

# IEEE-USA hosts the UTSA PTAC: Understanding Government Markets & Avoiding Common Mistakes

*Presented by:*

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**Regional Program Manager**

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*About:*

**The University of Texas at  
San Antonio (UTSA)**

**Procurement Technical  
Assistance Center (PTAC)**

# PTAC - Who we are!



The Procurement Technical Assistance Center (PTAC) is a specialty center of the UTSA (IED) assisting ***small*** and ***large*** businesses with no cost advising, training and networking with local, state, federal and DOD agencies in support of large-scale expansion.

The UTSA PTAC is funded in part through a cooperative agreement with the Department of Defense administered by the Defense Logistics Agency (DLA)



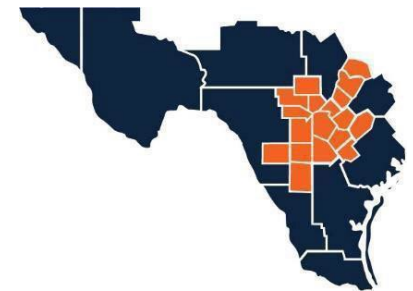
# PTAC Mission Statement

*“To provide our clients with a wide range of training opportunities and resources to successfully compete for contracts with Local, State, Federal and DOD agencies”*

# PTAC Service

## PTACservice area covers the following 38 counties

- Atascosa
- Bandera
- **Bell**
- Bexar
- Blanco
- Burnet
- Comal
- Concho
- Crockett
- Edwards
- Frio
- Gillespie
- Guadalupe
- Hays
- Irion
- Karnes
- Kendall
- Kerr
- Kimble
- Kinney
- La Salle
- Lampasas
- Llano
- Mason
- McCullough
- Medina
- Menard
- Mills
- Real
- San Saba
- Schleicher
- Sutton
- Travis
- Uvalde
- Val Verde
- Williamson
- Wilson
- Zavala



To Search for a PTAC Office in your area go to- <http://www.aptac-us.org/>

# PTAC Staff

- Curtis G. Mohler, Regional Program Manager
- Tony Palá, Senior Business Development Specialist
- Paul Herrera, Business Development Specialist
- Tommy Baker, Business Development Specialist
- Linda Gjergji, Program Specialist

# UTSA PTAC IMPACT

In FY 21, the Procurement Technical Assistance Center (PTAC) staff provided advising, training, and networking to **3,593 small and large**, minority owned, women owned, service-disabled, veteran, and small disadvantaged businesses, through **1,331** counseling sessions for a total of **1,551** one-on-one advising hours.

PTAC also provided local, state, federal government contract training, hosting **54** participated events totaling **2,262** attendees.

PTAC's efforts resulted in **27** business expansions of **\$948,480,628.00** local, state, federal and Department Defense Prime Contracts for small and large minority owned, women owned, service-disabled, veteran owned and small disadvantaged businesses. ***PTAC added another 71 billion in prime and sub-contracts.***



*Presentation Title:*

# **“Things important to your Small and Large Business**



# Things important to your Business

- NAICS & PSC Codes
- Marketing Capability Brief
- Leverage & Marketing Certifications
- System Award Management (SAMs)
- Small Business Administration Profile
- Government Pricing Sheet
- GSA Schedule

# Things important to your Business

- CPARS
- SWOT (Self Assessment)**
- Research Market
- Search Procurement Opportunities
- Know your competition (SBA-DSBS)
- Teaming Agreements
- Time Management (Self Assessment)

*Presentation Title:*

# **“Common Mistakes and Pitfalls”**

# Common Mistakes Pitfalls

- Choosing the wrong Business Structure
- Not the 51% or majority owner(s)
- Hiring 1099's vs. W2's (Friends, Family, and Acquaintances)
- Not having a vision—Too many services & products
- Not making a daily plan to succeed (no goals)
- Not understanding “doing business is not free”

*Presentation Title:*

# COVID Government Contracting Business & Top Trending NAICS codes”

# Contracting Trends

Shift to restarting & restructuring companies in the following areas:

- Transportation and Logistics of (good and services)
- Medical Supplies (masks, face shields, equipment, supplies)—  
NAICS Codes 423450 & FSC Code 6515, PSC Code Q
- Janitorial supplies, chemicals, cleaning including HAZMAT
- Remote IT Web hosting
- Cyber Security (Assessment, Detection, Fraud, COMSEC  
Telecommunications)
- Armed Security(Patrol and Guard)
- New Construction

