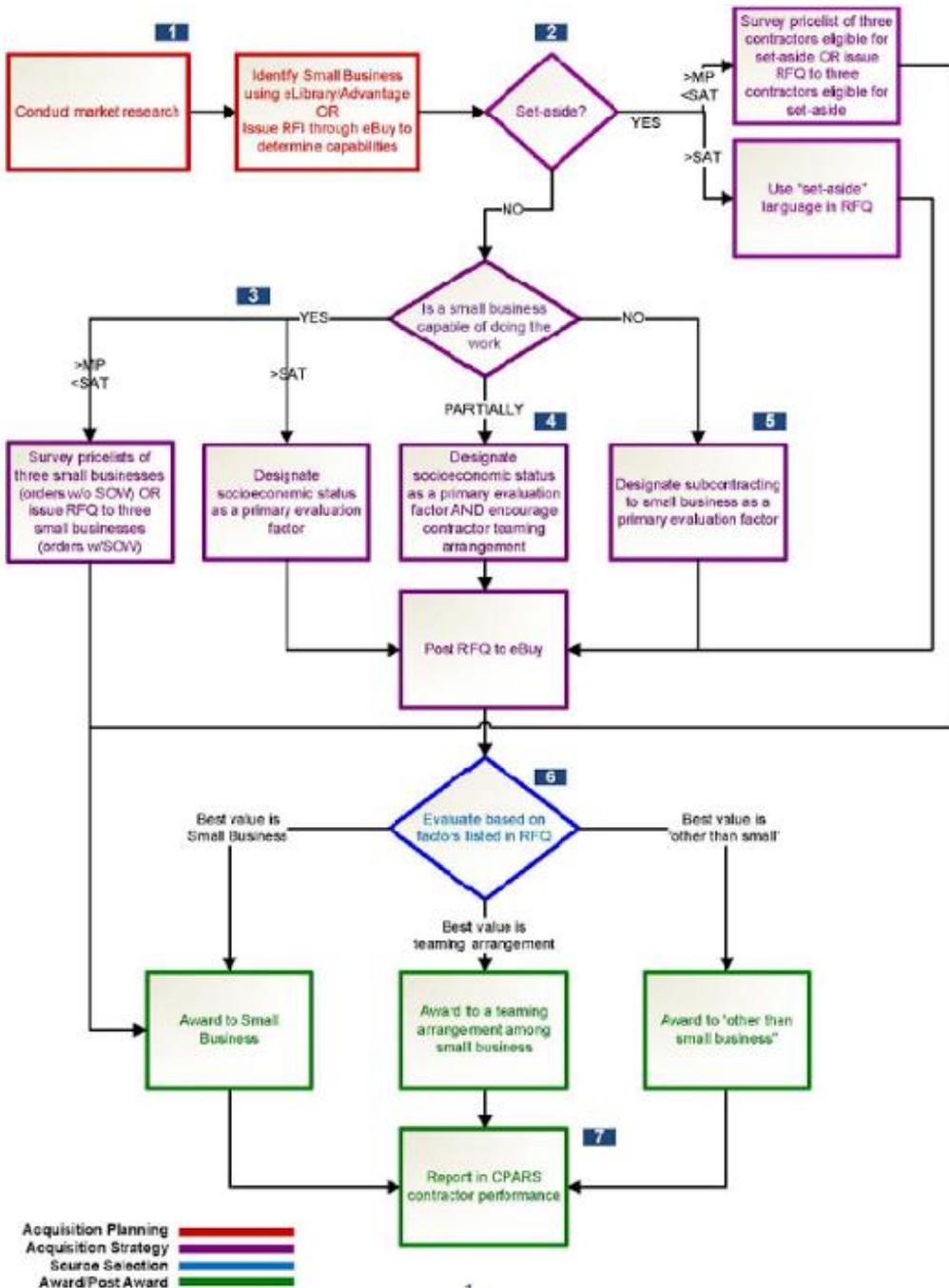
52.219-29, Notice of Set-Aside for Economically Disadvantaged Women-Owned Small Business (EDWOSB) Concerns (NOV 2011)

52.219-30, Notice of Set-Aside for Women-Owned Small Business Concerns Eligible Under the Women-Owned Small Business Program

# Process for Effective Accomplishment

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## The Acquisition Process and Small Businesses When Using GSA Schedules



## Explanation of Process Steps:

### 1. Conduct market research.

Ordering activities should utilize [GSA Advantage!](#)<sup>®</sup> and [GSA eLibrary](#) to identify small businesses capable of meeting the requirement. Through *Advantage!*<sup>®</sup>, ordering activities can find all contractors who provide the supply/product required and view the socioeconomic status of each contractor. Through *eLibrary*, ordering activities can find all contractors under the Special Item Number (SIN) associated with the required supply or service; ordering activities can then go one step further and filter the list of contractors by any specific socioeconomic category desired.

If a search on *Advantage!*<sup>®</sup> and *eLibrary* does not result in any possible small business sources, ordering activities may also consider issuing a Request for Information (RFI) on [eBuy](#) to determine the capabilities of small businesses in the relevant SINs and to identify small businesses capable of doing the work. An RFI is also a good idea when trying to determine whether your order is eligible for a set-aside (either for small business in general or for one of the small business subtypes listed in FAR 19.000(a)(3)). To do a set-aside, there have to be at least two (2) small business (or two of whatever sub-type the set-aside will be for) Schedule contractors that are capable of doing the work, taking into account the limitations on subcontracting.

After conducting market research, ordering activities should be able to answer the question, “Is a small business capable of doing the work?”

### 2. Set-aside determination

It is at the ordering activity’s discretion whether to set aside an order. This discretion can be exercised once two conditions are met: 1) There must be at least two (2) small business (or whatever subtype the set-aside will be for) Schedule contractors that are capable of doing the work, taking into account the limitations on subcontracting; and 2) Your requirement must meet the small business program eligibility requirements for set-asides. Currently, only the 8(a) and Women-Owned Small Business (WOSB) set-aside programs have eligibility requirements.

