



**DOING BUSINESS**  
WITH GSA 

The text "DOING BUSINESS" is in a large, bold, blue sans-serif font. Below it, "WITH GSA" is in a smaller, grey sans-serif font. To the right of "WITH GSA" is a graphic element consisting of two parallel horizontal blue lines.

# **The GSA Schedules Program: What You Need to Know!**



# Welcome

**Syretta Dyson**  
Supervisory Small Business  
Specialist  
National Small Business  
Advocacy and Engagement  
Division

# **Poll Question #1:**

What is your socioeconomic designation?



- Provide an overview of OSDBU: What we do!
- Discuss the importance of market research
- Cover prerequisites of the Schedules program
- Outline the process for getting on the GSA Schedule

# OSDBU Overview

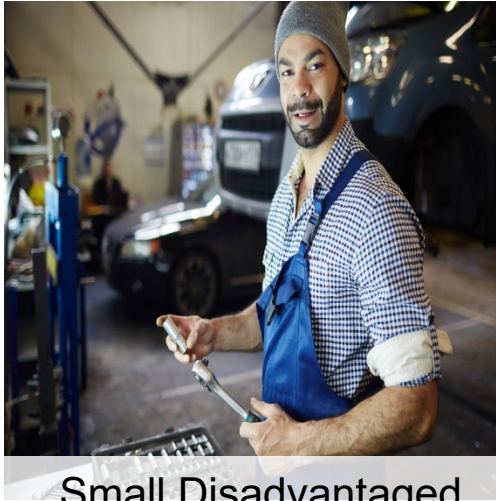
*“GSA's Office of Small and Disadvantaged Business Utilization connects small businesses with people and resources to help them grow.”*

***We are your advocates and believe in ‘Small Business First.’”***



*GSA OSDBU has offices in 11 regions across the country.*

# Advocating for our Nation's Small Businesses



Small Disadvantaged  
Businesses



Women Owned  
Small Businesses



Service Disabled Veteran  
Owned Small Businesses



Historically Underutilized  
Business Zones

We believe in Small Business First.



## **Poll Question #2:**

Do you know what a GSA  
Schedule is?

# What is a GSA Schedule?

- Indefinite delivery, indefinite quantity (IDIQ), long-term contracts
- Provides fast, flexible, cost-effective procurement solutions
- Represents approximately 21% of overall Federal procurement spending
- Requires commitment and effort to be successful



# The 12-MAS Categories

**IT**

**Professional  
Services**

**Industrial  
Products &  
Services**

**Transportation**

**Travel**

**Human Capital**

**Office MGMT**

**Furniture**

**Facilities**

**Scientific  
MGMT**

**Security**

**Miscellaneous**

# Topics Every Small Business Should Know

It is important to understand the policies and regulations that affect Federal Procurement market. Some topics to consider are:

- [Category Management](#)
- [National Defense Authorization Act \(NDAA\) Sections A & B](#)
- [Cybersecurity Maturity Model Certification](#)

## **Poll Question #3:**

Now that I have explained the term  
“Schedule,” are you now clear on  
what a GSA Schedule is?

# Items to Consider Before Applying to the Program :

- **Must Meet Minimum Qualifying Sales:** You must generate at least \$25,000 in sales within the first 2 years of your GSA Schedule contract and at least \$25,000 each year thereafter.
- **Takes Time to Secure a Contract:** The average time it takes to secure a contract is between 18-24 months (according to the SBA).
- **Your GSA Contract Can be Cancelled:** The government may cancel your schedule contract in accordance with clause 552.238-73, for failure to meet minimum sales criteria, specified above.



