

U.S Department of the Treasury

Teresa Lewis

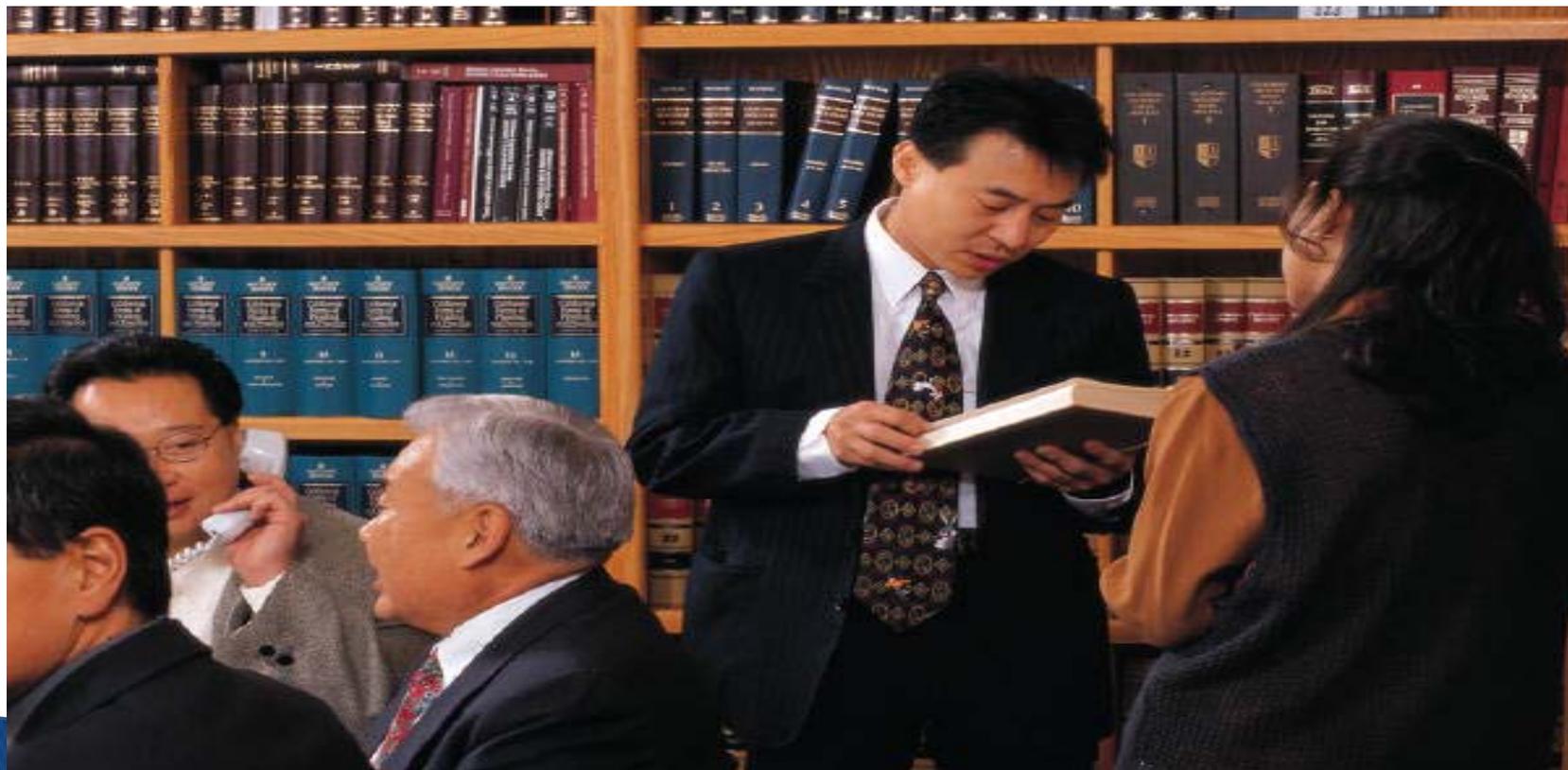
Director
Office of Small &
Disadvantaged Business
Utilization



KEYS to SUCCESS

1. **The RULES**
2. **Your NAICS CODE(S)**
3. **IDENTIFICATION**
4. **CERTIFICATION**
5. **HOMEWORK**
6. **BUYING ACTIVITIES**
7. **NICHE MARKETING**
8. **NETWORK**
9. **BEST PRACTICES**

