



Medical - Quarterly Industry Forum

By: *Fran Perez-Wilhite & TJ Gilroy*

Industry focus: *Medical*

Date: *12 March 2026*

Agenda

- **Brief Welcome**
- Featured Presentation: *R&D Funding for Medical Innovation*
- Welcome & Overview
- Special Focus: *OTA*
- Business Spotlight: *How SB Can Use NCMBC to Strengthen Their Federal Contracting Strategy*
- Highlights of Upcoming Opportunities
- Closing & Next Steps



Agenda

- Brief Welcome
- **Featured Presentation: *R&D Funding for Medical Innovation***
- Welcome & Overview
- Special Focus: *OTA*
- Business Spotlight: *How SB Can Use NCMBC to Strengthen Their Federal Contracting Strategy*
- Highlights of Upcoming Opportunities
- Closing & Next Steps



R&D Funding for Medical Innovations

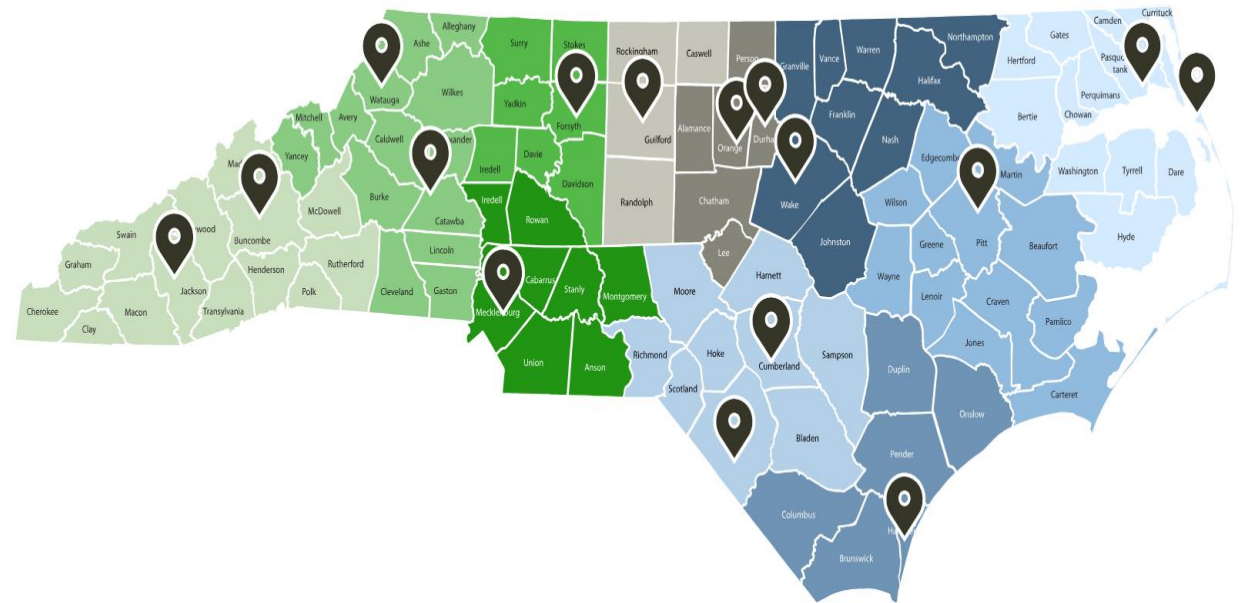
Ramya Vijapurapu, Technology Commercialization Counselor
SBTDC at NC State University

March 12, 2026

sbtcdc

About NC SBTDC

- Business extension - UNC System
- Confidential, no-cost counseling
- Services and specialty programs
 - General Business
 - International Business Development (IBD)
 - Government Contracting and Assistance Program (GCAP)
 - Business Launch
 - Technology Commercialization*



Technology Development and Commercialization



John Ujvari
Director, Technology
Commercialization
Chapel Hill, NC



Keith Savino
Tech Counselor
Chapel Hill, NC



Ramya Vijapurapu
Tech Counselor
Raleigh, NC



Andrea Giska
Equity Funding Specialist
Chapel Hill, NC

Focus Areas:

- **Fundraising** Strategy (SBIR/STTR, equity)
- SBIR/STTR Proposal Reviews
- Pitch Deck Preparation
- Commercialization Plan Reviews
- Understanding IP

Clients:

- Small
- Innovative, R&D Focus
- High Growth

Want Counseling? Contact Us!

<https://sbtdc.org/become-a-client>



About ▾ News Blog Events Contact Search Q

Business Life Cycle ▾ Services ▾ Locations Resources ▾ Impact ▾ **BECOME A CLIENT**

Request for Business Counseling

Find your closest regional office below and select "Request Counseling" to complete our confidential and secure request for business counseling. A counselor near you will follow up within three business days to discuss your needs.



Asheville

Counties Served: Buncombe, Haywood, Henderson, Madison, McDowell, Polk, Rutherford and Transylvania

✔ **Request Counseling**

Boone

Counties Served: Alleghany, Ashe, Avery, Mitchell, Watauga, Wilkes and Yancey

✔ **Request Counseling**



Today's Objectives



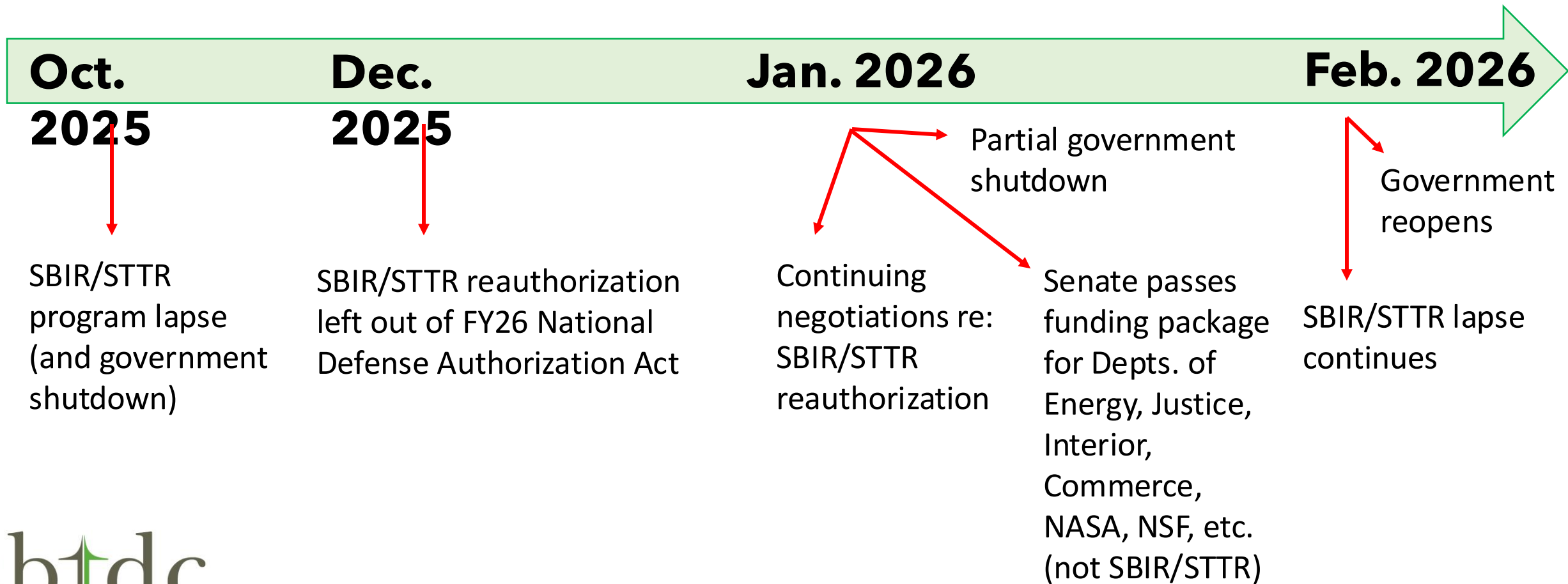
1. SBIR/STTR Reauthorization
 - Great news!
2. Post-Reauthorization SBIR/STTR Proposal Preparation
3. Other Non-Dilutive Funding Sources



