

PITTSBURGH 2019

APRIL 16-18, 2019

Department of Energy's and General Services Administration's Perspective: Category Management

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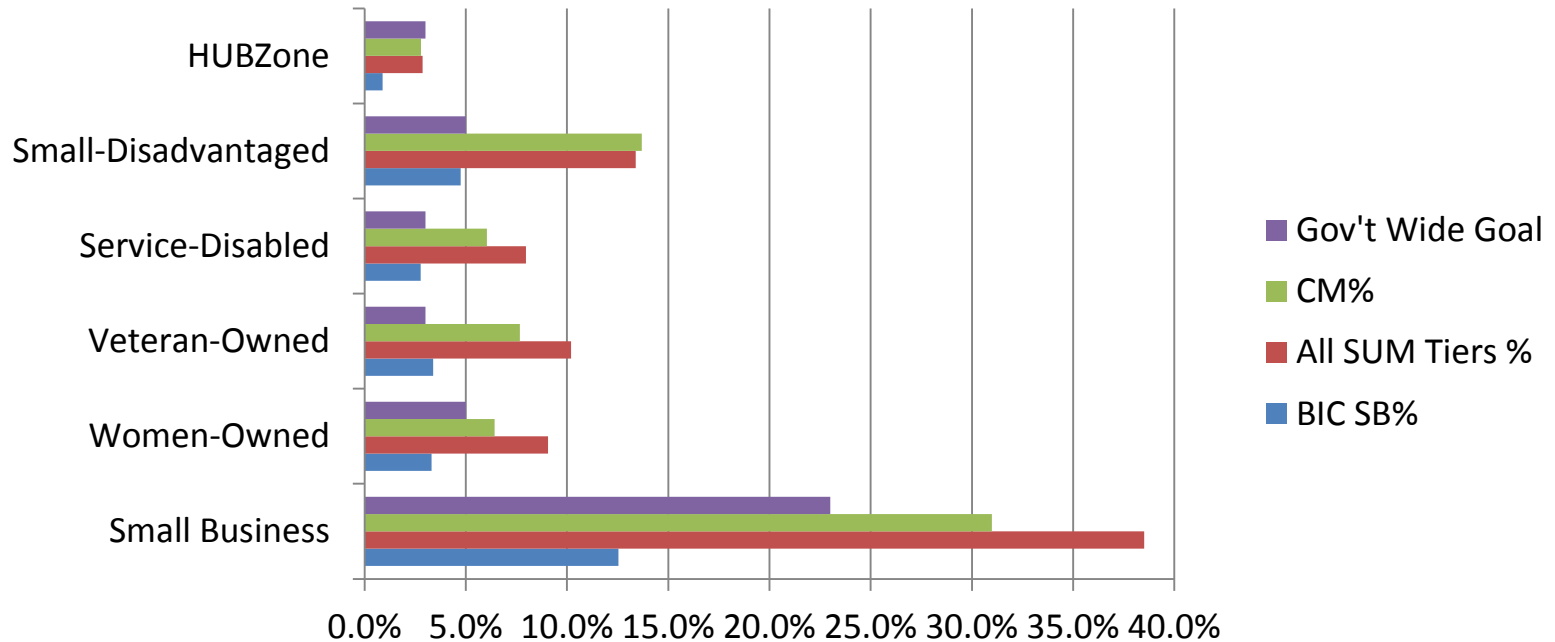
New American Energy Era



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Category Management FY 2018 SB Spend % by Type

