



DEFENSE CONTRACT MANAGEMENT AGENCY

**DoD Mentor Protégé Program
2023 DoD Mentor Protégé Summit
DCMA Reporting Requirements**

Presented By:
DCMA Mentor Protégé Team

DCMA Subcontracts and Small Business Center
Specialized Support Team

Date: 29 March 2023



DFARS Appendix I-112.2

- Participants report progress made under active Mentor-Protégé Agreements (MPAs) semiannually throughout entire period of performance
 - Expenditures, Developmental Assistance, Capabilities, Certifications, Tech Transfer, & ROI
- SARs are required for all active MPAs, even if there was no fiscal or developmental activity
 - Part of permanent record stored at OSBP
 - Included in Nunn Perry Award packet
- Reporting periods are October 1 – March 31 & April 1 – September 30
- SARs are due to DCMA, MDA, and OSBP 30 days after the end of the above reporting periods
 - Courtesy review due dates established by DCMA representative



- Completed SARs, with corresponding backup documentation, must be reviewed & formally approved by DCMA
- To be considered timely, accurate, and complete, SAR submissions must include the following required backup documentation:
 - Contract awards spreadsheet
 - *New requirement: Include At Start of Agreement (last full FY prior to MPA) prime & subcontract awards
 - Employee roster
 - Annual Gross Revenue (AGR) documentation
 - Copies of DoD & federal subcontracts
 - Training certificates
 - Copies of mentor & HBCU/MI Invoices



Why do we complete SARs?

- **DCMA FY Executive Summary**

- Agreement type, sponsoring agency/mission objective, socioeconomic category
- Trends in the progress of protégé employment, revenues, and participation
- Post agreement performance

- **DoD MPP Report to Congress**

- Program's return on investment
- Performance metrics

- **DoD MPP Agency Report to SBA**



Section I – Protégé Revenue, Employees, Prime & Subcontracts



Start of Agreement: are the reported amounts on the ORIGINAL MP Agreement proposal. These awards were in place 1FY PRIOR to the start of the MP Agreement.

	DoD Subcontracts						
	DoD Subcontracts From Mentor to Protégé (Dollars)	DoD Subcontracts to Protégé From All Sources Other Than Mentor (Number)	DoD Subcontracts to Protégé From All Sources Other Than Mentor (Dollars)	DoD Subcontracts From Protégé to Mentor (Number)	DoD Subcontracts From Protégé to Mentor (Dollars)	DoD Subcontracts From Protégé to Other Than Mentor (Number)	DoD Subcontracts From Protégé to Other Than Mentor (Dollars)
Start of Agreement (As Reported on Original Agreement Form)							
During Six-Month Period of This Report Only							
Cumulative Awards From Start of Agreement Thru End of Report Period							

During Six-Month: Invoices received from Awards AFTER the start of the MP Agreement, ONLY during the Six-Month Reporting period are reported in this section.

Cumulative: Awards that the Mentor OR Protégé have received since the START of the MP Agreement through the end of this Six-Month reporting period



Tips for Success

- **All data must be backed up by documentation**
 - Ex: Approved schedule, invoices, ROI, SAM accounts, etc.
- **Build off of your last SAR and keep working documents**
 - Ex: Contract awards spreadsheet
- **Information on the SAR must match what is later reported on the AR**
- **Review “Helpful Hints” document**
- **Mentor Involvement with Section I**
- **Ask for help and/or a courtesy review**



DoD MENTOR PROTÉGÉ PROGRAM (MPP)

Defense Federal Acquisition Regulation Supplement (DFARS)

Subpart 219.71: Mentor-Protégé Program

219.7101: Policy and Procedures are contained in Appendix I (Rev 2020)

MENTOR PROTÉGÉ AGREEMENTS (MPAs)

Reimbursable: Contract awarded by a Government Agency

Credit: MPA awarded by DCMA

Hybrid: Jointly awarded by both agencies

Reporting Requirements:

- Semi-Annual Report (SAR)
- **Annual Performance Review**
- Post Reporting Requirements



ANNUAL PERFORMANCE REVIEW

DFARS Appendix I-113

- The DCMA Program Manager will conduct annual performance reviews of the progress and accomplishments under approved MPAs
- The review verifies data provided on the SARs
- Required upon the anniversary of the MPA start date
- Questionnaire Forms are sent to the Mentor/Protégé/Agency PM
- The Protégé will provide input for their data reported accurately on the SARs:
 - ✓ Employee Count/Growth
 - ✓ Annual Gross Revenue
 - ✓ DOD/Other Federal Awards