1. KNOW THE RULES





A. Legislative Guidance

- ▶ Statutory Law

<http://thomas.loc.gov>

- ▶ Small Business Act (Public Law 85-536, as amended)

http://www.sba.gov/sites/default/files/tool_serv_sbact.pdf



B. Regulatory Guidance

- ▶ **Title 13 of the United States Code of Federal Regulations (13 CFR)**
 - **Section 121 – SB Size Regulations**
 - **Section 124 – 8(a) BD/SDB Programs**
 - **Section 125 – Subcontracting**
 - **- Limitations on Subcontracting**
 - **- SDVOSB Program**
 - **Section 126 – HUBZone Program**
 - **Section 127 – WOSB Program**
 - **Section 134 – Appeal Procedures**
 - **<http://ecfr.gpoaccess.gov>**



B. Regulatory Guidance

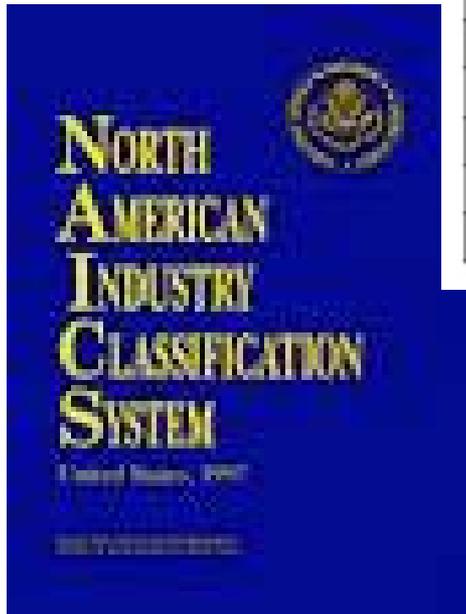
- ▶ Federal Register

- <http://www.gpo.gov/fdsys/>

- ▶ Federal Acquisition Regulation

- <http://www.acquisition.gov>

2. KNOW YOUR NAICS CODE



NAICS CODE	Description
541690	Other Scientific and Technical Consulting Services
238210	Electrical Contractors and Other Wiring Installation Contractors
423610	Electrical Apparatus & Equip., Wiring Supplies and Related Equip. Merchant Wholesalers
541512	Computer Systems Design Services
561612	Security Guards and Patrol Services
611420	Computer Training
611519	Other Technical and Trade Schools

NAICS Codes (Categorized)

- 52 - Finance and Insurance (36)
- 53 - Real Estate and Rental and Leasing (55)
- 54 - Professional, Scientific, and Technical Services (556)
- 55 - Management (1)
- 56 - Administrative and Support / Waste Management / Remediation Services (252)
- 61 - Educational Services (37)
- 62 - Health Care and Social Assistance (671)
- 71 - Arts, Entertainment, and Recreation (70)
- 72 - Restaurant & Lodging (512)
 - 721211 - RV (Recreational Vehicle) Parks and Campgrounds (1)
 - 722110 - Full-Service Restaurants (171)
 - 722211 - Limited-Service Restaurants (304)
 - 722213 - Snack and Nonalcoholic Beverage Bars (17)
 - 722310 - Food Service Contractors (1)
 - 722320 - Caterers (5)
 - 722410 - Drinking Places (Alcoholic Beverages) (13)
- 81 - Other Services (408)





