TRIAD

AGENDA

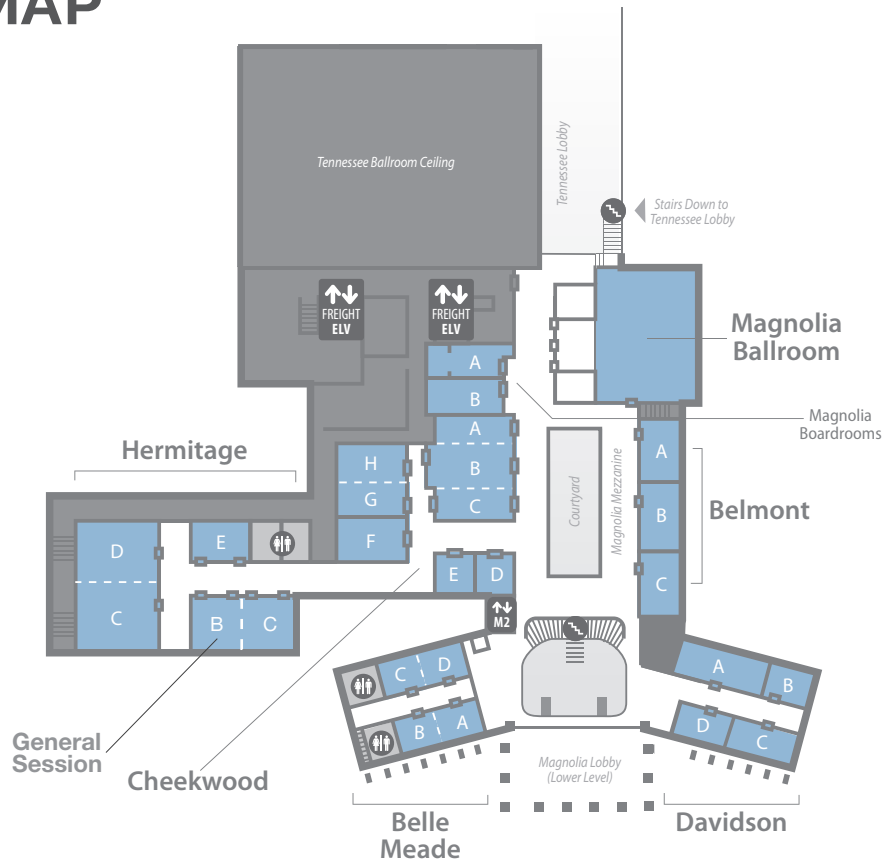**7:00 am – 5:00 pm**

REGISTRATION
HERMITAGE AB CORRIDOR

7:00 – 8:00 am

NETWORKING BREAKFAST
HERMITAGE D

8:00 – 8:30 am

WELCOME, INTRODUCTIONS AND PLEDGE OF ALLEGIANCE
HERMITAGE AB

Suzanne Raheb
TRIAD Co-Chair; Corporate Supplier Diversity and Compliance Leader, Lockheed Martin

Diane Dempsey
TRIAD Co-Chair; Director, Small Business Programs, BAE Systems, Intelligence & Security Sector

8:30 – 9:30 am

DOD UPDATES: SMALL BUSINESS INDUSTRIAL BASE STRATEGY AND NUNN PERRY NOMINATION PACKAGE

Shannon Jackson
Acting Director, Department of Defense, Office of Small Business Programs

9:30 – 10:00 am

DEFENSE CONTRACT MANAGEMENT AGENCY UPDATE

Rosalyn Wiggins
Associate Director, Defense Contract Management Agency Small Business Office and Compliance Center

10:00 – 10:15 am

NETWORKING BREAK

10:15 – 11:00 am

NDIA LEGISLATIVE UPDATE

Wes Hallman
Senior Vice President of Policy, NDIA

Christian Larsen
Legislative Policy Associate, NDIA

11:00 am – 12:00 pm

PRIME CONTRACTORS PANEL: CHALLENGES, BEST PRACTICES AND OPPORTUNITIES

Stacey Washington
Senior Regulatory Compliance Specialist, SBLO, Lockheed Martin Corporation
Moderator