SBIR/STTR Program

Current Updates

Timeline of Events - SBIR/STTR Reauthorization



March 3, 2026 - SBIR/STTR Reauthorization in Progress

Small Business Innovation and Economic Security Act

(S. 3971)

- Increased foreign due diligence
 - Affiliation – countries of concern
 - Investors
 - Tech licensing/joint ventures
 - Other business relationships
- Strategic Breakthrough Funding (SBF)
 - Up to \$30M for 4 years (Phase II contracts)
- Proposal caps
 - Determined by each agency
- Technical and Business Development Assistance (TABA)
 - Contract officer training
 - Awards for Direct to Phase II, SBF



Preparing for SBIR/STTR Post-Reauthorization

Test the Waters



- **Paragraph 1: Describing the Problem**
 - Significance
 - Who it affects
 - Current solutions and their gaps
- **Paragraph 2: About Your Product**
 - Product description
 - 2-3 specific aims/R&D objectives
 - Details for each aim/objective
- **Paragraph 3**
 - Expected achievements in Phase I
 - Potential impact of product

Final Step: Send to program manager(s)

<https://legacy.www.sbir.gov/agency-contacts>

SBIR/STTR Review Criteria

Significance

- Major problem
- Pain points
- Substantial market



Innovation

- Novelty
- IP generation/protection



Approach

- Clear objectives and timeline
- Risk mitigation



Team

- Scientific and business expertise



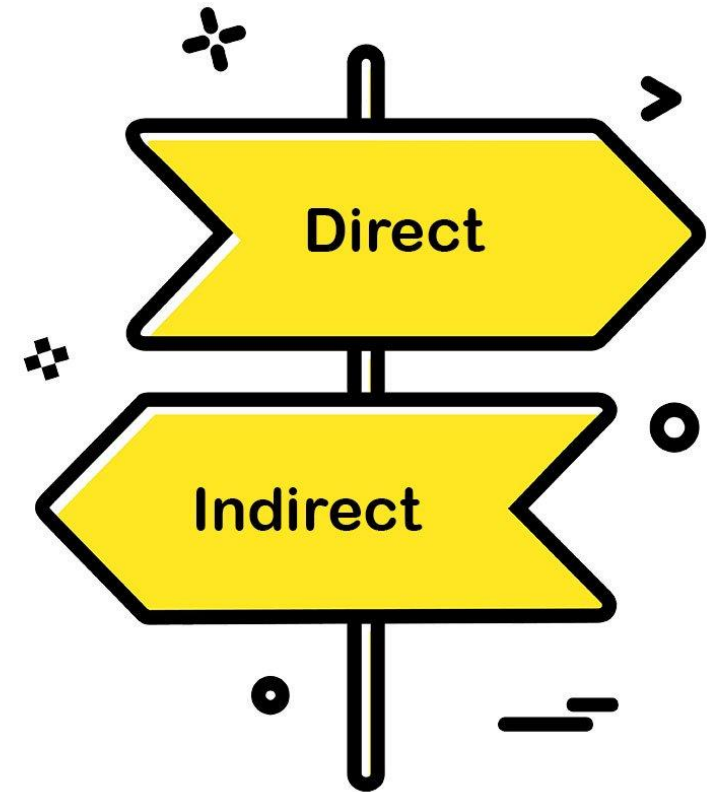
Environment

- Adequate facilities and equipment



Creating Your Budget

- Maximum amount varies agency-to-agency and solicitation-to-solicitation
- Budget breakdown:
 - Direct Costs
 - Attributable to R&D
 - Indirect Costs
 - Incurred, but not attributable to R&D
 - Fee/Profit
 - Request 7% - can be used for IP protection, accounting services, etc.



TABA - Additional Funds for Biz Dev

- TABA = Technical and Business Development Assistance
- Funds to support commercialization assistance via a contractor
 - Contractor selection may be dictated by the agency
- Lots of agency differences
- ***Always request!***

Phase 1

Up to \$6500

Phase 2

Up to
\$50,000

One NC Small Business Program

Incentive Program



- Up to **\$12,000**
- **50-75% reimbursement of proposal prep expenses**
- Ticket to apply: Phase I **proposal submission** letter
- Example expenses:
 - Employee/self salaries*
 - Proposal writing consultants

Match Program



- Up to **\$75,000**
- 50% match of the Phase I SBIR/STTR award
- **Ticket to apply: Phase I award notification letter**
- Purpose: bridge gap between Phase I and Phase II funding
 - **Not limited to R&D expenses**

**Aside From SBIR/STTR,
What Other Funding
Sources Are Available to
Me?**

"Non-SBIR/STTR" Funding Avenues

[Home](#) > [Funding](#) > Explore NIH Grant Opportunities

Explore NIH Grant Opportunities

Researchers can use the NIH-specific filters in this search tool to quickly identify potential funding opportunities of interest in [Grants.gov](#). Starting in October 2025, Grants.gov is the [single official source](#) for NIH grant opportunities. Use [Grants.gov Subscriptions](#) for notifications of new opportunities. Find [NIH Parent Announcements](#) and check [Search Tips for NIH Opportunities](#).

Filters [Export Results](#) [Share Results](#)

Active Opportunities Expired Opportunities

Funding Category [Learn more about Funding Categories](#)

Funding Organization(s) Issuing Organization Only

Keyword Title Only

[Advanced Search](#) [Active Opportunities](#) [Clear Filters](#)

<https://grants.nih.gov/funding/explore-nih-opportunities>

[Return to Grants.gov](#)

Search funding opportunities

Tip: Use a minus sign to exclude words or phrases, like "-research"

[Search](#) [Filters](#) [Copy this search query](#)

Must include all words (ex. transportation AND safety)
 May include any words (ex. transportation OR safety)

[Forecasted](#) [Open](#)

1,579 Opportunities [Export results](#)

Sort by: [Most relevant \(Default\)](#)

| Close date | Status | Title | Agency | Award min | Award max |
|------------|--------|--|---------------|-----------|-----------|
| | | Foundations for Operating the National | U.S. National | | |

https://simpler.grants.gov/search?utm_source=Grants.gov



Tip: Play around with keywords, filters, and other search bars!

