



Vetting a Supplier

ISM-CB Seminar: *Mitigating Risks in Purchase Orders and Contracts*

April 6, 2016

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Today's Agenda

- Overview of WA PTAC
- General Market Research Strategies
- System for Award Management (SAM)
- Dynamic Small Business Search (DSBS)
- Q & A



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Washington PTAC Program

The Procurement Technical Assistance Center assists Washington State businesses in selling to federal, state and local governments.

- Finding opportunities to bid
- Interpreting solicitations and regulations
- Certifications & registrations
- Marketing to government buyers
...and much more

We provide these services through:

- Workshops
- One-on-one Counseling Sessions
- Matchmaking events
- Optional Bid Match service (*fee-for service: \$135/year*)



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Washington PTAC Program

- PTAC funds are discretionary and allocated each year by Congress in the Defense Appropriations Bill.
- The Department of Defense, Defense Logistics Agency enters into cooperative agreements with PTAC across the United States.
- Matching funds are provided by the Tri-City Regional Chamber and the other sub-centers.
- There are 93 PTACs in U.S. employing 400 counselors
- 13 Counselors in Washington at 8 sub-centers



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Washington PTAC Program

Assistance to Government Agencies and Prime Contractors

- Your partner to connect with quality small and diverse businesses; can also assist with outreach events
- Post/market contracting and subcontracting opportunities (time permitting)



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WASHINGTON PTAC

Serves Washington State Businesses

A program of Thurston Economic Development Council
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 Lacey WA 98503
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 tscroggs@thurstonedc.com

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 Mona Carlson, Theresa Mangrum
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- 2: **Thurston Economic Development Council**
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- 3: **Greater Vancouver Chamber of Commerce**
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 360.561.1092 | vewa@washingtonptac.org
- 4: **Economic Alliance Snohomish County**
 Cate Taylor
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- 5: **Green River College**
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- 6: **Bates Technical College**
 Tom Westlund
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- 7: **Greater Spokane Incorporated**
 Jessica Kirk
 509.321.2641 | spokane@washingtonptac.org
- 8: **Tri-City Regional Chamber of Commerce**
 Ashley Coronado
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Market Research

What to explore:

- What information about suppliers can you find online?
- How can you verify that a supplier's legal identify and business info is correct?
- What information is validated by a 3rd party?
- What online info should be questioned?

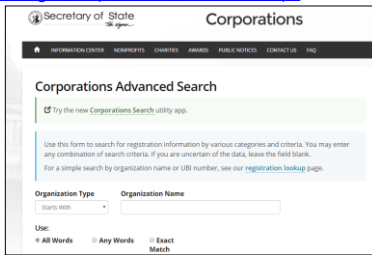


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Market Research Strategies

Registered Washington State businesses

http://www.sos.wa.gov/corps/search_advanced.aspx



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Market Research Strategies

Does the business have a website?

Google them!



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Market Research Strategies

Does the business have a DUNS number?

<https://update.dnb.com>



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Market Research Strategies

Who is registered to sell to federal government?

www.sam.gov and <http://dbs.sba.gov>



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Market Research Strategies

What contracts have been awarded in the past?

To whom? At what price?

www.usaspending.gov or <https://www.fpds.gov>



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Market Research Strategies

Federal Procurement Data System – Next Generation (FPDS-NG)

<https://www.fpds.gov> (or Google it!)

Steps:

- Log-in (Register if it's your first time)
- "ezSearch"
- "Advanced Search"
- "Add"
- Enter search item, such as company name, or choose something else (for example, "Vendor DUNS" and enter DUNS #)



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Market Research Strategies

Federal Procurement Data System – Next Generation (FPDS-NG)

Agency Name	Agency Code	Agency Address	Agency City	Agency State	Agency Zip	Agency Phone	Agency Fax	Agency Email
...
...
...
...



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WA State Office of Minority & Women's Business Enterprises (OMWBE)

omwbe.wa.gov

Certified firms directory
to locate women and/or minority-owned firms

Business Name	NAICS Code	Business Type	Owner	Contact Info
ALLIANCE CONTRACTORS LLC	238990	Construction	ALLIANCE CONTRACTORS LLC	509-491-3231
...
...
...
...



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System for Award Management (SAM)

Database of companies registered to sell to the federal government. Who is registered?

www.sam.gov

Steps (do not need to be logged in):

- "Search Records"
- In "Quicksearch" field, enter DUNS # or company name
- "Search"
- "View Details"
- "Entity Record"



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System for Award Management (SAM)

Database of companies registered to sell to the federal government. Who is registered?

- Company name and Tax ID Number are verified by the IRS.
- Company name and address are validated by the Defense Logistics Agency CAGE Department.



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System for Award Management (SAM)

What can you find in SAM?

- Business start date
- Physical address & mailing address
- Socio-economic information
- Entity structure (i.e. LLC, Corporation, etc.)
- NAICS codes (what do they do?)
- Point of contacts
- If a business is debarred



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System for Award Management (SAM)

What info can I TRUST in SAM?

- Business start date – entered by company
- Physical address & mailing address – physical address flowed from Dun & Bradstreet, mailing address entered by company
- Socio-economic information – it depends, see next slide!
- Entity structure (i.e. LLC, Corporation, etc.) – entered by company
- NAICS codes (what do they do?) – entered by company
- Point of contacts – entered by company
- If a business is debarred – entered by federal government

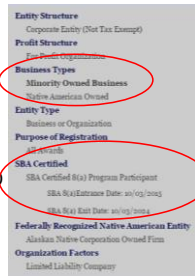


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System for Award Management (SAM)

Socio-Economic Information

- **Small Business**
 - Auto-detected based on # of employees and revenue information entered by the company
- **Woman-Owned**
 - Self-certification by company
 - Is the primary POC a woman?
- **Veteran/Service-Disabled Veteran Owned**
 - Self-certification by company
- **Minority-Owned (Small Disadvantaged Business)**
 - Self-certification by company
- **HUBZone**
 - Entered by the SBA
- **8(a)**
 - Entered by the SBA



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System for Award Management (SAM)

Who is debarred from federal government contracting?

www.sam.gov

Steps (do not need to be logged in):

- "Search Records"
- "Advanced Search – Exclusion"
- Enter search criteria
- PURPLE = debarred



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Dynamic Small Business Search

Small Businesses Registered in SAM
dsbs.sba.gov
Search by company name, DUNS # or other criteria

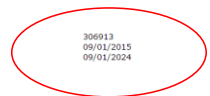


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Dynamic Small Business Search

8(a) Certification:

SBA 8(a) Case Number:
SBA 8(a) Entrance Date:
SBA 8(a) Exit Date:



Small Disadvantaged Business Certification:

SDB Entrance Date:
SDB Exit Date:

HUBZone Certification:

HUBZone Certified? [] Yes [X] No
HUBZone Certification Date: N/A



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➤ Questions, Comments, Discussion?

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