In the event that the ordering activity exercises its discretion and the order is eligible for a set-aside, the ordering procedures in FAR 8.405-1 and FAR 8.405-2 need to be followed. This means that for orders above the micro-purchase threshold but below the Simplified Acquisition Threshold (SAT), the ordering activity can either review the price list of three Schedule contractors that are eligible for the set-aside (e.g., small businesses for small business set-aside, HUBZones for HUBZone set-asides) if the order is for supplies or services not requiring an SOW, or send an Request for Quote (RFQ) to at least three Schedule contractors that are eligible for the set-aside for orders that require an SOW. For orders above the SAT, the RFQ needs to be posted on *eBuy* or sent to enough eligible Schedule contractors so that at least

three quotes are received. For set-aside orders, ordering activities should consider using the following language in the RFQ:

This is a notice that this order is a total set aside for [insert either “small business concerns” or specify a type of small business concern]. Only quotes submitted by [insert either “small business concerns” or specify a type of small business concern] will be accepted by the Government. Any quote that is submitted by a contractor that is not [insert either “a small business concern” or specify a type of small business concern] will be immediately rejected.

### **3. A small business is capable of doing the work in its entirety (no setting aside of order).**

If the ordering activity has determined that a small business can meet the whole requirement alone, as long as there is no limitation on subcontracting, it has two options depending on the estimated order value:

For orders above the micro-purchase threshold but below the SAT, the ordering activity can either review the price list of three small business Schedule contractors if the order is for supplies or services not requiring an SOW, or send an RFQ to at least three small business Schedule contractors for orders that require an SOW. The ordering activity can then place an order with the Schedule contractor that represents the best value.

For orders above the SAT, the RFQ needs to be posted on *eBuy* or sent to enough Schedule contractors so that at least three quotes are received. Since posting to *eBuy* will make the RFQ available for viewing by all Schedule contractors awarded the relevant SINs, the ordering activities should designate socioeconomic status as a primary evaluation factor in the RFQ. For additional guidance on how to use socioeconomic status as an evaluation factor, see the sample RFQ language posted on [www.gsa.gov/schedulesandsbgoals](http://www.gsa.gov/schedulesandsbgoals).

### **4. A small business is capable of doing only part of the work on its own.**

If market research reveals that there is no small business that can meet the requirement as a whole, but there are small businesses that can each cover portions of the entire requirement, ordering activities can designate socioeconomic status as a primary evaluation factor and also encourage Contractor Team Arrangements (CTAs) in the RFQ. The RFQ can then be posted on *eBuy*; this will result in all Schedule contractors awarded the relevant SIN(s) to be able to view the document. While posting on *eBuy* will result in the RFQ being viewable by large businesses awarded the relevant SIN(s), designation of socioeconomic status as an evaluation factor and the CTA language in the RFQ will prompt them to find a small business (or businesses) with whom to partner in response to the requirement. Posting on *eBuy* will also ensure that a sufficient number of small businesses (i.e., all those awarded the relevant SIN(s)) have access to the RFQ so that there is a greater probability of receiving responses from CTAs

made up solely of small businesses. For sample RFQ language on evaluating CTAs for the socioeconomic status factor, visit [www.gsa.gov/schedulesandsbgoals](http://www.gsa.gov/schedulesandsbgoals).

#### **5. A small business is not capable of doing any part of the work.**

If market research reveals that the requirement can be met only by "an other than small business," ordering activities can still utilize small business by designating subcontracting to small businesses as a primary evaluation factor. Ordering activities can then post the RFQ to *eBuy*.

#### **6. Evaluate the quotes.**

In any situation, quotes must always be evaluated in accordance with the evaluation factors listed in the RFQ.

#### **7. Report in CPARS contracting performance.**

Ordering activities are required to report on contractor performance in the Contractor Performance Assessment Reporting System (CPARS).

Regardless of whether the BPA/task order was placed with a small business, a CTA, or an other than small business, ordering activities need to report past performance for the contractor in CPARS. Positive past performance will assist the small businesses in being awarded BPAs/orders in the future.

## RFQ Language

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The Contracting Officer should include the following language in the RFQ:

*This is a notice that this [insert either "order" or "Blanket Purchase Agreement"] is a total set aside for [insert either "small business concerns" or specify a type of small business concern]. Only quotes submitted by [insert either "small business concerns" or specify a type of small business concern] will be accepted by the Government. Any quote that is submitted by a contractor that is not [insert either "a small business concern" or specify a type of small business concern] will not be considered for award.*

Note: If using *eBuy* and selecting "set aside," this language will be included in the RFQ automatically.

Include this notice in RFQs when a set-aside is used. It is included automatically when using *eBuy*. It's important that the notice be in a prominent location at the beginning of the document to alert small businesses of the opportunity, but also to notify other than small firms so they do not waste their resources pursuing something for which they do not qualify.

# Set-Aside Schedules and Special Item Numbers (SINs)

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GSA eLibrary GSA Federal Acquisition Service

Search Results Summary  
Search Criteria: **set aside** ←

**Instructions:** Click the source number to view a list of categories. Click the category number (i.e. SIN) to view a list of contractors.