NIH Grants Outside of SBIR/STTR

Activity Codes

NIH uses three-character activity codes to differentiate the wide variety of research-related programs NIH supports. The first character typically identifies the major funding category or program type. For example, activity codes for research and development often start with "R," training with "T," fellowship with "F," and career development with "K." Each institute and center (IC) participates in a subset of activity codes. Although each activity code has a broadly defined purpose, there may be differences in their use from one IC to another. Applicants should always refer to the funding opportunity for the specific requirements and details of an initiative.

| Activity Code ▼ | Funding Category | Title | Description |
|---------------------|--|--|--|
| C06 | Construction and Modernization | Research Facilities Construction Grant | To provide matching Federal funds, up to 75%, for construction or major remodeling, to create new research facilities. In addition to basic research laboratories this may include, under certain circumstances, animal facilities and/or limited clinical facilities where they are an integral part of an overall research effort. |
| D43 | Research Training and Career Development | International Research Training Grants | To support research training programs for US and foreign professionals and students to strengthen global health research and international research collaboration. |
| D71 | Research Training and Career Development | International Research Training Planning Grant | To plan for the preparation of an application for a D43 international research training grant or for a U2R international research training cooperative agreement. |

- R01 (Research Project)
- R03 (Small Research Grants)
- R21 (Exploratory/Developmental Grants)
- R61/R33 (Exploratory/Developmental Grants Phase I and II)
- R34 (Clinical Trials)

Other Funding Avenues



<https://ncinnovation.org/statewide-rfp/>

- \$300K-\$2M for university spinouts
- TRL 3-6

North Carolina Biotechnology Center®

- Translational Research Grant (>\$100K)
- Small Business Research Loan (up to \$250K)
- Strategic Growth Loan (up to \$650K)
- Flash Grants (approx. \$30K)

<https://www.ncbiotech.org/funding>



- MICRO grant (\$10K)
- SEED grant (\$50K)
- Short tech development timelines

<https://ncidea.org/nc-idea-micro/>

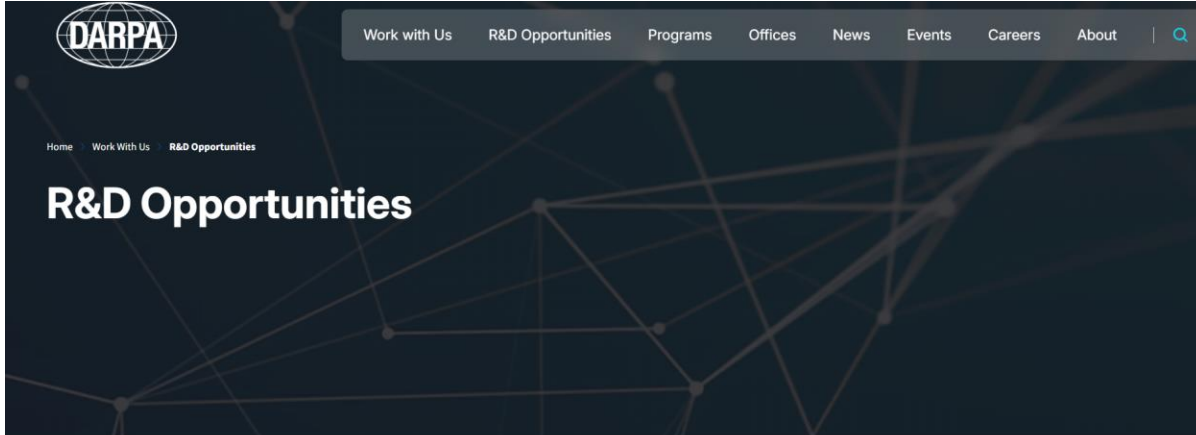
<https://ncidea.org/nc-idea-seed/>



- Various loan programs

<https://www.sba.gov/funding-programs/loans>

"Non-SBIR/STTR" Funding from Federal Agencies



Pushing Technology's Limits

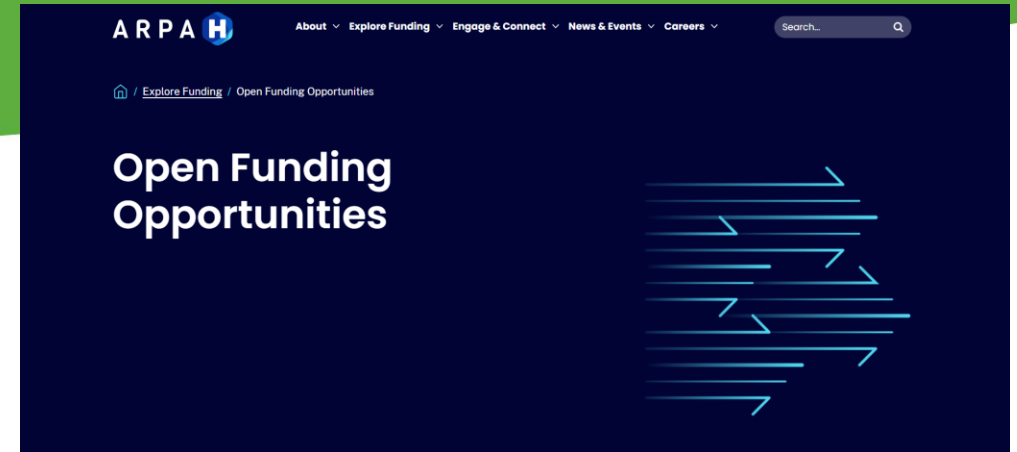
We bring together scientists, engineers, and tinkerers across the innovation ecosystem. Opportunities to engage include R&D programs and efforts, challenge competitions, and technology transition efforts.

Resources

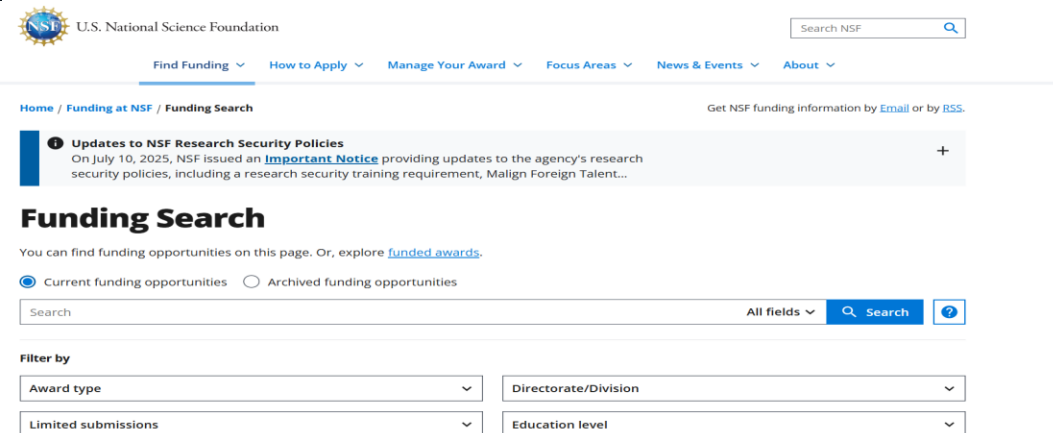
- [Funding Mechanisms](#)
- [Contracts Management Office \(CMO\)](#)

<https://www.darpa.mil/work-with-us/opportunities>

sbtdc



<https://arpa-h.gov/explore-funding/open-funding-opportunities>



<https://www.nsf.gov/funding/opportunities>

Tip: Play around with keywords, filters, and other search bars!

