



DEPARTMENT OF THE ARMY
OFFICE OF THE SECRETARY OF THE ARMY
OFFICE OF SMALL AND DISADVANTAGED BUSINESS UTILIZATION
106 ARMY PENTAGON
WASHINGTON DC 20310-0106

25 APR 2005

MEMORANDUM FOR MACOM COMMANDERS AND PROGRAM EXECUTIVE OFFICERS

SUBJECT: Policy Letter 01-05; The Army Small Business Program.

1. References:

- a. Federal Acquisition Regulations (FAR), Parts 19 and 26.
- b. Defense Federal Acquisition Regulation Supplement (DFARS), Parts 219 and 226.
- c. Department of Defense (DOD) Directive 4205.1, DOD Small Business and Small Disadvantaged Business Utilization (SADBU) Programs, September 11, 1996; and DOD Directive 5134.4, Director of Small and Disadvantaged Business Utilization, March 17, 1989, and 10 USC 2323 (a)(1)(c)
- d. DOD Small Business Program Strategic Management System (SMS) Guide
- e. Army Federal Acquisition Regulation Supplement (AFARS), Part 5119.
- f. Army Regulation 70-1, Army Acquisition Policy.
- g. Army Acquisition Executive Memorandum dated 23 February 2004, subject: Small Business Program Reinvention.

2. The purpose of this memorandum is to establish the Army as the premier organization for the promotion of and assistance to small business, small disadvantaged business, women-owned small business, Historically Black Colleges and Universities Minority Institutions (HBCU/MIs), Service Disabled Veteran-Owned (SDVOSB) small business and firms located in historically underutilized business zones (HUBZone). Special emphasis is placed on assisting concerns who have been historically underutilized or who have had difficulty participating in the Army procurement process. It is the intent to bring faster, more efficient information on Army forecasted procurement opportunities, thereby providing the business community adequate time to develop business strategies.

3. This policy applies to personnel involved in the acquisition process (including program management, technical development, engineering, requirements, contracting functions, and research and development) and the personnel process (such as education, training, and recruitment).

SADBU

SUBJECT: Policy Letter 05-01; The Army Small Business Program.

4. Duties and Responsibilities. In accordance with Headquarters, Department of the Army General Order #3, the Army SADBU office oversees Army Secretariat small business functions.

a. The Director of the Office of Small and Disadvantaged Business Utilization:

(1) The Director, Small and Disadvantaged Business Utilization (SADBU), reports to the SA and is the senior advisor on all Small Business Program matters. The Director, SADBU is responsible for developing policies for implementation of programs designed to afford opportunities to small businesses, including small disadvantaged businesses, women-owned small businesses, service disabled veteran-owned businesses, businesses located in historically underutilized business zones and historically Black colleges, universities, and minority institutions as set forth in title 10 U.S.C. and title 15 U.S.C., as amended, and other pertinent laws, directives, regulations and Executive orders.

(2) Develops, implements, and oversees policy and management of the Army small business programs in coordination with the ASA (ALT) to ensure the effective execution of the Small Business Program. Develops targets and initiatives for the small business program; monitors performance through established metrics as defined in the Army's Small Business and HBCU/MI Program Plan; and performs a mid-year review and an annual assessment of each program's accomplishments.

(3) Reviews and provides recommendations on proposed appointments, performance elements, standards, and appraisals for command associate directors of small business (AD) who serve as principal staff assistants and advisors to the commanders of MACOM, Field Operating Agencies (FOA), Direct Reporting Units (DRU), and Program Executive Officers (PEO).

(4) Receives and rules on all appeals from the Small Business Administration.

(5) Establishes and chairs the US Army HBCU/MI Board of Advisors comprised of senior Army and HBCU/MI leadership. Their role is to advise and recommend on policies, procedures, needs assistance, and outreach.

(6) Consults on a regular basis with Army and Department of Defense acquisition managers, representatives of the Small Business Administration, the Department of Commerce, and other government agencies.

b. The Office of the Deputy Assistant Secretary Army for Policy and Procurement (DASA P&P) implements contracting aspects of the small business program through promulgation in the FAR, DFARS, and AFARS.

c. The Office of the Chief Public Affairs (OCPA) disseminates public information for the small business program.

