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## Web Capture: Office of Research Administration, Small Business Subcontracting Plans

Office of Research Administration, University of Maine

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# Office of Research Administration

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## Small Business Subcontracting Plans

FAQs

How to Prepare a Plan

Resources

## Recent News

### DOCUMENT DOWNLOAD PROBLEMS

Published: December 18, 2020

PARS will be unavailable on Sunday, October 4, 2020 between the hours of 6-10 p.m.

Published: September 30, 2020

NSF Implements Changes to Biographical Sketch and Current & Pending Support

Published: September 23, 2020

## Small Business Subcontracting Resources

- [Small Business Subcontracting plan \(pdf fillable form\)](#)
- [Small Business Subcontracting Sample plan \(pdf\)](#)
- [Small business classifications](#)
- [Active vendors with designated diversity class codes \(pdf\)](#)
- [Search MaineStreet Marketplace for businesses with specific diversity classes \(pdf\)](#)
- [Search MaineStreet Marketplace to view diversity spending by supplier \(pdf\)](#)

### Additional Resources

- Small Business Administration (SBA) – [Dynamic Small Business Search \(DSBS\)](#)
  - To search for companies/vendors/suppliers with various small business designations
- [Procurement Services Vendor/Supplier Search](#) (requires single sign on, request permission from [adam.corrigan@maine.edu](mailto:adam.corrigan@maine.edu) for:
  - MaineStreet Marketplace Access and
  - Permission to do the supplier search ("Supplier Profile View Only.")
    - To search University of Maine System Marketplace for companies/vendors/suppliers that have small business designations

### [Electronic Subcontracting Reporting System \(eSRS\)](#)

- To submit required reporting

**Office of Research Administration**  
5717 Corbett Hall  
Orono, Maine 04469-5717

Tel: 207.581.1484  
Fax: 207.581.1479  
[ora@maine.edu](mailto:ora@maine.edu)



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Emergency

University of Maine | Orono, ME 04469 | 207.581.1865



TOP

## SMALL BUSINESS SUBCONTRACTING PLAN FORM

*The attached subcontracting plan form has been adapted from material in Appendix 9 of the Small Business Administration's Standard Operating Procedure 60 03 6, "[Subcontracting Assistance Program](#)". It may be completed and submitted as your proposed Small Business Subcontracting Plan.*

***Failure to include essential information in a Small Business Subcontracting Plan submitted to the Company may be cause for either a delay in acceptance or the rejection of an offer when a subcontracting plan is required.***

***The following guidance is offered to help expedite completion of the Small Business Subcontracting Plan approval process, as well as the required semiannual reporting process:***

- Using the attached subcontracting plan form will greatly accelerate the plan's approval process.
- If you do not use the attached form, your subcontracting plan must be in compliance with FAR 19.704 (Subcontracting Plan Requirements).
- It is recommended that, if possible, your plan goals reflect the minimum goals expected by the SBA for federal government subcontracting:

○ Small Business	23%
○ Women-Owned Small Business	5%
○ Small Disadvantaged Business	5%
○ HUBZone Small Business	3%
○ Veteran-Owned Small Business	3%
○ Service-Disabled Veteran-Owned Small Business	3%
- Progress against subcontracting plan goals is reported semi-annually for the periods ending March 31 and September 30 via the Electronic Subcontracting Reporting System (eSRS) at [www.esrs.gov](http://www.esrs.gov). Reports are due within 30 days following the close of each reporting period.
- The goals approved in the subcontracting plan, or any revision, are to be the same goals that are entered into eSRS.
- During eSRS reporting, any lack of progress against goals should be explained in the "Remarks" section.

## SMALL BUSINESS SUBCONTRACTING PLAN

Offeror: \_\_\_\_\_

Address: \_\_\_\_\_

Solicitation or Subcontract Number: \_\_\_\_\_

Supplies or services: \_\_\_\_\_

Estimated cost or price of contract (including options): \$ \_\_\_\_\_

Period of Performance (include option years): From: \_\_\_\_\_ To: \_\_\_\_\_

1. Type of Plan [see definitions in paragraph (b) of the Small Business Subcontracting Plan clause]

Individual Plan

Master Plan

2. Goals

*State separate dollar and percentage subcontracting goals in the following format. For an offer with options, provide separate statements for the basic quantity or period and for each option.*

- A. Total planned subcontracting dollars: \$ \_\_\_\_\_. (For commercial plans, paragraph A should instead show the dollar amount of total projected sales and the total dollar amount of projected subcontracts to support the sales.)
- B. Total estimated dollar value and percent of planned subcontracting with all small business concerns. The figures include veteran-owned small business concerns (VOSB), service-disabled veteran-owned small business concerns (SDVOSB), HUBZone small business concerns (HSB), small disadvantaged business concerns (SDB), and women-owned small business concerns (WOSB):
- \$ \_\_\_\_\_ and \_\_\_\_\_ % of 2.A above.
- C. Total estimated dollar value and percent of planned subcontracting with VOSB:
- \$ \_\_\_\_\_ and \_\_\_\_\_ % of 2.A above.
- D. Total estimated dollar value and percent of planned subcontracting with SDVOSB:
- \$ \_\_\_\_\_ and \_\_\_\_\_ % of 2.A above.
- E. Total estimated dollar value and percent of planned subcontracting with HSB:
- \$ \_\_\_\_\_ and \_\_\_\_\_ % of 2.A above.
- F. Total estimated dollar value and percent of planned subcontracting with SDB:
- \$ \_\_\_\_\_ and \_\_\_\_\_ % of 2.A above.
- G. Total estimated dollar value and percent of planned subcontracting with WOSB:
- \$ \_\_\_\_\_ and \_\_\_\_\_ % of 2.A above.

3. We plan to subcontract the following principal types of supplies and services to SB, VOSB, SDVOSB, HSB, SDB, and WOSB as indicated:

<u>Types of Supplies and Services</u>	<u>SB</u>	<u>VOSB</u>	<u>SDVOSB</u>	<u>HSB</u>	<u>SDB</u>	<u>WOSB</u>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. We developed the subcontracting goals in 2B through 2G above by the following methods:  
[Explain how (i) the capabilities of SB, VOSB, SDVOSB, HSB, SDB, and WOSB and (ii) the types of supplies and services to be subcontracted to them were determined. Identify any source lists used.]

5. We identified potential sources for solicitation purposes by the following methods:  
[Explain the use made of: your existing source lists; Central Contractor Registration (CCR) Database; veterans service organizations; the National Minority Supplier Development Council; the Minority Business Development Centers of the Department of Commerce; SB, VOSB, SDVOSB, HSB, SDB, and WOSB trade associations; and contact with local chambers of commerce and Federal agencies' Small Business Offices.]

6. Indirect costs were ☐ were not ☐ included in the subcontracting goals.  
[If indirect costs were included, describe the method used to determine the proportionate share of indirect costs to be allocated as subcontracts to SB, VOSB, SDVOSB, HSB, SDB and WOSB.]