**Description matches**

Source	Description						
23 V	<b>AUTOMOTIVE SUPERSTORE</b> - GSA purchases many types of new vehicles and vehicle related products for government. Alternative fuel vehicles; Ambulances; Buses; Light trucks; Light trucks - vocational; Medium and heavy trucks; Snowplows; Snow Maintenance Equipment (Vehicle Mounting) - limited to: Snowplows, salt/sand spreaders. When using this schedule, you can access vendors directly to place an order for vehicles or accessories or you can get information on these options is available through our CARS line at 703-605-CARS (2277). The following vehicles and accessories are available: Alternative Fuel Vehicles; Ambulances; Buses; Light Trucks; Light Trucks - Vocational; Medium and Heavy Trucks; Snowplows; Snow Maintenance Equipment (Vehicle Mounting) - limited to: Snowplows, salt/sand spreaders. When using this schedule, you can access vendors directly to place an order for vehicles or accessories or you can get information on these options is available through our CARS line at 703-605-CARS (2277). The following vehicles and accessories are available: Alternative Fuel Vehicles; Ambulances; Buses; Light Trucks; Light Trucks - Vocational; Medium and Heavy Trucks; Snowplows; Snow Maintenance Equipment (Vehicle Mounting) - limited to: Snowplows, salt/sand spreaders. <table border="1"><thead><tr><th>Category</th><th>Description</th></tr></thead><tbody><tr><td><b>271 102</b></td><td><b>Snow Maintenance Equipment (Vehicle Mounting) - limited to: Snowplows, salt/sand spreaders (Set-Aside)</b></td></tr></tbody></table>	Category	Description	<b>271 102</b>	<b>Snow Maintenance Equipment (Vehicle Mounting) - limited to: Snowplows, salt/sand spreaders (Set-Aside)</b>		
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36	<b>THE OFFICE, IMAGING AND DOCUMENT SOLUTION</b> <table border="1"><thead><tr><th>Category</th><th>Description</th></tr></thead><tbody><tr><td><b>20 220</b></td><td><b>Projection Screen, Stand, Printer (Enlarger), Systems</b> - Includes projection screens for all types of projectors (portable, manual wall ceiling, or electronic wall or ceiling, or wall mount, tripod, theatre video) without electrical outlets, folding or non-folding, may be self-leveling. Projection printers (portable, desktop) are designed for, and used specifically with, all types of projectors listed herein. The projection system that delivers film-quality image and digital surround sound. This SIN also includes supplies (SET ASIDE FOR SMALL BUSINESS; MAS EXPRESS)</td></tr><tr><td><b>47 147</b></td><td><b>Security Applications for Business Machines</b> - Includes security applications for office equipment (copiers, fax machines, TV and VCR, calculators, copiers, medical equipment, cash registers, printers, typewriters, etc.) audio/visual. This equipment is to be secured within any environment to deter unlawful removal.</td></tr></tbody></table>	Category	Description	<b>20 220</b>	<b>Projection Screen, Stand, Printer (Enlarger), Systems</b> - Includes projection screens for all types of projectors (portable, manual wall ceiling, or electronic wall or ceiling, or wall mount, tripod, theatre video) without electrical outlets, folding or non-folding, may be self-leveling. Projection printers (portable, desktop) are designed for, and used specifically with, all types of projectors listed herein. The projection system that delivers film-quality image and digital surround sound. This SIN also includes supplies (SET ASIDE FOR SMALL BUSINESS; MAS EXPRESS)	<b>47 147</b>	<b>Security Applications for Business Machines</b> - Includes security applications for office equipment (copiers, fax machines, TV and VCR, calculators, copiers, medical equipment, cash registers, printers, typewriters, etc.) audio/visual. This equipment is to be secured within any environment to deter unlawful removal.
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One Schedule and certain categories (SINs) within other Schedules have been set aside for small businesses. For example, Schedule 736, Temporary and Administrative Staffing, has been set aside in its entirety, and only small business firms receive contracts under this Schedule.

For more information, see <https://interact.gsa.gov/blog/set-aside-orders-small-business>.

## Topic 5: GSA's Role and MAS

### Implementation Support – Training

(slide)

- ❑ Training provided to customer agencies
- ❑ Courseware in either Instructor-Led, Webinar, or CLM formats
- ❑ Other training outlets:
  - YouTube
  - Interact
  - FAQ/Portal

**The training that GSA provides is increasingly easy to obtain.** Sources like Interact and the FAQs on the [gsa.gov/schedules](https://gsa.gov/schedules) portal allow ordering activities to take training in real time before placing orders. These resources also provide ready answers to questions.

## Implementation Support – System Updates

(slide)