SADBU

SUBJECT: Policy Letter 05-01; The Army Small Business Program.

d. MACOM, FOA, and DRU, with Delegated Contracting Authority. Oversee small business and HBCU/MI command and reporting activity functions:

(1) Implement the small business program within their commands including the establishment of program targets and initiatives in accordance with the DOD Small Business Program Strategic Management System (SMS) Guide. However, reporting dates to Army SADBU are 30 June and 30 December. Ensure that acquisition and technical personnel maintain knowledge of small business program requirements and take all reasonable actions to promote SB and HBCU/MI participation in the command's mission.

(2) Appoint, in writing, a full-time command associate director of small business (AD) after prior consultation and approval of the Director, Department of the Army (DA) SADBU. The command AD manages the small business program, reports directly to the commander or the deputy (second in command) on small business program matters, and is at a grade level sufficient to interface with other staff functions and subordinate units, generally the same grade as the Principle Assistant for Contracting (PARC).

(3) Provide the command AD with optimum staff and resources to perform their functions.

e. Army PEOs. In accordance with Army Regulation 70-1, Army Acquisition Policy and Army Acquisition Executive Memorandum dated 23 February 2004, SUBJECT: Small Business Program Reinvention:

(1) Ensure that a small business specialist is assigned to support your programs. Conduct small business outreach activities at least once each year.

(2) Establish three initiatives to support the small business program and insure that they are reported to both the Military Deputy for Systems Acquisition and the Director, SADBU no later than 30 December and a progress report due by 30 June.

(3) Ensure that small business coordination and involvement in acquisition strategies occurs in a timely manner and that subordinate program offices include small business specialist input in developing the small business strategy part of the acquisition strategy.

f. All other commands with annual contract obligations to U.S. business firms in excess of \$100 Million:

(1) Implement, within your command, the small business program in accordance with 4. d.

(2) Appoint a full-time unit SBS who manages the small business program for the commander and, at a minimum, a part-time HBCU/MI representative to manage the HBCU/MI program. The command SBS and HBCU/MI representatives are appointed in writing after consultation and approval of the

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SUBJECT: Policy Letter 05-01; The Army Small Business Program.

MACOM AD. The SBS and HBCU/MI representatives report directly to the commander on small business and HBCU/MI matters, respectively, and are at a grade level sufficient to effectively manage the command small business and HBCU/MI programs. The Director, DA SADBU, only, can waive this requirement. Adequate justification must be presented to the MACOM AD, who will then document their concurrence or non-concurrence and their reasoning, and forward the request to the Director, DA SADBU. A waiver is granted for only one year and a part time small business specialist must be appointed. Small business program functions take precedence over all other duties. If the SBS is less than full-time, make clear how the small business program is effectively managed. If the SBS reports to someone other than the commander, justify why this channel of command is more effective.

(3) Provide the SBS optimum staff and resources to perform assigned duties or functions.

g. All other Commands with Contracting Authority have the same responsibilities previously stated. However, approval for appointing part-time command SBS and HBCU/MI representatives to manage their small business and HBCU/MI programs is delegated to the MACOM AD. The SBS and HBCU/MI representatives shall be appointed in writing and, when performing their respective program duties, they report directly to the commander. In accordance with AFARS 5119.201 (e) (C) the part time SBS should be the chief of the contracting office. If not the Director, the SBS shall be at a grade level that permits effective management of the small business or HBCU/MI programs and in a grade/position no lower than the senior contracting officer.

5. Duties and Responsibilities of the Command Associate Director, SADBU.

- a. Develops command policy to support references in 1.
- b. Develops and manages the command small business and HBCU/MI Program Plan to achieve the command targets and initiatives. The plan must be approved and signed by the appointing authority, or reporting official, and forwarded to the Director, SADBU.
- c. Prepares and presents to the Director, SADBU, an annual small business assessment in accordance with reference 1.d. and 4. d. (1).
- d. Reviews acquisitions as required by DFARS 219.201 and reference e.
- e. Works closely with and assists the unit competition advocate to ensure that potential SB and 8(a) opportunities are thoroughly explored.
- f. Reviews and provides recommendations on proposed performance elements, standards, and evaluations for unit small business specialists (SBS).