# Top NAICS Codes FY 20 & 21

621111 –Offices of Physicians (Except Mental Health)  
541511 -Custom Computer Programming Services  
511210 -Software Publishers  
541513 –Computer Facilities Management Services 541690  
–Other Scientific and Technical Consulting Services 334516  
–Analytical Laboratory Instrument Manufacturing 541330  
–Engineering Services  
541990 -All Other Professional, Scientific, and Technical  
Services  
325412 –Pharmaceutical Preparation Manufacturing  
561110 –Office Administrative Services



# Top NAICS Codes FY 20 & 21

541519 -Other Computer Related Services

561210 –Facility Support Services

622110 –General Medical and Surgical Hospitals

541611 -Administrative Management and General  
Management Consulting Services

541512 -Computer Systems Design Services

339112 –Surgical and Medical Instrument Manufacturer

811219 –Other Electronic & Precision Equip. Repair & Maint.

339113 –Surgical Appliance & Supplies Manufacturing

541618 -Other Management Consulting Services

621999 -All Other Miscellaneous Ambulatory Health Care  
Services

# Registration Requirements to conduct Government Business

# What is a Unique Entity ID?

- Beginning April 4, 2022, the Unique Entity ID from SAM.gov is the authoritative identifier for those doing business with the federal government. The DUNS Number is no longer valid for federal award identification.
- All the Integrated Award Environment (IAE) systems—SAM.gov, eSRS, FSRS, FPDS, FAPIIS, and CPARS—are now only using the Unique Entity ID to identify entities.
- The Unique Entity ID is generated in SAM.gov. If you are registered in SAM.gov (active or not), you already have a Unique Entity ID. It is viewable at SAM.gov.
- [UEI Post-Transition Fact Sheet.pdf](#)

# How to obtain new Unique Entity ID

- Go to SAM.gov and select “Sign In” from the upper right corner of the page. If you do not have a SAM.gov account, you will need to create one. SAM.gov uses Login.gov for authentication. More help with using Login.gov can be accessed here. Once you create your user credentials, you will return to SAM.gov to complete your profile.
- After you sign in, the system will navigate you to your Workspace. On the “Entity Management” widget, select the “Get Started” button.
- Select the “Get Unique Entity ID” button on the next page.
- [2.0 Quick Start Guide-Getting a Unique Entity ID.pdf](#)
- <https://youtu.be/0uv1YNAsINk>

# Sam.gov registration & sections

- Unique Entity ID
- Core Data
- Assertions
- Reps & Certs
- Architect and Engineering Responses
- Defense FAR Supplement (DFARS) questionnaire (if applicable)
- Points of Contact (POCs)
- SBA supplemental page (If you are a small business)
- SAM Guide, FAQ's and Checklist: [Entity Registration Checklist \(iae-prd-videos.s3.amazonaws.com\)](https://iae-prd-videos.s3.amazonaws.com/EntityRegistrationChecklist)

# Self-Certifying Reps & Certs in Sam.gov

- You can self-certify in sam.gov in Representations and Certifications section in support of being eligible for federal contracting opportunities under the following socio-economic categories:
- African American Owned Small Business
- Hispanic American Owned Small Business
- Asian American Owned Small Business
- Native American Owned Small Business
- Women Owned Business
- Veteran Owned Small Business
- Service-Disabled Veteran Owned Small Business
- Economic Disadvantaged Women Owned Small Business (EDWOSB)-Certification
- Women Owned Small Business (WOSB)-Certification



# Socio-Economic Business Certifications



# Federal Small Business Certifications

- Economically Disadvantaged Woman Owned Small Business (EDWOSB)
- Woman Owned Small Business (WOSB)
- Service-Disabled Veteran-Owned Small Business (SDVOSB)
- Veteran-Owned Small Business (VOSB)
- SBA HUBZone Certification
- SBA 8(a) Certification

# State & Local Small Business Certifications

- African American Business Enterprise (AABE)
- Asian American Business Enterprise (ABE)
- Disabled Individual Business Enterprise (DIBE)
- Emerging Small Business Enterprise (ESBE)
- Hispanic American Business Enterprise (HABE)
- Minority Business Enterprise (MBE)