KNOW YOUR NAICS CODE

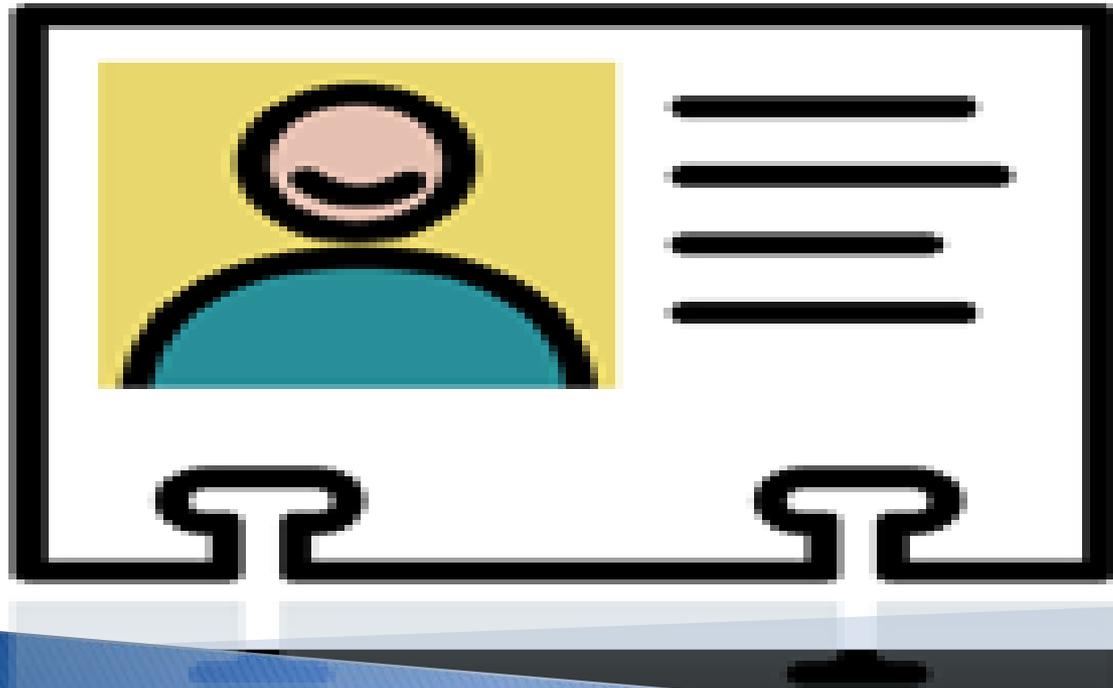
- ▶ U.S. Census Bureau

<http://www.census.gov/eos/www/naics/>

- ▶ U.S. Small Business Administration

<http://www.sba.gov/size>

3. IDENTIFY YOURSELF





IDENTIFY YOURSELF

▶ Acquire D & B Number

<http://fedgov.dnb.com/webform>

CCR Webform : Home



Decide with Confidence

D&B DUNS Numbers™
for US Government
Contractors & Grantees

Welcome to the D&B Webform! Spam-blockers and other security features on your computer could block our email response. Please make sure that you are able to receive emails from govt@dnb.com. Adding govt@dnb.com to your address book may help prevent our emails from being inadvertently blocked.

Begin D-U-N-S Search/
Request Process

About the D&B
D-U-N-S Number

Frequently Asked
Questions (FAQ)

D&B, CCR, Grants
Contacts

D&B's Privacy
and Data Policy

Accessibility

Welcome to the D&B D-U-N-S Request Service for US Federal Government Contractors and Grantees

Dun & Bradstreet (D&B) provides a D-U-N-S Number, a unique nine digit identification number, for each physical location of your business.

D-U-N-S Number assignment is FREE for all businesses required to register with the US Federal government for contracts or grants.

Click here to request your D-U-N-S Number via the Web. If one does not exist for your business location, it can be created within 1 business day.

Click here to request your D-U-N-S Number by phone (for U.S., Puerto Rico, and U.S. Virgin Islands Only).

For technical difficulties, contact govt@dnb.com



IDENTIFY YOURSELF

Register in CCR and DSBS

<http://www.ccr.gov>

Central Contractor Registration

CCR Home | CCR Search | Federal Agency Registration | News | Release Notes | Request Data Access | Help

Contractors | Grantees | International Registrants | Small Businesses | Security Notes | 5,671 Active Registrants

Quick Links

- Dynamic Small Business Search
- ORCA
- SBA
- Request DUNS Number
- Federal Business Opportunities

Welcome to Central Contractor Registration (CCR)

Central Contractor Registration (CCR) is the primary registrant database for the U.S. Federal Government. CCR collects, validates, stores and disseminates data in support of agency acquisition missions. [Learn more about CCR Policy and Background](#)

Log in to CCR

User ID:

Password:

[Forgot User ID](#) [Forgot Password](#)

Top Frequently Asked Questions

- [How do I register in CCR?](#)
Follow these steps: Step 1: Access the CCR...
- [What are my yearly renewal requirements? How do I keep my record active?](#)
You must renew and revalidate your registration...
- [How are CAGE Codes assigned?](#)
Background: The Commercial And Government Entity...
- [I am updating and renewing my CCR record and noticed that the D&B information provided requires changing. How can I update this data?](#)
Update your D&B information on the D&B...
- [What is an MPIN? Where can I locate or assign my MPIN?](#)
A Marketing Partner ID Number (MPIN) is a...

