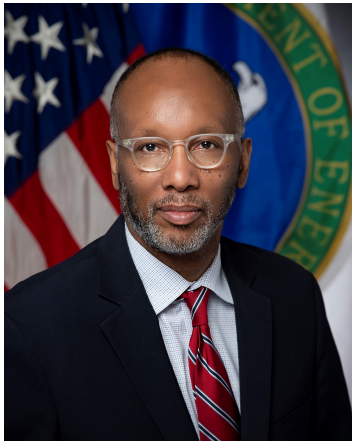




OFFICE OF SMALL AND DISADVANTAGED BUSINESS UTILIZATION

## FROM THE DIRECTOR



On behalf of the OSDBU, I am pleased to share quarterly updates on the DOE's small business achievements and activities.

Last month, the OSDBU hosted the 2023 DOE Small Business Forum & Expo in New Orleans that was successful in increasing the Department's partnerships with small businesses, including underrepresented firms, and providing a wide range of opportunities. Highlights from the two-day event will be covered in this special edition of the Quarterly Newsletter.

It is also my pleasure to report that the DOE has achieved an "A" grade from the U.S. Small Business Administration (SBA) for Fiscal Year

(FY) 2022 small business and socio-economic achievements. Through the collective efforts of the DOE workforce, the Department continues to advance the Administration's initiatives to increase equity in procurement and expand opportunities for underserved communities.

With regards to organizational updates, the OSDBU is pleased to share that Sandra Jacobs, Budget Analyst; and Michael Massello, Senior Small Business Advocate, have joined the OSDBU team. Additionally, the OSDBU anticipates finalizing an offer to bring on a Data Analyst before the end of the Fiscal Year. We are excited about the talents that each of these new team members will bring to advance the OSDBU's mission to maximize opportunities for small businesses.

In other developments, the FY 2024 Goaling year for DOE and NNSA is now underway and you can find further details on page 7. The OSDBU also continues to focus on DOE and NNSA Acquisition Forecast improvements through the Acquisition Forecast Improvement Working Group (AFIWG) with the aim to concisely capture all DOE and NNSA small business opportunities in one centralized resource, from prime and subcontracting opportunities to grants and other financial assistance.

The OSDBU greatly appreciates all the support of the 2023 DOE Small Business Forum & Expo and a special thanks to Secretary Jennifer M. Granholm for her inspiring Keynote and leadership. A special acknowledgment goes to Anita Anderson, the OSDBU's Outreach and Public Engagement Specialist, who organized the event. Additional appreciation goes to Small Business Program Managers (SBPMs) and other representatives from partnering DOE offices, leadership, and contract support, sponsors, and exhibitors for helping put on a fantastic event.

Thank you for advocating for the utilization of small businesses to help advance the DOE's mission.

*Ron Pierce*

Ron P. Pierce, Director  
Office of Small and Disadvantaged Business Utilization  
U.S. Department of Energy

## DOE SMALL BUSINESS ACHIEVEMENT

FY 2023 third quarter small business data projections indicate that the Department is headed for another successful year. The DOE's third quarter procurement base is \$38.9B. To help increase opportunities for underrepresented small business, the Department will continue its focus on achievement in the four socio-economic categories graded by the SBA: Small Disadvantaged Businesses (SDB), Women-Owned Small Businesses (WOSB), Service-Disabled Veteran-Owned Small Businesses (SDVOSB), and HUBZone Small Businesses.

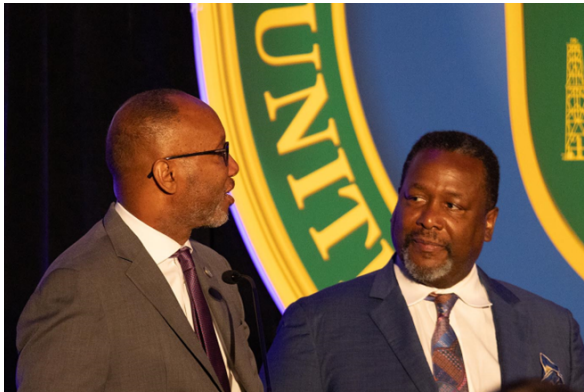
Below please find a summary of the FY 2023 third quarter prime small business socio-economic achievement, including Federal Procurement Data System-Next Generation (FPDS-NG) and Management and Operations Subcontract Reporting Capability (MOSRC) awards:

Total Small Business Eligible Dollars (Q3)		\$38,911,655,435.80	
	Achievement \$	Achievement %	
SDB	\$1,478,821,708.64	3.80%	
WOSB	\$848,058,813.23	2.18%	
SDVOSB	\$494,936,592.67	1.27%	
HUBZone	\$296,657,800.91	0.76%	

As the Department continues its focus on advancing socio-economic small business achievement, the OSDBU would like to highlight the importance of meeting the annual small business and socio-economic goals, as agreed upon by the SBA. To help meet the small business goals, please consider the following:

- Using available federal acquisition statutory and regulatory flexibilities to achieve the objectives of increasing equity and maximizing awards to underserved socio-economic small businesses.
- Utilizing Federal Supply Schedules, Simplified Acquisition procedures, Small Business Set-Asides, and the DOE preferred SDB acquisition solutions.
- Coordinating with the OSDBU—who will offer assistance on actions—when proposed acquisitions valued over \$3 million are not set aside for small businesses.

**2023 DOE Small Business Forum & Expo**  
**SPECIAL EDITION**



From left, OSDBU Director Ron Pierce; and Wendell Pierce, actor and small business owner



U.S. Secretary of Energy Jennifer M. Granholm



Shalanda Baker, Director of the Office of Economic Impact and Diversity and Secretarial Advisor on Equity

On July 11-12, 2023, the OSDBU hosted the 2023 Small Business Forum & Expo in New Orleans. More than 1,200 people attended the two-day event that brought together the DOE and NNSA under one roof, including the newly established Office of Clean Energy Demonstrations and the Office of State and Community Energy Programs, the 17 National Laboratories, cleanup sites, and other Departmental Elements. There were various DOE and NNSA representatives, such as SBPMs, Contracting Officers, and other members of the acquisition community. The purpose of the two-day event was to help make it easier to do business with DOE, share resources and best practices for success, and provide a wide range of opportunities for small and disadvantaged businesses.

To kick off the event, OSDBU Director Ron Pierce provided Welcome Remarks highlighting the Department's small business accomplishments and ongoing initiatives. Director Pierce emphasized the Small Business Opportunity Days hosted by the OSDBU in collaboration with the National Laboratories to increase opportunities for underrepresented small businesses, such as service-disabled veteran-owned, women-owned, and firms located in Historically Underutilized Business Zones (HUBZones). Additional topics of Director Pierce's remarks included previewing the agenda, and introducing the Keynote from Wendell Pierce, the renowned actor, author, activist, small business owner, and brother of Director Pierce.

On day two, Director of the Office of Economic Impact and Diversity at the U.S. Department of Energy and Secretarial Advisor on Equity, Shalanda Baker, provided welcome remarks followed by a Keynote from U.S. Secretary of Energy Jennifer M. Granholm. The Keynote highlighted the vital role the Department and small businesses are playing in advancing the clean energy economy. Additional topics of Secretary Granholm's Keynote covered the Administration's accomplishments in clean energy investments and infrastructure and the DOE's recent small business achievements, including surpassing the \$10 billion milestone in awards to small businesses through prime and subcontracting opportunities, the most the Department has ever awarded to small businesses. The 2023 DOE Small Business Forum featured an exciting agenda, including Breakout Sessions, Panel Discussions, and an Exhibit Hall for networking.