Advanced Research Projects Agency for Health (ARPA-H) Funding Opportunities

Innovative Solution Openings (ISOs)

1. [Health Science Futures \(HSF\)](#)
2. [Proactive Health Office \(PHO\)](#)
3. [Resilient Systems Office \(RSO\)](#)
4. [Scalable Solutions Office \(SSO\)](#)



Other Resources to Explore

- GrantEngine
 - [Funding Opportunities for Technology and Disease](#)
 - Includes SBIR/STTR and “non-SBIR/STTR” funding opportunities
- TechOpp Consulting
 - [Moving Beyond SBIR Funding – December 2025](#) (video)
- BW & Co
 - [Innovation Funding Database](#)
 - “Non-SBIR/STTR” funding opportunities
- Eva Garland Consulting
 - [Resources page](#)
 - “Non-SBIR/STTR” funding opportunities



Q&A

Thank you for your attention!

Any questions?

Contact the Presenter

Ramya Vijapurapu

Technology Commercialization Counselor

SBTDC at NC State University

rvijapurapu@sbtadc.org | (919)-714-9907

Website: sbtadc.org

Sources: SBIR/STTR Updates

- <https://sbir.org/news/sbir-funding-rules-2026-reauthorization-gap/>
- <https://sbir.org/news/sbir-sttr-omitted-2025-ndaa/>
- <https://minnesotasbir.org/news/sbir-sttr-reauthorization-update-2025/>
- <https://www.nsbaadvocate.org/post/news-sbir-sttr-reauthorization-gains-momentum-with-nsba-sbtc-push-as-congress-exchanges-proposals>
- <https://www.nsbaadvocate.org/post/news-small-business-is-still-waiting-on-a-spending-plan-from-congress-to-avoid-another-shutdown>
- <https://govcon.mofo.com/topics/sbir-sttr-programs-revived-with-some-notable-changes>
- LinkedIn posts from SBIR/STTR experts

Appendix

Additional Information In Case Time
Permits

Key Takeaways



- SBIR/STTR – significant source of **non-dilutive R&D funding**
- **Innovative R&D** → commercial product, demonstrated **market need**
- **Do your homework** on previous awards, solicitations, and agencies
- **Multi-award** funding strategy is powerful
- Leverage **TABA** funding and **One NC** Small Business funding
- Keep up with the **current federal trends**, and plan accordingly
 - Should I move forward with SBIR/STTR?
 - Should I consider other funding avenues?

SBIR/STTR Introduction

The Problem

- Innovation-driven businesses require R&D funding
- Many expense buckets:



Employee
salaries



Facilities



Equipment



Patents / legal
costs



Overhead

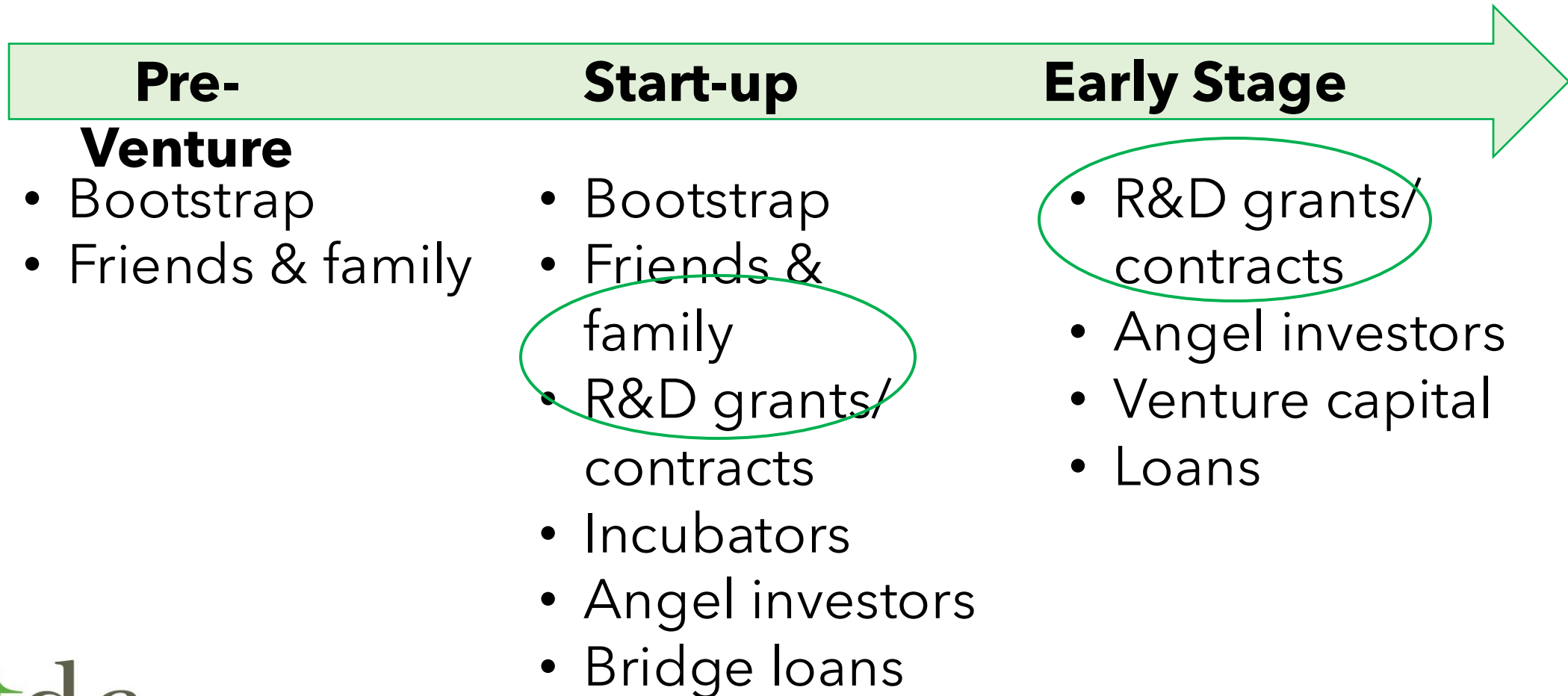


Business
development

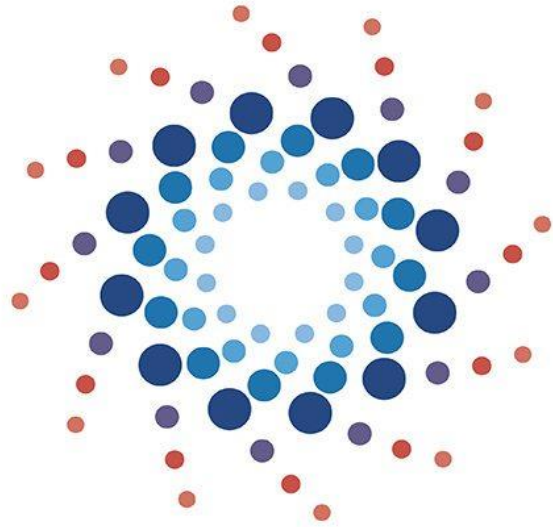


Marketing /
sales

Funding Options are Stage Specific



Enter...