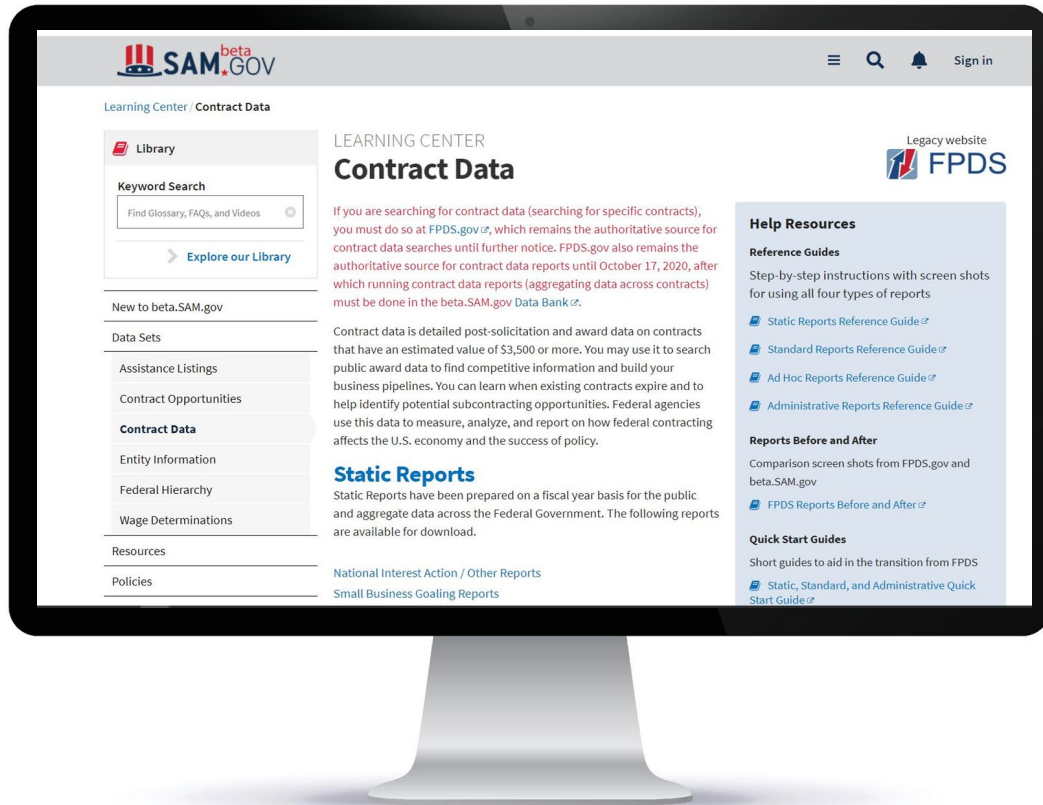
**Data mining and marketing your GSA Schedule contract is critical to your success!**

## Harness the Power of Data:

- Have a solid understanding of the federal market for your product or service
- Know the key players, critical policies, initiatives, and spending budgets for your target agencies.
- Use this information to be proactive in finding opportunities and generating leads.