7. The employee who will administer our subcontracting program is:

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

The administrator's duties include:

- A. Preparing subcontracting plans;
- B. Assisting in developing SB, VOSB, SDVOSB, HSB, SDB, and WOSB source lists;
- C. Attending or arranging for the attendance of company counselors at business opportunity workshops, Minority Business Enterprise seminars, trade fairs, procurement conferences, etc;

- D. Ensuring that SB, VOSB, SDVOSB, HSB, SDB, and WOSB are made aware of subcontracting opportunities and how to prepare acceptable offers;
- E. Conducting or arranging training for purchasing personnel on small business matters;
- F. Monitoring performance under subcontracting plans and assisting in making any adjustment necessary to achieve goals;
- G. Preparing and submitting required subcontract reports;
- H. Coordinating activities during compliance reviews by Federal agencies; and
- I. Other duties:

8. We will make the following efforts to ensure that SB, VOSB, SDVOSB, HSB, SDB, and WOSB have an equitable opportunity to compete for subcontracts:

- A. Outreach efforts to obtain sources:
  - 1. Contacting minority and small business trade associations;
  - 2. Contacting veterans service organizations;
  - 3. Contacting business development organizations;
  - 4. Attending small and minority business procurement conferences and trade fairs;
  - 5. Using CCR and other SBA and Federal agency resources; and
  - 6. Conducting market surveys to identify new sources.
- B. Internal efforts to guide and encourage purchasing personnel:
  - 1. Presenting workshops, seminars, and training programs;
  - 2. Establishing and maintaining SB, VOSB, SDVOSB, HSB, SDB, and WOSB source lists, guides, and other data for soliciting subcontracts; and
  - 3. Monitoring compliance with the subcontracting plan.
- C. Additional efforts:

9. We will include the "Utilization of Small Business Concerns" clause in all subcontracts exceeding the simplified acquisition threshold that offer further subcontracting opportunities. We will also require subcontractors (other than small business concerns) that receive subcontracts in excess of \$750,000 (\$1 million for construction of a public facility) to adopt a subcontracting plan that complies with the requirements of the Small Business Subcontracting Plan clause.

10. We will:

- A. Cooperate in any studies or surveys that may be required;
- B. Submit periodic reports that show compliance with the subcontracting plan;
- C. Submit Individual Subcontract Reports and/or Summary Subcontract Reports, using the Electronic Subcontract Reporting System (eSRS), in accordance with the instructions on the web site <http://www.esrs.gov> or as provided in agency regulations and the Small Business Subcontracting Plan clause;
- D. Ensure that subcontractors with subcontracting plans agree to submit Individual Subcontract Reports and Summary Subcontract Reports using eSRS;
- E. Provide our contract number, DUNS number, and the e-mail address of the Government or Contractor official responsible for acknowledging or rejecting the reports to all first-tier subcontractors with subcontracting plans so they can enter this information into the eSRS when submitting their reports; and
- F. Require that each subcontractor with a subcontracting plan provide the contract number, its own DUNS number, and the e-mail address of the Government or Contractor official responsible for acknowledging or rejecting the reports to its subcontractors with subcontracting plans.

11. We will maintain the following types of records on a company-wide ☐ division-wide ☐ basis:

- A. Source lists, guides, and other data that identify SB, VOSB, SDVOSB, HSB, SDB, and WOSB;

- B. Records that identify organizations contacted in an attempt to locate SB, VOSB, SDVOSB, HSB, SDB, and WOSB sources;
- C. Records on each subcontract solicitation resulting in an award of more than \$100,000 indicating: (1) whether SB were solicited, and if not, why not; (2) whether VOSB were solicited, and if not, why not; (3) whether SDVOSB were solicited, and if not, why not; (4) whether HSB were solicited, and if not, why not; (5) whether SDB were solicited, and if not, why not; (6) whether WOSB were solicited, and if not, why not; and (7) if applicable, the reason that the award was not made to a small business concern;
- D. Records of outreach efforts, e.g., contacts with trade associations, business development organizations, or veterans service organizations and attendance at conferences and trade fairs;
- E. Records of internal guidance and encouragement provided to Procurement Officers through: (1) workshops, seminars, training, etc., and (2) monitoring performance to evaluate compliance with the program's requirements; and
- F. On a contract-by-contract basis, records to support subcontract award data, including the name, address, and business size of each subcontractor.

This subcontracting plan was submitted by:

Signature: \_\_\_\_\_

Typed Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date Prepared: \_\_\_\_\_

Phone No.: \_\_\_\_\_

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_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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This subcontracting plan was submitted by:

Signature: \_\_\_\_\_

Typed Name: \_\_\_\_\_

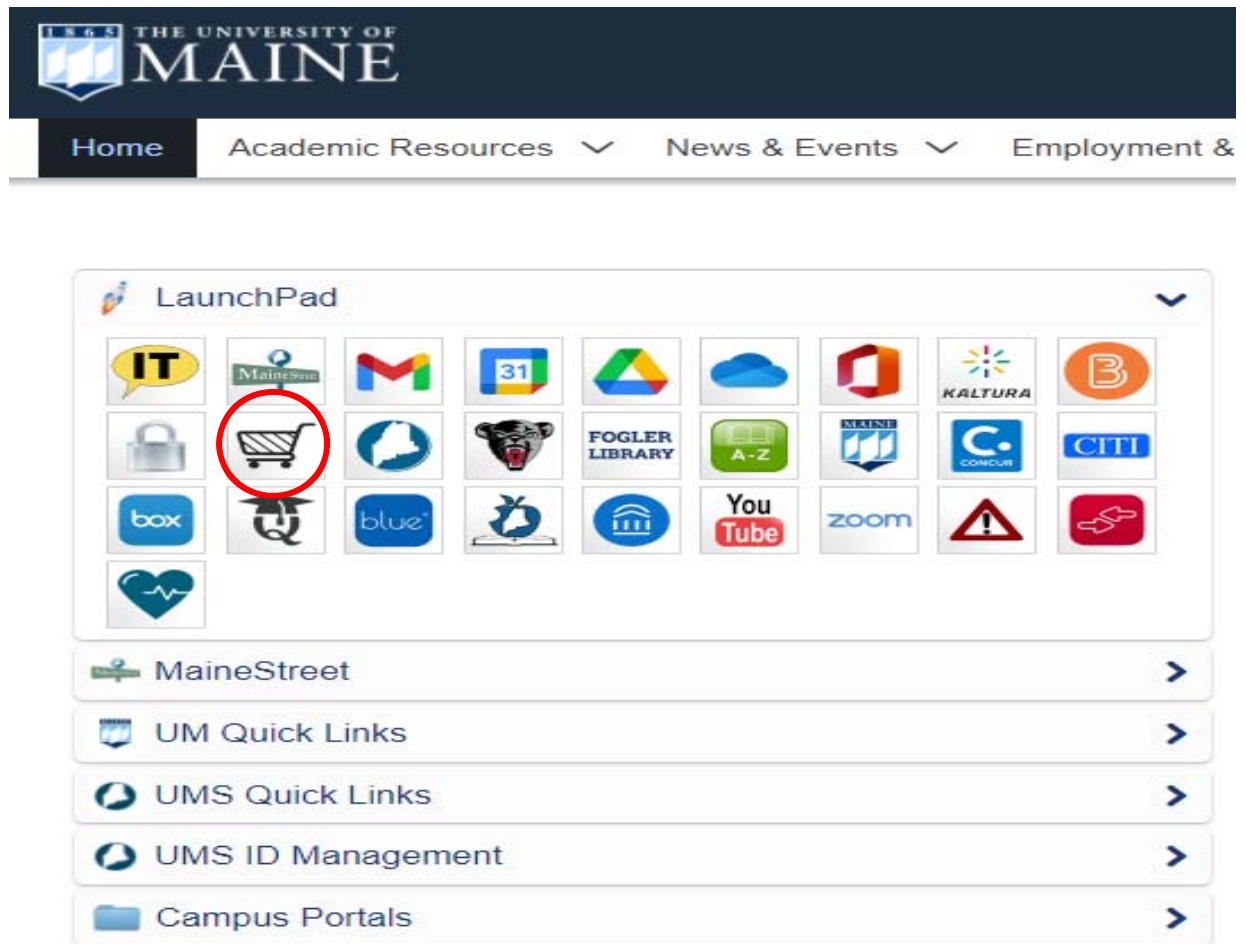
Title: \_\_\_\_\_

Date Prepared: \_\_\_\_\_

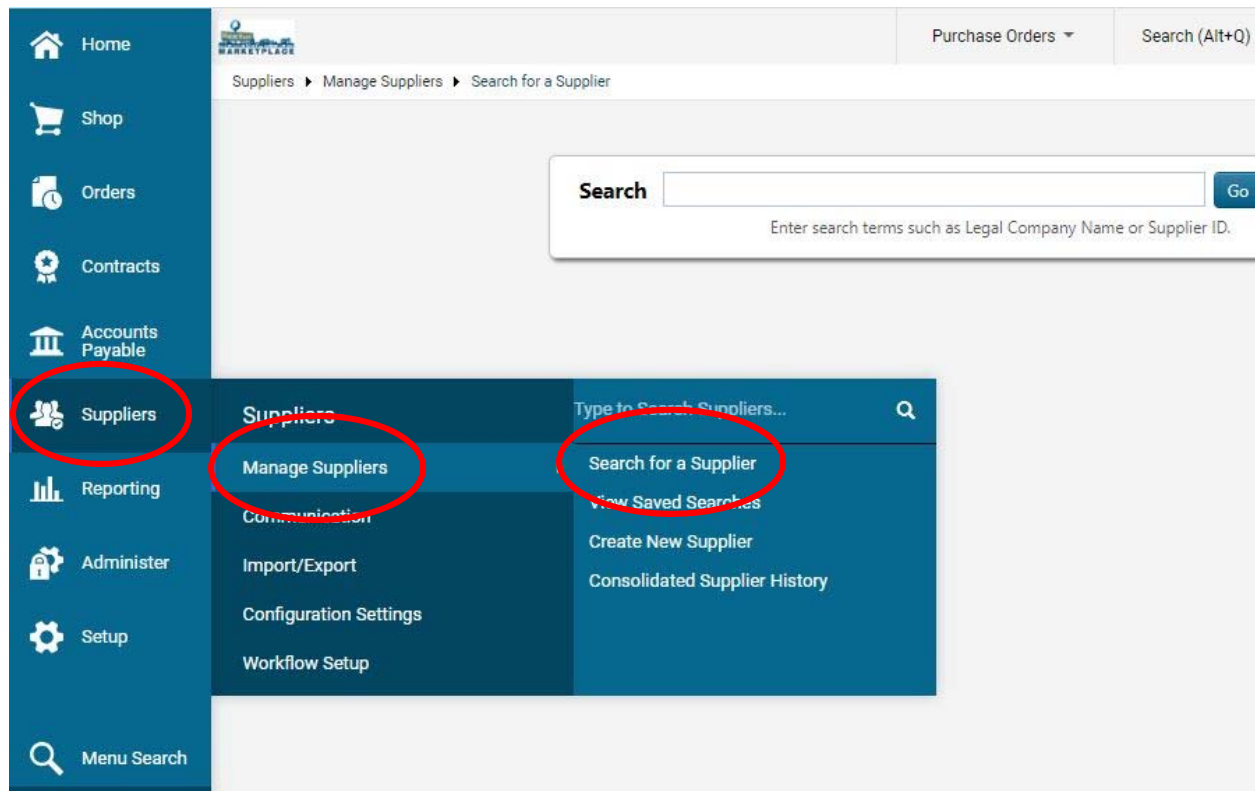
Phone No.: \_\_\_\_\_

Search within Marketplace for businesses with specific diversity classes:

Log into <https://mycampus.maine.edu/> (single sign on required)



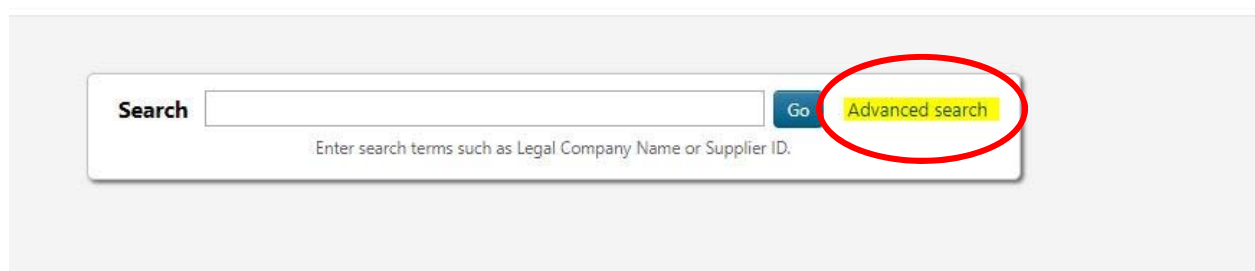
1. Select MaineStreet Marketplace icon from LaunchPad
2. Go to Suppliers
  - Manage Suppliers
  - Search for a Supplier
3. Click Advanced Search (If you cannot see "advanced search" then contact [adam.corrigan@maine.edu](mailto:adam.corrigan@maine.edu) to request permission for "Supplier Profile View Only.")
4. Search by "Class" (drop down menu)
5. Make sure Shopping/AP Status is active (drop down menu)
6. Click on Search button lower left
7. View Output: List of Women owned small business



## 2. Go to Suppliers

Manage Suppliers

Search for a Supplier



## 3. Click Advanced Search

**Advanced search** Simple Search ?

[Expand All](#) [Collapse All](#)

Supplier	<input type="text"/>
Type	All ▼
Class	WOMEN BSN ENT ▼
Shopping/AP Status	Active ▼
Tax Identification Number	<input type="text"/>
Country Of Origin	<input type="text"/> Country of Origin <input type="button" value="Q"/>
Include Organizational Nodes	<input type="checkbox"/>
Zip Code	<input type="text"/> Within 5 Miles ▼
Business Unit association	<input type="text"/> ▼
Supplier Contact Email Address	<input type="text"/>

> **Registration Information**

> **Products / Services**

> **Company Classification**

4. Search by "Class" (drop down menu) – example: Women owned small business
5. Make sure Shopping/AP Status is active (drop down menu)
6. Click on Search button lower left

Suppliers • Manage Suppliers • Search for a Supplier

Showing 1 - 20 of 188 Results

Search Details

Filtered By

Supplier

Shopping/AP Status

Active

Class

WOMEN BSH ENT

Save New Search

Remove All

Refine Supplier Search

Registration Status

None (188)

Registration Date

Type

Non-Catalog (188)

Diversity Classification

None (188)

Results Per Page: 20

Sort by: Best Match

Page 1 of 10

Legend ?