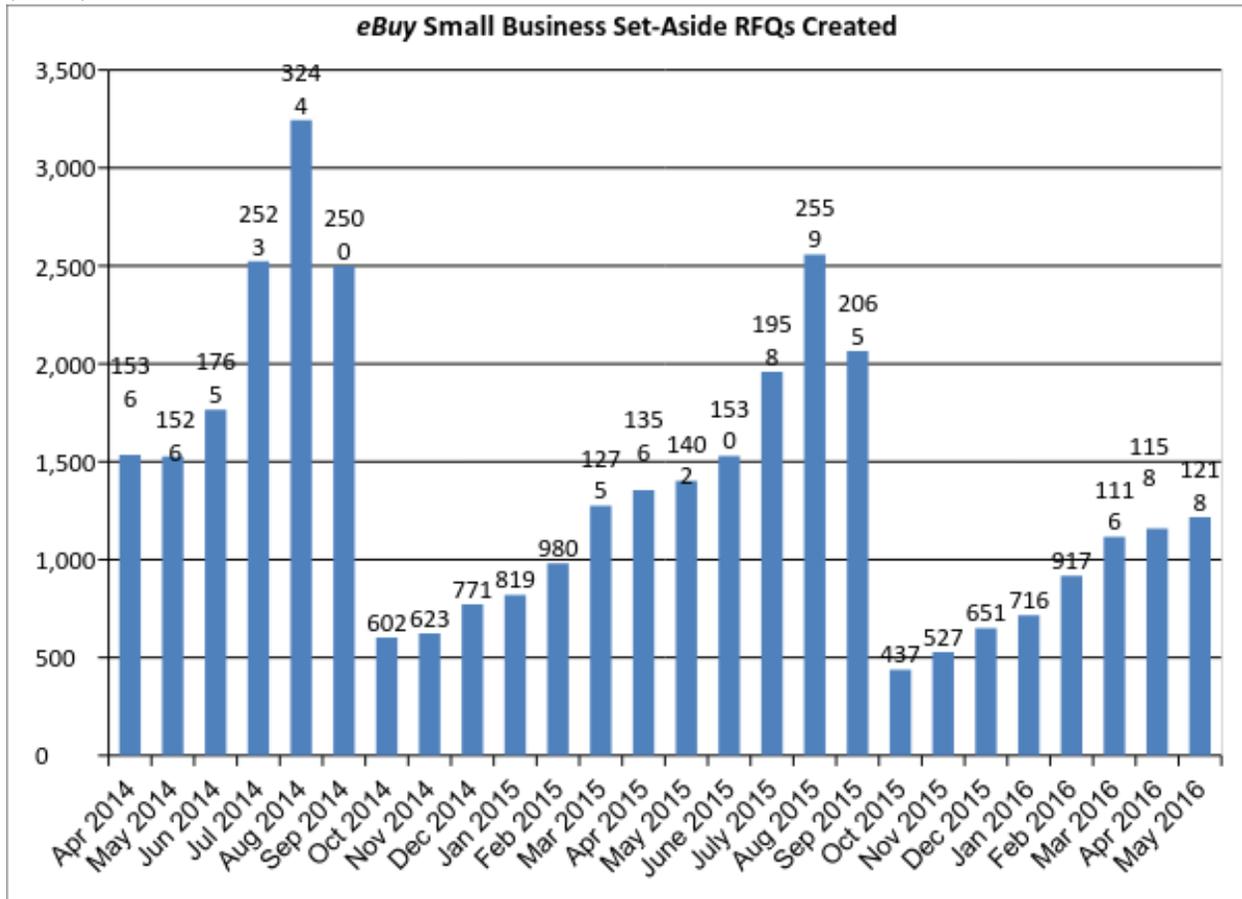
Upgrades to *eBuy* (MAS RFQ system) effective April 2012:

- Customers can now identify their RFQs as a set-aside.
- Functionality provides valuable data on the use of Section 1331 of the Small Business Jobs Act (SBJA).
- It is the only acquisition system in Government – until recently - that captures this data.

The *eBuy* upgrade now allows ordering activities to conduct set-asides electronically. This means less work and a more effective means of achieving socioeconomic goals.

## Set-Aside RFQs in eBuy

(slide)

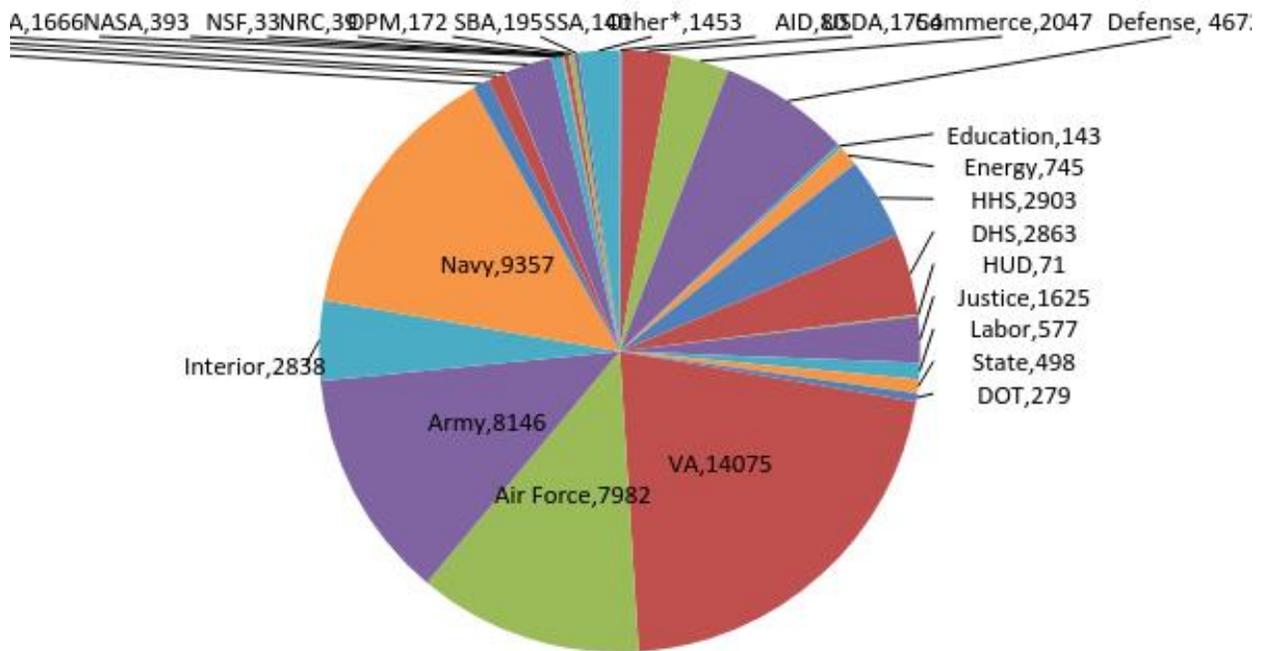


The bar graph illustrates the monthly amount of set-aside RFQs in eBuy.