SBIR • STTR
America's Seed Fund

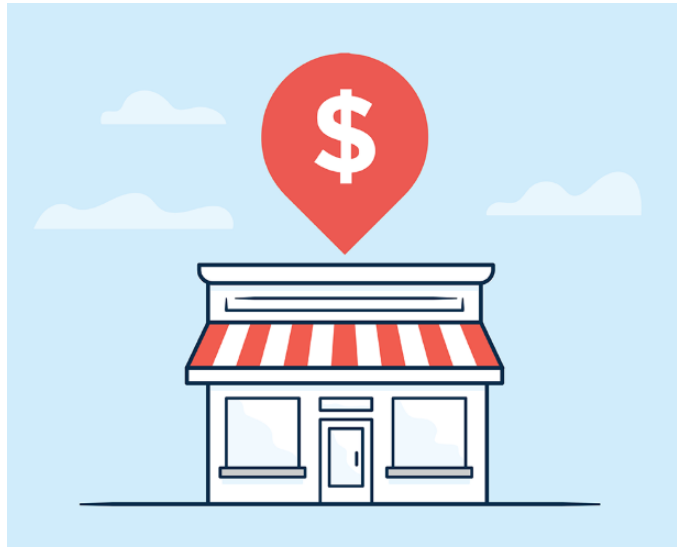
sbtdc

The SBIR/STTR Programs

- **Non-dilutive**, federal funding mechanism
- Only for **small businesses**
 - For-profit and US-based
 - 51% owned by individuals
 - Under 500 employees
- **R&D** grants and contracts
- Goal: develop and **commercialize innovative solutions** to problems
- For products with significant **market potential**



SBIR vs. STTR: Differences



Small **Business Innovation
Research (SBIR)**

Funds a small business to do R&D



**Small Business Technology Transfer
(STTR)**

Funds a **partnership** between a small
business and a research institution

SBIR vs. STTR: Differences (cont.)

| | SBIR | STTR |
|--|--|--|
| <u>Subcontracting</u> | Maximum of 33% in Phase I 50% in Phase II | 40% Minimum with Small Business 30% Minimum with Research Institution |
| <u>Principal Investigator (PI) Employment</u> | > 50% with Small Business | Either with Research Institution or Small Business (Check Solicitation) |
| <u>Program Size</u> | \$3.53 Billion (as of FY 2020) | \$485 Million (as of FY 2020) |
| Majority VC Ownership | May be allowed by: 1.HHS (CDC, NIH) 2.DoD (DAR-PA, Air Force, Army, Navy) 3.DoEd | Same as SBIR |
| Participating Agencies | 11 Agencies | 6 Agencies (including USDA, not mentioned on sbir.gov) |

SBIR/STTR Contracts vs. Grants: Main Takeaways



Contracts

Less flexibility/more strict requirements,
R&D mainly dictated by agency



Grants

More flexibility, R&D mainly
dictated by PI

SBIR and STTR only

SBIR

Dept of Defense
(DOD)

Health and
Human Services
(HHS)

Dept of
Commerce
(NOAA, NIST)

Dept of
Education (ED)

National Science
Foundation
(NSF)

Dept of Energy
(DOE)

Transportation
(DOT)

Env. Protection
Agency (EPA)

NASA

Dept of
Agriculture
(USDA)

Homeland
Security (DHS)

**Tip: Don't judge an agency by its
name!**

Three Phase Program

Phase I

Concept
Development
6-12 months
\$50,000 - \$300,000

Phase II

Prototype
Development
24 months
\$750,000 - \$2M

Phase III

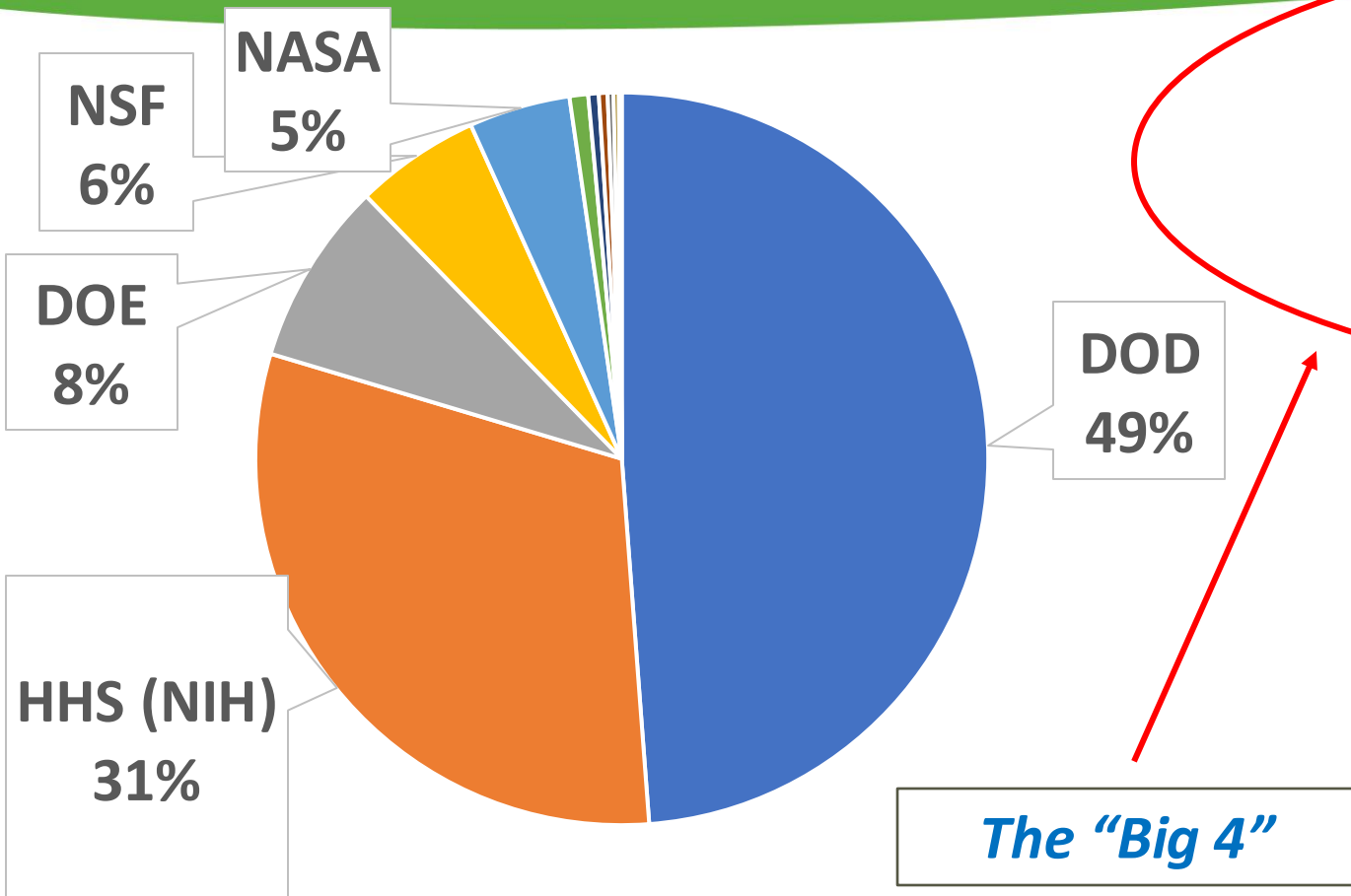
Commercialization
No further

**Tip: Fast Track and Direct to
Phase 2 are options at some
agencies, like NIH.**



More Information: SBIR/STTR

2023 Funding by Agency



| Agency | Budget |
|--|--------|
| Department of Defense (DOD) | \$1.9B |
| Department of Health and Human Services (HHS) – includes NIH | \$1.2B |
| Department of Energy (DOE) | \$315M |
| National Science Foundation | \$215M |
| National Aeronautics and Space Administration (NASA) | \$174M |
| Department of Agriculture (USDA) | \$32M |
| Department of Homeland Security (DHS) | \$18M |
| Department of Commerce: National Oceanic and Atmospheric Administration (NOAA) and National Institute of Standards and Technology (NIST) | \$15M |
| Department of Education (ED) | \$10M |
| Department of Transportation (DOT) | \$9M |
| Environmental Protection Agency (EPA) | \$5M |

Impacts of SBIR

\$20+ billion
awarded

70,000+ awards
since 1983

1.5 million persons
employed by SBIR
firms

1 in 9 SBIR firms
attract equity investors

Who Reviews Your Proposal?

