

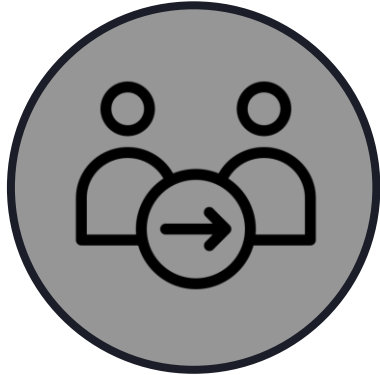


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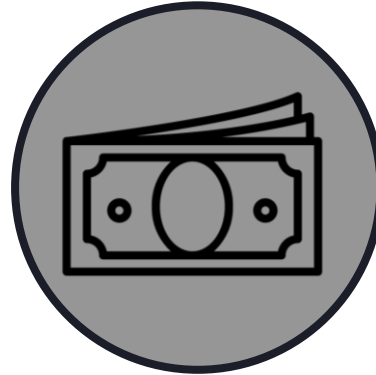
SOFWERX Small Business Boot Camp  
(SBBC) 4

# OVERVIEW

# SUPPORT FROM MENTORS



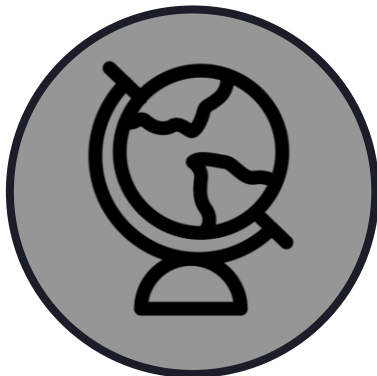
MANAGEMENT &  
TECHNICAL ASSISTANCE



FINANCIAL  
ASSISTANCE



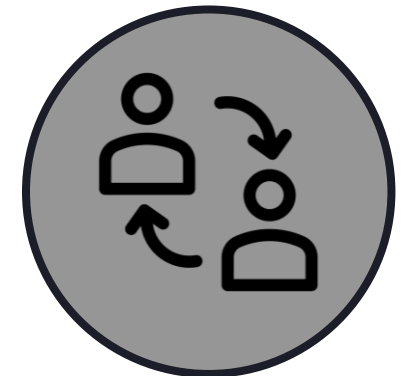
CONTRACTING  
ASSISTANCE



INTERNATIONAL TRADE  
EDUCATION



BUSINESS DEVELOPMENT  
ASSISTANCE



ADMINISTRATIVE  
ASSISTANCE

**Teaming Agreements**

Two/more companies **partner** for a specific requirement.

**Joint Ventures**

Protégé and Mentor form **Joint Venture** that qualifies as a small business.

**Subcontracts**

Protégé performs on contracts for Mentor.

**Business Development**

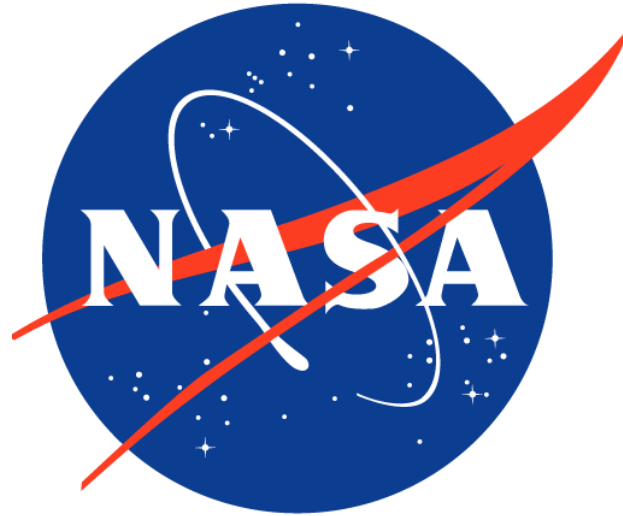
Protégé receives **guidance** from Mentor.