## Set-Aside RFQs in eBuy, Cont.

(slide)

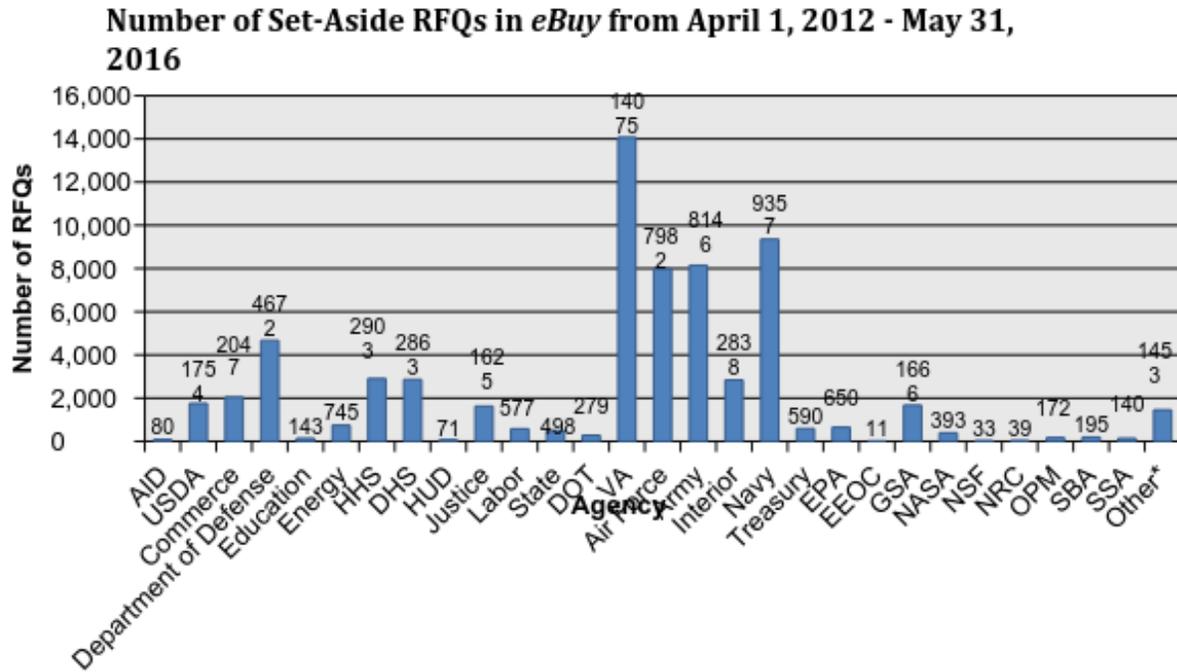
### Number of Set-Aside RFQs in eBuy from April 1, 2012 – May 31, 2016



This pie chart, which covers the same period as the previous graphic, shows the actual number of set-aside RFQs in eBuy, broken down by Federal agency.

# Set-Aside Utilization

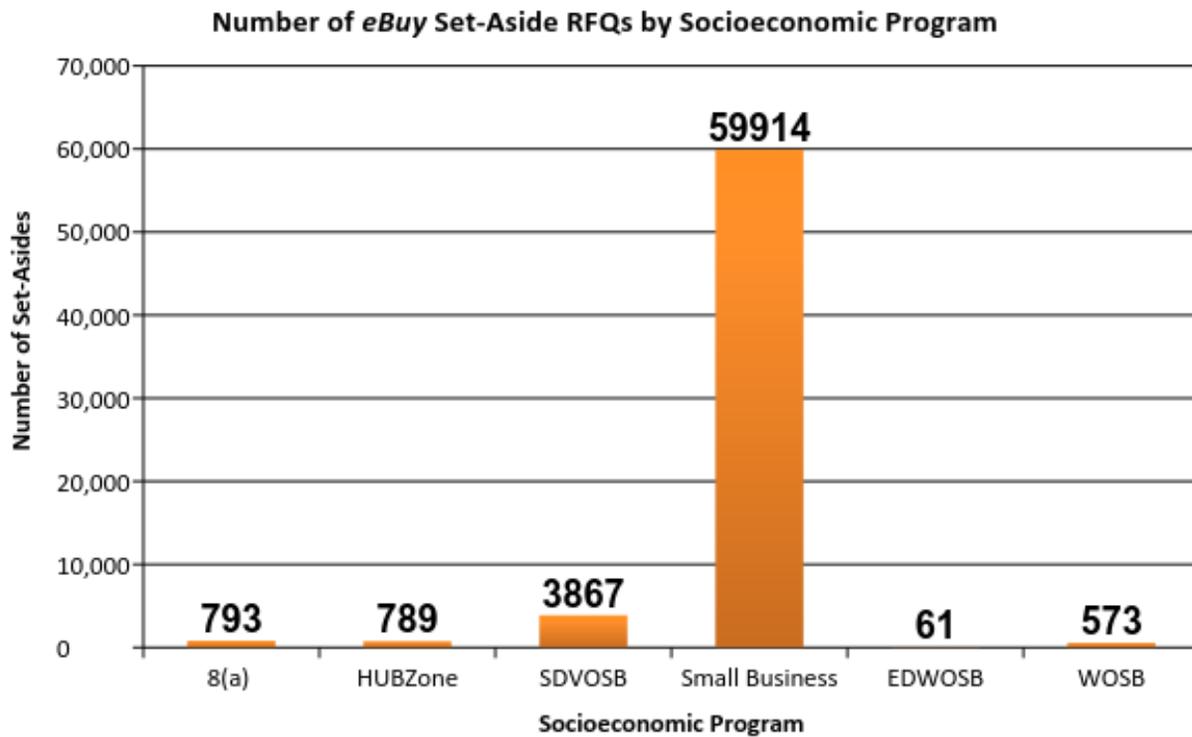
(slide)



This chart depicts the amount of eBuy set-aside utilization by agency.

## Set-Aside by Program

(slide)



This chart shows the number of set-aside RFQs in *eBuy*, broken down by socioeconomic program.