[View All FAQs](#)

Create New Registration

[What You Need to Register International Registrants](#)

Note: New registrations usually take 3-5 business days to process once completed by the vendor.

CCR News and Announcements

- 05/06/2009 [SBA Notification Email](#)
- 05/01/2008 [Important News About Your Registration](#)
- 11/01/2007 [New SBA NAICS Size Exceptions](#)
- 05/22/2007 [Hurricane Katrina and Effect on CCR Registrations](#)
- 04/25/2007 [FAQ on Individuals and NIH Peer Reviewers for CCR](#)

[View more Headlines](#)

CCR Active Registrations Over Time

Chart information is unavailable at this time.

[Terms and Conditions](#)



IDENTIFY YOURSELF

Register in ORCA

<https://orca.bpn.gov>

online representations and certifications application



4. GET CERTIFIED



5. DO YOUR HOMEWORK



A. RESEARCH FPDS-ng

FPDS Next Generation

Log In **What's New**

Need Help Using This Report ? Click here

Search Criteria

Please enter the criteria for the report:

Report Name:	Small Business Goaling Report
Search Name:	Default
From Date (mon-dd-yyyy or Qtr/FY):	<input checked="" type="radio"/> 1st Quarter 2007 <input type="radio"/> Oct 1 2006
To Date (mon-dd-yyyy or Qtr/FY):	<input checked="" type="radio"/> 1st Quarter 2007 <input type="radio"/> Dec 31 2006
Department ID:	9700
Agency ID:	9700
Organization Code:	
Contracting Office Region:	
Contracting Office ID:	

Execute Save Clear Cancel

Need Help Using This Report ? Click here

Search Criteria

Please enter the criteria for the report:

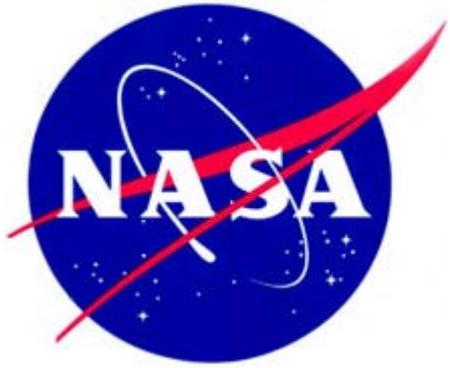
Report Name:	Total Actions by IIAICS Report
Search Name:	Default
From Date (mon-dd-yyyy or Qtr/FY):	<input checked="" type="radio"/> 1st Quarter 2007 <input type="radio"/> Oct 1 2006
To Date (mon-dd-yyyy or Qtr/FY):	<input checked="" type="radio"/> 1st Quarter 2007 <input type="radio"/> Dec 31 2006
Department ID:	9700
Agency ID:	9700
Organization Code:	
Contracting Office Region:	
Contracting Office ID:	

Execute Save Clear Cancel



<https://www.fpds.gov>

6. DETERMINE BUYING ACTIVITY



RESEARCH:

- A. OSDDBU.GOV**
- B. AGENCY ANNUAL FORECAST**
- C. AGENCY TOP 25 NAICS**
- D. SBA SCORECARD**
- E. SMALLBUSINESS.DATA.GOV**
- F. WEB.SBA.GOV/SUBNET**
- G. LARGE BUSINESS WEBSITE**
- H. AGENCY BUDGET**



7. NICHE MARKETING

Prime
Contractor

• **FEDERAL AGENCY**

Subcontractor

• **LARGE BUSINESS**

Teaming

• **SMALL BUSINESS**

A. KNOW THE MISSION OF THE ORGANIZATION





Mission of the Treasury

- ▶ **Serve the American people and strengthen national security by managing the U.S. Government's finances effectively, promoting economic growth and stability, and ensuring the safety, soundness, and security of the U.S. and international financial systems.**
- ▶ The Department of the Treasury's mission highlights its role as the steward of U.S. economic and financial systems, and as an influential participant in the global economy.
- ▶ The Treasury Department is the executive agency responsible for **promoting economic prosperity** and ensuring the financial security of the United States.
- ▶ **Treasury encourages growth through the use of small businesses to achieve its mission.**