✓ CEN MED ENTERPRISES INC	Supplier Number: 0000191366 Registration Status: None	Type: Preferences:  Diversity Classifications: N2D8	Manager
✓ CLEARMASK LLC	Supplier Number: 0000196912 Registration Status: None	Type: Preferences:  Diversity Classifications: N2D8	Manager
✓ CK ENVIRONMENTAL INC	Supplier Number: 0000188297 Registration Status: None	Type: Preferences:  Diversity Classifications: N2D8	Manager
✓ DESIGN GRP COLLABORATIVE	Supplier Number: 0000174672 Registration Status: None	Type: Preferences:  Diversity Classifications: N2D8	Manager
✓ EY LABS INC	Supplier Number: 0000186769 Registration Status: None	Type: Preferences:  Diversity Classifications: N2D8	Manager
✓ KMS ACTUARIES LLC	Supplier Number: 0000182134 Registration Status: None	Type: Preferences:  Diversity Classifications: N2D8	Manager
✓ L & D SAFETY MARKING CORP	Supplier Number: 0000164386 Registration Status: None	Type: Preferences:  Diversity Classifications: N2D8	Manager
✓ MN ASSOC INC	Supplier Number: 0000197341 Registration Status: None	Type: Preferences:  Diversity Classifications: N2D8	Manager
✓ POWERTECH CONTROLS CO INC	Supplier Number: 0000183546 Registration Status: None	Type: Preferences:  Diversity Classifications: N2D8	Manager
✓ WATHEN GRP LLC	Supplier Number: 0000185833 Registration Status: None	Type: Preferences:  Diversity Classifications: N2D8	Manager
✓ DARLA E PHILLIPS	Supplier Number: 0000195826 Registration Status: None	Type: Preferences:  Diversity Classifications: N2D8	Manager
✓ EAGLES MEDIA PRODUCTIONS	Supplier Number: 000017261 Registration Status: None	Type: Preferences:  Diversity Classifications: N2D8	Manager

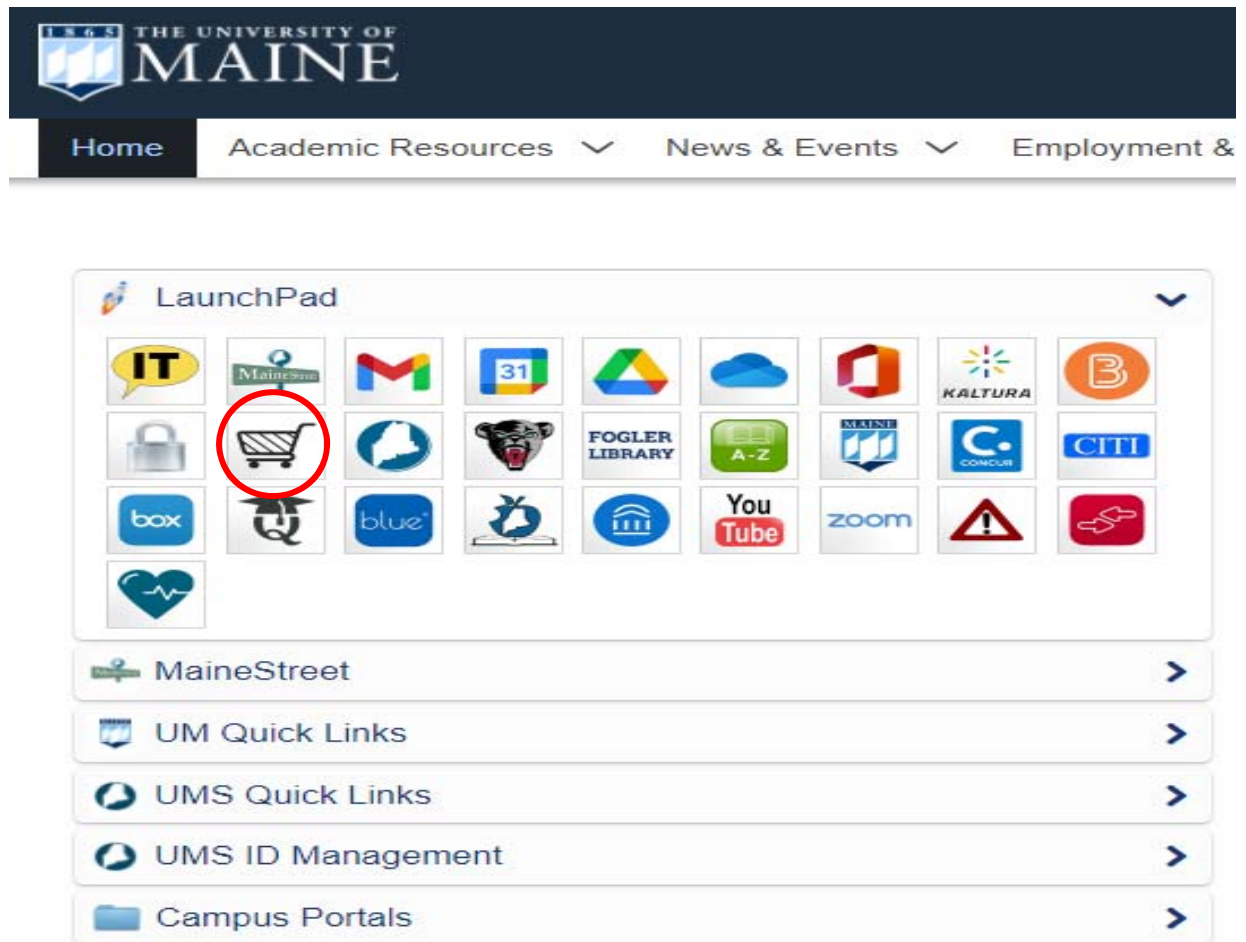
Powered by JAGGED Privacy Policy

## 7. View Output: List of Women owned small business



## Maine Street Marketplace to view diversity spending by supplier

Go to <https://mycampus.maine.edu> (single sign on required)



1. Go to Orders
  - Search
  - All Orders
2. Click on My Searches
3. Click on Manage Searches
4. Click on Diversity Supplier Spend
5. Click on Invoice Report Spend with Diversity Suppliers (Update Accounting Date and Add Project Codes)
6. Update with the Supplier Classes, Accounting Dates and Invoice Status selections that you want to view.