Heather Herndon Wright
Director, Supply Chain Diversity, Vistra Energy

Emma Stevens
Regulatory Compliance Analyst Sr. Staff, Lockheed Martin

Carol Wooden
Director, Supplier Diversity, Raytheon

Voltaire Walker
Manager Mentor Protege Programs & HBCU/MI Initiatives, Northrop Grumman Corporation

Thosie Varga
Supplier Diversity Manager and Corporate Team Lead, L3 Technologies

12:00 – 1:15 pm

NETWORKING LUNCH
HERMITAGE D

1:15 – 1:30 pm

NATIONAL 8(A) CONFERENCE WELCOME
Ron Perry
President, National 8(a) Association

1:30 – 2:30 pm

SMALL BUSINESS ADMINISTRATION UPDATE
Robb Wong
Associate Administrator, Office of Government Contracting and Business Development, U.S. Small Business Administration

2:30 – 2:45 pm

MBDA DIRECTOR INTRODUCTION
Henry Childs, II
National Director, U.S. Department of Commerce, Minority Business Development Agency (MBDA)

2:45 – 3:00 pm

NETWORKING BREAK

3:00 – 3:45 pm

SMALL BUSINESS FABLES
Megan Connor
Partner, PilieroMazza PLLC

3:45 – 4:45 pm

CUSTOMER PANEL: "ITS ALL IN A PLAN"
Diane Dempsey
TRIAD Co-Chair; Director, Small Business Programs, BAE Systems, Intelligence & Security Sector
Moderator

Emily Harman
Director, Department of the Navy, Office of Small Business Programs

Lee Rosenberg
Director, Small Business Programs, Missile Defense Agency

Pamela Callicutt
Acting Director, Army Office of Small Business Programs, U.S. Army

Valerie Muck
Director, Small Business Programs, U.S. Air Force

Christina Young
Director, Office of Small Business Programs, Defense Logistics Agency

4:45 – 4:55 pm

VETS 2019 UPDATE
Scott Denniston
Executive Director, National Veteran Small Business Coalition

4:55 – 5:00 pm

CLOSING ANNOUNCEMENTS

The NDIA has a policy of strict compliance with federal and state antitrust laws. The antitrust laws prohibit competitors from engaging in actions that could result in an unreasonable restraint of trade. Consequently, NDIA members must avoid discussing certain topics when they are together at formal association membership, board, committee, and other meetings and in informal contacts with other industry members: prices, fees, rates, profit margins, or other terms or conditions of sale (including allowances, credit terms, and warranties); allocation of markets or customers or division of territories; or refusals to deal with or boycotts of suppliers, customers or other third parties, or topics that may lead participants not to deal with a particular supplier, customer or third party.

VENUE MAP

Tennessee Ballroom Ceiling

Tennessee Lobby

◄ *Stairs Down to Tennessee Lobby*

FREIGHT ELV

FREIGHT ELV

Magnolia Ballroom

Magnolia Boardrooms

A

B

A

B

C

A

B

C

Belmont

Hermitage

H

G

F

Courtyard

Magnolia Mezzanine

D

E

C

B C

E D

M2

C D

B A

General Session

Cheekwood

A B

D C

Belle Meade

Magnolia Lobby (Lower Level)

Davidson

TRIAD

AT THE HEART OF THE MISSION

NDIA

1919 100 2019

TRIAD Conference, was formed in 1967 to coordinate the efforts of small-business subcontractors in the defense space. It looks to serve the best interests of industry associations, their members, government agencies and the small-business community. TRIAD encourages an open exchange of information and communication that promotes government and industry collaboration and understanding.

TRIAD seeks to meet these goals with its Winter meeting. It's a great opportunity to network and to exchange important information on small and diverse businesses in government contracting, including legislation and rules and changes that affect prime contractors.