B. KNOW THE ORGANIZATION'S GOAL ACHIEVEMENTS





SB Goal Achievements

SB Category	Treasury Negotiated Goals	Goal Accomplishments FY 2010 (Official)	Goal Accomplishments FY 2011 (Unofficial)	Treasury Proposed Goals	Goal Accomplishments FY 2012 (Thru 10/14/11)
SB	28.5%	30.17%	33.99%	32%	45.14%
SDB	5%	10.58%	12.49%	5%	25.65%
HUBZone	3%	2.24%	3.70%	3%	10.42%
SDVOSB	3%	3.86%	4.08%	3%	2.19%
WOSB	5%	8.93%	21.91%	5%	5.38%

C. KNOW WHAT THE ORGANIZATION BUYS





WHAT Treasury Buys

- ▶ $\frac{1}{2}$ of Treasury's \$4.2 Billion budget is exempt from the FAR
 - Bureau of Engraving and Printing
 - Office of the Comptroller of the Currency
 - **Office of Thrift Savings**
 - U.S. Mint
- ▶ Of the \$2.1 Billion Small Business Total Eligible Dollars:
 - $\frac{1}{2}$ of all Treasury purchases is Information Technology



What Treasury Buys . . .

1. Fabricated Metal Product Manufacturing
2. Precious Metal Merchant Wholesalers
3. **Computer Systems Design**
4. Nonferrous Metal Rolling
5. **Other Computer Services**
6. **Computer & Software Stores**
7. Admin & Gen'l Mgt Consulting
8. Paper Mills
9. **Computer Facilities Mgt**
10. **Computer Programming**
11. Copper Rolling & Extruding
12. Public Relations
13. Other Mgt Consulting
14. **Software Publishers**
15. Other Business Support
16. Warehousing and Storage
17. Wired Telecommunications
18. Office Furniture Manufacturer
19. **Electronic Computer Manufacturing**
20. Facilities Support Services
21. Printing Ink Manufacturing
22. Certified Public Accountants
23. **Data Processing, Hosting**
24. Other Professional, Scientific & Technical Services

D. UNDERSTAND CUSTOMER'S NEEDS





UNDERSTAND CUSTOMER'S NEEDS

- ▶ Performance Requirements
 - Large Businesses
 - Small Businesses
- ▶ Problem Solution
- ▶ Innovation
- ▶ Proven Experience
- ▶ Strong Financial Position
- ▶ Certifications
- ▶ Go **Green**

**E. KNOW THE
ORGANIZATION'S POINTS
OF CONTACT**



OFFICE of SMALL & DISADVANTAGED BUSINESS UTILIZATION (OSDBU)

BUREAU SMALL BUSINESS SPECIALISTS

The Alcohol & Tobacco & Trade Bureau: CHERYL RICE-HENDERSON

Bureau of Engraving and Printing: YVETTE ANDERSON

Bureau of Public Debt: LORETTA OSUNA-COTTO

Community Development Financial Institution: AVERY BECTON

Departmental Offices: *see Internal Revenue Service*

Financial Crimes Enforcement Network: JACQUELINE JOHNSON

Financial Management Service: KIM WITCHER

Internal Revenue Service: LATONYA RICHARDSON

Office of the Comptroller of the Currency: : RHONDA TRENT

U.S. Mint: MELISSA JAMES

8. NETWORK FOR SUPPORT





9. BEST PRACTICES





Business Card (front)

Certs

PAGE AFTER PAGE PRINT CENTERS

Page After Page, Inc.
630-A I Street, NW
Washington, D.C. 20001
Toll Free: 1-866-848-4762
Local: 202-296-7247
Fax: 202-463-8113
www.pageafterpage.info

