

“MANAGING YOUR SMALL BUSINESS OUTREACH PROGRAM”

DoD SMALL BUSINESS TRAINING CONFERENCE – *June 2007*

Julie Krnc, Assistant Director, Office of Small Business Programs for DoD

Introduction

Your small business outreach program should consist of activities and services that:

- Engage internal and external customers,
 - Raise awareness and offer support to small business concerns who need advice and guidance on how to do business with the government, specifically with your activity/agency/DoD, and
 - Ensure small business concerns are informed of available prime contract and subcontracting opportunities.
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Definition of Outreach

Outreach is defined as efforts taken to locate small businesses to increase the small business prime/subcontractor “industrial base”. Actions taken may include but not be limited to: participation in organizations/committees, hosting/co-hosting events, counseling at events hosted by others, or speaking in the marketplace. (See Examples of Events)

Purpose of Outreach

Outreach is conducted for the purpose of increasing access of small business concerns to DoD or federal prime and subcontracting opportunities.

An effective Small Business Outreach Program should be designed to locate and develop new small business sources for your activity resulting in increased small business opportunities and, ultimately, an increase in dollars awarded to small businesses.

Duty/Responsibility

The DoD Small Business Specialist is assigned the responsibility of maintaining a small business outreach program. The outreach program should include participation in Government-industry conferences and regional interagency small business councils and should be designed to locate and develop information on the technical competence of small business concerns, small disadvantaged business concerns, historically underutilized business zone (HUBZone) small business concerns, women-owned small business concerns, service-disabled veteran owned small business concerns, historically black colleges and universities, minority institutions, and tribal colleges. (Reference: DFARS 219.201(e)(v))

Planning Your Outreach Program

The Small Business Specialist receives numerous invitations to participate in outreach events. Develop a strategy for determining which events in which to participate –

- What are the benefits/return on investment for your participation?
- Does the event address weak areas in your program? For example, does it focus on HUBZone small businesses and you are failing to meet your HUBZone prime contract targets?
- Will it target small businesses that sell what you buy?
- Would attendance at the event improve your activity’s “face to the local community”?
- Would attendance assist in improving relationships, for example with SBA, PTACs, Congressional delegates, industry organizations?

Your Outreach Program should be a team effort. Include your Contracting Officers, Program Managers, and requirements personnel in your outreach efforts. They can participate as conference speakers and counselors, providing valuable insight to small businesses. This further ensures a team approach to your Small Business Program.

This is an area that allows for creativity and innovation!

Topic Examples for Outreach Events

Basic topic examples for presentations at outreach events may include but not be limited to:

- What does your contracting activity buy?
 - Include points of contact: name, email, phone number
- Where to find contracting opportunities for your activity/agency/DoD
- How to market products/services to your activity/agency/DoD
- How to do business with your activity/agency/DoD
- An overview of your buying activity
- Subcontracting opportunities and Small Business Liaison Officer points of contact information
- Invite CEOs of small businesses (& new large businesses) to discuss how they got started, keys to their success, lessons learned
- “Roadmap” for getting connected to opportunities within your buying activity

Your outreach program can be effectively combined with your external training program by providing training workshops/breakout sessions at your outreach events. Topic examples may include but not be limited to:

- The latest policy/regulatory changes affecting small business
 - Any changes in how your activity does business that may affect small business
 - Resources available to small businesses, including websites and points of contact
 - An overview of the DoD Small Business Program
 - Specific preference programs (e.g., service-disabled veteran owned small business)
 - Workshops (e.g.; “How to get a GSA Federal Supply Schedule”, “Tips for Successful Teaming/Partnering”)
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Examples of Events

You may choose to mix and match any of the following at the same event or develop your own ideas. We asked Small Business Specialists what was their most successful outreach event and received the following responses:

- Events targeting specific audiences (e.g., service-disabled veteran owned small businesses, woman-owned small businesses, etc.)
 - One-on-one counseling (may choose to pre-schedule appointments or first-come-first-served) with:
 - Small Business Specialists
 - Requirements Personnel
 - Purchase Cardholders
 - Small Business Liaison Officers (SBLOs)
 - Event Partners
 - Vendor/trade fairs – exhibit tables for vendors in targeted small business categories; invite requirements personnel/ buyers/contracting personnel/purchase cardholders to visit & learn about different suppliers
 - Website – include information on what you buy, how to do business with your activity, and points of contact information
 - Co-host with Large Businesses – invite your large businesses to co-host along with their SBLOs and Program Managers with specific opportunities; one option: ask for a list of small business categories and products/services the large business is looking for, perform market research for small business attendees by invitation only; arrange “matchmaking” appointments with the primes
 - Events sponsored by local Congressional delegates
 - Small Business Administration’s “matchmaking” events
 - Events sponsored by NDIA, AFCEA, other industry organizations
 - Annual Command Industry Day – Program Managers provide information on current known procurements or future programs; attendees network & possibly locate teaming partners
 - Presolicitation Conferences – attendees network & possibly locate teaming partners
 - Joint event with other buying activities & resource partners; e.g. Day 1 – Procurement Symposium (training event); Day 2 – Trade Fair
 - Invite one or two small businesses in targeted categories to provide capability presentations on a monthly basis – invite high level management, Program Managers, Contracting Officers to attend; limit time available for each presentation
 - Targeted small business category event – perform market research to locate firms that sell what you buy, attendance by invitation only requiring RSVP, attendees offered opportunity to meet one-on-one with Program Managers either by appointment or first-come-first-served
 - Program Managers/Requirements personnel explain functional responsibilities for each Division, identify areas in which small businesses could assist, identify upcoming specific requirements
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**Best Practices/
Lessons Learned**

We asked government Small Business Specialists and industry representatives what made an outreach event successful and received the following responses:

- One on one time between vendors and purchase cardholders
 - One on one time with large business Program Managers who have specific business opportunities for small business subcontractors
 - Get as many program management, requirements/technical personnel, contracting personnel as possible to participate in the event and interact with the small businesses. They learn from one another!
 - Target small businesses in categories in which your numbers are weak
 - Target small businesses that actually sell what you buy!
 - Joint conferences with other buying activities, Small Business Administration, PTACs, resource partners
 - Don't expect every outreach event to generate the results you would like – choose the events in which you participate carefully
 - If inviting requirements personnel – invite early and often! Advertise the event frequently!
 - Invite Small Business Liaison Officers so that small businesses may seek subcontract opportunities from large businesses while simultaneously seeking prime opportunities from the buying activity
 - Be sure to allow networking time in the agenda!
 - Be sure speakers leave enough time for question and answer period
 - Consider logistics issues when selecting location/time – security, adequate parking, rush hour traffic, good airport transportation, availability of lodging (if necessary)
 - Consider calendar of other events repetitively conducted at same time
 - If outreach is “open invitation” – be sure flyer identifies the event partners and what they buy, otherwise a small business selling ceramics will come to an event attended by major weapons systems buyers
 - Be aware of the length of your event – time is money to a small business and they may not be able to afford a full day away from their business with limited resources
 - Require attendees to complete a survey before leaving your event. Pay attention to these event survey results! Analyze survey results and make appropriate changes for future events
 - Survey small business attendees six months after the event to determine true value; consider another survey 18 months after the event (awards may not have been made within six months due to procurement lead-times)
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Potential Event Partners

Don't go it alone! The following list is offered for assistance only, and is not intended to be all-inclusive.

