

### SMALL BUSINESS ANALYSIS RECORD

**Contracting Officer's preferred procurement method**

*Items 1-9, New Acquisition Details - To be completed by the Contracting Officer*

1a. Contracting Officer (Last, First, Middle Initial)	1b. Office Symbol	1c. E-Mail/Telephone Number
2. Office/Organization	3. Project/Requisitioner Name (if applicable)	4. Project(s)/Requisition(s) Number
5. Description of Product(s) or Service(s), including place of performance		
6a. Federal Supply Class/Product Service Code	6b. NAICS Code	7. GSA Funded? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Partial
8a. Estimated Dollar Value Base Period		
8b. Total Estimated Dollar Value Including Options		
8c. Estimated Dollar Value Set-Aside		
8d. Estimated Dollar Value Not Set-Aside		
9. Period of Performance/Delivery Date Base Period for the contract      From _____ To _____ Option Periods _____ From _____ To _____		

**Item 10 to be completed by the Contracting Officer. Item 11 to be completed by the Supervisory Official. Item 12 to be completed by the SBTA. Item 13 to be completed by the SBA PCR. Item 14 to be completed by the AA OSBU, as applicable.**

10a. Name of Contracting Officer	11a. Name of Supervisory Official
10b. Signature of Contracting Officer and Date	11b. Concurrence by Supervisory Official and Date
12a. Small Business Technical Advisor (SBTA) (Check One) <input type="checkbox"/> Concur <input type="checkbox"/> Non-concur <input type="checkbox"/> Additional Sources	12b. SBTA Reviewer Name
	12c. SBTA Signature
	12d. Date
12e. SBTA's rationale/additional sources provided for the Contracting Officer's consideration	
13a. Small Business Administration (SBA) Procurement Center Representative (PCR) (Check One) <input type="checkbox"/> Concur <input type="checkbox"/> Non-concur <input type="checkbox"/> Additional Sources	13b. SBA PCR Reviewer Name
	13c. SBA PCR Signature
	13d. Date
13e. SBA PCR's rationale/additional sources provided for the Contracting Officer's consideration	
14a. Associate Administrator of the Office of Small Business Utilization (AA OSBU) (Check One) <input type="checkbox"/> Concur <input type="checkbox"/> Non-concur	14b. AA OSBU Reviewer Name
	14c. AA OSBU Signature
	14d. Date
14e. AA OSBU's rationale provided for the Contracting Officer	

**Items 15 - 17, Acquisition History - To be completed by the Contracting Officer**

15. First Time Buy  YES  NO \*\*\* If YES, skip to 18.

16. Were there multiple previous acquisitions?  YES - Attach separate supporting documentation for 17a-i.  
(Include up to the 3 most recent award histories.)  
 NO - Complete 17a-i on the form.

17a. NAICS Code | 17b. Small Business Size Standard (visit [www.sba.gov](http://www.sba.gov) for size standard)

Number of Employees

Average Annual Receipts

17c. Previous Contract/Delivery or Task Order Number

17d. Award Date

17e. Total Award Amount

17f. Contractor Name & Address

17g. Contractor Size/Preference Status at Award

17h. Total Number of Offerors (if known) \_\_\_\_\_ and Business Size Status (check below)

Other Than Small \_\_\_\_\_ SB \_\_\_\_\_ HUBZone \_\_\_\_\_ SDB \_\_\_\_\_ 8(a) \_\_\_\_\_ WOSB \_\_\_\_\_ EDWOSB \_\_\_\_\_ SDVOSB \_\_\_\_\_

17i. Comments

**Items 18-27, Proposed Acquisition Method, Justifications and Considerations - To be completed by the Contracting Officer**

18a. Is this procurement a sole source or limited source acquisition? (FAR 6.3, 8.4, 16.5)  YES  NO

Note: If "Yes", attach the approved sole-source or limited source justification, complete item 18b, and submit the form without proceeding further. If "No", proceed to item 19.