# Beta.SAM.Gov



## What is reported to the SAM.gov Data Bank:

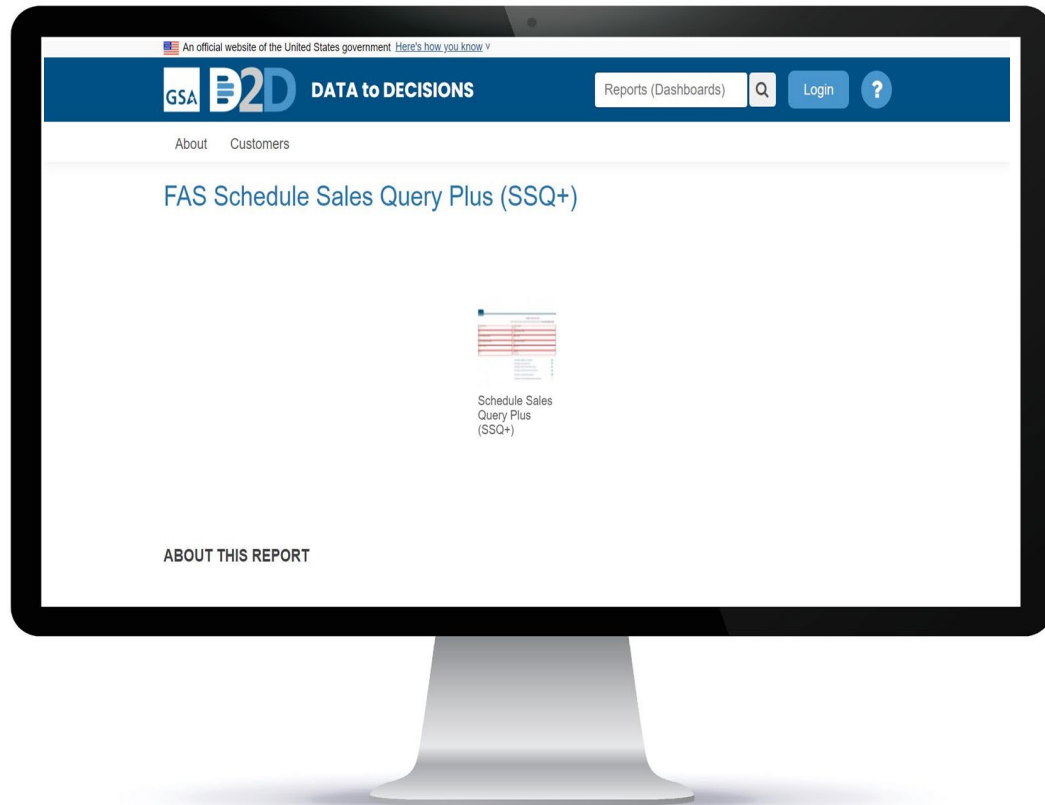
→ Contract actions valued at \$10,000.  
Every contract modification is reported as well

## Where is the data from?

→ The data is fed from 90+ agency contract writing systems.

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

# Schedules Sale Query Plus(SSQ)



## What is reported to SSQ:

→ Federal Sales Figures provided by GSA contractors.

## Why is this helpful?

→ Provides you with a barometer of how each individual company is performing on the GSA Schedule.

<https://d2d.gsa.gov/report/fas-schedule-sales-query-plus-ssq>



# Prerequisites

- Must be in business for two years and you must provide two years of financial statements. (unless you are seeking an IT Schedule 70 contract)
- Ability to demonstrate past performance
- Products must be commercially available
- Products must be compliant with the Trade Agreements Act

# IT Category Startup Springboard:

In lieu of the 2-year corporate experience requirement, you can now:

- Use professional experience of executives and key personnel as a substitute
- Use project experience of key personnel, and
- Provide financial documentation that demonstrates the company's financial responsibility in lieu of submitting 2 years of financial statements.

For more information visit [www.gsa.gov/springboard](http://www.gsa.gov/springboard)

# Registrations & Certifications

## Data Universal Numbering System D-U-N-S Number

- The DUNS number is like a social security number—it allows us to go into SAM to make sure you are a viable company that has not been suspended or debarred.
- Is a unique 9 digit code to identify your business
- Please visit Dun & Bradstreet
- You should receive your DUNS within 1 business day. Save your number for future use

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

## System for Awards Management (SAM)

- You must have an active SAM registration within **1 year** of your GSA Schedule application
- You need to use your D-U-N-S Number to register in SAM
- SAM confirms your company meets eligibility requirements to do business with the government
- eOffer will automatically pull your SAM registration information
- Questions? Visit the Federal Service Desk at [fsd.gov](http://fsd.gov)

(<http://sam.gov>)

# FAS ID Transition:



- As of March 8<sup>th</sup>, all contractors must the FAS ID multi-factor authentication to access the eOffer and eMod systems. Please ensure that you are listed in SAM as one of the following points of contact:
  - Government Business POC
  - Electronic Business POC
  - Government Business Alternate POC
  - Electronic Business Alternate POC
  - Past Performance POC
  - Past Performance Alternate POC

# Required Training

## Pathways to Success

- Guidance on GSA's Multiple Award Schedule contracts.
- Guidance on how to be a successful contractor, process requirements, and guidance on the offer process.
- **Completed within 1 year of application**
- Visit the Vendor Education Center to take the course at: [vec.gsa.gov](http://vec.gsa.gov)