## Topic 6: Identifying Small Businesses

### Market Research

(slide)

- ❑ Market research is the key to achieving small business objectives.
- ❑ Use market research to ensure at least three small businesses can meet the need in order to meet ordering procedure requirements.
- ❑ FAR Part 7 and Subpart 8.4 require acquisition planning and market research prior to placing orders against Schedules.
- ❑ Two commonly used approaches to market research are:
  - Identify small businesses through *eLibrary*
  - Issue an RFI through *eBuy* to determine market capabilities
- ❑ The outcome of market research determines the acquisition strategy, both in terms of how to acquire goods and services and in how they are described to enable maximum competition.

FAR Part 10 describes market research requirements. All acquisitions over the Simplified Acquisition Threshold (SAT) **require** market research, but some level of market research should be performed on all acquisitions over the micro-purchase threshold. Agency policies and procedures will prescribe the documentation requirements for acquisitions under the SAT.

The GSA *Advantage!* web pages facilitate market research. Use the *eLibrary* tab and a key word or NAICS code to find out whether small businesses capable of performing the required tasks are on Schedule. If there are enough contractors in the same socioeconomic category , consider setting aside the acquisition.

# GSA Advantage!®

(slide)

GSA Advantage! can help find supplies (products) through the price comparison option. By using the column entitled “Socio” the ordering activity can view the socioeconomic status of each contract.

**PENCIL,MECH, PENCIL, 0,SS**

Mfr Part No.: 54310  
 Contractor Part No.: ZEB54310  
 UPC/ISBN/GTIN: 045888543102  
 Manufacturer: Zebra Pen Corporation  
 Contract No.: GS-14F-0039L (ends: Apr 16, 2016)  
 MAS Schedule/SIN: 75/75 200  
 Warranty: 30 DA  
 Made In: JAPAN

Disaster Recovery Purchasing Items

Additional Description  
 Zebra Pen M-301 Mechanical Pencil - Lead Size: 0.7mm - Barrel Color: Black - 1 Each

Compare Available Sources

Quantity:   Instructions: Select price below, enter qty at left, then Add to Cart. To view another contractor description, simply select the Contractor in the list below. @Indicates when volume discounts are offered.

**Top 40:**

Price/Unit	Features	Contractor	Socio	Photo	Deliv Days	Min	FOB/Shipping
\$1.44 EA 1	◆	WECsys LLC	s d	----	4 days delivered ARO	\$50.00	D-CONUS/O-AK,PR,HI
\$1.44 EA 1	BPA	WECsys LLC	s d	----	3-4 days delivered ARO	\$50.00	D-CONUS/O-AK,PR,HI
\$1.47 EA	◆ ◆	COMPLETE PACKAGING AND SHIPPING SUP	s	----	5 days delivered ARO	\$100.00	D-CONUS/O-AK,PR,HI

Ordering activities can utilize GSA Advantage! to find supplies through the price comparison option. By selecting the product number, ordering activities can view all contractors who provide that product. Then by using the column entitled “Socio,” the ordering activity can view the socioeconomic status of each contractor. See [www.gsaadvantage.gov](http://www.gsaadvantage.gov).

# eLibrary (slide)

GSA eLibrary can assist with locating Schedule contractors and their socioeconomic status by using the Socioeconomic column.

The screenshot shows the GSA eLibrary interface. At the top, there is a navigation bar with links for Home, eBuy - quotes, GSA Advantage - online shopping, and Help. A search bar is located on the right. Below the navigation bar, the page title is "Schedule Details" for "70 GENERAL PURPOSE COMMERCIAL INFORMATION TECHNOLOGY EQUIPMENT, SOFTWARE, AND SERVICES". The main content area displays a list of contractors for "Leasing of Products - SUBJECT TO COOPERATIVE PURCHASING". A red circle highlights the "Socio-Economic" column in the contractor list table.

Contractor	Contract #	Phone	(Sort by) City, State	Socio-Economic	Contract Terms Conditions	View Catalog
ACADEMY PARTNERS, INC.	GS-35F-0136V	(619)475-1527	BOHNET, VA	s/dv		
AT&T CORP.	GS-35F-02493	(703)506-5103	OAKTON, VA	o		
BUSHTEK, INC.	GS-35F-0546R	(480)471-6688	GILBERT, AZ	s/w		
CARAHOSFT TECHNOLOGY CORPORATION	GS-35F-0121R	(703)871-8500	RESTON, VA	s		
CAS SEVERN, INC.	GS-35F-0380V	(301)776-3400	LAUREL, MD	s		
CITYROOTS INC	GS-35F-0180S	(661)588-0639	BAKERSFIELD, CA	s/d/w/Ba		
COMM-WORKS/FORTRAN, LLC	GS-35F-0124L	(800)394-4444	CHANTILLY, VA	o		
...	...	...	...	...	...	...

Ordering activities can utilize GSA eLibrary to assist with finding Schedule contractors and their socioeconomic status. By going to eLibrary, the ordering activity can look up a specific contractor or a list of contractors by the Special Item Number (SIN) associated with the supply or service they are ordering.

By clicking on the specific SIN, the ordering activity can view all contractors available. The ordering activity can then utilize the Socioeconomic column to find contractors within the appropriate small business program. They can also filter the display by the socioeconomic category that is relevant to this purchase. See [www.gsaelibrary.gsa.gov](http://www.gsaelibrary.gsa.gov).

Step 1. Assign Category & Select Vendors

**Instructions:** Listed below are vendors who currently have contracts under the Category you selected. Place a "check" next to the vendors whom you would like to quote on your RFQ. The vendors you select will receive an e-mail notice inviting them to quote on your requirements. You may request a quote from any or all vendors listed. In order to satisfy FAR requirements, you should request quote from at least three (3) vendors (if available). Remember, vendors are not required to submit a quote.  
**Reminder:** Other vendors listed under this category may view and quote on the RFQ even if they have not been selected to receive an email invitation. In the event of a set-aside, ALL eligible vendors must be able to view the RFQ.