HUBZone
Historically Underutilized Business Zone

Disabled Veteran Owned Business

James V. Page
Operations Manager
page@pageafterpg.com

IBM Authorized Dealer

KONICA MINOLTA Authorized Dealer

QA Stds

ACEINFO

- 8(a) Certified
- GSA Schedules: - 70, 8(a) STARS, MOBIS
- CMMI Level III
- ISO 9001:2000

Nar Koppula
Chief Operating Officer

Phone: 703.391.2800
Fax: 703.391.2833
Mobile: 703.929.0604
nar@aceinfosolutions.com

Ace Info Solutions, Inc.
11490 Commerce Park Drive - Suite 140, Reston VA 20191
www.aceinfosolutions.com

Cape Keywords

Vencal, Inc.
www.vencal.com

Enterprise Architecture ~ SOA ~ Data Management

Pool Roy, BEng, MBA
President

17705 Lisa Drive
Rockville, MD 20855
poolroy@vencal.com

Phone: (301) 216-1681
Cell: (301) 252-7292
Fax: (301) 977-6016

GSA 8(a), SDB, MBE
GS-35F-0648M

NAICS
541511, 541512
541513, 541519, 541690

MS TI Service Disabled Veteran Owned Small Business

Management Support Technology, Inc.

Government Financial Management, Information Management, and Program Management

Professional Services

Thomas W. Hodge
Director of Business Development

9990 Fairfax Boulevard, Suite # 300
Fairfax, VA 22030-1720
Tel: (703) 385-5841 x 212
Fax: (703) 385-5843
Cell: (703) 343-3481
Email: thodge@msti-net.com Website: www.msti-net.com

EGSA
ISO 9001 2000
Certified

GSA Sched #

NAICS



Business Card (back)

Contracting Vehicles

- GSA IT Schedule 70
- State of Maryland (CATS)

Classifications

- SBA 8(a)
- SBA SDB

State Contract Primary NAICS Codes

334611	518112	518210	541511
541512	541513	541519	541611
541612	541618	541710	561410
561439	611420	611519	811212

CAGE/NCAGE Code: 01JL9

Cage Codes

GSA: GS-25F-0065N
 LSDBE Certified LS 06200414794
 DC Supply Schedule DS-C-1-600-38-C-002
 8(a) pending
 INC ICCI 100 Alumni 2000

State Contract

NAICS CODES:

323115	811212	561439
453210	323110	323114
541430	323111	561210

"Delivering best value that makes the difference".

GSA FABS: GS-23F-0310N

- . Special Item No. 520-3 Due Diligence and Support Services
- . Special Item No. 520-11 Accounting Services

GSA Schedules & SIN

Primary NAICS Codes

518210, 522390, 531390, 541211, 541219, 541611, 541618, 561990

Women-Owned Business

Capable Keywords

CAPABILITIES

Systems Integration
 Enterprise Architecture
 Enterprise Resource Planning (ERP)
 Customer Relations Mgmt. (CRM)
 Data Warehousing, ETL Process
 Business Intelligence(BI)
 Web/Portal Development
 Database Management
 Custom Application Development
 Project Management

NAICS CODES

518210 - Data Processing, Hosting, and Related Services
 519130 - Internet Publishing and Web Search Portals
 519190 - All Other Information Services
 541511 - Custom Computer Programming Services
 541512 - Computer Systems Design Services
 541513 - Computer Facilities Management Services
 541519 - Other Computer Related Services
 541611 - Admin. Mgmt. & General Mgmt. Consulting Services
 541612 - Human Resources & Exec. Search Consulting Svcs.
 541618 - Other Management Consulting Services
 541990 - All Other Professional, Scientific, & Technical Svcs.

SBA certified 8(a) SDB * Woman Owned Small Business
 SWAM - Virginia Dept. Of Minority Business Enterprise
 State of MD DoIT CATS-II Contract
 CAGE: 1T6A4 * DUNS: 010228836

State Certs

DUNS #

KEYS to SUCCESS

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- 2. Know your NAICS CODE(S)**
- 3. Identify YOURSELF**
- 4. Get CERTIFIED**
- 5. Do your HOMEWORK**
- 6. Determine BUYING ACTIVITY**
- 7. Conduct NICHE MARKETING**
- 8. Network FOR SUPPORT**
- 9. Best PRACTICES**



**BE PREPARED WHEN
OPPORTUNITY KNOCKS!**





QUESTIONS