**COFFEE, BEIGNETS, AND CLEAN ENERGY POWERED BY SMALL BUSINESSES**

At the end of the first day of the 2023 DOE Small Business Forum & Expo, Secretary Granholm and Director Pierce met for coffee and beignets. They discussed the setting of the conference in New Orleans, the successes of the first day, and explored the theme of the conference: American clean energy powered by small businesses. Secretary Granholm established the vital importance of small businesses partnering with the Department to develop innovative solutions for the clean energy transition. Director Pierce highlighted the focus of the conference in providing a wide range of opportunities for small businesses to support DOE's clean energy initiatives and other core mission areas. [Please check out the video here.](#)



U.S. Secretary of Energy Jennifer M. Granholm and OSDBU Director Ron Pierce



# 2023 DOE Small Business Forum & Expo SPECIAL EDITION



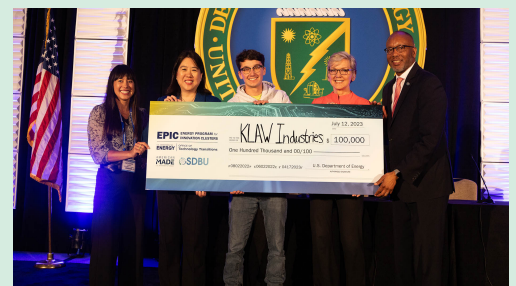
## EPIC PITCH COMPETITION

An exciting new feature of the 2023 DOE Small Business Forum & Expo included The Big Easy EPIC Pitch Competition in the Gator Swamp (EPIC Pitch Competition) in collaboration with the National Renewable Energy Laboratory (NREL) and the Office of Technology Transitions (OTT). The competition involved 8 cutting-edge clean tech startups pitching their unique ideas for a clean energy breakthrough to a panel of expert judges, including OSDBU Deputy Director for Small Business Programs Tamara Miles and NNSA Deputy Associate Administrator for Partnership and Acquisition Services (NA-PAS) and Senior Procurement Executive (SPE) William “BJ” Quigley. Each of the eight startups in the competition were nominated by competitors in OTT’s [Energy Program for Innovation Clusters \(EPIC\) Prize](#).

The winners were awarded more than \$160,000 in cash prizes for their groundbreaking clean energy technologies that will help provide vital solutions to the climate crisis. **KLAW Industries** from Binghamton, NY, received the first place prize of \$100,000 in DOE funding for its pitch on Pantheon™, a high-quality, partial cement replacement made from post-consumer glass that will help to save costs and lower carbon emissions. [Please check out the video of the winning technology here](#). Rounding out the second to fifth place awards were Renewell Energy from Bakersfield, CA and Houston, TX; C-Motive Technologies of Middleton, WI; ReJoule from Signal Hill, CA; and Plantd of Durham, NC. To support small businesses and entrepreneurship with a green twist, the EPIC Pitch Competition will be a staple of the DOE Small Business Forum & Expo moving forward.



Winners of the EPIC Pitch Competition at the 2023 DOE Small Business Forum & Expo



In middle, the first place winner and co-founder of Klaw Industries, Jacob Kumpon

## SMALL BUSINESS OWNERS PANEL



From left, OSDBU Deputy Director for Small Business Programs Tamara L. Miles; Jessica O. Matthews, Founder, and CEO, Uncharted/Total Solutions Group; Marcella Medor, Owner, MarCom, LLC; and Tracy Solomon, CEO, TEVET

The 2023 DOE Small Business Forum & Expo included a panel discussion of small business owners with prior experience doing business with DOE. Moderated by OSDBU Deputy Director for Small Business Programs Tamara L. Miles, the discussion featured small business owners Jessica O. Matthews, Founder, and CEO, Uncharted/Total Solutions Group; Marcella Medor, Owner, MarCom, LLC; and Tracy Solomon, CEO, TEVET. Topics of the discussion included challenges, best practices, and tips for doing business with DOE. Additionally, the small business owners provided insights on networking with the Department for partnership opportunities. TEVET was also the recipient of the Service-Disabled Veteran-Owned Small Business of the Year in the DOE FY 2022 Small Business Awards Program (please see article on next page for list of award recipients recognized during the awards ceremony in the 2023 DOE Small Business Forum & Expo).