**Protégé expands capacity  
to bid independently.**



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# Other Federal Mentor Protégé Programs





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# SBA Mentor- Protégé Program



**SINCE MPP BEGAN IN 2016, SBA  
HAS REVIEWED MORE THAN**

**3280**

**MENTOR PROTÉGÉ AGREEMENTS**

# GETTING IN



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# MPP Eligibility

# **A SMALL BUSINESS MUST HAVE THE FOLLOWING...**



**FOR-PROFIT BUSINESS**



**NO DETERMINATION OF AFFILIATION**



**SMALL FOR NAICS CODE**



**NO MORE THAN 40% EQUITY FROM MENTOR**



**NO MORE THAN TWO MENTORS IN A LIFETIME**



**NO MORE THAN THREE PROTEGES AT ANY ONE TIME**



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# The Application Process

# PREPARE AHEAD

**1 SELECT YOUR MENTOR**

**2 REGISTER IN SAM**

**3 APPLY THROUGH CERTIFY**

**4 ALLOW 105 DAYS**

- ✓ 15 DAYS FOR SCREENING
- ✓ 90 DAYS FOR PROCESSING
- ✓ SUBMIT A CLEAN CASE

**5 REMAIN RESPONSIVE**

- ✓ CHECK YOUR INBOX & SPAM
- ✓ RESPOND QUICKLY
- ✓ RESPOND QUICKLY

# BEST PRACTICES FOR VERIFYING ELIGIBILITY



**COPY OF WELCOME LETTER**



**ACTIVE LIST OF MENTOR-PROTÉGÉ AGREEMENTS**



**CONTACT US**



While all three options are good ways to verify eligibility, **a welcome letter alone or even the active list of MPAs may not capture a recent termination** – by either the participants or SBA. If you are in doubt about whether an MPA is still active, please contact us at [sbampp@sba.gov](mailto:sbampp@sba.gov) or [kanika.perkins@sba.gov](mailto:kanika.perkins@sba.gov) to ensure up-to-date verification.