- Association for Service Disabled Veterans (ASDV) <http://www.asdv.org/>
 - Chamber of Commerce offices
 - City, State, County Government offices
 - Congressional representatives
 - Department of Veterans Affairs Small Business Office
<http://www.va.gov/osdbu/contacts/contacts.asp>
 - Disabled American Veterans (DAV) <http://www.dav.org/>
 - DoD/Federal agency Small Business Offices
 - DoD Office of Small Business Programs Regional Councils
<http://www.acq.osd.mil/osbp/programs/regional/index.html>
 - HUBZone Contractors National Council <http://www.hubzonecouncil.org>
 - Industry organizations
 - Armed Forces Communications & Electronics Association (AFCEA) <http://www.afcea.org/>
 - National Defense Industrial Organization (NDIA) <http://www.ndia.org/>
 - National Contract Management Association (NCMA) <http://www.ncmahq.org/>
 - National Women's Business Council <http://www.nwbc.gov/>
 - Procurement Technical Assistance Centers (PTACs) <http://www.aptac-us.org/new/> OR <http://www.dla.mil/db/procure.htm>
 - Small Business Administration
 - Regional & District SBA Offices, Procurement Center Representatives <http://www.sba.gov>
 - Service Corps of Retired Executives (SCORE) <http://www.score.org/>
 - Women's Business Centers (WBC) <http://www.sba.gov/aboutsba/sbaprograms/onlinewbc/index.html>
 - Small Business Development Centers (SBDC) <http://www.sba.gov/aboutsba/sbaprograms/sbdc/index.html>
 - Small Business Liaison Officers (SBLOs) from large business prime contractors <http://www.acq.osd.mil/osbp> & click on "Doing Business with DoD" then "Subcontracting Opportunities with DoD Major Prime Contractors"
 - U.S. Women's Chamber of Commerce <http://www.uswcc.org>
 - Veterans Business Enterprise <http://www.vetbiz.gov>
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Advertising Your Event

Be sure to advertise your event well in advance. It is particularly important to advertise early and often within your organization if you want requirements personnel to attend.

How do you get the word out?

- Industry attendees
 - Email/letter invitation
 - Through your Event Partners
 - Your activity website
 - DoD/DoN Small Business Program Office websites
 - Other Small Business Specialists
 - Local Small Business Administration District Office newsletter
 - Newspaper, radio, television
 - Flyers in central locations (e.g., SBDCs, PTACs, etc.)
- Government attendees
 - By email/letter invitation
 - Bulletin Boards
 - Post flyers near lunch/break/entrance areas
 - All Hands e-mail notices
 - Staff Meeting announcements
 - Personal email invitation by Commanding Officer for government attendees

Don't forget to advertise the success of your event afterwards (and to include it on your Small Business Accomplishment Report)!

Analysis of Benefits or Return on Investment (ROI)

It would be an understatement to say that our resources are limited – today, more than ever. We have limited budget, reduced staff, and cannot spend our time on something that will not reap results. Also, we must remember – while the Small Business Specialist is out attending outreach events, we're not able to attend acquisition planning meetings and may miss contract opportunities for small business! We need to ensure that we have an effective outreach program and are not participating in a large volume of events without results!

When planning your outreach program, develop a system to evaluate its effectiveness in producing new small business sources.

Develop a variety of methods to periodically evaluate the effectiveness and analyze the benefits of your overall small business outreach ***program***.

In addition, develop methods to evaluate the effectiveness/benefits of each individual outreach ***event***.

Examples of Analysis of Benefits/ROI

Examples of tangible benefits:

- Increase in dollars awarded to targeted small business categories
- Increase in actions awarded to targeted small business categories
- Increase in dollars/actions set-aside/sole source for targeted small business categories
- Number of small business attendees at outreach events
- Participant satisfaction scores based upon event surveys (It is recommended that you standardize your event surveys if used for this purpose.)
- Prime or subcontract award dollars/actions reported on surveys six months after the event. (It is recommended that you standardize your after-event surveys if used for this purpose.)
- Increase in number of small businesses in targeted categories submitting bids/offers
- Increase in number of small businesses in targeted categories registering or subscribing to receive Requests for Proposals/Invitations for Bids
- Increase in number of hits on your Small Business Program website
- Increase in subcontract dollars awarded to targeted small business categories (may use Subcontract Report Data) by participating large businesses
- Dollars/actions awarded to small businesses that you have counseled

Examples of intangible benefits:

- Improved teamwork with contracting/requirements personnel, Program Managers, & purchase cardholders resulting from their involvement in the outreach program
- Increased awareness of the small business program through contracting/requirements personnel, Program Managers, & purchase cardholders involvement in the outreach program
- Increased organizational commitment to the small business program
- Improved public image through “face to the community”
- Improved relationships through partnerships with Congressional offices, Small Business Administration, etc.
- Increased knowledge level of small businesses assisting them in being more competitive

This is another area for creativity and innovation!