# State & Local Small Business Certifications

- Native American Business Enterprise (NABE)
- Small Business Enterprise (SBE)
- Veteran-Owned Business Enterprise (VBE)
- Woman-Owned Business Enterprise (WBE)
- Disadvantaged Business Enterprise (DBE)
- Historically Underutilized Business (HUB)

# Vets First Certification Overview, Benefits, and Requirements



# Vets First Certification Overview

The Vets First Certification Program is managed by the Office of Small & Disadvantaged Business Utilization

The Vets First Verification Program affords verified firms owned and controlled Service-Disabled Veteran Owned Small Businesses (SDVOSB) and Veteran Owned Small Businesses (VOSB) the opportunity to compete for VA set asides



# Benefits of CVE Registration

- As a part of VA's Veterans First Program, contract set-asides are available for VOSBs and SDVOSBs that achieve VA Verification. The VA Procurement hierarchy places highest priority with SDVOSB then VOSB.
- VA-verified firms may display the trademark-protected SDVOSB or VOSB logo. Use of the logo communicates the firm has undergone a comprehensive review to validate its status as an eligible Veteran- owned and controlled firm.



# Benefits of CVE Registration

- Provides **opportunities to bid on over \$4 billion in VA contract** set-asides
- Recognized as the “**Gold Standard**” for **SDVOSBs and VOSBs**
- Offers **chances to do business** with federal and state agencies and commercial businesses that prefer to work with Veterans
- Allows access to **subcontracting opportunities with VA’s large prime contractors** in acquisitions
- Makes your business more **attractive** to federal and state agencies who prefer VA-verified firms



# CVE Verification Requirements

- Firms must be in the System for Award Management (SAM)
- Unlike self-certification programs administered by other organizations, CVE is required by law to validate the applicants
- A DD-214 and/or VA Disability Letter, on their own, do not fulfill the CVE requirements

*Source: Public Law (P.L.) 111-275*

# Verification Assistance Counselors

Verification Assistance Counselors are **trained and certified by VA** to provide application assistance to SDVOSBs/VOSBs at no cost to Veterans.

VA-certified Verification Assistance Counselors can:

- **Offer insight** regarding Title 38 CFR Part 74
- **Review** a Veteran firm's **business model**
- **Assist** Veteran business owners with resource tools
- **Review documents** for application submission

<https://www.va.gov/osdbu/verification/assistance/counselors.asp>

*Presentation Title:*

# **“Understanding the Integrated Awards Environment (IAE) and the SAM.gov Update”**

## What is the IAE?

The Integrated Award Environment (IAE) is a government-wide initiative administered by GSA's Federal Acquisition Service (FAS) within the Office of Systems Management (OSM).



*IAE Delivers the Framework for Conducting  
Government Business*

## Purpose of the IAE

- Reduce barriers for doing government business
- Increasing transparency into federal spending
- Increasing accountability in the award process
- Reducing reporting burden
- Increasing data quality and integrity
- Single Log-In for what used to be multiple sites

Source: <https://www.gsa.gov/about-us/organization/federal-acquisition-service/office-of-systems-management/integrated-award-environment-iae>