# STAYING IN





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# Maintaining Eligibility

## **PROTEGES MUST:**

**Submit annual reports**

**Demonstrate material or developmental benefits**

**Submit annual and project-end reports & Certificates of Compliance**

## **MENTORS MUST:**

**Provide meaningful assistance, as described in agreement**

## **SBA RESERVES THE RIGHT TO:**

**Terminate the agreement for noncompliance if the mentor hasn't provided proper assistance**

**Renew the agreement for an additional three years upon expiration after the initial three years**

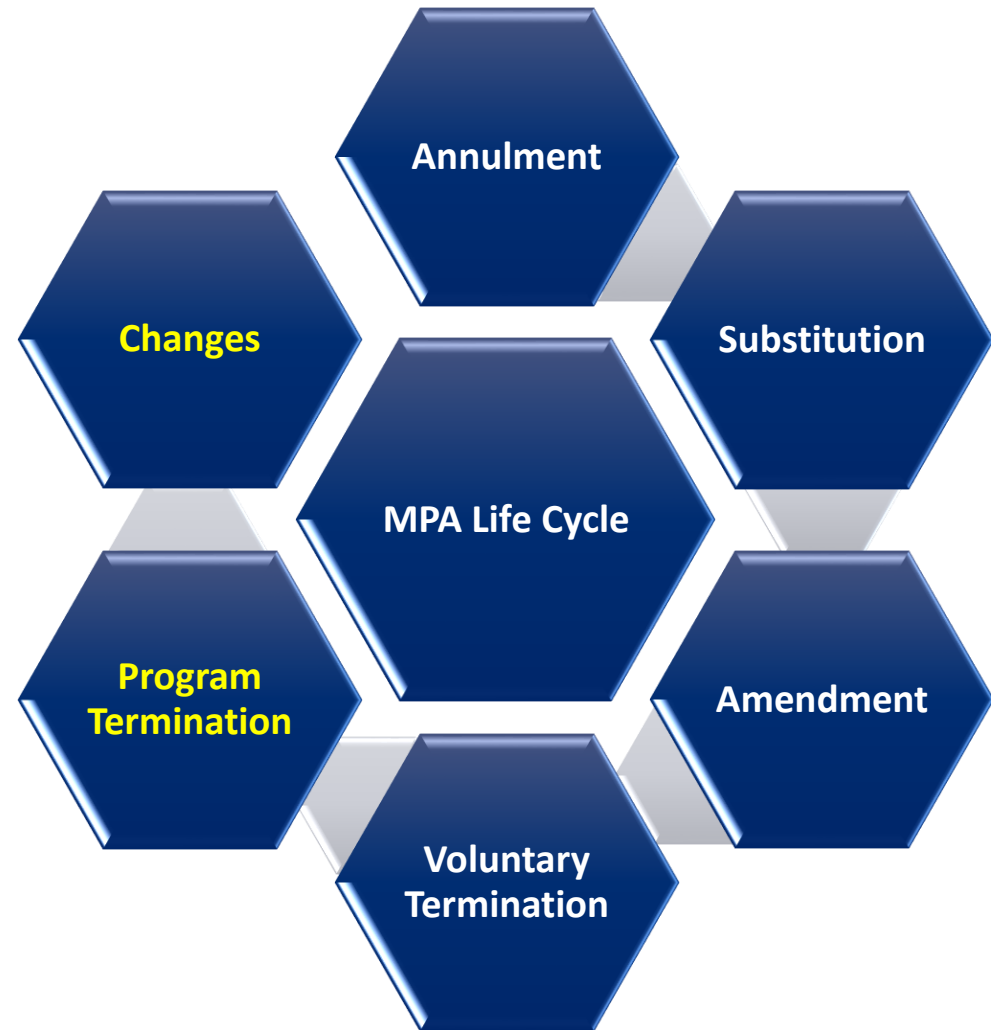
# AE TOP 10:

- 1 Protégé & Mentor UEI
- 2 Anniversary Date & Program Year
- 3 Changes to MPA
- 4 Proposed Assistance, Hours, Assistance Received
- 5 Loans, Investments, and Bonding
- 6 JV Name & UEI
- 7 Subcontracts: Won, Pending, & Lost
- 8 Prime K's: Won, Pending & Lost
- 9 JV K's: Won, Pending & Lost
- 10 Mentor Rating