## ELECTRIC VEHICLE (EV) CHARGING INFRASTRUCTURE 101 ROUNDTABLE DISCUSSION & NETWORKING SESSION

Another part of the 2023 DOE Small Business Forum & Expo included opening remarks from Monisha Shah, Deputy Director J40 White House Council on Environmental Quality, and a roundtable discussion with Dr. Richard Ezike, Program Communications Specialist for the Joint Office of Energy and Transportation, and representatives from the EV Infrastructure Industry. The discussion covered the objectives to advance the goal of a clean transportation system, cultivate business connections in an emerging multi-billion-dollar industry, share what’s driving success and innovation in the industry, and to inspire greater participation of Small Disadvantaged Businesses (SDBs), Minority-owned Enterprises and other small businesses. Following the discussion, there was a business networking session for opportunities with federal, state, and local officials as well as industry leaders. The Minority Business Development Agency (MBDA), and the DOE Office of Economic Impact and Diversity also provided support.



Above: From left, Dr. Richard Ezike and representatives from the EV Infrastructure Industry

Below: Monisha Shah, Deputy Director J40 White House Council on Environmental Quality



# 2023 DOE Small Business Forum & Expo

## SPECIAL EDITION



## FY 2022 SMALL BUSINESS AWARDS CEREMONY

The 2023 DOE Small Business Forum & Expo also included an awards ceremony to honor and recognize the outstanding achievements of the many small businesses and internal DOE stakeholders who have helped promote and expand the utilization of small businesses. Below is a list of the award recipients of the FY 2022 Annual Small Business Awards Program:



FY 2022 Small Business Awards Ceremony, including award recipients and OSDBU Director Ron Pierce, at the 2023 DOE Small Business Forum & Expo

- Federal SBPM of the Year:** Gary Lyttek
- Federal Contracting Officer of the Year:** Kyle Krzywicki
- Federal Procurement Director of the Year:** Aaron Deckard
- FMC Small Business Program Manager of the Year:** Jonathan Benjamin
- FMC Contracting Officer of the Year:** Y. Sofia Delgadillo Marrufo
- FMC Procurement Director of the Year:** Jacque Coleman
- FMC Procurement Director of the Year:** Shawna Southwick
- Mentor of the Year:** Sandia National Laboratories Small Business Mentor-Protégé Program
- Protégé of the Year:** Pueblo Alliance
- 8(a)/Small Disadvantaged Business of the Year:** Chenega Professional & Technical Services
- Woman-Owned Small Business of the Year:** BC Computer Supply, Inc
- HUBZone Small Business of the Year:** Wildflower International, Ltd
- Service-Disabled Veteran-Owned Small Business of the Year:** TEVET
- SBIR/STTR Small Business of the Year:** Tiptek, LLC
- Small Business of the Year:** Seaway Plastics Engineering
- OSDBU Director's Excellence Award:** Patrick Simien, Anne Marie Bird, Byron McCollum, and Lani MacRae

Congratulations to the award recipients of the FY 2022 Annual Small Business Awards Program and thank you for your contributions to the DOE's mission successes! For additional information on the DOE's Annual Small Business Awards Program, please visit the [OSDBU website](https://www.osdbu.gov).

## SBPM ANNUAL TRAINING SESSION

Prior to the first day of the 2023 DOE Small Business Forum & Expo, the OSDBU hosted an in-depth SBPM Training session that included over 100 participants from the DOE procurement community in attendance. The purpose was to share best practices, small business legislative updates, and other important information to help SBPMs advocate for the Department's mission. Director Pierce provided opening remarks to highlight the Department's small business achievements and ongoing initiatives. Strategic Petroleum Reserve (SPR) SBPM Leslie Bourgeois served as the Mistress of Ceremony.



Small Business Program Managers at the Annual Training Session

The training session also included participation from representatives of AbilityOne, the U.S. General Services Administration, Lafayette APEX Accelerators, the Minority Business Development Agency, and the SBA. The representatives provided small business updates from their respective programs.



David Park, GSA, speaking on GSA's Equity Action Tool and Acquisition Gateway during the Advancing Equity in Procurement Panel

The SBPM Training Session was highly informative for the acquisition community. Kudos to Leslie Bourgeois for her role as the Mistress of Ceremony and to all presenters from across the DOE and NNSA. Special thanks to OSDBU Senior Small Business Advocate Nicola Ohaegbu and Deputy Director for Small Business Programs Tamara Miles who planned and organized the training.