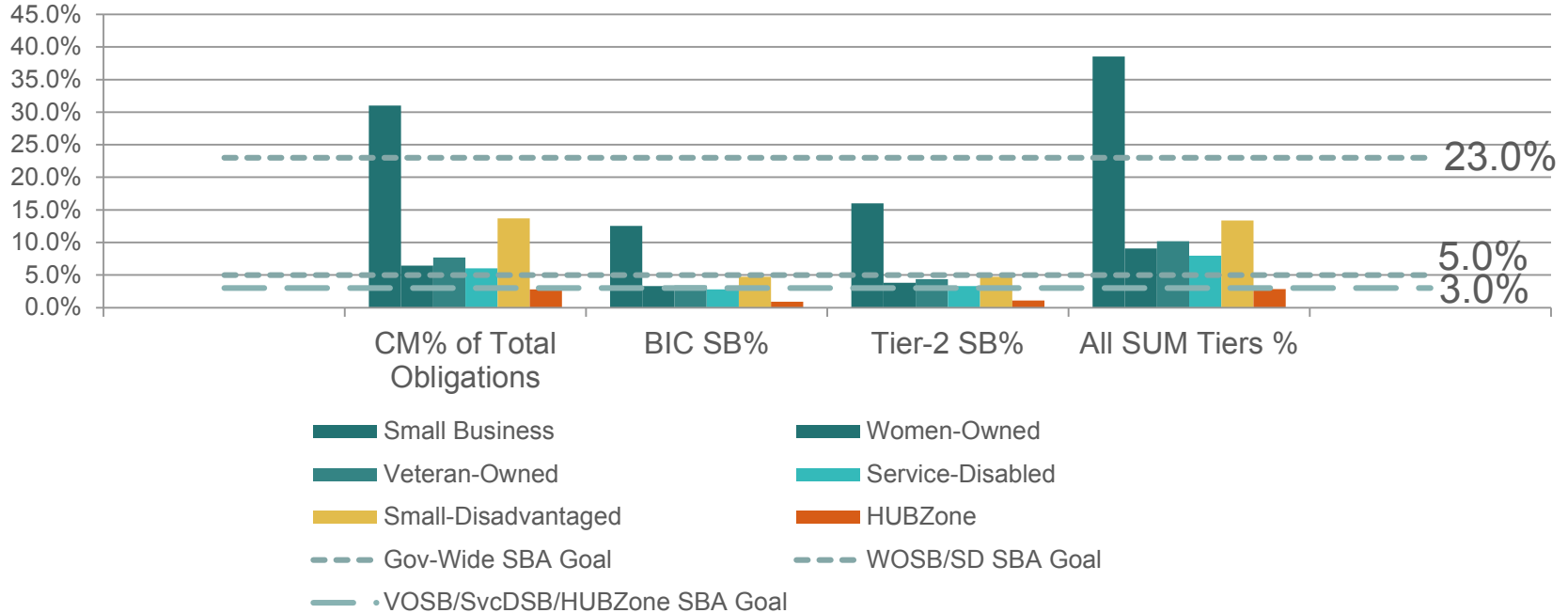
Category Management FY18 Small Business Spend (%) by Type



- The FY18 Small Business percentages are as of the Executive Summary Dashboard (ESD) refresh on 2/1/2019
- The “CM%” represents obligations as a percentage of total SB-Eligible Obligated dollars, all other bars are percentages of SB Actual Obligated dollars

Category Management FY 2018 Small Business Spend %

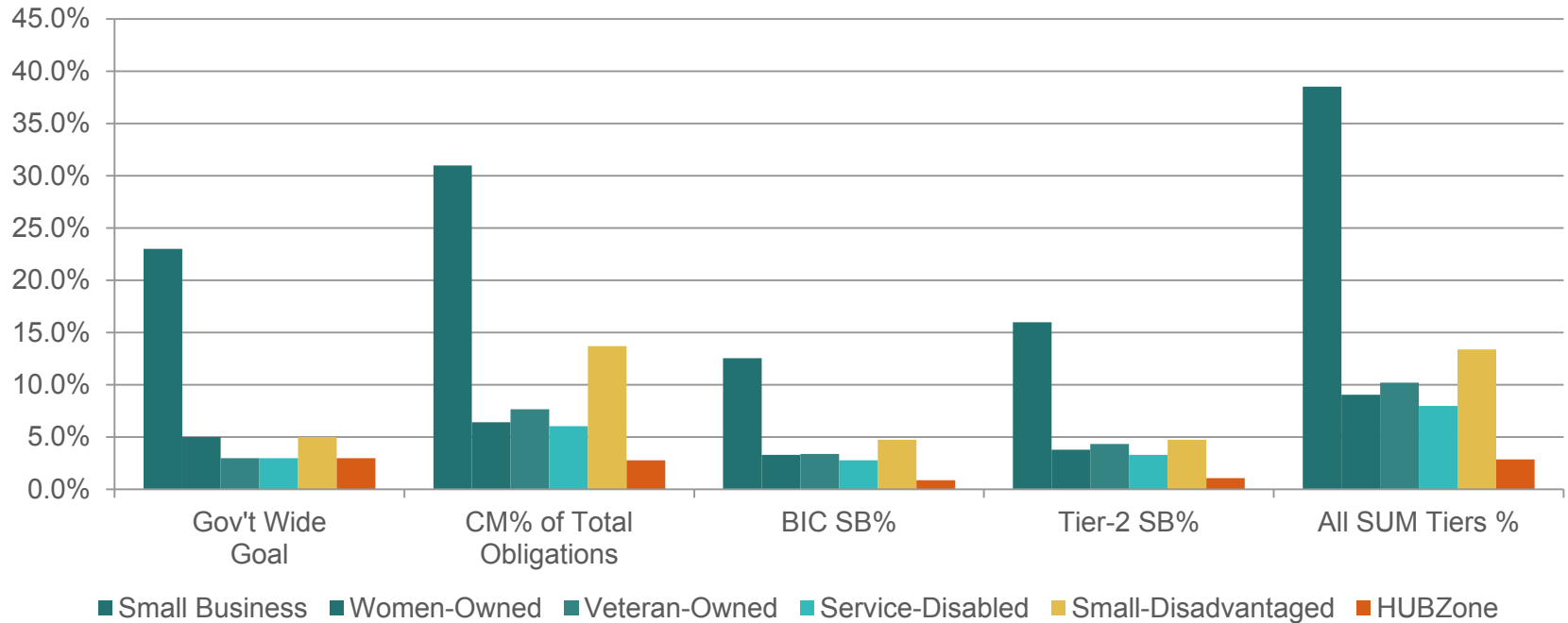
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Category Management FY 2018 Small Business Spend %