## Readiness Assessment

- Mandatory process that walks you through questions that help you determine if pursuing a GSA Schedule is the right business decision for your company.
- **Completed within 1 year of application**
- Visit the Vendor Education Center to take the course at: [vec.gsa.gov](http://vec.gsa.gov)

# Required Documents

Document Name	Definition
Agent Authorization Letter	<ul style="list-style-type: none"><li>• If applicable. Must be signed by a company official.</li></ul>
Readiness Assessment	<ul style="list-style-type: none"><li>• Completed and Signed by Officer of the Company (Offeror). Not accepted from Consultants or Agents. Must be completed/dated within 1 year from date of offer.</li></ul>
Pathways to Success	<ul style="list-style-type: none"><li>• A copy of the Training Certificate should be uploaded.</li></ul>
Past Performance	<ul style="list-style-type: none"><li>• CPARS, Narrative Customer References, Relevant Work Performed</li></ul>
Subcontracting Plan	<ul style="list-style-type: none"><li>• Must be submitted by “Other than small” concerns, if the contract value is expected to be \$750,000 or more, and has a possibility of subcontracting opportunities.</li></ul>

# Required Documents

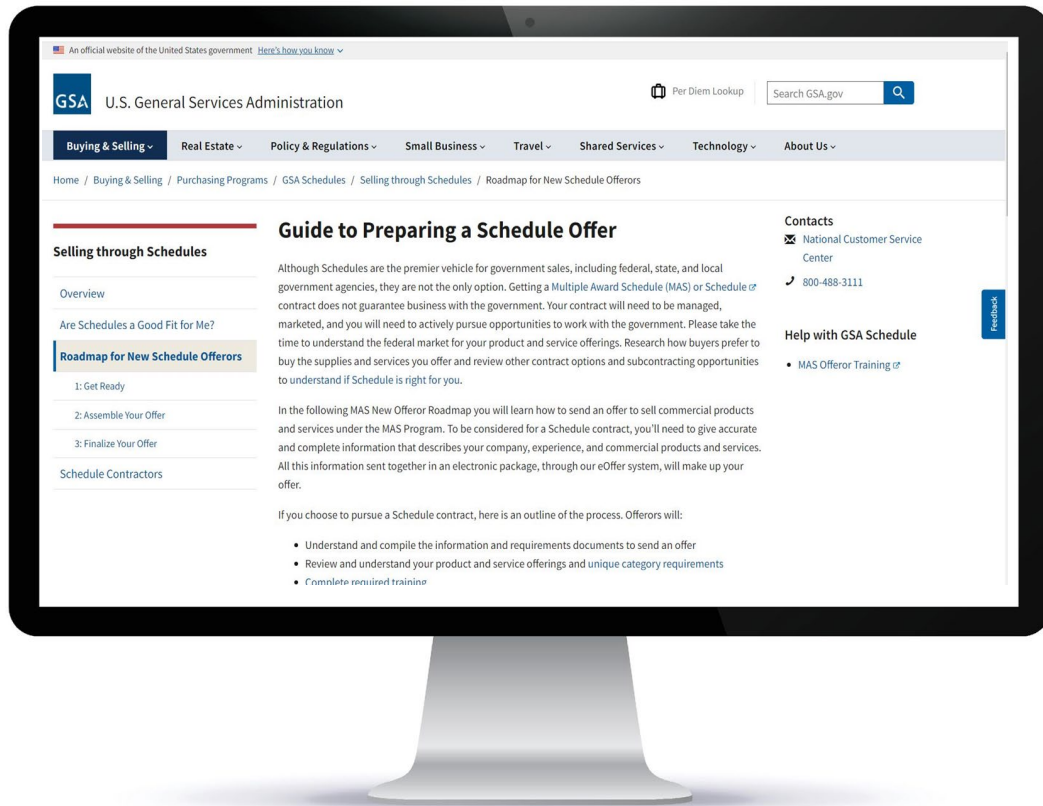
Document Name	Definition
Commercial Sales Practice Format (CSP-1)	<ul style="list-style-type: none"><li>• Template provided to outline commercial sales only. Sales should be provided for each SIN you are applying to. Will ask about any written discount policies and if these discounts are better than or equal to the pricing offered to the government.</li></ul>
Financial Statements (2 Years)	<ul style="list-style-type: none"><li>• From date of offer (Balance Sheet, Income Statement, Net Income/Loss). Provide an explanation for any negative financial information disclosed, including negative equity or income.</li></ul>
Price Proposal Template	<ul style="list-style-type: none"><li>• Outlines prices you will offer to the government. This document should not be modified in any way. Do not leave any sections blank to avoid a possible rejection of your offer.</li></ul>
Pricing Support (Invoices/SOW)	<ul style="list-style-type: none"><li>• Should be the same percentage discounts being offered in the CSP-1. Should show the same prices in the Price Proposal Template (invoices/SOW dated in current year).</li></ul>
Commercial Price List or Market Rate Sheet	<ul style="list-style-type: none"><li>• (Whichever applies) List of current Commercial Prices dated between 1 to 3 years of offer.</li></ul>
Professional Compensation Plan	<ul style="list-style-type: none"><li>• Submission of the general compensation practices printed in the offeror's employee handbook is often sufficient. State uncompensated overtime.</li></ul>