# MPA MODIFICATIONS

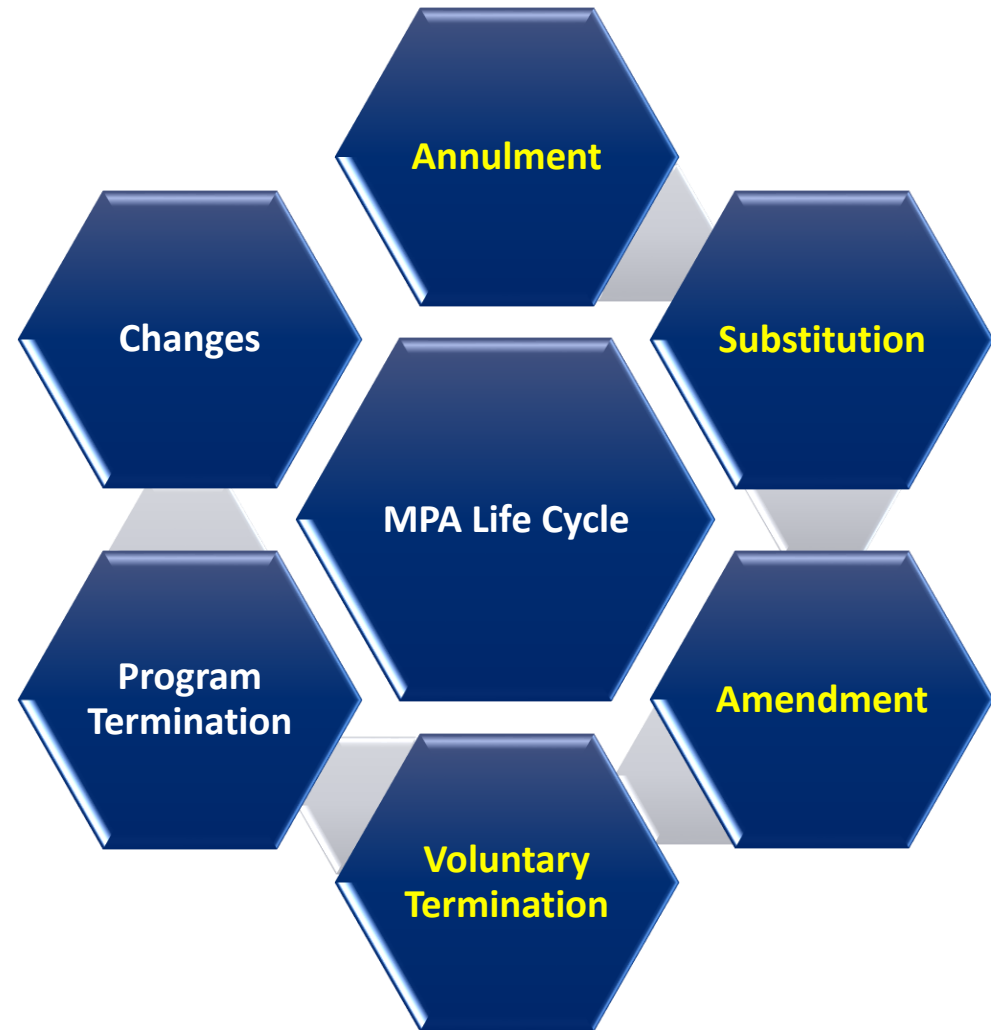
# Changes to the MPA

- An SBAMPP MPA lasts up to six years, where the mentor-protégé relationship renews automatically **without notice of continuation or extension**
- The protégé firm must complete its annual evaluation annually **within 30 days of its anniversary date.**
- Effective October 1, 2022 **ALL annual evaluations are completed through Certify**
- The protégé must answer all certification questions in the annual evaluation. Otherwise, the annual evaluation is incomplete and may result in a **Program Termination.**



# Changes to the MPA

- The protégé may request an annulment **within the first 18 months** for virtually any reason, and SBA can prohibit abuse of any tool used to circumvent SBA regulations.
- The protégé may request substitution of a mentor for another chosen mentor, who SBA will vet for approval.
- The protégé or mentor may request an amendment to change contact information, partner ownership, or business assistance.
- The protégé or mentor may request voluntary termination **at any time**. The effective date will be 30 from the submitted request.



# JOINT VENTURES

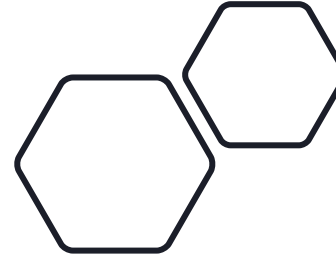


# JOINT VENTURE BASICS

- **MPA approval** required prior to JV bid on award
- MPP does **not review or approve JVs**
- **SBA District Offices approve JVs for 8(a) sole source only**
- MPA JVs are granted **exclusions from affiliation**
- MPA JVs may earn **unlimited** contracts in two years
- Procuring activities must **consider past performance individually** by each partner to the joint venture as well as any work done by the joint venture itself.
- Protégé firms must perform at least 40%, Mentor firms may perform up to 60%

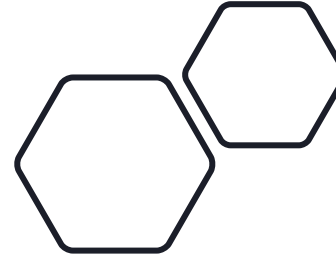
# Q & A

Q1: Protégé, SmallBiz is 8(a), HUBZone, and WOSB. SmallBiz forms an MPA relationship with mentor, BigBiz, and later a JV. Which certifications does the JV possess?