Category Management FY18 Small Business Spend (%)



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FY 2018 Small Business Spend by Tier and Set-Aside


	Small Business Obligated	Women-Owned Obligated	Veteran-Owned Obligated	Service-Disabled Obligated	Small-Disadvantaged Obligated	HUBZone Obligated
BIC	\$11,776.0M	\$3,098.5M	\$3,173.3M	\$2,603.8M	\$4,456.1M	\$826.6M
TIER 2	\$15,022.7M	\$3,566.6M	\$4,083.9M	\$3,112.5M	\$4,448.3M	\$1,009.5M
TIER 1	\$9,370.9M	\$1,845.4M	\$2,325.4M	\$1,772.7M	\$3,668.8M	\$847.9M
TIER 0 - DC	\$22,010.3M	\$4,057.7M	\$5,156.7M	\$4,254.6M	\$12,924.0M	\$2,293.4M
TIER 0 - PO	\$7,131.1M	\$1,373.2M	\$1,711.6M	\$1,288.3M	\$2,590.0M	\$473.5M
TIER 0 - IDV	\$28,565.6M	\$5,508.7M	\$6,777.1M	\$5,289.6M	\$13,402.4M	\$2,967.8M
TIER 0 - OTHER	\$30.1M	\$0.2M	\$6.2M	\$5.6M	\$15.2M	\$0.0M
All SUM	\$36,169.6M	\$8,510.5M	\$9,582.6M	\$7,489.0M	\$12,573.2M	\$2,684.0M
All Tiers	\$93,906.7M	\$19,450.3M	\$23,234.2M	\$18,327.1M	\$41,504.8M	\$8,418.7M

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OMB Memo M-19-13



EXECUTIVE OFFICE OF THE PRESIDENT
OFFICE OF MANAGEMENT AND BUDGET
WASHINGTON, D.C. 20503

DEPUTY DIRECTOR
FOR MANAGEMENT

March 20, 2019

M-19-13

MEMORANDUM FOR THE HEADS OF EXECUTIVE DEPARTMENTS AND AGENCIES

FROM: Margaret M. Weichert
Deputy Director for Management 

SUBJECT: Category Management: Making Smarter Use of Common Contract Solutions and Practices

The purpose of this Memorandum is to provide guidance on the use of category management. As used in this document, the term "category management" refers to the business practice of buying common goods and services as an enterprise to eliminate redundancies, increase efficiency, and deliver more value and savings from the Government's acquisition programs. Teams of experts in each category of spending help agencies increase their use of common contract solutions and practices and bring decentralized spending into alignment with organized agency- and Government-level spending strategies by sharing market intelligence, Government and industry best practices, prices paid data, and other information to facilitate informed buying decisions.

To implement category management, the Office of Management and Budget (OMB) will require agencies to carry out a set of tailored management actions and provide updates on these management actions to evaluate their progress in bringing common spending under management. The expected result is more effectively managed contract spending through a balance of Government-wide, agency-wide, and local contracts; reduced unnecessary contract duplication and cost avoidance; and continued achievement of small business goals and other socio-economic requirements. OMB also expects that this Memorandum will help agencies shift time, effort, and funding currently spent performing repetitive administrative tasks toward accomplishing mission outcomes. See Attachment 1.