# Required Documents

Document Name	Definition
<b>Technical Proposal</b>	<ul style="list-style-type: none"><li>• A Technical Proposal is a description of the items being offered in sufficient detail, and is similar to how businesses would respond to RFPs and RFQs.</li><li>• It should confirm all the information that you have submitted.</li><li>• Each schedule has its own technical proposal.</li></ul>
<b>Letter of Supply</b>	<ul style="list-style-type: none"><li>• This is a form letter that binds the supplier or manufacturer to the GSA Schedule contract holder, to ensure products will be provided for the duration of the contract.</li></ul>
<b>Previous FSS Rejections</b>	<ul style="list-style-type: none"><li>• If your company has received any previous Schedule contract offer rejections, you should include copies of any rejection letters received within the last 2 years of your offer.</li></ul>
<b>Previous Cancellations</b>	<ul style="list-style-type: none"><li>• Include a copy of the cancellation letter or notification</li><li>• Low Sales (12 months-One year)/ Cancelled for something else, you can re-apply immediately</li><li>• Current Federal sales in excess of \$25,000, as evidenced by copies of contractual documents that identify the Federal entity and the date and value of the product or services provided, Demonstration that there is a reasonable expectation that any future award will comply with clause I-FSS-639 Contract Sales Criteria.</li><li>• A marketing plan detailing the steps you plan to take to generate sales through a new GSA Schedule contract.</li></ul>



# The MAS Roadmap



## What is the MAS Roadmap?:

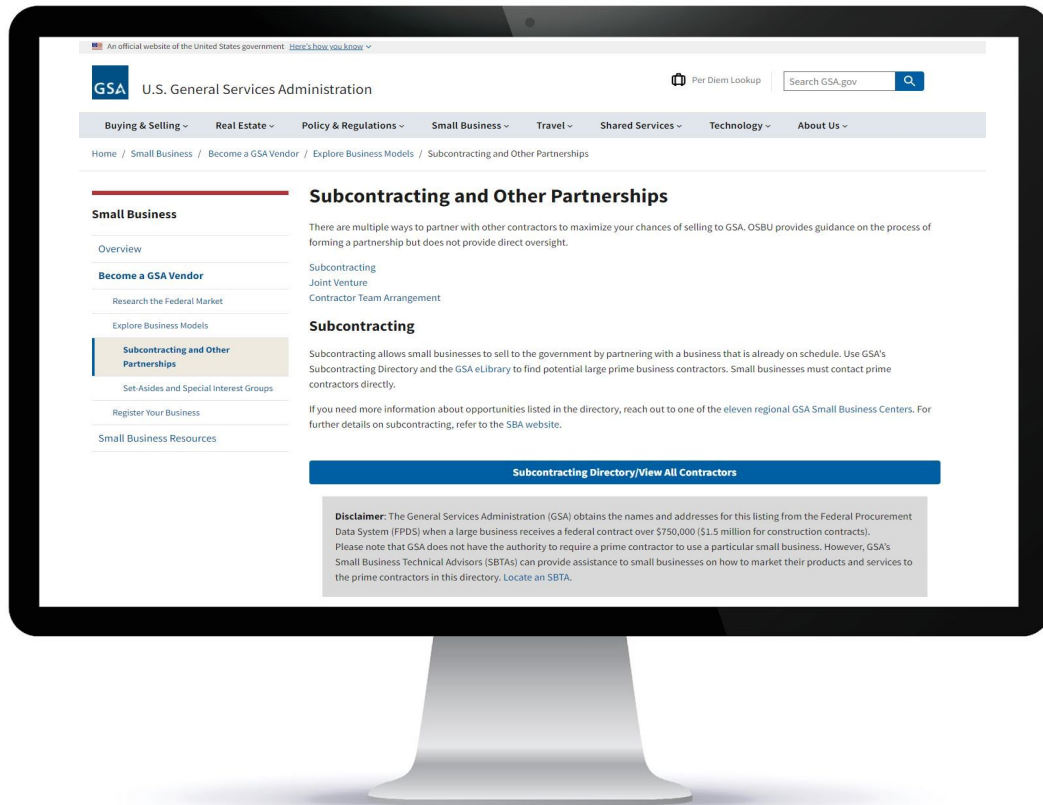
→ Provides information on the contract award process to make it easier to do business with the government.