- **Academic** experts
- Small business or corporate **scientists**
- **Business** development professionals



SBIR/STTR Review Criteria

#1: Significance

- What are the pain points?
- How important is the problem?
- Who does it affect/matter to?
- Is there a substantial market?



#2: Innovation

- Novel, untested solution
- Better? Faster? Lower cost?
- IP generation potential
- NOT an incremental improvement
- Understand the competition



#3: Approach

- Clear research plan
- Project milestones
- Time to completion
- Contingencies - what is plan B?



#4: Investigators/Team

- Technical expertise
- Research management experience
- Support roles
- Business development/leadership

Surround your business with the right expertise

- R&D support
- Accounting
- Advisors
- Legal



#5: Environment

- Strength of collaborators
- Adequate facilities
- Equipment



SBIR/STTR Reauthorization

Supplemental Information

SBIR/STTR Reauthorization - 2025

Proposed Bills

SBIR and STTR Reauthorization Act of 2025

- Permanent
 - No reauthorization every 3 years
- Funding increase
 - 7% SBIR, 1% STTR
- Commercialization Officers
 - Post-SBIR/STTR funding
 - Product to market
 - Identify customers
- Broader FAST participation
 - Underrepresented areas
- Foreign due diligence until 2030
 - Reduce national security risks

INNOVATE Act

- Phase IA
 - Smaller \$40K awards for first-time applicants
- Defense/national security focus
 - Reallocation of DOD STTR Phase II to fund SBIR Phase II
- \$75M maximum for 1 company
 - No more SBIR/STTR “mills”
 - Commercialize faster → more revenue
- After 25 Phase II awards
 - Min. 1:1 ratio between SBIR/STTR and non-SBIR/STTR revenue

SBIR/STTR Reauthorization - 1 More Proposed Bill

Research Advancing to Market Production (RAMP) for Innovators Act

- Streamlined, accelerated SBIR/STTR applications and awards
- Fast-Track options for all agencies
- Commercialization Officers
- Technical assistance for awardees
- I-Corps training for awardees
- Metrics-based assessment post-SBIR/STTR award
- Fast-track patent examination for awardees

This could also be signed into law!

One NC Small Business Program (cont.)

One NC Small Business Program

- Goals:
 - Increase number of SBIR and STTR Phase I awards
 - Increase research caliber in Phase I projects
 - Increase success in securing Phase II awards



NORTH CAROLINA
DEPARTMENT of
COMMERCE



one north carolina
Small Business Program

sbtcdc

<https://www.commerce.nc.gov/grants-incentives/technology-funds/one-north-carolina-small-business-program>

One NC Program Summary

| | FY 2025 Solicitations | |
|--------------------------|-----------------------|--|
| Program | Incentive | Matching |
| Budget | \$444,444 | \$3,655,556 |
| Award Caps | \$12,000* | 50%, up to \$75,000 |
| Eligibility Restrictions | 1 grant/company | 1 grant/company; <=2 Prior Matching Grants;** |
| Expected Award # | 55 - 60 | 50 |

One NC Program Impacts

18
Years

400+
Companies
funded

1200+
Jobs created

60%
Match winners
secured Phase II
SBIR/STTR grants

\$8 Billion
External
investment
attracted

Contact the Presenter

Ramya Vijapurapu

Technology Commercialization Counselor

SBTDC at NC State University

rvijapurapu@sbtcdc.org | (919)-714-9907

Website: sbtcdc.org

Agenda

- Brief Welcome
- Featured Presentation: *R&D Funding for Medical Innovation*
- **Welcome & Overview**
- Special Focus: *OTA*
- Business Spotlight: *How SB Can Use NCMBC to Strengthen Their Federal Contracting Strategy*
- Highlights of Upcoming Opportunities
- Closing & Next Steps



Disclaimer

The opinions expressed by participants in this meeting do not necessarily represent the official views or positions of the NC Military Business Center, the North Carolina Community College System, or the State of North Carolina. This meeting and its contents are provided for informational purposes only and do not constitute legal advice. The NC Military Business Center, the North Carolina Community College System, and the State of North Carolina assume no responsibility for any actions taken based on the information provided during this meeting.



Who We are

The NCMBC is a statewide business development and technology transition entity of the State of North Carolina, embedded in the state's community colleges and headquartered at Fayetteville Technical Community College. It is the only statewide, military-focused economic development organization in the U.S. and the only North Carolina entity solely dedicated to growing the defense economy through existing industry.

How NCMBC Can Help

- One-on-one business counseling
- Opportunity sourcing and daily email notifications via Matchforce.org
- Proposal development and solicitation interpretation
- Pre-award capture assistance and teaming support
- Federal agency market intelligence and acquisition forecasts
- Training events, webinars, and contraction workshops



Mission, Goals, and Outcomes

Mission: To leverage military and federal business opportunities to expand the economy, grow jobs and improve quality of life

Goals and Operations:

1. Increase federal revenues for businesses
2. Support technology transition to federal agencies
3. Support integration of military into workforce
4. Support defense-related business recruitment



Agenda

- Brief Welcome
- Featured Presentation: *R&D Funding for Medical Innovation*
- Welcome & Overview
- **Special Focus: OTA**
- Business Spotlight: *How SB Can Use NCMBC to Strengthen Their Federal Contracting Strategy*
- Highlights of Upcoming Opportunities
- Closing & Next Steps



Definitions

- An **Other Transaction (OT)** is a unique type of legal instrument **other than** a
 - contract,
 - grant, or
 - cooperative agreement
- A **Non-Traditional Entity**, in the context of Other Transaction Authority (OTA), is a business or organization that has not performed any Department of Defense (DoD) contract or subcontract subject to full Cost Accounting Standards (CAS) for at least one year prior to a solicitation.
 - These entities, often startups, small businesses, or commercial-focused firms, are targeted to bring innovation to the defense sector without the burden of traditional procurement regulations.
- **OTAs work with traditional entities as well**



OT Authorities (Medical)

- Generally, this awarding instrument is **NOT subject to the FAR, nor Grant Regulations unless otherwise noted for certain provisions** in the terms and conditions of award.
- It is, however, subject to the OT authority that governs the initiative as well as applicable legislative mandates.
- There are seven OT Authorities (OTAs)
 1. DOD (DOW)
 2. NASA
 3. HHS (NIH)
 4. DHS
 5. DOE
 6. DOT
 7. ARPA-H