# 2023 DOE Small Business Forum & Expo SPECIAL EDITION



## BREAKOUT SESSIONS

The 2023 DOE Small Business Forum & Expo included various educational workshops for small businesses, referred to as Breakout Sessions, to share resources, best practices, and a wide range of upcoming opportunities. Breakout sessions covered doing business with the Department's National Laboratories, sites, and program offices, including the Office of Headquarters Procurement Services that provided an overview of strategies for success through solicitation responses, strategic alliances, and other solutions. Additional topics included an overview of DOE's Mentor Protégé Program, the newly established Office of Clean Energy Demonstrations, Office of State and Community Energy Programs, Joint Office of Energy and Transportation, and stakeholder support for veteran-owned small businesses. Attendees of the breakout sessions had the chance to follow up with the presenters at the end of the session with questions about doing business with DOE and upcoming opportunities. The OSDBU will be tracking awards and contracts granted from opportunities presented at the 2023 DOE Small Business Forum & Expo.



David Hawkes, Small Business Program Manager, Idaho Operations Office; and Karen Tappert, Small Business Program Manager, Office of Nuclear Energy, DOE



Mark Lochbaum, OSDBU Senior Small Business Advocate

## EXHIBIT HALL

With 100+ exhibitors, the Exhibit Hall offered small businesses the chance to network for opportunities with DOE procurement officials, small business program managers, and prime contractors. Areas for opportunities included the following product and services categories:

- Professional, Scientific & Technical Services
- Engineering Services
- Information Technology
- Facilities Support Services
- Manufacturing
- Administrative Management & General Management Services
- Research and Development
- Construction, Architectural Services
- Industrial Hardware & Wholesalers
- Hazardous Waste Treatment & Disposal
- Machine Shops
- Security Services, Security Guards, Patrol Services
- Office Supplies, Furniture.



Exhibit Hall at the 2023 DOE Small Business Forum & Expo

## OSDBU FEDERAL AGENCIES PANEL

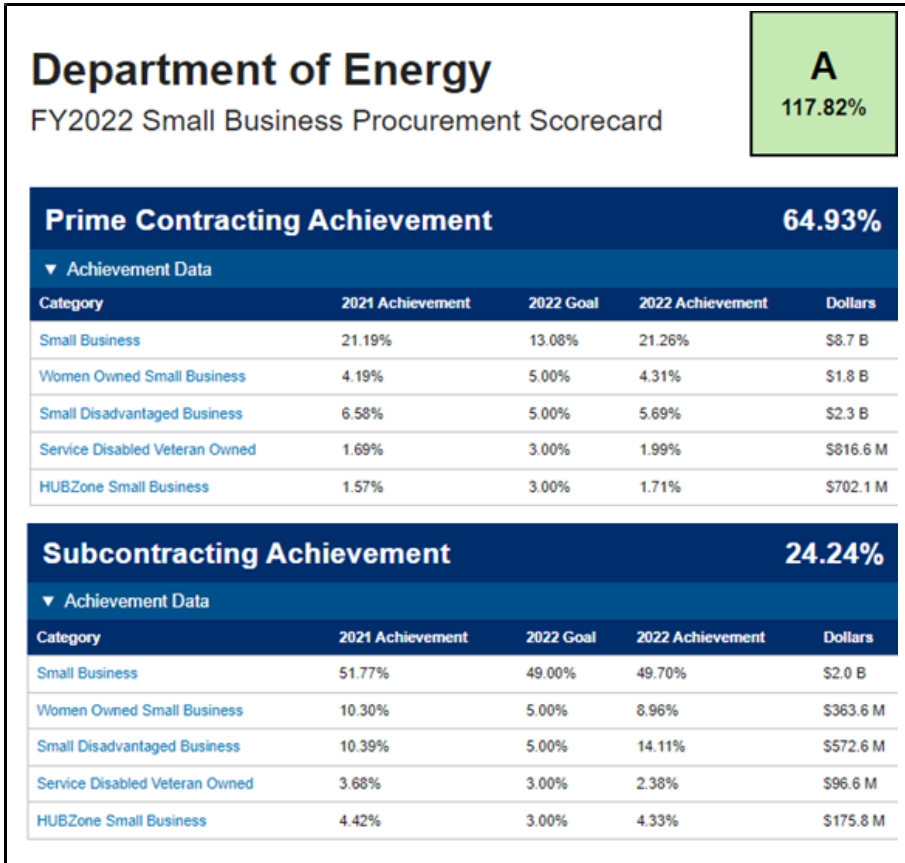


From left, David Allen, Sam Le, Jean Lin Pao, Tyra Redus, and Steve Sizemore on the OSDBU Federal Agencies Panel