## Why is this helpful?

→ Breaks down the offer process into easy to follow step-by-step instructions.

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

# GSA Subcontracting Directory



## What is the Subcontracting Directory?:

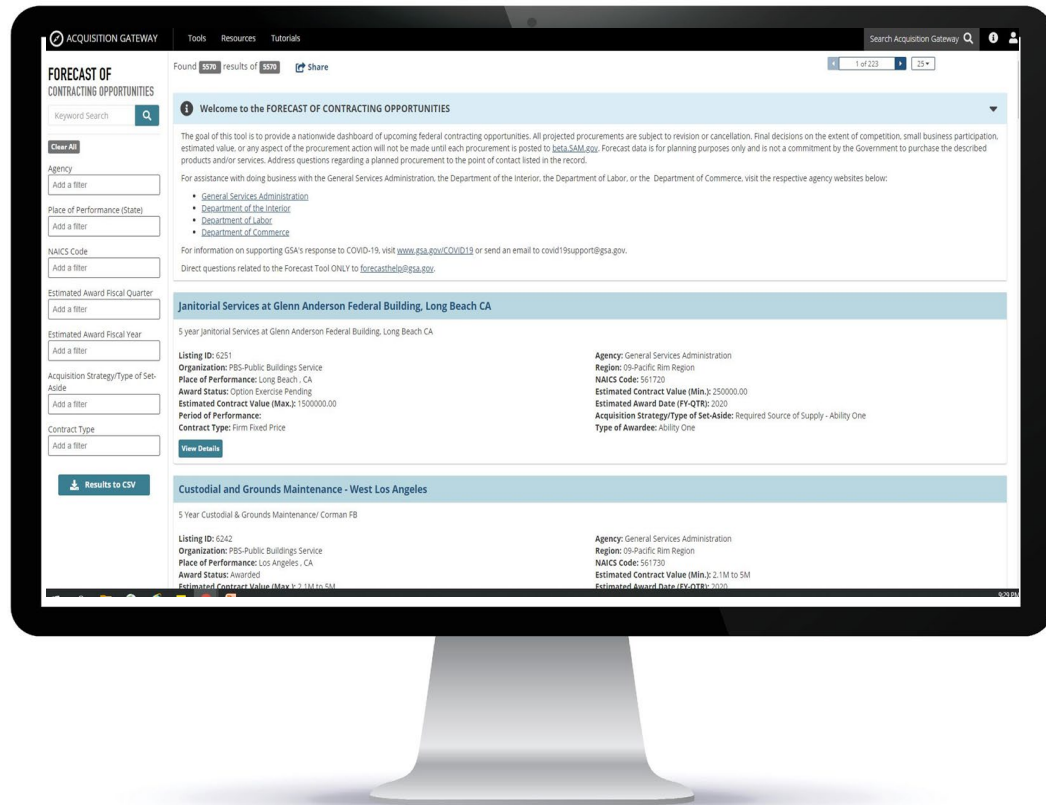
→ Provides information on the contract award process to make it easier to do business with the government.