Home/Shop

solutions.sciquest.com/apps/Router/Home?tmstmp=1611824337468

Apps Awards - Federal-W... FSRs - Federal Fun... DPAP | Defense Acq... DPAP | Defense Acq... Part 52 - Solicitatio... Federal Acquisition... UMaine Policies - O... Inc

Shop > Shopping > Shopping Home

Orders Quick search

Search All Orders

My Orders Requisitions

Approvals Purchase Orders

Invoices

Receipts

Register for upcoming WEBINARS - click [here](#)

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Frequently Used Forms

Check Request

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Fixed Contract Payment(s)

Sole Source

Construction

Office, Publications, and General Suppliers

Office Supplies & Furniture

CATERTRAX

Books/ Periodicals/ Subsc

Facilities & Maintenance Suppliers

Industrial/ Facilities Supplies

Industrial/ Facilities Supplies

Electric/ Datacom/ Seci

Advantage Gas/ Valley Natl

Dorm and Facilities Supplies

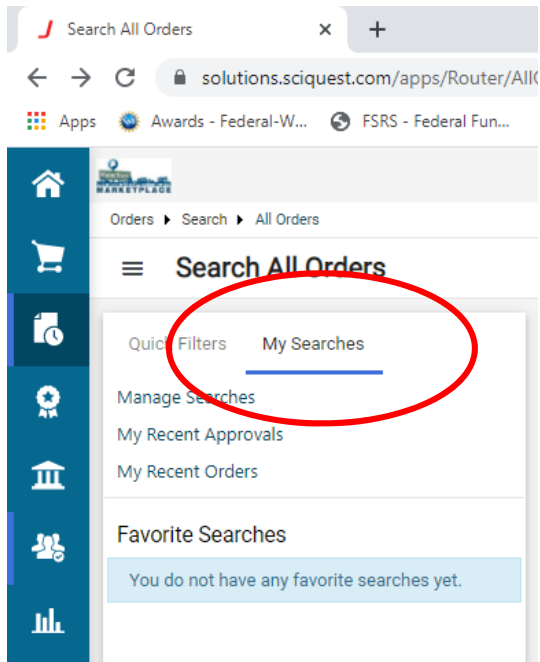
Industrial/ Facilities Sup

Technology Suppliers

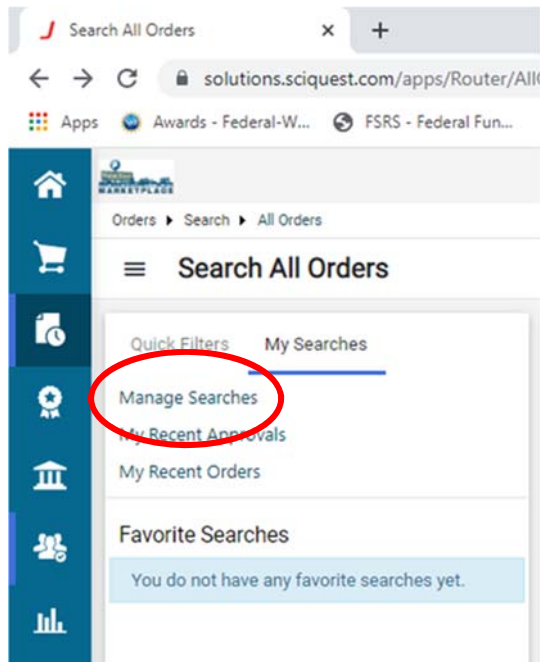
## 1. Go to Orders

Search

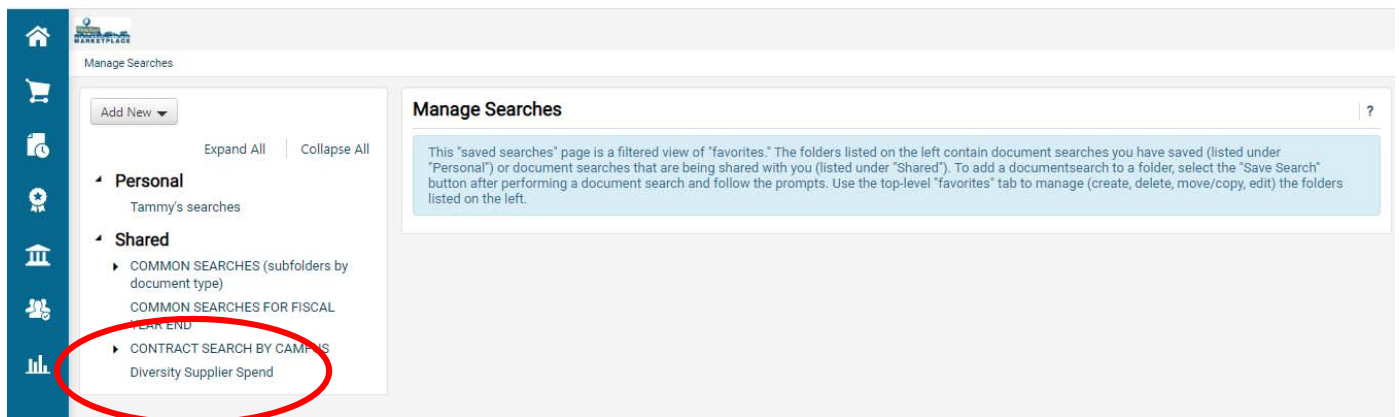
All Orders



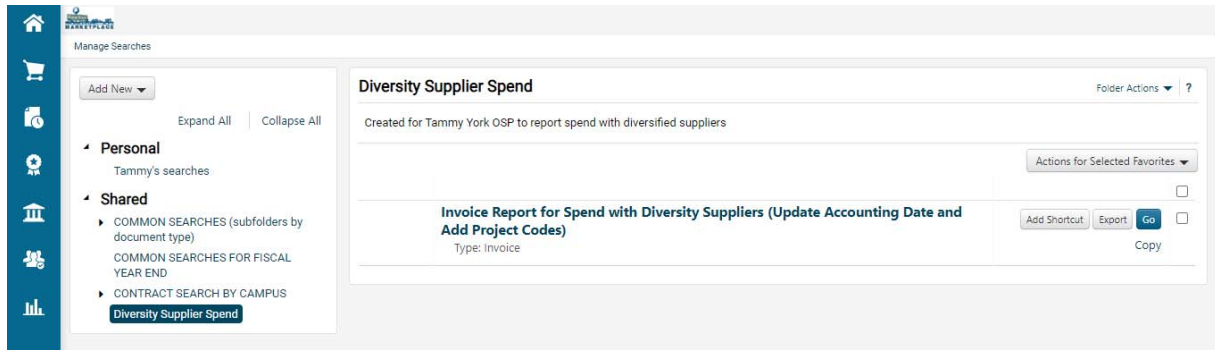
2. Click on My Searches



3. Click on Manage Searches



4. Click on Diversity Supplier Spend



5. Click on Invoice Report Spend with Diversity Suppliers (Update Accounting Date and Add Project Codes)

Invoice Number	Supplier	Total Amount	Pay Status	Invoice Status	Paid Date	Department	Invoice Owner
82156002	COMPLETEBOOK.COM	1,000.00 USD	In Process	Pending	-	UMS Finance	Bragg, Emily
82155341	COMPLETEBOOK.COM	73.66 USD	Payable	Complete	-	UMS Campus Specific Services	Jacobson, Matthew
82154783	COMPLETEBOOK.COM	27.39 USD	Payable	Complete	-	UMS Organizational Effectiveness	Kramer, Samantha
82154181	UNITEL INC	7,200.00 USD	Paid	Complete	2/9/2021	-	-
82154036	SHI INTRNTL CORP	98.00 USD	In Process	Pending	-	UMS Campus Specific Services	Drake, Thomas
82153201	COMPLETEBOOK.COM	42.75 USD	Payable	Complete	-	UMS Campus Specific Services	Jacobson, Matthew
82153005	247 ACCESSIBLE DOCUMENTS PTE LTD	1,140.00 USD	In Process	Pending	-	UMS Campus Specific Services	Woodhouse, Nicole
82152905	SHI INTRNTL CORP	98.00 USD	In Process	Pending	-	UMS Campus Specific Services	Drake, Thomas