September 4 | Chantilly, VA | **NDIA.org**

Small Business Strategy

Office of Small Business Programs
OUSD(A&S) DASD Industrial Policy

Agenda

- **Mentor Protégé Program Update**
  - MPP Reauthorization
  - Nunn-Perry Awards
  - MPP Data Base

- **DoD Cyber Security Initiatives**

- **NDAA 2018 (Small Business Strategy)**

- **Questions**

"To Improve is to change; To Be Perfect Is To Change Often"

By Winston Churchill

Mentor Protégé Program Reauthorization Updates

➢ **Reauthorize Mentor-Protégé Program**

- On Sept. 25, 2018, U.S. Rep. Sheila Jackson Lee (D-Texas) introduced legislation, H.R. 6875, that would reauthorize the DoD Mentor-Protégé program. The bill was referred to the House Armed Services Committee

➢ **Scheduled to meet with congressional staffers to discuss the reauthorizations and recommended changes to the program**

➢ **Mentor Protégé Agreements during reauthorization period**

➢ **Kick-Off for the 2019 Mentor Protégé Program conference will start in March timeframe**

2019 Nunn-Perry Award Nomination

➢ **Nunn-Perry Award Update:**

  - Late-January we completed adjudication of the Nunn-Perry Award Nomination Packages

  - Received a total of 21 packages, including 2 credit agreements

  - Very close competition with strong submissions

  - We will release the results 2019 Nunn-Perry selection on 18 February 2019

➢ **This years Nunn-Perry candidate submissions display a great examples of companies who are making major contributions to the defense industrial base**

Mentor Protégé Data Base Highlights

➢ **MPP Data Base Capability:**

- Automate the mentor application process

- Reduce the timeline between mentor application submission and approval

- Automate the mentor protégé agreement application process

- Enable the mentor to customize mentor protégé agreement applications by selecting

  amongst the various service offerings of HBCUs/MIs, PTACs, and SBDCs

- Enable Program Managers and Mentors to store and reference important agreement documents

- Enable Program Leadership to conduct historical and up-to-date analysis on the program by

  running reports and looking at programmatic metrics

Small Business Cybersecurity Training Initiative Updates

➢ **Initial cyber security workshop participates totaled 275 small businesses**

➢ **Upcoming Cyber Security workshops:**

Region	Location	Month
9	Sacramento, CA	February
9	Phoenix AZ	March
9	Honolulu HI	May
10	Seattle WA	March
10	Portland OR	March
10	Boise ID	May

40 Cybersecurity Workshops

...other Region 9 sites
► Guam
► American Samoa
► Trust Territories

...other Region 2 sites
► Puerto Rico
► Virgin Islands

► Commonwealth of the Northern Mariana Islands

National Defense Authorization Act 2018

➢ **In Section 851 of the Act, Congress requested the department to address the following four areas:**

1. **Ensure Small Business Programs Further National Defense Programs and Priorities**

2. **Improve Small Businesses Points of Entry into Defense Market**

3. **Enable and Promote Coordinated Outreach to Small Businesses**

4. **Create a Unified Management Structure**

Other Governing Documents For The
Small Business Strategy

➢ **OSD Direction – National Defense Strategy, National Defense Business Operation Plan, E.O. 13806**

➢ **Independent Guidance - Panel 809 Reports Volumes 1 & 2**

➢ **Legislative – National Defense Authorization Act 2018 & Small Business Act Reauthorizations/Revisions to Relevant Programs**

Ensure Small Business Programs Further National Defense Programs and Priorities

➢ **Workforce Education and Development**

- Workforce education and professional development are key components of leveraging small business capabilities

- Integration of Small Business Professional across the acquisition process is critical

➢ **Maximize the Use of Existing Programs and Authorities (Innovation & Commercialization)**

- Utilize existing department innovation programs that specifically drive towards the enabling innovation, attracting small businesses

- Proactively enabling these programs to work together to drive technology transfer into defense programs

➢ **Maximize the Use of Existing Programs and Authorities (Manufacturing & Sustainment)**

- Utilize investment programs targeted at critical defense industrial and manufacturing areas deemed fragile

Improve Small Business Points
of Entry Into Defense Market

➢ **Engaging on Policy and Process**
- Developing the right types of legislation, regulation and policy that reduces entry for small businesses
- Track the involvement of small business professionals in acquisition strategies and peer reviews for major procurements

➢ **Utilizing Tools, Technologies, and Data**
- Acquisition professionals can utilize to streamline how they conduct market research, track performance management and run comparative analytics
- Utilize data analytics to effectively measure performance across North American Industry Classification System (NAICS) and Product Service Codes (PSC)
- Develop big data tools that will measure the impact of policy initiatives on small business performance