## Why is this helpful?

→ Breaks down the offer process into easy to follow step-by-step instructions.

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

# Looking toward the Future: Forecast Tool



## What is the Forecast Tool?

→ Provides forward looking data about future requirements.

→ Helps you learn about potential prime contracting opportunities

Visit: [FBF.GOV](https://fbf.gov)

# Still Have Questions?

## Contact Your Local Small Business Specialist

Buying & Selling ▾ Real Estate ▾ Policy & Regulations ▾ Small Business ▾ Travel ▾ Shared Services ▾ Technology ▾ About Us ▾

Home / Small Business

assessments, and regulations.

**First, go to [gsa.gov/osdbu](https://gsa.gov/osdbu), scroll down to “Small Business Resources,” then select “News, Events, and Contact”**

### Small Business Resources

- Training for Small Businesses
- Video Resources
- Policy & Regulations
- News, Events, and Contact
- Follow OSDBU on Twitter or explore other GSA social media

Find out the latest contract award info at [FBO.gov](https://fbo.gov).

Last Reviewed: 2020-04-06

GSA U.S. General Services Administration

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### Small Business Resources

### SBU Events and Contacts

#### Contacts by region

Review the small business support contacts and choose an advocate near you.

**Second, go to contacts by region and select “small business support contacts.”**

Submit a question

Buying & Selling ▾ Real Estate ▾ Policy & Regulations ▾ Small Business ▾ Travel ▾ Shared Services ▾ Technology ▾ About Us ▾

Home

### Contact information for Small Business Support

This group provides access to GSA's nationwide procurement opportunities through outreach, training and counseling. They are advocates for small and disadvantaged businesses, including women-owned and Hubzone firms.

Back

Filter by State or Region:

All Locations

Name	Contact Info	State or Region	Serves
<b>City Ash</b>	Phone: 312-353-1100 Email: <a href="mailto:ash@gsa.gov">ash@gsa.gov</a>	AL, FL, GA, KY, MS, NC, SC, TN	General Services Administration
<b>Shannon Banks</b> Supervisory Small Business Specialist 3800 230 S Dearborn St CHICAGO, IL 60603-1425	Phone: 312-353-1100 Email: <a href="mailto:shannon.banks@gsa.gov">shannon.banks@gsa.gov</a>	IL, IN, MI, MN, OH, WI	General Services Administration
<b>La'Vida Barnes (La Vida)</b> Small Business Specialist 11A00 819 TAYLOR ST FORT WORTH, TX 76102-6124	Phone: 817-978-0441 Email: <a href="mailto:lavida.barnes@gsa.gov">lavida.barnes@gsa.gov</a>	AR, LA, NM, OK, TX	General Services Administration
<b>Janice Bracey</b> Small Business Specialist	Phone: 212-264-1235		

**Finally, select your state location for the OSDBU POC near you.**

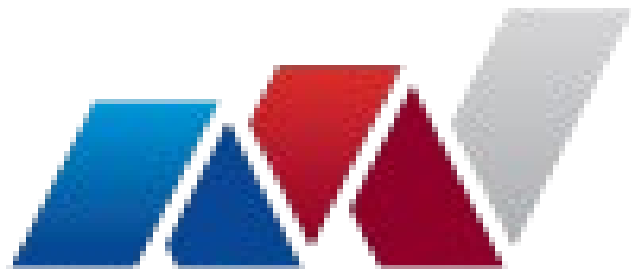
# Additional Resources



U.S. Small Business  
Administration



Association of  
Procurement  
Technical  
Assistance  
Centers



**MINORITY BUSINESS  
DEVELOPMENT AGENCY**  
U.S. DEPARTMENT OF COMMERCE



**DOING BUSINESS**  
WITH GSA 

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

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

## **Poll Question #4:**

Was this training helpful to you?

**QUESTIONS?**