82152887	CASADY DESIGN	4,760.00 USD	In Process	Pending	-	UMS Strategic Procurement	Campbell, Melissa
82152531	MN ASSOC INC	3,000.00 USD	Paid	Complete	2/5/2021	UMF Special Services/Exchange	Hiebert, Jennifer
82152516	CERTIFIED INTERPRETING LLC	366.00 USD	In Process	Pending	-	UMS Human Resources	Eddy, Lisa
82149790	BRAILSFORD & DUNLAVY INC	11,141.25 USD	Paid	Complete	2/9/2021	UMS VP Admin & Finance	Pierce, Nancy
82149627	SHI INTRNTL CORP	196.00 USD	In Process	Pending	-	UMS Campus Specific Services	Drake, Thomas
82146700	UNITEL INC	11,600.00 USD	Paid	Complete	1/26/2021	-	-
82146261	SHI INTRNTL CORP	2,225.88 USD	In Process	Pending	-	UMS Procurement Operations	Noblet, Michael
82146250	SHI INTRNTL CORP	2,205.68 USD	In Process	Pending	-	UMS Procurement Operations	Noblet, Michael
82143233	SHI INTRNTL CORP	7,532.00 USD	Paid	Complete	1/12/2021	UMS ITS Chief Info Officer	Ferrante, Judith
82144826	KNOWLEDGE SVCS	1,138.24 USD	Paid	Complete	2/3/2021	UMS ITS Admin Systems Dev&support	Caron, Cathy

6. Update with the Supplier Classes, Accounting Dates and Invoice Status selections that you want to view.

Notes:

Add award project codes

These are for Invoices not PO

Accounting date and PO in fiscal year

Created vs accounting invoices arrive end of June, more consistent with general ledger based on accounting date of invoice

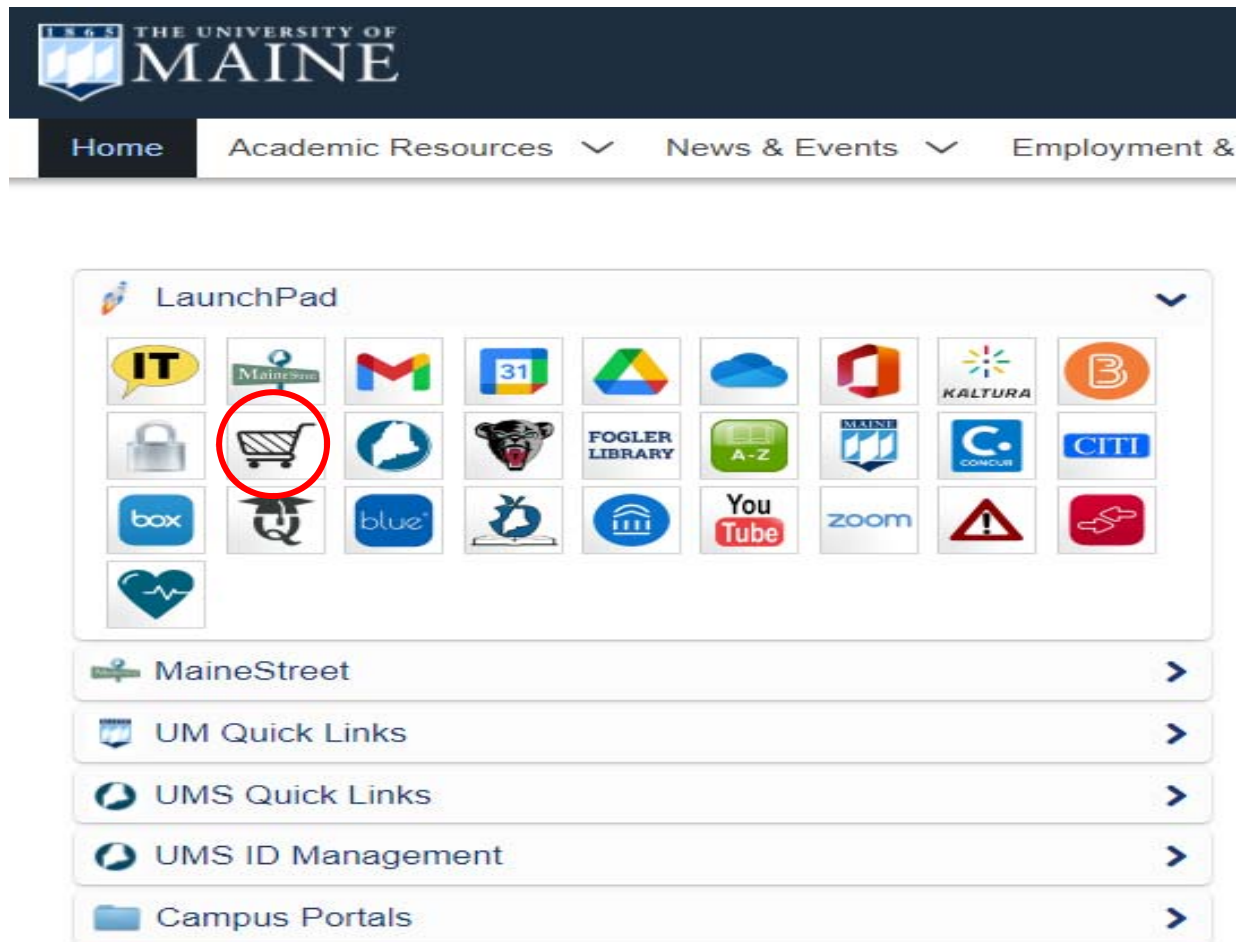
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Contact [adam.corrigan@maine.edu](mailto:adam.corrigan@maine.edu) for assistance

## Maine Street Marketplace to view diversity spending by supplier

Go to <https://mycampus.maine.edu> (single sign on required)



1. Go to Orders
  - Search
  - All Orders
2. Click on My Searches
3. Click on Manage Searches
4. Click on Diversity Supplier Spend
5. Click on Invoice Report Spend with Diversity Suppliers (Update Accounting Date and Add Project Codes)
6. Update with the Supplier Classes, Accounting Dates and Invoice Status selections that you want to view.

Home/Shop

solutions.sciquest.com/apps/Router/Home?tmstmp=1611824337468

Apps Awards - Federal-W... FSRs - Federal Fun... DPAP | Defense Acq... DPAP | Defense Acq... Part 52 - Solicitatio... Federal Acquisition... UMaine Policies - O... Inc