- A. 8(a)
- B. HUBZone
- C. WOSB
- D. All of the above

Q2:  
JV Small-N-BigBiz receive a \$10M services contract. A similarly situated entity performs \$2M of the work. The JV must perform \_\_\_\_\_ of the work. Protégé, SmallBiz must therefore perform \_\_\_\_\_ of the work.



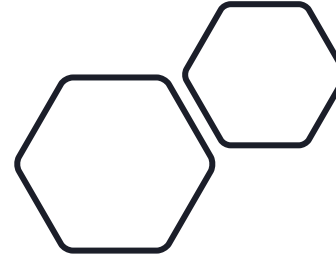
A. \$3M, \$1.2M

B. \$1.2M, \$3M

C. \$1.2M, \$8.8M

D. \$10M, \$0M

Q3: MP JV 123 wins a \$10 M prime contract. MP JV 123 subcontracts 50% of the work to its underlying partners (Protégé A and Mentor B) and 50% of the work to an unrelated firm. Protégé A performs 50% of MP JV 123's work share. How are receipts allocated to Protégé A for size purposes?



A. \$10M (100%)

B. \$5M (50%)

C. \$2.5M (25%)

D. \$0

# RESOURCES



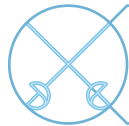
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# Guiding Regulations

# CONSOLIDATION OF MENTOR PROTÉGÉ PROGRAMS



No Facility Security Clearances for JVs



Mentors May not Submit Competing Offers



Mentors May Own Up to 40% Equity in Protégé Firm



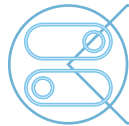
Annulments for Terminations w/in First 18 Months



No More 3-in-2



SBA Only Reviews 8(a) Sole Source JVs



Protégé Firms May Substitute Mentors



Facility Security Officers May be Administrative Personnel



**Under what circumstances can a joint venture be awarded an 8(a) contract?**

13 CFR 124.513

**What requirements must a joint venture satisfy to submit an offer for a procurement or sale set aside or reserved for small business?**

13 CFR 125.8

**What are the rules governing SBA's small business mentor-protégé program?**

13 CFR 125.9

**What requirements must an SDVO SBC meet to submit an offer on a contract?**

13 CFR 125.18

**What requirements must a joint venture satisfy to submit an offer and be eligible to perform on a HUBZone contract?**

13 CFR 126.616

**May a joint venture submit an offer on an EDWOSB or WOSB requirement?**

13 CFR 127.506

**All Small Mentor-Protégé Program**

13 CFR 125.9

**Service-Disabled Veteran**

13 CFR 125.15(b)

**SBA Size Regulations**

13 CFR 121

**8(a) and SDB Regulations**

13 CFR 124.5

**HUBZone Program**

13 CFR 126.6

**Small Disadvantaged Business**

13 CFR 124.1002(f)

**SBA Certificate of Competency**

13 CFR 125.5

**WOSB Program**

13 CFR 127

**SBA Prime Contracting**

13 CFR 125.2

**SBA Subcontracting**

13 CFR 125.3

**Non-manufacturer rule**

13 CFR 121.406(b)

**Limitations on subcontracting**

13 CFR 125.6



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# MPP Support

**1**

### **MPP Site**

<https://www.sba.gov/federal-contracting/contracting-assistance-programs/sba-mentor-protege-program>

**2**

### **Active List of MPP MPAs**

<https://www.sba.gov/document/support-active-mentor-protege-agreements>

**3**

### **Joint Venture Guide**

Review 13 CFR §124.513 (c)



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# Questions

**I am at year 3 of the MPA and I would like to extend for 3 more years.**

**I am interested in participating in the SBAMPP, how do I locate a Mentor?**

**What happens if my IDIQ contract issues a task order  
after the “2 year” period of my JV?**



**Past performance is based on the Mentor, Protégé or  
JV?**

# What does it mean to extend your MPA?

**1**

**MPP Mailbox**

sbampp@sba.gov

**2**

**MPP Deputy Director**

kanika.perkins@sba.gov

Cell 202-689-4828

**3**

**MTAD Director**

sandra.barrett@sba.gov

Work (202) 205-7039