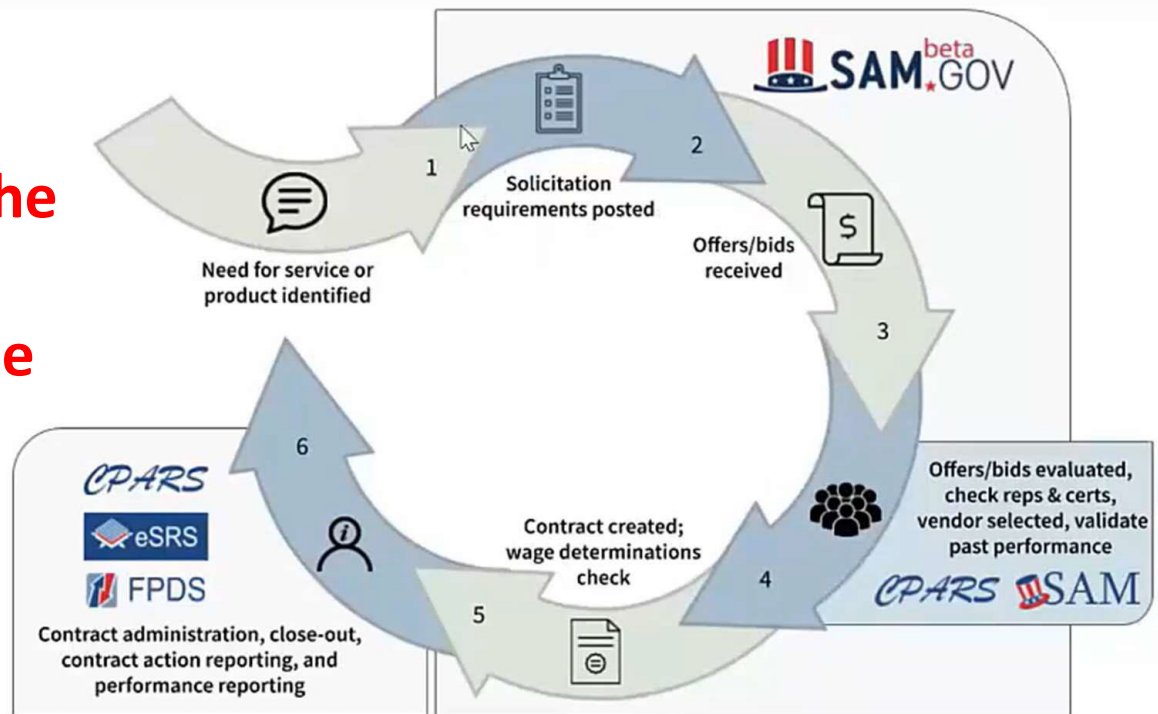
*A “One Stop” Solution*

# The IAE Systems

- ***System for Award Management (SAM)***
- Contractor Performance Assessment Reporting System (CPARS)
- Electronic Subcontracting Reporting System (eSRS)
- Federal Awardee Performance and Integrity Information System (FAPIIS)
- Federal Funding Accountability and Transparency Act (FFATA) Subaward Reporting System (FSRS)
- Federal Procurement Data System (FPDS)