Shop > Shopping > Shopping Home

Orders Quick search

Search All Orders

My Orders Requisitions

Approvals Purchase Orders

Invoices

Receipts

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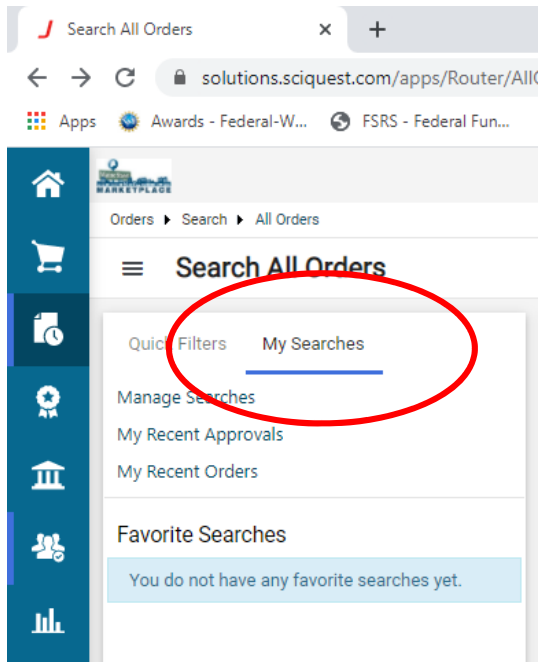
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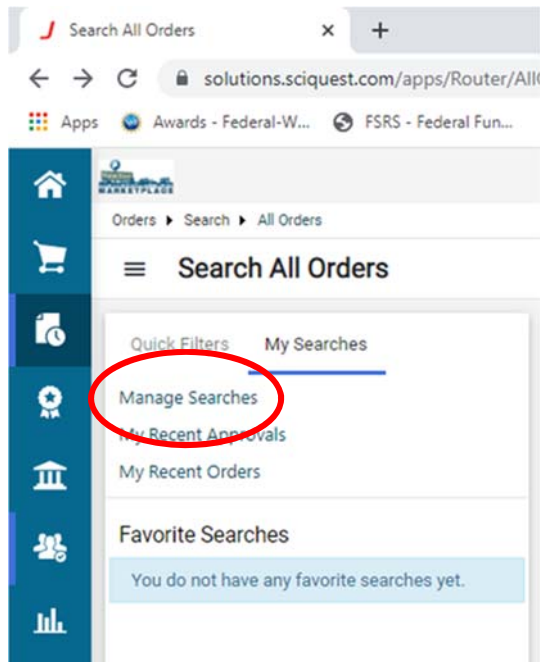
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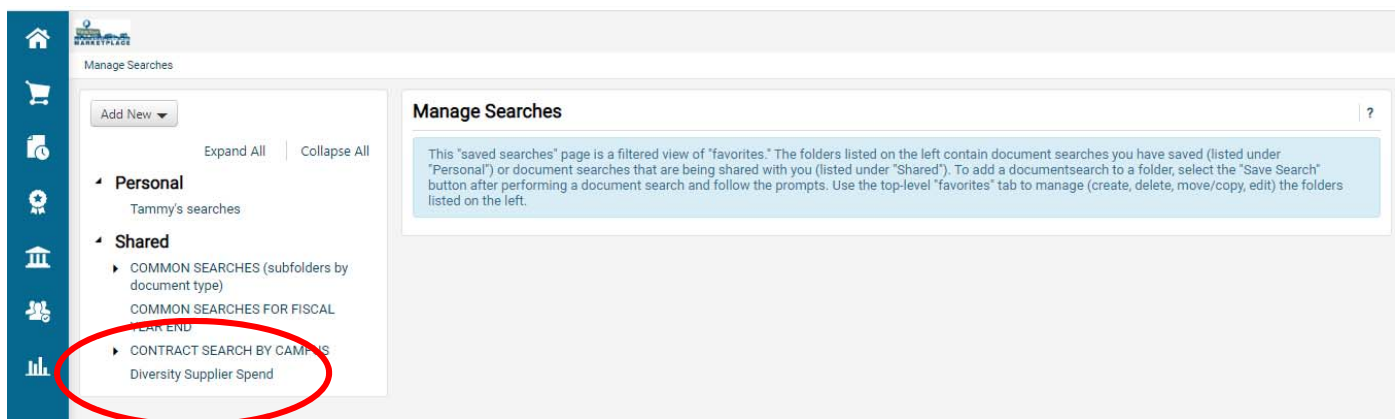
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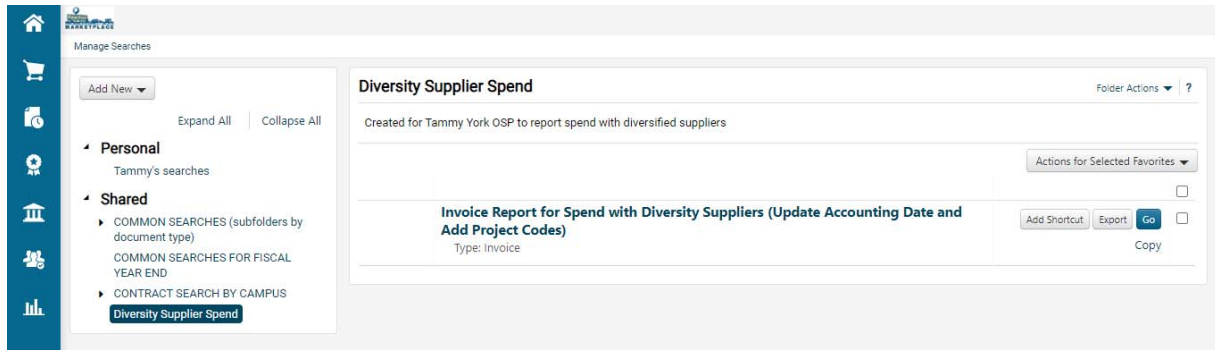


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## SMALL BUSINESS SUBCONTRACTING PLAN FORM (Sep 30, 2015)

*The attached subcontracting plan form has been adapted from material in Appendix 9 of the Small Business Administration's Standard Operating Procedure 60 03 6, "[Subcontracting Assistance Program](#)" and DOE Acquisition Letter 2006-01. It may be completed and submitted as your proposed Small Business Subcontracting Plan.*

***Failure to include essential information in a Small Business Subcontracting Plan submitted to the Company may be cause for either a delay in acceptance or the rejection of an offer when a subcontracting plan is required.***

***The following guidance is offered to help expedite completion of the Small Business Subcontracting Plan approval process, as well as the required semiannual reporting process:***

- Using the attached subcontracting plan form will greatly accelerate the plan's approval process.
- If you do not use the attached form, your subcontracting plan must be in compliance with FAR 19.704 (Subcontracting Plan Requirements).
- It is recommended that, if possible, your plan goals reflect the minimum goals expected by the SBA for federal government subcontracting:

○ Small Business	23%
○ Women-Owned Small Business	5%
○ Small Disadvantaged Business	5%
○ HUBZone Small Business	3%
○ Veteran-Owned Small Business	3%
○ Service-Disabled Veteran-Owned Small Business	3%
- Progress against subcontracting plan goals is reported semi-annually for the periods ending March 31 and September 30 via the Electronic Subcontracting Reporting System (eSRS) at [www.esrs.gov](http://www.esrs.gov). Reports are due within 30 days following the close of each reporting period.
- The goals approved in the subcontracting plan, or any revision, are to be the same goals that are entered into eSRS.
- Approval of eSRS reports is handled by Cassandra McGee Stuart, Manager, ORNL Small Business Programs, [mcgeeecm@ornl.gov](mailto:mcgeeecm@ornl.gov).
- During eSRS reporting, any lack of progress against goals should be explained in the "Remarks" section.
- Performance against your subcontracting plan goals will be monitored and tracked by the ORNL Small Business Programs Office and may be used as part of the Subcontractor Performance Evaluation process.