18b. Sole source or limited source business information:  Other than SB  SB  8(a)  HUBZone  SDVOSB  WOSB  EDWOSB  
(check all that apply)

19. Will this procurement be solicited off of a pre-existing contract vehicle?  YES  NO

If "Yes," identify the contract name or number: \_\_\_\_\_

Note: GSA employees are required to use existing acquisition vehicles (unless an exception is applicable) before establishing new contracts for similar products or services ([Acquisition Alert 2014-07](#) and GSA memo dated October 11, 2012).

20. Acquisition Authority: FAR Part \_\_\_\_\_ (FAR 8.4, 13, 14, 15, or 16.5) 21. Is a synopsis required?  YES  NO  
(Exceptions see FAR Subpart 5.202)

22. Multiple Item Acquisition (product/supplies only)  YES  NO

Note: If "Yes," complete items 23a-c for each acquisition item as a separate attachment. If "No," complete item 23 on this form.

23. **Prioritized Small Business Consideration:** (reference FAR 19.203)

a. First, will this procurement be considered for a socioeconomic program set-aside?  YES  NO

If "Yes," identify the type of set-aside:  8(a)  HUBZone  SDVOSB  WOSB  EDWOSB

If your procurement is consolidation and you set aside for a socioeconomic program, the GSA 2689 is required and skip to item 27. If your procurement is not consolidation and you set aside for a socioeconomic program, this form is not required but may be used as a memo to the file to document market research.

b. Second, if "No" to 23a, then will this procurement be considered for a small business set aside?  YES  NO

If "Yes," identify the type of set-aside:  Total SB set-aside  Partial SB set-aside

c. Third, if "No" to 23b, then the procurement will not be set aside.  Correct  Incorrect

24. After consideration of the following source selection factors, will any be used in the source selection evaluation plan?

If "No," explain why in the supporting documentation.

a. Socioeconomic Status (See 15 USC 644(g))  YES  NO

b. Subcontracting Plan (See GSAM 519.7 for reference)  YES  NO

c. Mentor Protégé  YES  NO

d. Small Business Teaming Arrangements or Joint Ventures (See FAR 7.107-6)  YES  NO

25.  Market Research Conducted to Support Selected Method

Attach additional documentation supporting determination in accordance with GSAM 519.502-70, FAR 7.105, and FAR 10.001.

26. Justifications for non-set-aside determination (check all that apply)

No reasonable expectation that offers will be received from at least two responsible 8(a), HUBZone, SDVOSB, WOSB, or EDWOSB that are competitive in terms of fair market prices, quality, and delivery.

No reasonable expectation that offers will be received from at least two or responsible small business concerns that are competitive in terms of fair market prices, quality, and delivery.

No reasonable expectation that offers will be received from at least two 8(a), HUBZone, SDVOSB, WOSB, or EDWOSB offering on the product of different small business manufacturers (See FAR 19.102(f) and 19.502).

No reasonable expectation that offers will be received from at least two small business concerns offering on the product of different small business manufacturers (See FAR 19.102(f) and 19.502).

Item on a Qualified Products List (QPL)/Qualified Products Database (QPD) and large businesses are interested in offering (See FAR 19.502-6).

Other (Attach supporting documentation)

27. Contract Consolidation, Bundling, or Substantial Bundling Review

YES  NO Does the procurement meet the definition of a consolidated, bundled, or substantially bundled contract? (See FAR 2.101 and 7.107-4) \*\*\*If "Yes," attach the approved determination. (See GSAM 507.107-1) If "No," then the form is complete.

YES  NO For consolidated, bundled, or substantially bundled contracts, is this form being submitted at least 30 days in advance of your planned solicitation date? (See FAR 19.202-1(e)(1)(iii) and GSAM 519.202-1)

YES  NO  N/A For bundled or substantially bundled contracts, was the affected small business incumbent notified of the Government's intention to bundle the requirement performed at least 30 days in advance of the solicitation? (See FAR 7.107-5(a))