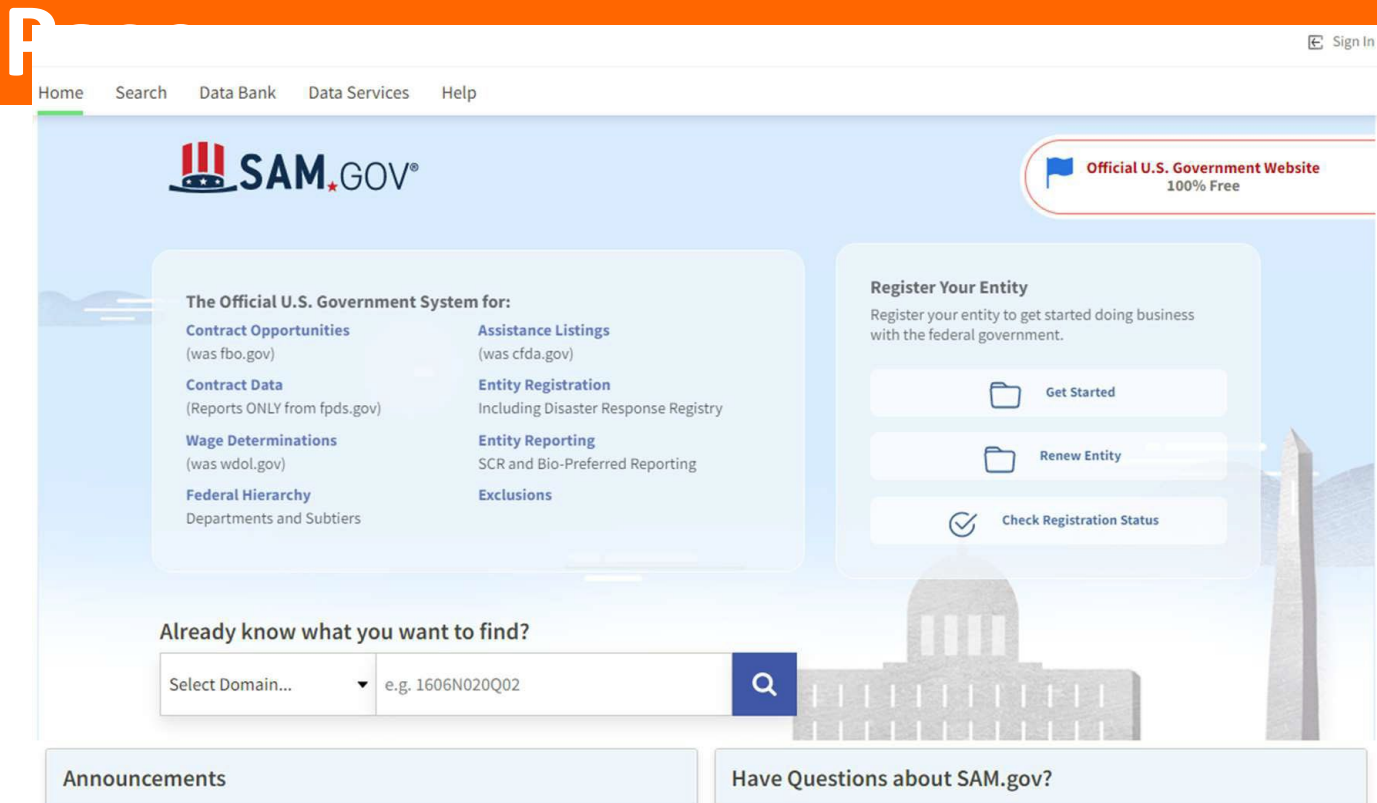
# The IAE Systems Role in Procurement

## IAE Systems in the Procurement Awards Lifecycle





# The “Updated” SAM.gov Home



*Presentation Title:*

# CMMC 2.0 Rule Making Timeline

# CMMC 2.0 Rule Making Timeline

Changes reflected in CMMC 2.0 will be implemented through a Rule Making process. Companies will be required to comply once forthcoming rules go in effect.

The Department of Defense intends to pursue rulemaking both in Part 32 of the Code of Federal Regulations (CFR) as well as the Defense Acquisition Federal Regulations (DFARS) in Part 48 of C.F.R.

A few proposed changes included in CMMC 2.0 include decreasing certification levels from 5 to 3 and increasing opportunities for (no-cost) self-assessments.

*Source:* Bradley Barnes, Governance, Risk, and Compliance  
Advisor, Conquest Cyber

# CMMC Key Take Aways

Cyber Security Maturity Model (CMMC) 2.0

Intent: Ensure we protect Federal Contract Information and Controlled Unclassified Information (CUI)

- \*CMMC 2.0 9-24 months away

- \*NIST 171 still in effect

- \*Time to act is now to assess your gaps and plan your solution

**Source:** Bradley Barnes, Governance, Risk, and Compliance  
Advisor, Conquest Cyber

# Who is affected by CMMC 2.0?

Organizations supporting the Department of Defense or higher education research institutes handling the following types of data:

- \*Federal Contract Information (FCI)
- \*Controlled Unclassified Information (CUI)
- \*Covered Defense Information (CDI)
- \*Controlled Technical Information (CTI)
- \*International Traffic in Arms Regulations (ITAR)

*Source:* Bradley Barnes, Governance, Risk, and Compliance Advisor, Conquest Cyber

# New Timeline for CMMC 2.0

CHANGE: Collapsed model CMMC 2.0 removed Levels 2 and 4.

REALITY: No impact since those levels were transition phases and not associated with holding any data classification (FCI or CUI).

CHANGE: CMMC 2.0 ML 2 removed 20 Practice/Requirements and revert to original 800-171.

REALITY: NIST is already evaluating the next release of 800-171 and CMMC-AB is incorporating additional controls from 800-172 for CMMC Level 3.

*Source*: Bradley Barnes, Governance, Risk, and Compliance  
Advisor, Conquest Cyber

# Why should I address CMMC Requirements?

## Competitive advantage:

\*Contractors who can implement CMMC today will have a competitive advantage over contractors who wait to address CMMC until right before the clauses appear in individual procurements.

\*DOD has also indicated that there will be incentives like vendor selection preference in the future for those that have taken the steps to become compliant.

## New Opportunities:

Opens you up to a new market of contracts to bid on.