Key Drivers of OTA Growth

1. **Speed** – weeks instead of months

2. **Flexibility** – terms negotiated, not dictated

3. **Attracting non-trationals**

- Any company or organization that **HAS NOT** performed a (DoD) contract or subcontract subject to full Cost Accounting Standards (CAS) for at least one year prior to the OTA solicitation, allowing innovators like startups, universities, and non-profits to participate, not just small businesses.
- This definition is intentionally wide to bring new tech and diverse ideas, even from large companies without recent CAS-covered work, into defense innovation
- **Does CMMC apply to OTAs.**
 - Applicability to OTAs is outside the scope of this DFARS rule, as the DFARS does not provide coverage of OTA requirements. If the program office or requiring activity identifies a need to include a CMMC requirement in an OTA, it will be included in the solicitation and resulting agreement.
<https://www.regulations.gov/document/DARS-2020-0034-0194>

4. **Prototype-to-Production pathways** – the golden ticket

- a follow-on Production OTA without another competition



Legal Authority

- **FAR-based contracts:**
 - Fully governed by the Federal Acquisition Regulation
- **OTAs:**
 - Statutory authority created by Congress, **not** governed by FAR



When They're Used

- **FAR:**

- Routine goods, products, services, long-term programs

- **OTA:**

- R&D, prototyping, leading-edge tech, rapid acquisition through sole source contracting if manufacturing and scale up criteria are met



Competition Requirements

- **FAR:** Formal competition, strict rules
- **OTA:** programs require achieving as much competition as possible, but the methods differ significantly from traditional contracts,
 - often involves special conditions like non-traditional contractors (NTCs) or consortia to foster innovation, especially for prototypes,
 - with specific statutory triggers for involvement from NTCs/non-profits or
 - significant cost-sharing, enabling streamlined processes while still seeking broad participation.
- **Key Competition Aspects:**
 - OTA Mandated Competition: The Department of Defense (DoD) is statutorily required to seek maximum competition for OTAs.
 - Flexibility: OTAs aren't bound by Federal Acquisition Regulation (FAR) rules,
 - allowing for different approaches to competition
 - i.e. AFWERX and ERDCWERX challenges



Why agencies are using OTAs more often

- **Compliance Burdens**

- **FAR:** Cost accounting standards, auditability, flow-downs
- **OTA:** Negotiated terms; fewer mandatory flow-downs

- **Protest Risk**

- **FAR:** Yes, and they can stop everything
- **OTA:** Minimal to no protest avenues (and agencies like that a *lot*)



Types of OTAs

■ Prototype OTAs

- Most common flavor
- Used for development, testing, evaluation
- Can lead to **Follow-On Production OTAs** without re-compete if certain conditions are met
- Participants:
 - Nontraditional defense contractors (NDs)
 - Traditional contractors *if* teamed with an ND or meeting cost-share requirements



Types of OTAs

■ Production OTAs

- Used after a successful prototype
- Can be awarded to the same team
- Big deal because no new competition may be required
 - → faster tech to end users



Types of OTAs

■ Research OTAs

- Focused on cutting-edge scientific research (think early-stage tech)
- Frequently used by DOW (DARPA, DTRA, DHA), ARPA-H, the services' labs, and others



Types of OTAs

■ Consortium-Based OTAs

- Consortium Manager = Managed by organizations like ATI, SOSSEC, NSTXL
 - usually at some nominal cost to join
- Member companies get access to Requests for White Papers (RFWPs)
- Often the easiest route for small and mid-sized businesses to enter the game
- Consortia list
 - [Existing Other Transaction \(OT\) Consortia | AiDA](#)



Who Can Participate in OTAs

- **Non-traditionals (the VIP guests)**
 - Any company that has **not** performed a DoD CAS-covered contract in the last year
 - Often commercial tech firms, startups, academic institutions
- **Traditionals**
 - They can still play—just need:
 - Partnership with a nontraditional **or**
 - Significant cost share **or**
 - Strong justification by the Government
- **Academia**
 - Absolutely
 - Often part of research OTAs
- **Foreign-Owned Firms**
 - Sometimes, but subject to restrictions and national security review
 - Consortium managers usually help navigate this

Agenda

- Brief Welcome
- Featured Presentation: *R&D Funding for Medical Innovation*
- Welcome & Overview
- Special Focus: *OTA*
- **Business Spotlight: *How SBs Can Use NCMBC to Strengthen Their Federal Contracting Strategy***
- Highlights of Upcoming Opportunities
- Closing & Next Steps



A woman, Dr. Tanya O Jones, is speaking at a podium. She is wearing a white blazer over a white top, a white headwrap, and several gold bracelets on her right wrist. She is holding a microphone in her left hand and has her right hand raised. The background is dark with a wooden podium on the right.

How Small Businesses Can Use NCMBC to Strengthen Their Federal Contracting Strategy

Medical Quarterly Industry Forum | March 12, 2026

Presenter: Dr. Tanya O Jones, CEO | Interactive Advocacy LLC



www.interactiveadvocacy.com

About Interactive Advocacy

Who We Are



Interactive Advocacy LLC is a Women-Owned and Service-Disabled Veteran-Owned Small Business specializing in violence prevention and behavioral training

Our programs focus on:

- Violence prevention
- Sexual Assault prevention
- Domestic violence prevention
- Suicide Prevention
- Trauma-informed leadership

Our immersive training combines research, psychology, and theatrical learning experiences to transform how organizations approach prevention and culture change.

This aligns with the organization's focus on immersive, research-based violence prevention training.

Our Federal and Military Experience

Serving Military and Federal Communities

Interactive Advocacy has delivered training and support for:

- Pentagon (Military District of Washington)
- National Security Agency
- Installation Management Command (IMCOM)
- HQ Coast Guard
- U.S. Air National Guard
- U.S. Army
- U.S. Marine Corps
- U.S. Navy
- U.S. Air Force
- U.S. Space force



Our Federal Contracting Journey

How Our Federal Work Began

Interactive Advocacy received its first federal contract within six months of opening our doors.

Our growth has been driven by

- subject matter expertise
- mission-focused training
- relationships built through trusted work



Organizations like the North Carolina Military Business Center have helped us strengthen our strategic engagement with federal agencies and installations.

The Role of NCMBC



Why NCMBC Matters

The North Carolina Military Business Center helps businesses:

- understand federal contracting opportunities
- connect with military installations
- engage with prime contractors
- identify capability gaps in the market

These connections help businesses become more competitive in the federal marketplace.



A Connection That Created Opportunity

After attending an NCMBC event:

- We connected with leaders from Fort Bragg
- This led to an invitation to present at a senior leader event

This illustrates how strategic engagement can open doors to new opportunities.