874 MISCELLANEOUS BUSINESS INTEGRATED SERVICES (MOBIS)

Category:

874 4 Training Services: Instructor Led Training, Web Based Training and Education Courses, Course Development and Test Administration Learning Management, Internships

727 contractors are available.

Select all vendors

Is this a small business set-aside?  
 If small business set-aside, select small business program

\* If this is a small business set-aside, you must select the small business program from the drop-down

Display:

Note: Hold the 'Ctrl' key to select all that apply. This allows sorting for selection/invitation purposes only. It does not prevent unselected vendors from submitting quotes.

Vendor	City, State	Socio-economic	Text File	Web page
<input type="checkbox"/> 1ST CHOICE, LLC	BALTIMORE, MD	Small Business SBA Certified Small Disadvantaged Business	<input type="button" value="Text File"/>	<input type="button" value="Web page"/>
<input type="checkbox"/> 22ND CENTURY TECHNOLOGIES INC.	SOMERSET, NJ	Women Owned business SBA Certified (s) Firm	<input type="button" value="Text File"/>	<input type="button" value="Web page"/>
<input type="checkbox"/> 3D FITNESS, INC.	PATERSON, NJ	Other than Small Business	<input type="button" value="Text File"/>	<input type="button" value="Web page"/>
<input type="checkbox"/> A-T SOLUTIONS, INC.	FREDERICKSBURG, VA	Small Business Women Owned business SBA Certified HUBZone Firm	<input type="button" value="Text File"/>	<input type="button" value="Web page"/>
<input type="checkbox"/> A76 INSTITUTE LLC	SILVER SPRING, MD	Other than Small Business	<input type="button" value="Text File"/>	<input type="button" value="Web page"/>
<input type="checkbox"/> ABRAXAS CORPORATION	HERNDON, VA	Small Business	<input type="button" value="Text File"/>	<input type="button" value="Web page"/>
<input type="checkbox"/> ACADEMY OF SOUTH FLORIDA, INC., THE	MIAMI, FL	Other than Small Business	<input type="button" value="Text File"/>	<input type="button" value="Web page"/>
<input type="checkbox"/> ACADEMYWOMEN	LOS GATOS, CA	Other than Small Business	<input type="button" value="Text File"/>	<input type="button" value="Web page"/>

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**Reminder:** Other vendors listed under this category may view and quote on the RFQ even if they have not been selected to receive an email invitation. In the event of a set-aside, ALL eligible vendors must be able to view the RFQ.

874 MISCELLANEOUS BUSINESS INTEGRATED SERVICES (MOBIS)

Category:

874 4 Training Services: Instructor Led Training, Web Based Training and Education Courses, Course Development and Test Administration Learning Management, Internships

487 contractors are available.

Select all vendors

You have indicated this is a Small Business set-aside. The following vendors will be notified. Click here to change/remove the set-aside business indicator that you have selected.

Vendor	City, State	Socio-economic	Text File	Web page
<input type="checkbox"/> 1ST CHOICE, LLC	BALTIMORE, MD	Small Business SBA Certified Small Disadvantaged Business	<input type="button" value="Text File"/>	<input type="button" value="Web page"/>
<input type="checkbox"/> 3D FITNESS, INC.	PATERSON, NJ	Women Owned business SBA Certified (s) Firm	<input type="button" value="Text File"/>	<input type="button" value="Web page"/>
<input type="checkbox"/> A76 INSTITUTE LLC	SILVER SPRING, MD	Small Business	<input type="button" value="Text File"/>	<input type="button" value="Web page"/>
<input type="checkbox"/> ACCLARO RESEARCH SOLUTIONS, INC.	BALTIMORE, MD	Small Business SBA Certified Small Disadvantaged Business	<input type="button" value="Text File"/>	<input type="button" value="Web page"/>
<input type="checkbox"/> ACTION TRAINING SYSTEMS, INC	POULSBORO, WA	Women Owned business SBA Certified (s) Firm	<input type="button" value="Text File"/>	<input type="button" value="Web page"/>
<input type="checkbox"/> ACUITY CONSULTING, INC.	ALEXANDRIA, VA	Small Business Veteran Owned Small Business	<input type="button" value="Text File"/>	<input type="button" value="Web page"/>
<input type="checkbox"/> ADELIS, NANCY DBA: ADELIS DEVELOPMENT SYSTEMS	SOUTHPORT, NC	Small Business	<input type="button" value="Text File"/>	<input type="button" value="Web page"/>
<input type="checkbox"/> ADOA EXPERTS INC	BEAVERDAM, VA	Small Business Women Owned business	<input type="button" value="Text File"/>	<input type="button" value="Web page"/>
<input type="checkbox"/> ADRIAN TECHNOLOGIES INCORPORATED	TANNER, AL	Small Business SBA Certified HUBZone Firm	<input type="button" value="Text File"/>	<input type="button" value="Web page"/>

### Step 1. Assign Category & Select Vendors

**Instructions:** Listed below are vendors who currently have contracts under the Category you selected. Place a "check" next to the vendors whom you would like to quote on your RFQ. The vendors you select will receive an e-mail notice inviting them to quote on your requirements. You may request a quote from any or all vendors listed. In order to satisfy FAR requirements, you should request quotes from at least three (3) vendors (if available). Remember, vendors are not required to submit a quote.  
**Reminder:** Other vendors listed under this category may view and quote on the RFQ even if they have not been selected to receive an email invitation. In the event of a set-aside, ALL eligible vendors must be able to view the RFQ.

874 MI... ORIENTED BUSINESS INTEGRATED SERVICES (MOBIS)

Category: Training Services: Instructor Led Training, Web Based Training and Education Courses, Course Development and Test Administration Learning Management, Internships

43 contractors are available. Submit

Select all vendors You have indicated this is a Women Owned (WOSB) set-aside. The following vendors will be notified. Click here to change/remove the set-aside business indicator that you have selected.