At the 2023 DOE Small Business Forum & Expo, there was also a panel discussion with various OSDBU representatives from Federal agencies, including Sam Le, Director of Policy Planning, and Liaison at the U.S. Small Business Administration; Tyra Redus, Deputy Director, Office of Small and Disadvantaged Business Utilization at the U.S. Department of Transportation; David Allen, Senior Small Business Specialist, Office of Small and Disadvantaged Business Utilization at the U.S. Environmental Protection Agency; Steve Sizemore, Deputy Director of the Multiple Award Schedule Program Management Office at the General Services Administration; and Jean Lin Pao, Director, Office of Small and Disadvantaged Business Utilization at the U.S. Department of Housing and Urban Development. Moderated by OSDBU Principal Deputy Director Paul Ross, the wide-ranging discussion included best practices for navigating the respective procurement environments for each agency in addition to steps to success for the small business community.

## DEPARTMENT ACHIEVES "A" GRADE FROM THE SBA

The Office of Small and Disadvantaged Business Utilization (OSDBU) at the U.S. Department of Energy (DOE) is pleased to report that DOE has earned an “A” grade on its Fiscal Year (FY) 2022 Small Business Procurement Scorecard from the SBA. The Department has achieved seven “A” grades from the SBA since 2015. In FY 2022, the DOE awarded a total of \$10.7B to small businesses through prime and subcontracting opportunities, an increase of \$1 billion dollars from the previous year.



### Summary Small Business and Socio-Economic Accomplishments:

- DOE achieved 21.26% in prime small business contracting, exceeding its goal of 13.08%
- The Department exceeded its prime socio-economic SDB goal (5%), achieving 5.69%
- DOE awarded over \$800M to Service-Disabled Veteran-Owned Small Businesses and over \$700M to HUBZone Small Businesses in prime contracting achievement.
- The Department achieved 49.70%, exceeding its subcontracting goal of 49%.
- DOE exceeded goals for three SBA-graded socio-economic subcontracting categories: Women-Owned Small Business (WOSB) (5%), Small Disadvantaged Business (SDB) (5%), and HUBZone Small Business (3%).
- The Department awarded over \$90M to Service-Disabled Veteran-Owned Small Businesses in subcontracting achievement.

With the Department’s ongoing initiatives to advance equity in procurement and expand opportunities for underserved communities, DOE continues to make progress in socio-economic achievement. DOE awarded over \$2.8B to small disadvantaged businesses, including minority-owned firms, in prime and subcontracting awards. Additionally, the Department awarded a total of over \$2.1B to women-owned small businesses.

The DOE continues its commitment to maximize contracting and financial assistance and opportunities to small businesses. The Department also notes additional significant Agency spend to small businesses that is over and above the SBA small business metrics captured in the Small Business Procurement Scorecard. More specifically, DOE obligated additional funds not currently included in the 117.82% Scorecard grade to small businesses under the following agency efforts in FY 2022:

1. \$660,581,540 Financial Assistance Obligations to Small Businesses
2. \$102,020,409 Non-appropriated obligations to Small Businesses.

The annual Small Business Procurement Scorecard (Scorecard) measures how well each Federal agency meets their small business and socio-economic prime contracting and subcontracting goals. This helps the SBA ensure the sum total of the goals set for each agency meets the 23% target for the Federal Government as well as the socio-economic goals established by statute. For more information on the DOE's FY 2022 Small Business Procurement Scorecard, please visit the [OSDBU website](#).



## GOALING AND LEGISLATIVE UPDATES

Below are updates on DOE goaling information and legislation from the SBA.