Five Ways Businesses Can Use NCMBC

How to Use NCMBC Strategically

Attend industry forums
and networking events

1

Listen for agency
capability gaps

2

Introduce your
company to program
leaders

3

Follow up with a
capability statement

4

Position for
subcontracting
opportunities

5

What Makes Businesses Competitive

Positioning Yourself for Federal Opportunities

Successful federal contractors typically have:



Clear capability statements



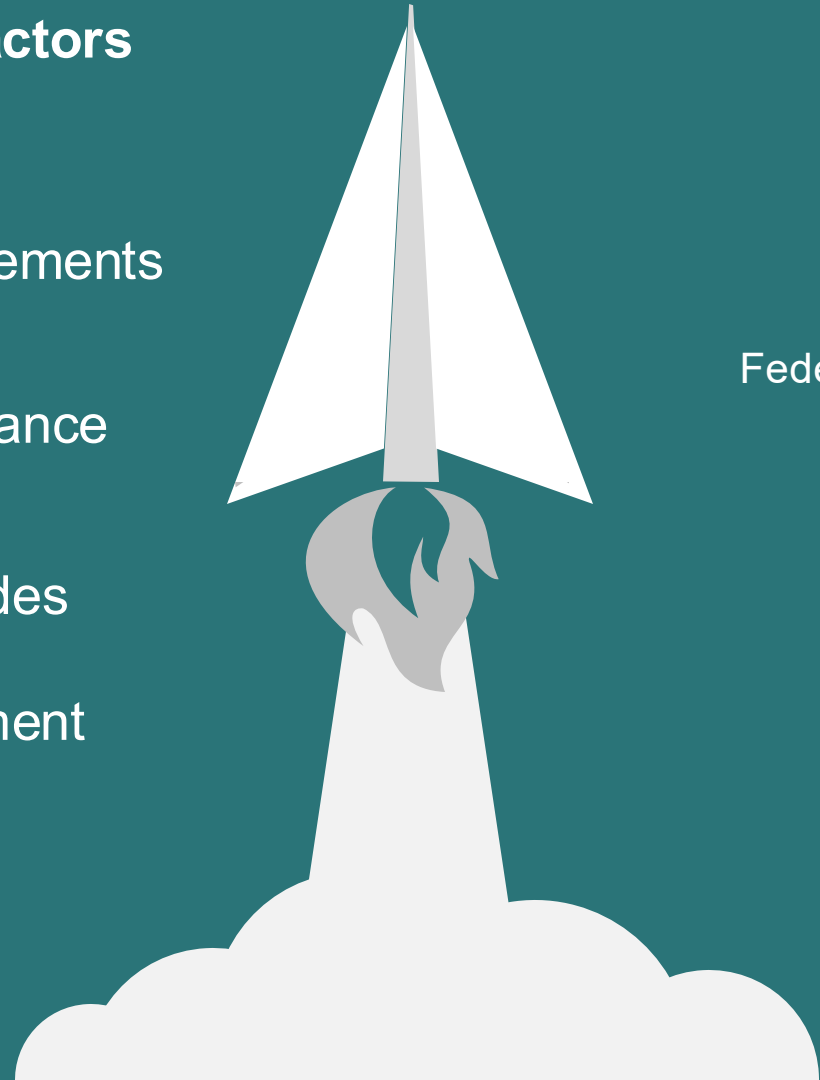
Strong past performance



Relevant NAICS codes



Consistent engagement with agencies



Federal contracting success is built through relationships and credibility.

Lessons Learned

Federal contracting success requires:

understanding the mission of agencies

Relationship building

Preparation

Persistence

Organizations like NCMBC provide a valuable platform for building those connections.





Closing

Final Thought

Federal contracting is not just about winning contracts.

It is about building partnerships that support the mission and strengthen communities.

Thank you to the North Carolina Military Business Center for creating spaces where businesses and agencies can connect.

Contact:

Dr. Tanya O Jones
Interactive Advocacy LLC
www.interactiveadvocacy.com



SCAN ME

Agenda

- Brief Welcome
- Featured Presentation: *R&D Funding for Medical Innovation*
- Welcome & Overview
- Special Focus: *OTA*
- Business Spotlight: *How SB Can Use NCMBC to Strengthen Their Federal Contracting Strategy*
- **Highlights of Upcoming Opportunities**
- Closing & Next Steps



Opportunity 1: Custom Surgical Packs

Dept of Veterans Affairs – VISN 6

- *Solicitation #:* 36C24626Q0364
- *Location:* Kernersville, Charlotte & Salisbury, NC.
- *Contract Type:* Combined Synopsis/Solicitation
- *Set-Aside:* N/A
- *NAICS:* 339113
- *Response Due:* 30 Mar 2026, 8 AM
- <https://sam.gov/workspace/contract/opp/4090198325874623bb1a7ee12a84da6b/view>

NCMBC Guidance:

- *Rare opportunity, right here in VISN 6 in Central NC!*
- *These opps are usually Sole Source! Take advantage!!*



Opportunity 2: VA Office of Information Technology (OIT) Industry Day, 27 Mar 26

Dept of Veterans Affairs – VA OSDBU

- *Solicitation #: N/A*
- *Location: Hybrid – VA HQ - Washington DC & Virtual*
- *Contract Type: Special Notice*
- *Set-Aside: None*
- *NAICS: 541519*
- *Response Due: 26 Mar 2026, 12 PM*
- <https://veteransaffairs.webex.com/webappng/sites/veteransaffairs/webinar/webinarSeries/register/d64e802747bb44d2a4cd5a094b8cc87d>

NCMBC Guidance:

- *Although this is not a medical opp, this is an example of a Hybrid Industry Day!*
- *We highly recommend that you attend Industry Day events! Participants get to engage with senior leadership, get knowledge about recent organizational improvements, obtain insights into acquisition strategies and forecasts!*



Opportunity 3: Sources Sought | Interventional and General Cardiology Physician Services | Orlando

Dept of Veterans Affairs – VISN 8

- *Solicitation #: 36C24826Q0377*
- *Location: Orlando, FL.*
- *Contract Type: Sources Sought*
- *Set-Aside: N/A*
- *NAICS: 621111*
- *Response Due: 19 March 2026, 4 PM*
- <https://sam.gov/workspace/contract/opp/58abf906f4934b08810c67ecf6a3ab32/view>

NCMBC Guidance:

- *Medical opportunities are not only supplies but services as well.*
- *Read the ENTIRE opportunity!! There are rumors that medical staffing opps are only set-asides for SDVOSBs!! THIS OPP PROVES THAT IS NOT TRUE!!!*
- *Must hire not only competent employees but also compassionate ones as well!! They will be taking care of our veterans!!*



Agenda

- Brief Welcome
- Featured Presentation: *R&D Funding for Medical Innovation*
- Welcome & Overview
- Special Focus: *OTA*
- Business Spotlight: *How SB Can Use NCMBC to Strengthen Their Federal Contracting Strategy*
- Highlights of Upcoming Opportunities
- **Closing & Next Steps**



Upcoming Forums and Other Events

Medical Focus:

- Medical Industry Forums: June 11; December 10
- MBB Symposium: September 23-24 (Chapel Hill)

Other Industry Focused Events:

- March 18-19 (Chapel Hill): [Defense Industrial Sustainment for Combat Systems Summit](#)
- April 14-16 (Wilmington): [Federal Construction, Infrastructure & Environmental Summit](#)
- May 19-20 (Raleigh): [Federal and Defense Textile and Tactical Gear Summit](#)
- August 4-5 (Fayetteville): Federal Technology Symposium

Visit NCMBC.US for more information
Stay connected via LinkedIn and the NCMBC Newsletter



Contact the NC Military Business Center



Fran Perez-Wilhite
Regional Program Manager
Charlotte Metro
704-681-4659
perezf@ncmbc.us



TJ Gilroy
Regional Program Manager
Pinehurst
910-489-3047
gilroyt@ncmbc.us

Visit NCMBC.US for more information
Stay connected via [LinkedIn](#) and the NCMBC Distribution