Vendor	City, State	Socio-economic	Text File	Well pag
<input type="checkbox"/> 3D FITNESS, INC.	PATERSON, NJ	Small Business Women Owned business SBA Certified HUBZone Firm Woman Owned (WOSB)		
<input type="checkbox"/> ADVANCED CONCEPTS ENTERPRISES, INC.	SHALINAR, FL	Small Business Women Owned business Service Disabled Veteran Owned Small Business Woman Owned (WOSB)		
<input type="checkbox"/> AGILE-GROUP, LLC, THE	ALBUQUERQUE, NM	Small Business SBA Certified Small Disadvantaged Business Women Owned business SBA Certified 8(a) Firm Woman Owned (WOSB)		
<input type="checkbox"/> ALLIED CONTAINER SYSTEMS, INCORPORATED	WALNUT CREEK, CA	Small Business Women Owned business Woman Owned (WOSB)		
<input type="checkbox"/> AMTIS, INC.	ORLANDO, FL	Small Business SBA Certified Small Disadvantaged Business Women Owned business Service Disabled Veteran Owned Small Business SBA Certified 8(a) Firm Woman Owned (WOSB) Woman Owned (EDWOSB)		
<input type="checkbox"/> BARBARA JOHNSON AND ASSOCIATES, LLC	HERNDON, VA	Small Business Woman Owned business		

Ordering activities can choose specific vendors to notify when posting an RFQ. Part of the RFQ posting process on eBuy involves selecting the relevant Schedule(s) and SIN(s). All orders over the SAT require the development of an RFQ, which must be posted on eBuy or sent to as many Schedule contractors as practicable to ensure that three quotes are received.

After choosing the appropriate scope, ordering activities can select specific vendors who will receive email notices inviting them to quote on their requirement. Note that all vendors awarded the selected Schedule(s) and SIN(s) will be able to view the RFQ and submit a quote.

*From GSA website:* eBuy is an online Request for Quotation (RFQ) tool designed to facilitate the request for submission of quotations for a wide range of commercial supplies and services offered by GSA Schedule contractors who are on GSA Advantage!®.

eBuy allows Federal, state, and local government agencies (buyers) to maximize their buying power by leveraging the power of the internet to increase Schedule contractor participation. This results in obtaining quotations that will promote a best value purchase decision. eBuy provides Schedule contractors (sellers) with greater opportunities to offer quotations and increase business volume for supplies and services provided under their Schedule contracts.

eBuy streamlines the buying process with point-and-click functionality by allowing RFQs and responses to be exchanged electronically between agencies and GSA Schedule contractors.

*eBuy* provides both agencies and contractors with a tool that will result in savings of both time and money.

# Knowledge Checks



## Knowledge Check 1

Can you set aside orders and BPAs under Schedule contracts?

**Answer:**



## Knowledge Check 2

May an agency set aside Schedule orders and/or BPAs for any of the socioeconomic programs (e.g., 8(a), service-disabled veteran-owned, women-owned, and HUBZone small business concerns)?

**Answer:**



## Knowledge Check 3

Are there any circumstances in which COs are *required* to use set-asides?

**Answer:**

 **Knowledge Check 4**

If an agency can find only two small businesses, can it still do a set-aside?

**Answer:**

 **Knowledge Check 5**

What steps must an agency take to set aside an order under the Schedules program?

**Answer:**

 **Knowledge Check 6**

What is meant by the “program eligibility requirements”?

**Answer:**

 **Knowledge Check 7**

Can socioeconomic status still be used as an evaluation factor as opposed to set-asides?

**Answer:**

## Web Resources

- ❖ FAQs about Set-Asides on Schedules
  - [www.gsa.gov/portal/content/113371](http://www.gsa.gov/portal/content/113371)
  - [www.gsa.gov/schedulesandsbgoals](http://www.gsa.gov/schedulesandsbgoals)
- ❖ MAS Training Student Guides <https://www.gsa.gov/portal/content/141427>
- ❖ MAS Desk Reference [www.gsa.gov/masdeskreference](http://www.gsa.gov/masdeskreference)
- ❖ Multiple Award Schedules [www.gsa.gov/schedules](http://www.gsa.gov/schedules)
- ❖ eLibrary [www.gsaelibrary.gsa.gov](http://www.gsaelibrary.gsa.gov)
- ❖ GSA Advantage! [www.gsaadvantage.gov](http://www.gsaadvantage.gov)
- ❖ eBuy [www.ebuy.gsa.gov](http://www.ebuy.gsa.gov)
- ❖ Common Acquisition Platform (CAP) <https://hallways.cap.gsa.gov>
- ❖ Contract Awarded Labor Category <https://calc.gsa.gov/>
- ❖ MAS News [www.gsa.gov/masnews](http://www.gsa.gov/masnews)
- ❖ Federal Acquisition Regulation (FAR) [www.acquisition.gov/far](http://www.acquisition.gov/far)
- ❖ NAICS Codes are at <http://www.census.gov/eos/www/naics/>
- ❖ SBA's Table of Size Standards  
[http://www.sba.gov/idc/groups/public/documents/sba\\_homepage/serv\\_sstd\\_tablepdf.pdf](http://www.sba.gov/idc/groups/public/documents/sba_homepage/serv_sstd_tablepdf.pdf)
- ❖ Monthly Webinars sponsored by the MAS Program Office [www.gsa.gov/masnews](http://www.gsa.gov/masnews)
- ❖ Training Videos <http://www.gsa.gov/portal/content/210517>
- ❖ Defense Acquisition University <http://icatalog.dau.mil/> Search for continuous learning modules with FAC prefix.