## SMALL BUSINESS SUBCONTRACTING PLAN

Offeror:

Address:

Solicitation or Subcontract Number:

Supplies or services:

Estimated cost or price of contract (including options): \$

Period of Performance (include option years): From:

To:

1. Type of Plan [see definitions in paragraph (b) of the Small Business Subcontracting Plan clause]

☐ Individual Plan

☐ Master Plan

2. Goals

*State separate dollar and percentage subcontracting goals in the following format. For an offer with options, provide separate statements for the basic quantity or period and for each option.*

A. Total planned subcontracting dollars: \$ . (For commercial plans, paragraph A should instead show the dollar amount of total projected sales and the total dollar amount of projected subcontracts to support the sales.)

B. Total estimated dollar value and percent of planned subcontracting with all small business concerns. The figures include veteran-owned small business concerns (VOSB), service-disabled veteran-owned small business concerns (SDVOSB), HUBZone small business concerns (HSB), small disadvantaged business concerns (SDB), and women-owned small business concerns (WOSB):

\$ and % of 2.A above.

C. Total estimated dollar value and percent of planned subcontracting with VOSB:

\$ and % of 2.A above.

D. Total estimated dollar value and percent of planned subcontracting with **SDVOSB**:

\$ and % of 2.A above.

E. Total estimated dollar value and percent of planned subcontracting with HSB:

\$ and % of 2.A above.

F. Total estimated dollar value and percent of planned subcontracting with SDB:

\$ and % of 2.A above.

G. Total estimated dollar value and percent of planned subcontracting with WOSB:

\$ and % of 2.A above.

3. We plan to subcontract the following principal types of supplies and services to SB, VOSB, SDVOSB, HSB, SDB, and WOSB as indicated:

<u>Types of Supplies and Services</u>	<u>SB</u>	<u>VOSB</u>	<u>SDVOSB</u>	<u>HSB</u>	<u>SDB</u>	<u>WOSB</u>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. We developed the subcontracting goals in 2B through 2G above by the following methods:  
*[Explain how (i) the capabilities of SB, VOSB, SDVOSB, HSB, SDB, and WOSB and (ii) the types of supplies and services to be subcontracted to them were determined. Identify any source lists used.]*
5. We identified potential sources for solicitation purposes by the following methods:  
*[Explain the use made of: your existing source lists; Central Contractor Registration (CCR) Database; veterans service organizations; the National Minority Supplier Development Council; the Minority Business Development Centers of the Department of Commerce; SB, VOSB, SDVOSB, HSB, SDB, and WOSB trade associations; and contact with local chambers of commerce and Federal agencies' Small Business Offices.]*

6. Indirect costs were ☐ were not ☐ included in the subcontracting goals.  
*[If indirect costs were included, describe the method used to determine the proportionate share of indirect costs to be allocated as subcontracts to SB, VOSB, SDVOSB, HSB, SDB and WOSB.]*

7. The employee who will administer our subcontracting program is:

Name:

Title:

Address:

\_\_\_\_\_

Telephone:

The administrator's duties include:

- A. Preparing subcontracting plans;
- B. Assisting in developing SB, VOSB, SDVOSB, HSB, SDB, and WOSB source lists;
- C. Attending or arranging for the attendance of company counselors at business opportunity workshops, Minority Business Enterprise seminars, trade fairs, procurement conferences, etc;

- D. Ensuring that SB, VOSB, SDVOSB, HSB, SDB, and WOSB are made aware of subcontracting opportunities and how to prepare acceptable offers;
- E. Conducting or arranging training for purchasing personnel on small business matters;
- F. Monitoring performance under subcontracting plans and assisting in making any adjustment necessary to achieve goals;
- G. Preparing and submitting required subcontract reports;
- H. Coordinating activities during compliance reviews by Federal agencies; and
- I. Other duties:

8. We will make the following efforts to ensure that SB, VOSB, SDVOSB, HSB, SDB, and WOSB have an equitable opportunity to compete for subcontracts:

- A. Outreach efforts to obtain sources:
  - 1. Contacting minority and small business trade associations;
  - 2. Contacting veterans service organizations;
  - 3. Contacting business development organizations;
  - 4. Attending small and minority business procurement conferences and trade fairs;
  - 5. Using CCR and other SBA and Federal agency resources; and
  - 6. Conducting market surveys to identify new sources.
- B. Internal efforts to guide and encourage purchasing personnel:
  - 1. Presenting workshops, seminars, and training programs;
  - 2. Establishing and maintaining SB, VOSB, SDVOSB, HSB, SDB, and WOSB source lists, guides, and other data for soliciting subcontracts; and
  - 3. Monitoring compliance with the subcontracting plan.
- C. Additional efforts:

9. We will include the "Utilization of Small Business Concerns" clause in all subcontracts exceeding the simplified acquisition threshold that offer further subcontracting opportunities. We will also require subcontractors (other than small business concerns) that receive subcontracts in excess of \$750,000 (\$1.5 million for construction of a public facility) to adopt a subcontracting plan that complies with the requirements of the Small Business Subcontracting Plan clause.

10. We will:

- A. Cooperate in any studies or surveys that may be required;
- B. Submit periodic reports that show compliance with the subcontracting plan;
- C. Submit Individual Subcontract Reports and/or Summary Subcontract Reports, using the Electronic Subcontract Reporting System (eSRS), in accordance with the instructions on the web site <http://www.esrs.gov> or as provided in agency regulations and the Small Business Subcontracting Plan clause;
- D. Ensure that subcontractors with subcontracting plans agree to submit Individual Subcontract Reports and Summary Subcontract Reports using eSRS;
- E. Provide our contract number, DUNS number, and the e-mail address of the Government or Contractor official responsible for acknowledging or rejecting the reports to all first-tier subcontractors with subcontracting plans so they can enter this information into the eSRS when submitting their reports; and
- F. Require that each subcontractor with a subcontracting plan provide the contract number, its own DUNS number, and the e-mail address of the Government or Contractor official responsible for acknowledging or rejecting the reports to its subcontractors with subcontracting plans.

11. We will maintain the following types of records on a company-wide ☐ division-wide ☐ basis:

- A. Source lists, guides, and other data that identify SB, VOSB, SDVOSB, HSB, SDB, and WOSB;

- B. Records that identify organizations contacted in an attempt to locate SB, VOSB, SDVOSB, HSB, SDB, and WOSB sources;
- C. Records on each subcontract solicitation resulting in an award of more than \$100,000 indicating: (1) whether SB were solicited, and if not, why not; (2) whether VOSB were solicited, and if not, why not; (3) whether SDVOSB were solicited, and if not, why not; (4) whether HSB were solicited, and if not, why not; (5) whether SDB were solicited, and if not, why not; (6) whether WOSB were solicited, and if not, why not; and (7) if applicable, the reason that the award was not made to a small business concern;
- D. Records of outreach efforts, e.g., contacts with trade associations, business development organizations, or veterans service organizations and attendance at conferences and trade fairs;
- E. Records of internal guidance and encouragement provided to Procurement Officers through: (1) workshops, seminars, training, etc., and (2) monitoring performance to evaluate compliance with the program's requirements; and
- F. On a contract-by-contract basis, records to support subcontract award data, including the name, address, and business size of each subcontractor.

This subcontracting plan was submitted by:

Signature: \_\_\_\_\_

Typed Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date Prepared: \_\_\_\_\_

Phone No.: \_\_\_\_\_