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SUBJECT: Policy Letter 05-01; The Army Small Business Program.

g. Prepares, reviews, and/or coordinates the command position on Section 8(a), SB set-aside, and certificate of competency secretarial appeals before forwarding to the Director, SADBU.

h. Monitors source approval requests; participates in source development surveys; performs market surveys, and other source development activities as required to support the command small business program.

i. Maintain a process for measuring the effectiveness of the outreach program in producing new sources.

j. Schedules command representation at procurement and outreach conferences in accordance with Army FAR Supplement 5119.201 (d)(9)(B).

k. Evaluates and provides for the SB training needs of command personnel.

l. Manages the small business awards program.

m. Coordinates SBA Surveillance Review visits with the DA SADBU and ensures corrective actions are in place for any cited deficiencies.

n. "Works closely with the Deputy Program Executive Officer/Program Manager who serves as the designated point of contact and assists in drafting the Small Business Strategy in support of each Acquisition Strategy in accordance with AFARS Revision # 11, dated May 4, 2004."

6. The Small Business and HBCU/MI Program Report. This report describes the command's qualitative and quantitative achievements in pursuit of the targets and initiatives in accordance with reference 1. d. Reporting periods to DA SADBU are 30 June and 30 December.

7. The POC for this action is Mr. Paul Gardner, (703) 697-2868.



Tracey L. Pinson
Director

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SUBJECT: Policy Letter 05-01; The Army Small Business Program.

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PEO AVIATION
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PEO ENTERPRISE INFORMATION SYSTEMS
PEO GROUND COMBAT SYSTEMS
PEO INTELLIGENCE, ELECTRONIC WARFARE AND SENSORS
PEO SOLDIER
PEO SIMULATION, TRAINING AND INSTRUMENTATION
PEO TACTICAL MISSILES
JPEO CHEMICAL AND BIOLOGICAL DEFENSE



DEPARTMENT OF THE ARMY
OFFICE OF THE SECRETARY OF THE ARMY
OFFICE OF SMALL AND DISADVANTAGED BUSINESS UTILIZATION
106 ARMY PENTAGON
WASHINGTON DC 20310-0106

25 APR 2005

MEMORANDUM FOR MACOM COMMANDERS

SUBJECT: Policy Letter 02-05; Mandatory Reporting Procedure for Bundled and Consolidated Contracts.

1. References:

- a. Federal Acquisition Regulation (FAR) 19.202-1(e) (1) (iii) and FAR 7.104(d) (1)
- b. Defense FAR Supplement (DFARS) 219.201(d) (11).

2. The purpose of this memorandum is to provide direction and guidance to insure compliance with the referenced regulations implementing changes regarding contract bundling and consolidation. There are now additional types of actions that will require an Army small business specialist's review as a result of changes made in the definition of bundling. These actions consist of orders placed against Indefinite Quantity type contracts like Federal Supply Schedules awarded by the General Services Administration and actions awarded by any non-DOD agency. There are also additional reporting requirements.

3. In order to ensure compliance with the FAR the following actions are required:

- a. Substantial bundling that is necessary or justified because the Government would derive measurably substantial benefits shall be planned in accordance with FAR 7.104 and documented IAW FAR 7.105 and 7.107 using the format in the DOD Benefit Analysis Guidebook. Only the Army Acquisition Executive can determine that bundling is necessary and justified when the expected benefits do not meet the thresholds in FAR 7.107, but are critical to the agency's mission success. Justifications must include all of the elements listed in FAR 7.107(e). Documentation shall also include the DD Form 2579 (coordinated with the assigned small business specialist and the Small Business Administration Procurement Center Representative), the proposed acquisition strategy, and bundling justification. The bundling documentation must be sent to the Director, SADBU, within 30 days of approval, but in no case any later than 30 days prior to the issuance of a solicitation or placement of an order for the requirement.