Analyze Results

Periodically analyze your benefits/return on investment information to determine the effectiveness of the type of events in which you are participating and the overall effectiveness of your small business outreach program. It is recommended that you review your overall outreach program on a quarterly basis, at minimum.

Based upon your analysis, take appropriate actions to improve your outreach program, developing lessons learned and best practices.

Resources for Materials

You may wish to develop your own materials. However, the following resources may also be useful:

- DoD Office of Small Business Programs website – overviews of each small business program are provided as well as links to each of the DoD Component websites <http://www.acq.osd.mil/osbp>
- DoD Office of Small Business Programs website & click on “Doing Business with DoD” – “Marketing to DoD: The Basics” <http://www.acq.osd.mil/osbp>
- The Small Business Administration has developed “Fact Sheets” and PowerPoint presentations for various small business programs. <http://www.sba.gov>
- Air Force Small Business website includes a variety of presentations/resources <http://www.selltoairforce.org/>
- Army Small Business website <http://sellingtoarmy.com>
- Defense Acquisition University Continuous Learning Center <http://clc.dau.mil/> (SEE CLC 001 Defense Subcontract Management, CLM 023 JWOD, CLC 009 SDVOSB Program, etc.)
- Defense Logistics Agency <http://www.dla.mil/db> for “Doing Business with Defense Logistics Agency, An Overview for New Vendors”
- DoD Small Business Training Conference materials <http://www.acq.osd.mil> and click on .MIL Extranet
- Department of Navy Acquisition One Source, click on “Business Opportunities” for a “Doing Business with the Navy” presentation http://acquisition.navy.mil/acquisition_one_source
- Federal Acquisition Institute Learning Resources & Tools <http://www.fai.gov/resource/index.asp> (SEE HUBZone Empowerment Contracting Program – Contractual Assistance, Set-Asides for Small Business, SBIR, Small Business Size Standards, Waivers of the Nonmanufacture’s Rule, etc.)
- Other Small Business Specialists
- Your local Small Business Administration Office
- **NEW:** Small Business Community of Practice <https://acc.dau.mil/smallbusiness>

Steps for Basic Outreach Planning

The following table is not meant to be all-inclusive but provides basic steps for planning your small business outreach program/events.

STEPS FOR BASIC OUTREACH PLANNING

The following basic steps are not all-inclusive but provide basic steps for planning your small business outreach program/events.

STEP	ACTION
1	<p>Determine Purpose of Your Events</p> <ul style="list-style-type: none"> • Plan events for the coming fiscal year. • Analyze the benefits/Return on Investment you expect to obtain for each outreach event in which you plan to participate. • Be sure events address weak areas of your program, provide a face to the local community, or are responsive to "political" needs.
2	<p>Evaluate Resources</p> <ul style="list-style-type: none"> • Determine which events you will host or co-host with other Government/Non-government activities. <ul style="list-style-type: none"> ○ Can logistical support be provided by an outside resource? • Determine which events hosted by others in which you will participate. Participate as a speaker? Attend as a counselor?
3	<p>Budget Planning</p> <ul style="list-style-type: none"> • Estimate expenses for each event planned in the coming fiscal year. <ul style="list-style-type: none"> ○ Be conservative, but realistic with estimates. ○ Revenue may come from conference fees, exhibit fees, and co-sponsors. • Manage budget throughout the planning process for each event. • Manage overall budget throughout the fiscal year.
4	<p>Scheduling Date, Time, & Location</p> <ul style="list-style-type: none"> • Determine date, time, and length of the event. <ul style="list-style-type: none"> ○ Be aware of major holidays; Tuesday/Wednesday/Thursday are best days for good attendance. ○ Consider annual events sponsored by others that may affect attendance. ○ Consider major projects (e.g., Small Business Accomplishment Report preparation), fiscal year end workload, etc. • Determine size of event, space needs, and select location. • Review facility & determine needs for parking, seating, exhibit tables, audiovisual needs, microphones, etc. • Arrange for flags, as appropriate (be sure flags are placed properly)
5	<p>Serving Refreshments</p> <ul style="list-style-type: none"> • Non-government attendees frequently expect refreshments. • Integrate refreshments with valuable networking time. • Coordinate with local legal office, as appropriate. SEE latest guidance relative to "Contractors Collecting Fees at Agency-Hosted Conferences" & "Food at Government-Sponsored Conferences" • Factor refreshments into conference fee, as appropriate. • Develop procedure in advance for processing receipt of conference fees. Consider utilizing an outside resource (e.g., NDIA, AFCEA, etc.).

