

MARKET RESEARCH ROADMAP FOR DETERMINATION OF ACQUISITION STRATEGY FOR SOLICITATION ON AN UNRESTRICTED BASIS

Executive Summary

Background

This executive summary describes the final product for a capstone project completed by the Partnership for Public Service, Leadership Excellence for Acquisition Professionals 2019-2020 cohort. The multidisciplinary team that developed this tool included acquisition professionals from the Department of Education, Department of Health and Human Services, Department of Justice, Department of Transportation and the General Services Administration. The team was also supported by an Executive Sponsor at the Small Business Administration.

Problem

Research gathered, as well as interviews from the Office of Small and Disadvantaged Business Utilization representatives, found that market research reports were incomplete ranging from 50 to 90 percent of the time. Reasons cited for market research report rejection on initial submission include insufficient information or not using enough sources. From the interviews conducted, it was also found that 100 percent of participants thought a tool to assist in conducting market research would be useful.

Solution

A tool entitled, *Market Research Roadmap for Determination of Acquisition Strategy*, was developed to serve as a solution to the common problems experienced when conducting market research. While every Agency uses a slightly different Small Business Review form, it is the information within and that which accompanies the form that is critical to the establishment of the Acquisition Strategy, especially when proposing to solicit on an unrestricted basis. This Roadmap aims to be the single point of reference, placing required market research steps in a visual and chronological order. Each block on the Roadmap provides additional information on each “step” in the market research process, along with hyperlinks embedded for quick access to usable resources. The goal for this Roadmap is to save valuable time in the procurement administration lead time (PALT), by enabling acquisition professionals to submit complete and comprehensive market research reports with the initial Small Business Review submission, avoiding rejection and resubmission, through the use of a more efficient and effective process.

Recommended Best Practices

- ✓ Use when conducting market research for [solicitation on an unrestricted basis](#)
 - ✓ Use Roadmap “steps” in chronological order
 - ✓ Document each “step” of the Roadmap on YOUR Agency’s small business review template
 - ✓ Engage your Agency’s Small Business Representative at the *beginning* of the process, as this is critical to the success of any procurement action
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Agency Requirement*
Description of acquisition and compatibility requirements, history, previous buys, etc.
NAICS Size Standards 13 CFR Part 121

Market Research Begins*
FAR Part 10

Agency Excess*
FAR Subpart 8.1

UNICOR*
Confirm Availability on Federal Prison Industries, Inc.
FAR Subpart 8.6

Ability One*
Procurements for Blind or Severely Disabled
FAR Subpart 8.7

Wholesale Supply Sources*
FAR Subpart 8.002

Category Management (BIC Solutions)*
GSA.Gov/BIC

PCR Coordination
Coordinate with Small Business Procurement Center Representative (PCR) early and often to avoid conflicts and issues.

Set-Aside Results / "Rule of Two"
In order to be Small Business Set Aside, two firms of same size must be able to compete for the proposed acquisition, unless under the 8(a) Program.

- No Two Sources
- No Two HubZone Sources
- No Two 8(A) Sources
- No Two SDB Sources
- No Two SB Sources
- No Two WOSB Sources
- No Two SDVOSB Sources

Contracting Assistance Programs / Small Business Programs*
SBA Dynamic Small Business Search

- HubZone
- 8(a)
- EDWOSB
- SDVOSB
- SDB
- WOSB
- VOSB

Commercial Sources
Including Educational and Non-Profit

Federal Supply Schedule*
FAR Subpart 8.4
GSA.Gov

Market Research Roadmap for Determination of Acquisition Strategy for Solicitation on an Unrestricted Basis

Large Business*
Businesses who exceed the largest size standard defined to participate in Government contracting programs for set-asides for small businesses.

Internet Search*
www.Google.com
www.Amazon.com

Personal Knowledge*
Procurement of similar services, etc.

Sources Sought / RFI*
Provide posting date, response received, etc

Market Price
Provide Independent Government Cost Estimates (IGCE) based on quotes / catalog pricing, or provide apparent fair market value pricing.
IGCE Tool
FAR Part 10.002

Review of Market Research
Review all Market Research to ensure Market Research is complete and detailed, prior to recommendation of a Commercial Item Determination



Review and Route for Approval
Contracting Officer reviews the Market Research Report, and submits to OSD/BU / SBA for review / approval of proposed acquisition strategy.

Prepare Market Research Report
Based on the Market Research, the COR or PM prepares the Market Research Report, detailing the steps taken to justify the need to award to Other Than Small Business.

Commercial Item Determination
FAR Part 12
Based on the Market Research, the Contracting Officer has determined that the Government's Requirement can only be met by supplies or services currently available in the commercial marketplace, and offered for sale to the general public.

Complete Agency Small Business Review Form
Complete Small Business Review Form required by your Agency, inclusive of NAICs Code, Dollar Value, Set-Aside Type, etc.

Header items with a * contain more information as you rollover the header.