- b. Small business specialists shall notify the Army's SADBU Office, by e-mail or fax if a proposed acquisition strategy involves substantial bundling that is unnecessary or unjustified as determined by a benefit analysis, or is not identified as bundled by the

SADBU

SUBJECT: Policy Letter 02-05; Implementation of the Reporting Procedures for Bundled and Consolidated Contracts.

activity even after coordination with the Small Business Specialist and the activity's Associate Director, SADBU.

c. Each MACOM shall include the following reports to the Director, SADBU with their mid-year and annual Strategic Management System (SMS) reports:

(1) The extent of consolidation of contract requirements that has occurred the previous fiscal year (DFARS 207.170); and

(2) The impact of those consolidations on the availability of small business concerns to participate in procurements as both contractors and subcontractors.

4. The key to a successful acquisition is to involve the small business specialist as early as possible in the acquisition strategy/planning process. It is the duty of the small business specialist to support their command by identifying alternative strategies that maximize opportunities for small business, and assist in identifying small businesses capable of performing the requirements through aggressive market research conducted by the requiring and contracting activities.

5. The POC for this action is Mr. Paul Gardner, (703) 697-2868.



Tracey L. Pinson
Director

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OFFICE OF SMALL AND DISADVANTAGED BUSINESS UTILIZATION
106 ARMY PENTAGON
WASHINGTON DC 20310-0106

25 APR 2005

MEMORANDUM FOR MACOM COMMANDERS

SUBJECT: Policy Letter 03-05; Mandatory Procedure For Processing Small Business Administration (SBA) Appeals to the Agency Head

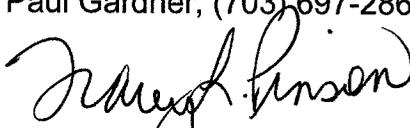
1. References:

- a. Federal Acquisition Regulation (FAR) 19.505
- b. Defense FAR Supplement (DFARS) 219.5.
- c. Army FAR Supplement (AFARS) 5119.505

2. The purpose of this memorandum is to provide instructions and guidance to insure compliance with the referenced regulations for processing appeals from the SBA.

3. Procedures. When notified by the SBA that it has filed an appeal with the Agency Head, either for a small business set-aside or the 8(a) program, the contracting officer shall prepare an appeal file. The file shall contain a statement by the contracting officer, which sets forth the decision rationale and addresses the appeal issues on a point-by-point basis. The statement shall include the rationale for disregarding known small business sources, small businesses identified through synopsis, and sources recommended by the Small Business Specialist and SBA. Discuss results of market research or attach a market research report. In addition to the contracting officer's statement, the file shall include the comments and/or concurrence of the Small Business Specialist, the MACOM Associate Director for Small Business, the completed DD Form 2579, SBA Form 70, any related correspondence, the procurement history, and a copy of the solicitation's evaluation and award factors. Include a statement that the action on the procurement has been suspended pending resolution of the appeal. Waivers to suspension of procurement action should be previously coordinated with the Director, SADBUD. Forward the appeal file through contracting channels to arrive in DA SADBUD within ten workdays after receipt of the formal appeal.

4. The POC for this action is Mr. Paul Gardner, (703) 697-2868.


Tracey L. Pinson
Director

SADBU

SUBJECT: Policy Letter 03-05; Implementing Instructions for Small Business Administration (SBA) Appeals to the Agency Head

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106 ARMY PENTAGON
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25 APR 2005

MEMORANDUM FOR MACOM COMMANDERS

SUBJECT: Policy Letter 04-05, Staff Assistance Review Program

1. References.

- a. Federal Acquisition Regulation (FAR) 19.201.
- b. Defense Federal Acquisition Regulation Supplement (DFARS) 219.201.
- c. Army Federal Acquisition Regulation Supplement (AFARS) 5119

2. General. In accordance with FAR 19.201 and DFARS 219.201, the Director, SADBUE, is responsible for ensuring that contracting and technical personnel maintain knowledge of the small business program requirements and take all reasonable action to increase participation in their activities' contracting processes by these businesses and institutions. Therefore the Director, SADBUE will schedule reviews of subordinate activities. The Director, SADBUE will identify best practices for sharing with other activities, program deficiencies, and provide recommendations that will improve the overall performance of the activity.