**Source:** Bradley Barnes, Governance, Risk, and Compliance  
Advisor, Conquest Cyber



# NIST 800-171 Overview, Compliance & Assistance

# NIST 800-171 CMMC Compliance

- The Offeror shall verify that summary level scores of a current NIST SP 800-171 DoD Assessment (i.e., not more than 3 years old unless a lesser time is specified in the solicitation) are posted in the Supplier Performance Risk System (SPRS) for all covered contractor information systems relevant to the offer.
- If the Offeror does not have summary level scores of a current NIST SP 800-171 DoD Assessment (i.e., not more than 3 years old unless a lesser time is specified in the solicitation) posted in SPRS, the Offeror may conduct and submit a Basic Assessment to for posting to SPRS in the format identified in paragraph (d) of this provision.

# PTAC's Assistance with NIST 800-171

- Provide overview of NIST 800-171 Revision 2 requirements, NIST MEP Cyber Security Self-Assessment Handbook, DFARS 252.204-7008 & 252.204-7012
- Provide client a template relaying step-by-step procedures in support of CMMC Level I, II, and III to achieve Interim Rule Compliance
- Provide client training on the 14 Cyber Security groups within the required self-assessment scoring checklist
- Provide training on “how” to take those scores and reflected items containing both sections not-implemented identified as “weaknesses” of the weighted values and transfer to a Plan of Action Milestones (POAM) spreadsheet.
- Provide procedures and training on “how” to upload your required scores through the Supplier Performance Risk System (SPRS).

*Presentation Title:*

# “Marketing Capabilities Statements”

# Market Research (FAR Part 10)

**Market Research (FAR Part 10)** is conducted to determine the availability of commercial products and services and to identify and evaluate **market** practices. It's a continuous process of finding viable sources of goods and services to meet government requirements and is mandated for all acquisition programs.

# Regulatory Perspective

- Federal Acquisition Streamlining Act –Title 10 U.S. Code, Sec.2377
- FAR 10.000 –10.003 --Market Research
- FAR 2.101 –Market Research Definition
- FAR 7.102 –Acquisition Planning and Market Research
- FAR 19.202 –Small Business Policy

# Capability Statement - 1

**INSERT COMPANY LOGO**

**INSERT CVE-VA LOGO (IF APPLICABLE)**

*If you want the logo on both pages it would be better to insert them in the HEADER*

**SMITH CONSTRUCTION COMPANY**  
12 BUILD IT LANE  
ACREAGE CITY, TEXAS 78000

PHONE: 210-XXX-XXXX  
E-mail: [Sconstruction@satx.rr.com](mailto:Sconstruction@satx.rr.com)

FAX: 210-XXX-XXXX  
Website: [www.smithcons.org](http://www.smithcons.org)

**COMPANY CONTACTS:** ANN SMITH, PRESIDENT  
JOHN SMITH, VICE PRESIDENT  
JOE DONALDSON, CONTRACTS MANAGER

**\*What We Believe:** Smith Construction Company believes each customer's need is unique, and requires an individual customized approach and solution to adapt to their business needs and requirements. At Smith Construction Company, our goal is to provide expert level construction services through our myriad of business services and platforms in support of private, local, state and federal sectors to take your company to the next level, while providing superior customer service!

**\*What We Do:** Smith Construction Company is woman-owned, service disabled veteran, (SBA Certified 8(a), Small Disadvantage Business (SDB), HUBZone), general contractor specializing in providing capability services and support in the following industry categories:



# Capability Statement - 2

**\*CAPABILITIES:**

SABER

Historical Repair – Foundation and Interior

HVAC

Remodeling

Painting

Electrical

Plumbing

Concrete

Demolition

**\*GSA Advantage-Federal Supply Schedule (FSS) Contract:**

GS-XXF-XXXDA

\*Accept Government Purchase Card(s)

**\*NAICS CODES**

236115 – Single Family Housing Construction

236116 – Multifamily Housing Construction

236220 – Commercial and Institutional Building Construction

238910 – Site Preparation Contractors

**\*PSC CODES**

Y1FA – Construction of Family Housing Facilities

Y161 – Construction of Family Housing Facilities

Y1CZ – Construction of Other Educational Buildings

# Capability Statement - 3

**INSERT COMPANY LOGO**

**INSERT CVE-VA LOGO (IF APPLICABLE)**

*If you want the logo on both pages it would be better to insert them in the HEADER*

**Business Registrations:**

\*SBA ID: Pxxxxxxx (Electronic Marketing Capability Briefing)

Cage Code: IAM4U

Duns Number: 555666777

**Federal Certifications:**

\*SBA 8(a) Case Number:

XXXXXX

\*HUBZone Certification:

XX/XX/XXXX

\*Veterans First-CVE-Certified-VA-SDVOSB

**\*Non-Federal Certifications:** Historic Underutilized Business (HUB-TX); South Central Texas Regional Certification Agency certified (SCTRCA); Woman Owned Small Business Enterprise (WBE); Small Business Enterprise (SBE); Emerging Small Business Enterprise (ESBE); Minority Business Enterprise (MBE), Veteran Owned Small Business Enterprise (VBE) (Others may be applicable)

**\*BONDING LEVEL:** \$10,000,000 – Per incident  
\$20,000,000 – Aggregate

**\*Registered member of the Disaster Response Registry**

# Capability Statement - 4

**\*Key Differentiators—How are you different?**

\*Pricing

\*Experience

\*Technical certifications

\*New Technologies or Processes

\*Service after the sale

\*Relationships

\*Lead times/delivery

\*\*Technical Experience

\*Warranties

*\*Special note: You must “sell” to one or more of your strengths, as a differentiator(s) is a “result” the customer can expect from using your company’s service or product that would support a customer, contracting officer, or agency from buying from you!*

**PERFORMANCE HISTORY:** *(or Professional Experience (If Past Performance would not apply—Personal experience can be included, but, must relate to New Business))*

\*Name: Foundation Repair, Historical Bldg. 654, Ft. Sam Houston

Contract: XXXXXXXXXX

Start: 01/01/2007

End: 12/15/2008

Value: \$ 250,000.00

Contact: Mr. John Smith

Phone: 210-415-3219

**ADD MORE PAST PERFORMANCE IF AVAILABLE**

# Develop a Good Introduction!

"Good morning/afternoon,

I am (Name of Owner), CEO of (Name of Company)—we are a “LLC”. We are currently working with the UTSA Procurement Technical Assistance Center, specifically (Name of Counselor). Ma’am/Sir, we/I wanted to know if we/I could schedule a 20 minute "Marketing Capability Brief" presentation for (Name of Company) in support of selling our products and services to the federal government, as well as current federal opportunities which we could assist your agency in fulfilling as one of your preferred vendors.”

# PTAC Services

- Determine suitability for Contracting
- Business Technical Reviews
- Secure necessary Registrations & Certifications
- Leverage & Marketing Certifications
- Proposal Preparation
- GSA Schedule Assistance
- Federal Procurement Systems Training
- Capabilities Statements
- CPARS
- NIST 800-171 & SPRS
- Advanced Government Strategies
- Beginner-Intermediate-Advanced-Training Syllabus
- PTAC Seven Phase System

# Upcoming Training Events

## **UTSA PTAC hosts Understanding Government Contracting 101 June 30 | 10am – 11:30am**

This is a basic level or introductory course to understanding Government Contracting. During this training seminar you will be provided information on regulations, laws, terminology, classifications, certifications and registrations needed to conduct business with local, state and federal agencies. Finally, no pre-requisite is required for this course and all levels of business owners are encouraged to attend. This is no-cost training.



# Upcoming Training Events

## **UTSA PTAC hosts UTSA Purchasing HUB & E-Procurement Systems Department**

June 28 | 10am – 11:30am

*No Cost-Webinar*

## **UTSA PTAC hosts U.S. Army CID, Compliance & Fraud Awareness**

July 19 | 10am – 11:30am

*No Cost-Webinar*



# Upcoming Training Events

## **UTSA PTAC hosts VIA Metropolitan Transit "Turning Your Contacts into Contracts"**

July 21 | 10am – 11:30am

*No Cost-Webinar*

## **UTSA PTAC hosts NAVY's Small Business Innovation Research (SBIR & Small Business Technology Transfer (STTR)**

July 26 | 1pm – 2:30pm

*No Cost-Webinar*

## **UTSA PTAC hosts Southwest Research Institute (SWRI)**

July 28 | 10am – 11:30am

*No Cost-Webinar*

# PTAC Website



# PTAC Facebook Page



<https://www.facebook.com/UTSAProcurementTechnicalAssistanceCenter>

# Contact Us

UTSA Procurement Technical Assistance Center (PTAC)  
501 W. Cesar E. Chavez Blvd. Rm. 2.112 San  
Antonio, Texas 78207  
(210) 458-3353

***“Building the Texas Economy  
One Business At a Time!”***