Enable and Promote
Coordinated Outreach to Small Businesses

➢ **Improve Outreach and Communication**

- Establish targeted outreach events (APBIs, Industry Day, and Technology Demonstrations)
- Strengthen partnership with the Procurement Technical Assistance Center
- Engagement from senior leadership across the Department promoting Small Business

➢ **Address Small Business Cybersecurity Challenges**

- Work with Department cybersecurity components and utilize both regulatory and voluntary programs to improve small business cybersecurity readiness and DFARS compliance; and
- Develop mechanisms to create roadmaps and threat assessments for small businesses to improve cyber security posture

➢ **Protect Small Business Intellectual Property**

- Work with government and industry partners to enhance communication and outreach to small businesses about current intellectual property education programs

Ensure Small Business Programs Further National Defense Programs and Priorities

➢ **Workforce Education and Development**

- Workforce education and professional development are key components of leveraging small business capabilities

- Integration of Small Business Professional across the acquisition process is critical

➢ **Maximize the Use of Existing Programs and Authorities (Innovation & Commercialization)**

- Utilize existing department innovation programs that specifically drive towards the enabling innovation, attracting small businesses

- Proactively enabling these programs to work together to drive technology transfer into defense programs

Create a Unified Management Structure

➢ **The Department began progress to implement a unified management structure in early 2017 as a result of Section 901 of the National Defense Authorization Act 2016**

➢ **The Under Secretary of Defense for Acquisition, Technology, and Logistics (AT&L) was divided into Undersecretary for Research & Engineering (R&E) and an Undersecretary of Defense for Acquisition and Sustainment (A&S)**

➢ **In this new structure, the Department of Defense Office of Small Business Programs resides within the Undersecretary of Defense for (A&S) as a part of the Industrial Policy**

Four Key Messages

- ➢ **Proactive approach to strengthen industrial base and defense supply chain**