3. Purpose. The purpose of this memorandum is twofold. First, is to outline the responsibilities and the procedures for the administration of the Director, SADBUE Staff Assistance Review Program. Second, it is designed to assist commanders and managers at all levels to effectively and efficiently comply with the public laws, the DOD Small Business Program Strategic Management System (SMS) Guide, and the Army's policy of ensuring that a fair proportion of the procurement dollars are awarded to small businesses and HBCUs/MIs.

4. Responsibilities. The Director, SADBUE, is responsible for planning, coordinating, and conducting the Staff Assistance Review Program with the MACOM/activity SADBUE Associate Directors. The Director, SADBUE will:

- a. Coordinate Assistance Reviews with the Assistant Secretary of the Army Acquisition, Logistics, and Technology (ASA (ALT) and conduct the small business reviews as a part of the Deputy Assistant Secretary of the Army, Policy and Procurement (DASA P&P) Review and Assessment Program to the maximum extent possible.

SADBU

SUBJECT: Policy Letter 04-05, Staff Assistance Review Program

b. For those Small Business Offices that are not scheduled for review as a part of the DASA (P&P) Review and Assessment Program DA SADBU will select, coordinate, and schedule those offices for a staff assistance review.

c. Ensure that a formal notification is provided to the command/activity not less than 30 days prior to the scheduled visit.

d. Provide an entrance briefing for the MACOM Commander or Activity Director that outlines the scope of the staff assistance review.

e. Perform the staff assistance review as prescribed by Enclosure 1 and other guidance as directed by the Director, SADBU.

f. Provide a debriefing for the MACOM Commander or Activity Director regarding the results of the review.

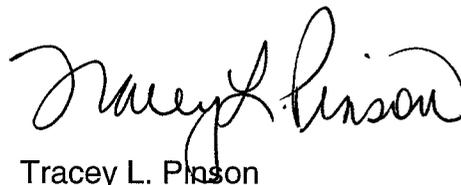
g. Provide the command/activity a written report of the staff assistance review not later than 30 days following the scheduled visit.

h. Coordinate and conduct post-program staff assistance follow-up actions as required.

5. Procedures. The Director, SADBU and/or the officer with DA staff responsible for the MACOM/activity will coordinate and conduct the staff assistance review as prescribed by the administrative instructions at Enclosure 1.

6. Program Implementation. This memorandum will be referenced as the basic document for each fiscal year's staff assistance review schedule.

7. The POC for this action is COL Gus Mancuso, august.mancuso@hqda.army.mil, (703) 697-2868.



Tracey L. Pinson
Director

3 Encls

1. Administrative Instructions
2. Staff Assistance Review
Questionnaire
3. Standard Slides For the Staff
Assistance Review In-Briefing

SADBU

SUBJECT: Policy Letter 04-05, Staff Assistance Review Program

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ASSISTANT SECRETARY OF THE ARMY, ACQUISITION, LOGISTICS, AND
TECHNOLOGY

Administrative Instructions/Procedures for SADBUs Staff Assistance Review Program

1. Purpose. The purpose of this enclosure is to prescribe procedures and assign responsibilities for conducting the SADBUs Staff Assistance review Program.

2. Applicability and Scope.

The SADBUs Staff Assistance and Review Program applies to the Secretary of the Army and its Field Operating Agencies (FOAs), the Army's major commands (MACOMs), and subordinate commands in the Continental United States (CONUS), including the National Guard and reserve components.

3. Procedures.

a. During each fiscal year, the DA SADBUs office will develop a tentative schedule of staff assistance review visits. The visits will be scheduled every two years, and will be coordinated when practicable with other acquisition reviews so as not to conflict. Based upon the proposed schedule, and the recommendation of the command/activity Associate Director (AD), formal notification will be provided no less than 30 days prior to the visit.

b. The requirement for MACOMs that do not have an integral contracting activity but have policy and oversight functions (such as the Army Materiel Command (AMC)) is to have a HQDA SADBUs approved Assistance and Review program for their MACOM, and demonstrate that it is active by submitting copies of the results of their reviews to the Director, OSADBUs. When selected for a HQDA Staff Assistance Visit, they will fill out the applicable parts of the questionnaire and brief their SADBUs program and Small Business Improvement accomplishments.

c. Prior to the visit, the Director, OSADBUs, or the DA staff officer responsible for the command/activity will request the command/activity AD to perform the following actions:

(1) Complete the SADBUs Staff Assistance Review Questionnaire (Enclosure 2). The questionnaire must be completed and received by HQDA SADBUs electronically not later than 14 days prior to the visit.