<p style="text-align: center;">6</p>	<p>Planning the Agenda</p> <ul style="list-style-type: none"> • Determine topics to be covered (e.g., outreach topics only or combine with training). • Select subject matter expert speakers (internal/external). • Select Master of Ceremony, facilitator, & Keynote Speaker, as appropriate. • Consider utilizing Contracting Office, Program Managers, & requirements personnel. • Consider timing for each session allowing for question and answer period. • Plan appropriate networking time into the agenda.
<p style="text-align: center;">7</p>	<p>Developing the Invitation List</p> <ul style="list-style-type: none"> • Determine size of the event considering the capacity of the facility. • Consider focus of your event. Are you targeting specific small business categories? • Will you have open attendance or by invitation only? • Typical guest lists and/or co-hosts include: potential and current customers, local small businesses registered in CCR/Dynamic Small Business Search, local Small Business Administration office, local Service Corps of Retired Executives (SCORE), local Procurement Technical Assistance Center representatives, other Small Business Specialists, Small Business Development Centers (SBDCs), local Women’s Business Centers, Regional Small Business Councils, Small Business Liaison Officers, Chamber of Commerce representatives, local Congressional offices, key government officials, military dignitaries. (See “Potential Event Partners” list) • Consider including representatives from other DoD/Federal agencies.
<p style="text-align: center;">8</p>	<p>Registration Procedures, Attendee’s Packet, Flyer/Brochure</p> <ul style="list-style-type: none"> • Determine registration procedures. <ul style="list-style-type: none"> ◦ Utilize on-line registration, if possible. Arrange on-site registration, if any. • Develop Flyer/Brochure & Attendee’s Packet (if any). • Include bios for the speakers/Master of Ceremony/Keynote Speaker & agenda. • Prepare Event Evaluation Survey for attendees. Assign responsibility for collection.
<p style="text-align: center;">9</p>	<p>Other Considerations</p> <ul style="list-style-type: none"> • Coordinate with Ethics Counselor – Follow local procedures. Many offices require advance approval <u>prior to</u> accepting speaking engagements at non-government sponsored events when attendees are being charged a conference fee. • Notify the Public Affairs Office (PAO) – Arrange coverage & possible photographer. • Check with PAO for local guidance – Some PAOs require approval of presentations prior to their release outside of the activity and/or prior to posting to a website. • Advertise your event in a variety of venues well in advance. • Coordinate parking, escort, reserved seating, etc. for VIPs
<p style="text-align: center;">10</p>	<p>Post-Event Actions</p> <ul style="list-style-type: none"> • Provide a timely response to requests from those you counseled during the event. • Post presentations to website in Adobe Acrobat format (.pdf) to prevent editing. • Send thank you letters to guest speakers. • Write and publish post-event website/news article, if appropriate. • Analyze Event Evaluation Survey submitted by attendees. • Develop Lessons Learned for use on future events. • Evaluate benefits/Return on Investment. What benefits has your Program received as a result of your participation in the outreach event? • Document on your Small Business Program Accomplishment Report! • Consider sending a survey to attendees six months after the event to better determine benefits/Return on Investment.