ANNUAL PERFORMANCE REVIEW

Questionnaire forms

- DCMA will send a Questionnaire form to the mentor, protégé and agency program manager 30-45 days prior to the MPA year anniversary date (same forms for reimbursable/credit/hybrid MPAs)
- **The Questionnaire will request general information**
- The Questionnaires must be complete, accurate, signed and dated and include copies of all supporting data
- The mentor/protégé/agency program manager will send their package to DCMA MP Small Business Professional by the requested suspense date. Final signed annual performance reviews are due to the DoD Office of Small Business Programs 30 days after for yearly reviews and 60 days after for closeout reviews



ANNUAL PERFORMANCE REVIEW – Example of Mentor & Protégé Questionnaires

Mentor Questionnaire

DCMA REIMBURABLE ANNUAL REVIEW
FOR DoD MENTOR-PROTÉGÉ AGREEMENT

Current Date (Today): _____

Mentor Name (Division): _____

Protégé Name (Division): _____

Period of Performance Covered By Review:

Mentor Protégé Agreement Start Date: _____ End Date:

1. Developmental Assistance Provided:
2. Contract Obligation/ Payment History:
3. Invoice Information:
4. Summary of Milestones:
5. Mentor Comments on Agreement:
6. Expenditures (HBCU/MI/PTAC/SBDC/MEP):
7. Property provided on the Agreement:
8. What is the value to the DoD and the Warfighter?
9. Additional comments:

Requires the Signature by the Mentor and date

Protégé Questionnaire

DCMA REIMBURSABLE ANNUAL REVIEW
FOR DoD MENTOR PROTÉGÉ AGREEMENT

Current Date (Today): _____

Mentor Name (Division): _____

Protégé Name (Division): _____

Period of Performance Covered By Review: _____

Mentor Protégé Agreement Start Date: _____ End Date: _____

Contract Number/Delivery Order/Task Order (if Reimbursable agreement):

Protégé Cage Code: _____ DUNS No.: _____

Small Business Category:

Type of Certifications: (SB, SDB, WOSB, SDVOSB, Hub Zone, etc.) and Expiration dates required: _____

Do you have any business size or small business certification updates since your last certification? _____ (NAICS Codes)

1. Types of Developmental Assistance Provided by the Mentor:
2. Milestones Met:
3. Certificates Received:
4. Protégé Comments, Overall health of MPA:
5. Noteworthy Accomplishments:
6. New Markets Realized:
7. Growth / Return on Investment (ROI):
Employees, Annual Gross Revenue, Contract Awards (DoD Prime/Subs, Other Fed Prime/Subs)
8. Additional Comments/Concerns/Suggestions to your MPA or DoD MPP:
9. What is the value to the DoD and the Warfighter:

Requires the Signature of the Protégé and date



ANNUAL PERFORMANCE REVIEW – Example of Agency PM Questionnaire

Agency Program Manager - Questionnaire

DCMA REIMBURSABLE ANNUAL REVIEW
FOR DoD MENTOR PROTÉGÉ AGREEMENT

Date: _____

Mentor name: _____

Protégé name: _____

Contract No.: _____

Period of Performance Covered By Review: _____

Mentor Protégé Agreement Start Date: _____ End Date: _____

1. Developmental Assistance Provided:

Agency Concern and MPA Industrial Base:

Program of Record:

Industry Base:

2. Agency Program Manager's Comments on the MPA:

Name & Title: _____ Date: _____



ANNUAL PERFORMANCE REVIEW

Annual Review Form

- DCMA will process the data from the Questionnaire Forms, SARs, and supporting documentation to generate the Annual Performance Review
- A ROI Form is provided to reflect the Protégé's growth since the Start of the MPA through the current period:
 - ✓ Number of Employees
 - ✓ Annual Gross Revenue
 - ✓ Contract Awards- DoD Prime/Subcontracts and Other Federal Prime/Subcontracts
- A Pre-review of the Annual Performance Review will be sent to the team for concurrence prior to submitting the final, signed Review to the DoD OSBP



Post Reporting

- DFARs Appendix I-113
- The protégé must provide Return on Investment (ROI) data for revenue, employees and contract awards
- **FY23 NDAA updates:** Post Reporting increased from **2** years to **5** years
- Required for all complete Mentor Protégé Agreements
- ROI baseline information is from the closeout annual performance review
- Terminated agreement do not require post reporting

Questions???