## INSTRUCTIONS FOR GSA 2689, SMALL BUSINESS ANALYSIS RECORD

The General Services Administration Acquisition Manual (GSAM) subsection [519.502-70](#), *Review of non-set-aside determinations*, prescribes the requirement for when to complete the GSA 2689. Specifically use the table in subsection (g) to help determine whether the form is applicable to the procurement. Execution of the GSA small business program requires coordination and participation from all members of the acquisition team. Therefore, the appropriate acquisition personnel shall complete this form [e.g. Contracting Officer, and the Small Business Technical Advisor (SBTA) and the Small Business Administration Procurement Center Representative (SBA PCR)]. This form is utilized to record evidence that consideration has been given to small business (SB), service-disabled veteran-owned small business (SDVOSB), Historically Underutilized Business Zone (HUBZone) small business, women-owned small business (WOSB), and 8(a) Business Development Program Participants. The form also documents that small businesses received maximum practicable opportunity to participate in a proposed acquisition; including instances of contract consolidation, bundling, and substantial bundling. The form may be used in place of a "Memo to File" when documenting market research if appropriate.

### Form Instructions

1. The following instruction prescribes how to complete each item on the GSA 2689 and what additional documentation must be submitted with the form:

**Items 1-9:** Fill in as required.

**Items 10-14:** Signatures required before the next level of review.

**Items 15-17:** Fill in as required.

**Item 18:** Fill in as required. If sole source or limited source is selected, attach the approved justification required pursuant to FAR 6.302, 8.405-6, or 16.505.

**Item 19:** Identify if the procurement will be solicited of a pre-existing vehicle. Pre-existing contract vehicles include Multiple Award Schedule (MAS) or MAS Blanket Purchase Agreement (BPA), Multi-Agency Contract (MAC), Government-Wide Acquisition Contract (GWAC), and Multiple Award Indefinite Delivery Indefinite Quantity (IDIQ) Contracts.

**Item 20:** Enter in the acquisition authority being used for the procurement (i.e. FAR Part 8.4, 13, 14, 15, or 16.5)

**Item 21:** Identify if a synopsis is required. See FAR 5.2 for exceptions to the synopsis requirement.

**Item 22:** Multiple item acquisitions, which are not bundling, combine related items under one solicitation and make awards either on an item-by-item basis, or an all-or-none basis, to one or more sources. For multiple item acquisitions, set-aside determinations must be determined on an individual basis if item-by-item award basis and as a whole if under an all-or-none basis. "Items" may be called a National Stock Number (NSN), Contract Line Item Number (CLIN), Special Item Number (SIN), Functional Area (FA), or Pool.

**Item 23:** After proper market research, indicate if the procurement will be considered for a socioeconomic program set-aside (e.g. 8(a), HUBZone, SDVOSB, WOSB, EDWOSB). If the procurement will not be set aside for a socioeconomic program, indicate if the procurement will be considered for a small business set-aside. A small business set-aside can be a partial set-aside or a full set-aside. If the procurement will not be set aside for small business, then verify by selecting "correct" or "incorrect." Note: if the procurement is a consolidation, the GSA 2689 is required even if the procurement will be set aside for a socioeconomic program.

**Item 24:** Identify whether consideration was given to the source selection factors listed. Address in your supporting documentation and Acquisition Plan the source selection evaluation factors that will be used and indicate on the form whether consideration was given to Subcontracting Plan and/or Mentor Protégé involvement as an evaluation factor. Also indicate whether socioeconomic status will be considered in order to help achieve/exceed GSA's socioeconomic goals established in accordance with the Small Business Act (15 USC 644(g)).

**Item 25:** Attach market research conducted to support determination in accordance with GSAM 519.502-70, FAR 7.105, and FAR 10.001 (e.g. Sources sought notice and responses, Dynamic Small Business Search results).

**Item 26:** Select reason(s) for not setting aside for a socioeconomic program (e.g. 8(a), HUBZone, SDVOSB, WOSB, EDWOSB) or small business (FAR 19.203(c)).

**Item 27:** Complete Contract Consolidation, Bundling, and Substantial Bundling Review and attach the approved written determination required pursuant to FAR 7.107 and GSAM 507.107. For construction IDIQs being established in accordance with GSAM 507.107-1(a)(2)(ii), the CO shall submit supporting documentation to support the determination.

2. The level of concurrence and standard timeframes for completion are listed at GSAM 519.502-70(h)).

3. The completed and approved GSA 2689 shall be placed in the contract file as required.