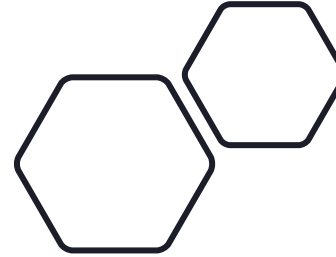




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SBTW23: SBA Mentor-Protégé Program

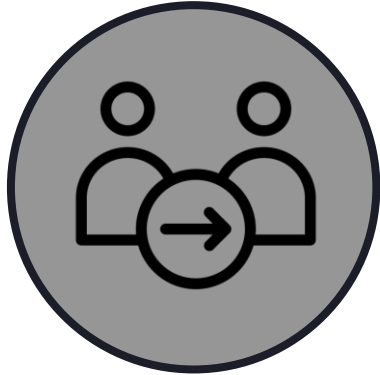
Q1: Protégé, SmallBiz is 8(a), HUBZone, and WOSB. SmallBiz forms an MPA relationship with mentor, BigBiz, and later a JV. Which certifications does the JV possess?



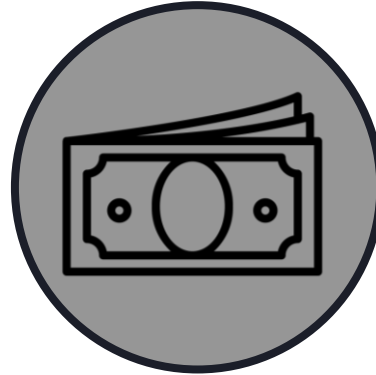
- A. 8(a)
- B. HUBZone
- C. WOSB
- D. All of the above

OVERVIEW

SUPPORT FROM MENTORS



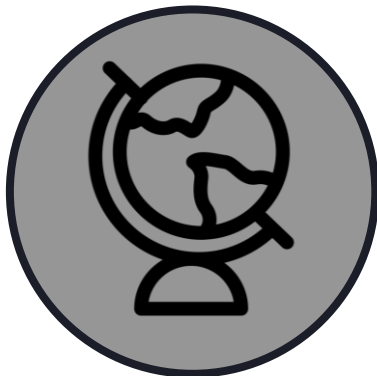
MANAGEMENT &
TECHNICAL ASSISTANCE



FINANCIAL
ASSISTANCE



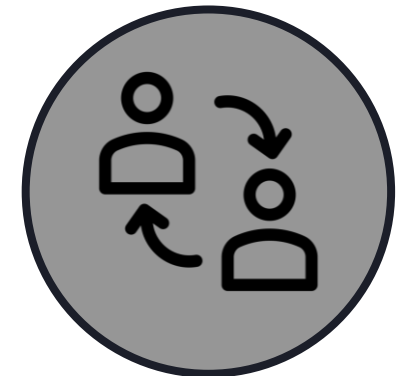
CONTRACTING
ASSISTANCE



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

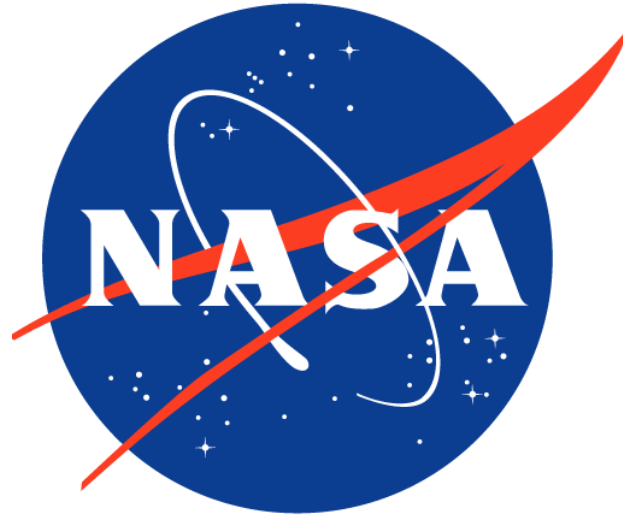
Protégé receives **guidance** from Mentor.

**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**

2474

MENTOR PROTÉGÉ AGREEMENTS

CONSOLIDATION OF MENTOR PROTÉGÉ PROGRAMS



**FACILITY SECURITY
CLEARANCES NOT
REQUIRED FOR JV IF
BOTH PARTNERS HAVE
A SUCH CLEARANCE**



**MENTORS CANNOT SUBMIT
COMPETING OFFERS**



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



**ANNULMENTS FOR
TERMINATIONS W/IN FIRST
18 MONTHS**



**PROTÉGÉS FROM
PUERTO RICO MAY
HAVE UP TO FIVE
MPAs**

MPP CONSOLIDATION CONTINUED...



**JV MAY RECEIVE
UNLIMITED
CONTRACTS IN TWO-
YEAR PERIOD – NO
MORE 3-IN-2 RULE**



**FACILITY SECURITY
OFFICERS MAY BE
ADMINISTRATIVE
PERSONNEL**



**NO JV APPROVAL FROM
SBA, INCLUDING
COMPETITIVE 8(A) JV**



**PROTÉGÉ MAY SUBSTITUTE
MENTORS**



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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



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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

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

SBA RESERVES THE RIGHT TO:

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

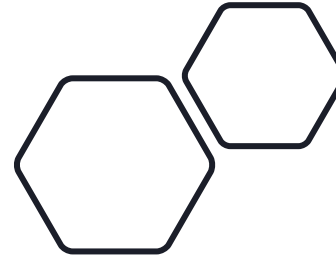
Renew the agreement for an additional three years upon expiration after the initial three years

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%

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.



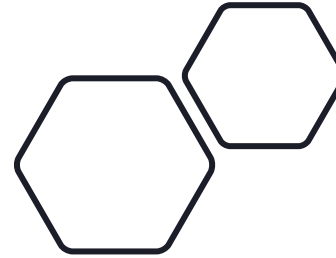
A. \$3M, \$1.2M

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

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

1

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