- ➢ **Focus key innovation programs for small business participation**

- ➢ **Develop the right tools for acquisition professional**

- ➢ **Streamline policy and regulations where appropriate**

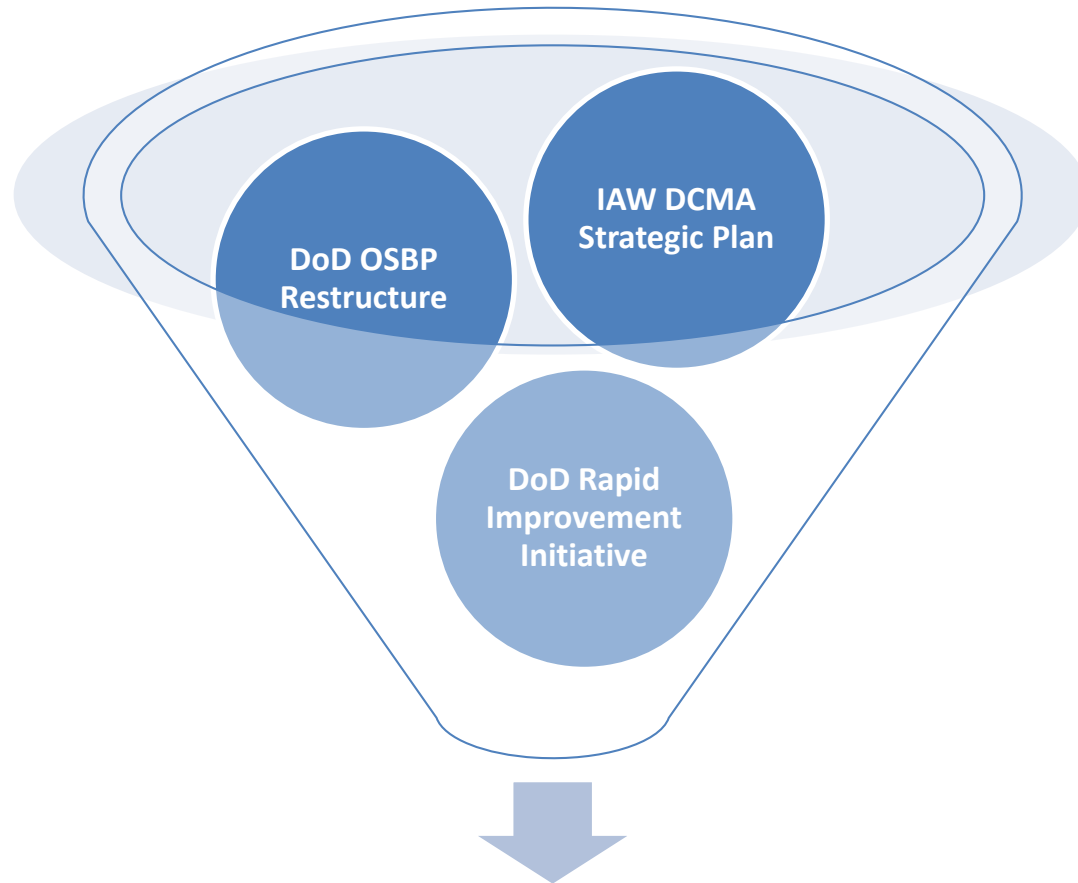# Questions

DCMA SMALL BUSINESS SUPPORT AND SUBCONTRACTING

Rosalyn I. Wiggins
Associate Director
DCMA Small Business Office
February 2019

DEFENSE CONTRACT MANAGEMENT AGENCY

- **Codifies DCMA DoD support – Mentor Protégé Pilot Program, CSP Program, and Special Assignments**
  - **OSBP governance**
  - **DCMA post-award subject matter expertise**
- **Consistency & Relevancy – DoD and DCMA policies and implementing processes**
- **Standard Methodology - Develop DoD standards via DFARS PGI from DCMA procedures**
- **Partnership – Combine resources; DCMA as SME for DoD on subcontracting management**

DCMA
DEFENSE CONTRACT MANAGEMENT AGENCY

- **Leveraged resources-the SBA's role for Civilian contracts held by the same vendor as DoD contracts through DCMA, the MOU results in future cost avoidance – SBA will not review vendors being reviewed by DCMA**

- **Compliance review ratings are in line with CPAR Ratings**

- **Improved SB Program Performance Ratings evaluation form (DCMA 640 Form)**

- **Shared information – Yearly planned reviews and reviews conducted quarterly**

- **Follow-Up Reviews For Marginal And Unsatisfactory Ratings**

- ## Drivers

Funnel diagram with drivers: DoD OSBP Restructure, IAW DCMA Strategic Plan, DoD Rapid Improvement Initiative

DCMA SB Restructure

DCMA as SME and Administration on --

- **DoD Mentor Protégé Pilot Program (MPP)**
- **DoD Comprehensive Small Business Subcontracting Test Program (CSP)**

DEFENSE CONTRACT MANAGEMENT AGENCY

Increased Workload for Military Partners

Train/re-train workforce on subcontract management and evaluating prime small business performance

Routine changes

Customer impact

Transition timeframe

Questions?

dcma.lee.hq.mbx.small-business-center-support@mail.mil

NDIA Legislative Updates for TRIAD

NDIA

Legislative Update:
- Defense Spending Toplines
- Sequestration or Continuing Resolutions (CRs)?
- Bipartisan Policy Efforts
  - Workforce Development

Section 809 Panel Volume 3 / Section 813 Panel:

House Small Business Initiatives:
- SBA Category Management Initiatives
- Mentor-Protégé Legislation and Initiatives
- Cybersecurity NIST Requirements Update

Proposed Regulations:

NDIA Policy Efforts:
- Accelerated Payments
- Performance-Based Payments and Progress Payments
- Technical Data Rights

TRIAD Recommendations / Responses:

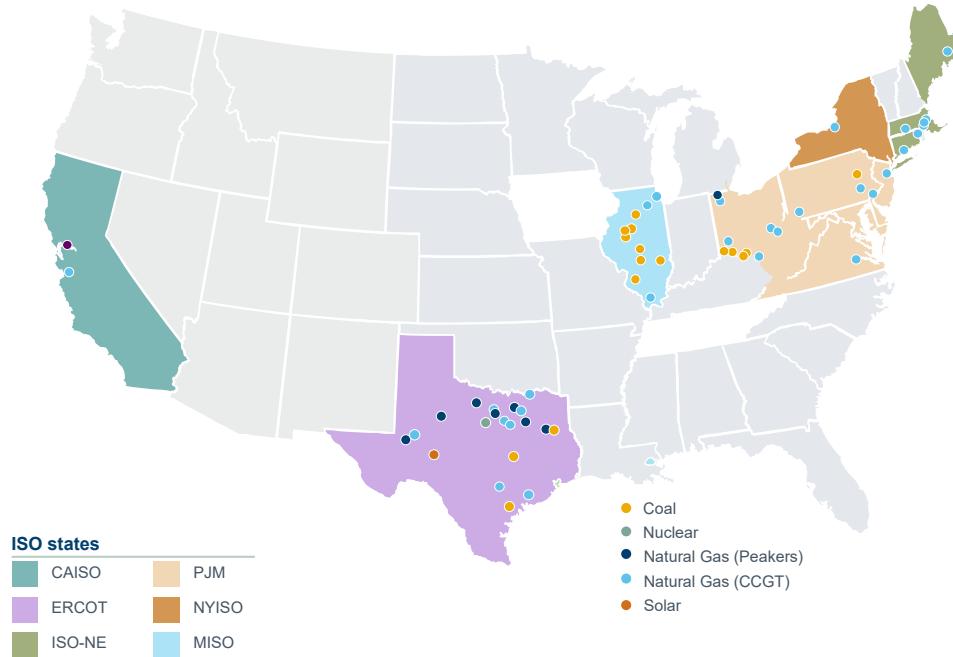Heather Herndon Wright – Director, Supply Chain Diversity

Matt Williams – Senior Financial Analyst

Vistra Energy SBA Reporting Solution

Vistra Energy Overview

Vistra Existing Generation and Retail Presence

ISO states
- CAISO
- ERCOT
- ISO-NE
- PJM
- NYISO
- MISO

- Coal
- Nuclear
- Natural Gas (Peakers)
- Natural Gas (CCGT)
- Solar

Vistra Energy (NYSE: VST) is a premier, integrated power company based in Irving, Texas, combining an innovative, customer-centric approach to retail with a focus on safe, reliable, and efficient power generation.

Current System and Short Comings

This presentation is going to delve into solutions for two Corrective Action Plan items for Vistra Energy as a result of the 2016 audit.

① Vistra Energy uses the UNSPSC (United Nations Standard Products and Services Code) accounting system, while we need to use NAICS to be in compliance with SBA reporting.

  - Proposed Solution: <u>UNSPSC to NAICS Code Conversion</u>

② Inability of suppliers to fully and accurately identify all NAICS codes associated with their product/service to determine small business size status resulting in inaccurate SBA reporting for Vistra Energy

  - Proposed Solution: <u>Self Certification With SBA Size Standard Table</u>

UNSPSC to NAICS Code Conversion

- Mapped UNSPSC codes to NAICS codes allowing us to convert our UNSPSC coding system into the NAICS coding system.

- Mapping allows companies to use UNSPSC systems and map to NAICS systems without making significant technology investments

Self Certification With SBA Size Standard Table

- **Issue:** Confusion on supplier's part as to how to navigate the SBA website and SBA Size Standard Table based on NAICS Code to determine if they are Small or Large.

- **Solution:** Changed Self Certification online form to ask a supplier for their Employee Count (12 months average) and Revenue (three year average). We then match their size elements against the SBA Size Standard Table to see which NAICS codes are valid for SBA spend reporting. This takes the burden off the supplier having to search through NAICS codes and also increases the accuracy of auditable reporting.

New Workflow Example

Maximo

Tableau

Tableau selects most expensive line on PO and assigns primary NAICS code

UNSPSC to NAICS Mapping

PO UNSPSC#111
UNSPSC#112
UNSPSC#113
UNSPSC#114

PO NAICS#1012
NAICS#1013
NAICS#1014
NAICS#1015

Identify Primary NAICS
NAICS#1012

Valid SBA PO based on Primary NAICS
NAICS#1012

Online WuFoo Form dumps into Excel Spreadsheet

Tableau

Tableau Report

Self Certification with Size Standards

SBA Size Standards Table
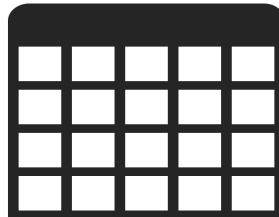
Valid Small Business NAICS Codes
NAICS#1012
NAICS#1013
NAICS#1017
NAICS#1015
NAICS#1078
NAICS#1031