### GOALING

The OSDBU is pleased to announce that the FY 2024 Goaling year for DOE and NNSA Program Elements has kicked off. Located in iPortal through the Small Business Dashboard, the Small Business Goaling Application serves as the system for DOE FY 2024 Small Business Goaling Submitters to enter their Program Element's FY 2024 small business and socio-economic category goals.

While the SBA has not yet provided the FY 2024 Small Business Goals to Federal agencies and may not do so until the latter half of the first quarter of FY 2024, DOE Program Elements should proceed with projecting their respective FY 2024 Small Business Goals. Once the DOE FY 2024 Small Business Goal is agreed upon and finalized by the DOE and SBA, it will be shared with Program Elements.

Please stay tuned later this month for the FY 2024 SB Goaling Workshop Training presentation that will be available in iPortal under the "Training" tab in the Small Business Dashboard. Please note that the FY 2024 Timeline is subject to change, but notification of such changes will be provided.

For questions, please contact Paul E. Ross, Principal Deputy Director, at [paule.ross@hq.doe.gov](mailto:paule.ross@hq.doe.gov) and René Flores Jr., Senior Project Administrator (Contract Support), at [rene.flores@hq.doe.gov](mailto:rene.flores@hq.doe.gov).

### LEGISLATIVE UPDATE

The OSDBU is pleased to share a recent legislative update from the SBA:

- SBA Final Rule: Ownership/Control and Contract Assistance for 8(a): 88 FR 26164 (April 27, 2023 corrected May 5, 2023)

The final rule makes several changes to the ownership and control requirements for the 8(a) Business Development (BD) program, including recognizing a process for allowing a change of ownership for a former Participant that is still performing one or more 8(a) contracts and permitting an individual to own an applicant or Participant where the individual can demonstrate that financial obligations have been settled and discharged by the Federal Government. For more information, please refer to the [Federal Register](#).

## OTHER EVENT UPDATES

The OSDBU is pleased to share updates from three small business events:

1. On May 3, the OSDBU and National Energy Technology Laboratory (NETL) co-hosted the HUBZone and SDB Small Business Opportunity Day at NETL in Morgantown, WV. Over 70 stakeholders participated in the event, including the SBA, Appalachian Regional Commission, and other advocacy organizations.



2. On June 7th, OSDBU Director Ron Pierce and Gary Lyttek, Senior Business Source Manager at the National Nuclear Security Administration (NNSA) Office of Partnership & Acquisition Services, were the keynote speakers at the National Veterans Small Business Coalition's DC Networking Dinner, held at the Army Navy Country Club in Arlington, VA, with almost 200 people in attendance. Topics included DOE and NNSA's operations and Procurement Opportunities for Veteran Owned Small Businesses at the U.S. Department of Energy. The event was sponsored by the Fairfax County Economic Development Authority.



From left, OSDBU Director Ron Pierce and the NNSA's Gary Lyttek

3. On June 12th, the OSDBU's Tamara L. Miles (Deputy Director for Small Business Programs) and Nicola Ohaegbu (Senior Small Business Advocate) participated in the Brookhaven National Laboratory Small Business Vendor Day in Upton, New York.



Photograph: From left, OSDBU Deputy Director for Small Business Programs Tamara L. Miles, OSDBU Senior Small Business Advocate Nicola Ohaegbu; and Anita Darden Gardyne, a small business vendor

## MARK YOUR CALENDARS

Below are upcoming small business events. Check out the [Small Business Events Calendar](#) on the OSDBU's website for more information.

**August 22-23, 2023** 2023 National HUBZone Conference

**August 29, 2023** Sandia National Laboratories Small Business Forum in Partnership with DOE OSDBU

**September 22, 2023** Senator Ernst's Entrepreneur Expo: A Small-Business GovCon and Innovation Conference

**October 18, 2023** Energy Technology and Environmental Business Association (ETEBA) Business Opportunities and Technical Conference (BOTC) 2023



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[www.smallbusiness.energy.gov](http://www.smallbusiness.energy.gov)

[smallbusiness@hq.doe.gov](mailto:smallbusiness@hq.doe.gov)

The OSDBU maximizes contract opportunities for small businesses while advancing the Agency's mission.