This Memorandum supersedes and rescinds the Office of Federal Procurement Policy (OFPP) Memorandum entitled *Development, Review, and Approval of Business Cases for Certain Interagency and Agency Specific Acquisitions*, dated September 29, 2011, and also OMB Memorandum M-13-02, *Improving Acquisition through Strategic Sourcing*, dated December 5, 2012.

- New guidance on March 20, 2019
- d. Meet statutory socio-economic responsibilities. This guidance does not change an agency's responsibility to meet its small business contracting goals, including its socioeconomic goals. To further ensure an agency achieves its statutory small business goals, the agency's OSDBU should use the small business dashboard and other information, as appropriate, to help the SAO and the workforce achieve the best balance of BIC, Government-wide, agency-wide and local contracts.

A balanced approach can help the agency leverage the Government's buying power while simultaneously maintaining meaningful opportunities to contract with well-performing incumbent small business contractors and providing a pathway into the Federal market for new entrant small businesses. For this reason, local, decentralized spending (e.g., a small

OMB Memo (Cont.)

dollar definitive contract or a medium-sized indefinite-delivery, indefinite-quantity (IDIQ) contract serving one or a small number of agency customers) would generally be considered Tier 1 spending if it is designed to achieve small business goals and is conducted pursuant to a comprehensive, organized agency-level strategy, as approved by the agency, after consultation with OMB, that also addresses where use of agency-wide, Government-wide, and BIC solutions and vehicles can help the agency meet small business goals. Such strategy should also address the use of on-ramps for agency-wide vehicles, whenever practicable, and working with BIC and Government-wide solution owners to do the same. This will increase opportunities for small businesses at all levels. The strategy should be reflected in internal agency guidance that explains to the workforce when it is appropriate to use each type of contract solution and also explains the process for requesting and/or exercising exceptions from BICs and other Government-wide contract solutions. The guidance should be shared with OMB.

DOE Small Business First Policy

U.S. Department of Energy
Washington, D.C.

POLICY

DOE P 547.1A

Approved: 03-30-2018

SUBJECT: SMALL BUSINESS FIRST POLICY

PURPOSE AND SCOPE

To establish a Small Business Policy that reinforces the goals of the Small Business Act (Public Law 85-536, as amended), Small Business Jobs Act of 2010, and other applicable laws, Executive Orders, regulations and best business practices. This Policy will provide DOE's principles for engagement with the Nation's small business community.

SUPERSEDES

DOE Policy 547.1, *Small Business First Policy*, dated 12-14-2012.

POLICY

The Department of Energy (DOE) will foster a dynamic business environment for the small business community, which includes small, veteran-owned, service-disabled veteran-owned, HUBZone, small disadvantaged, and women-owned small business concerns. This will widen the scope of opportunities that small businesses can participate in, while also strengthening the Agency, and in turn, the American economy.

DOE commits to promoting inclusiveness in all Departmental activities by advancing initiatives that attract the innovation and creativity of small businesses. Advancement of these initiatives will enhance relationships among internal and external small business stakeholders, and expand the Agency's engagement with all socio-economic sectors of the Nation's small businesses.

DOE strives to create jobs and strengthen the small business economy by committing to identify and remove barriers wherever possible. Removing barriers benefits small businesses seeking to contribute to the Nation's energy science advancements, and to participate in furthering America's global energy dominance. DOE will advocate for and create new small business opportunities that support the Department's mission. DOE will ensure small businesses can take advantage of opportunities in its research and technology partnership programs. Fostering this engagement of the small business community will advance research and development across DOE's National Laboratories and production facilities, through greater access to the full breadth of America's workforce.

DOE's encouragement of new perspectives will promote avenues for small businesses to engage in the full range of the Agency's research, development, and deployment opportunities. DOE will continue to champion partnerships, such as the DOE Mentor-Protégé Program. Through these partnerships, small businesses will help keep DOE on the cutting edge of energy science and national security.

Increasing small business access to Agency opportunities is essential. DOE will continue to employ a broad promotion strategy and timely notification of these opportunities. Through these

AVAILABLE ONLINE AT:
www.doe.gov

INITIATED BY:
Office of Small and Disadvantaged Business Utilization

- Policy issued on March 30, 2018

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Session Evaluations



Reminder

Please complete the Speaker/Session Evaluation Form located in the Mobile App

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Questions?

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