(2) Coordinate and schedule visits to the command group, PEOs, and as appropriate, local government, business, and community leaders.

d. Conduct of the Staff Assistance Review Program. When visiting command/activity subordinate units, a representative of the command/activity AD's office will accompany the HQDA SADBUs team and participate in the review.

(1) Entrance Briefing.

(a) The HQDA SADBUs team leader will present an entrance briefing for the command/activity. The briefing will be in a PowerPoint format and will be provided to the command/activity one week prior to arrival in order to facilitate preparations. The attendees for the command briefing should include the Commander or Deputy Commander, Chief of Staff, PARC/DOC, AD, and other representatives as designated by the command/activity. The briefing will include the purpose, objectives, and special areas of interest of the staff assistance review.

(b) The command/activity will present a command briefing that will include, in addition to a command overview, a SADBUs program overview in accordance with the format at Enclosure 3. The overview format at Enclosure 3 should be modified based upon command/activity characteristics and guidance from HQDA based upon the HQDA SADBUs review of the command/activity's completed questionnaire.

(3) Conduct of the Review. An examination of SADBUs duties and, as applicable, contract files, reports, and procedures will be conducted to assess the quality of the SADBUs program. Particular emphasis will be placed upon the following:

(a) Proper reporting placement of SADBUs Personnel

(b) Progress of the Small Business Program Reinvention initiatives.

(c) Method and effectiveness of outreach efforts.

(d) Subcontracting program initiatives.

(e) Effectiveness of HCBUs/MI initiatives.

(f) Process improvements accomplished to address program deficiencies or increase SB participation noted during previous SADBUs, command/activity, or other agency (i.e. IG, AAA, and SBA) audits and/or reviews.

(g) Contract files to review compliance with various policies and regulations.

(h) Other special initiatives or areas as appropriate.

(4) Exit Briefing. At the conclusion of the review, the HQDA SADBUs team will present a summary of the results to the same personnel identified in 3.d. (I) (a). The results will be presented in terms of best practices noted and recommendations for program improvement. Systemic issues and problems beyond the scope of the command will be identified as action items for the HQDA SADBUs staff.

4. Reports and Follow-up. The command/activity will send a formal response to HQDA SADBUs within 30 days of receipt of the HQDA SADBUs report. If required, the command/activity will coordinate reports of process improvements or follow-up visits with the HQDA SADBUs staff. If applicable, a separate report will be provided to the Army Acquisition Executive (AAE) concerning support to the PEOs.

ARMY
OFFICE OF SMALL AND DISADVANTAGED BUSINESS UTILIZATION (SADBU)
STAFF ASSISTANCE REVIEW PROGRAM QUESTIONNAIRE

1. IS THE COMMANDER BRIEFED ON PROGRAM ACCOMPLISHMENTS?

FREQUENCY _____

DATE OF LAST BRIEFING _____ (attach copy of briefing)

2. PROVIDE A COPY OF THE JOB DESCRIPTION AND CURRENT TAPES OBJECTIVES FOR CHIEF AND ALL MEMBERS OF THE SADBU OFFICE.

3. PROVIDE A COPY OF THE ORGANIZATION CHART REFLECTING THE POSITION/LOCATION OF THE SADBU OFFICE.

3A. PROVIDE THE FOLLOWING INFORMATION:

NAME TELEPHONE NO.

- COMMANDER
- DEPUTY COMMANDER
- CHIEF OF STAFF
- DIRECTOR OF CONTRACTING OR PARC
- CHIEF, PROCUREMENT POLICY
- COMPETITION ADVOCATE

4. HOW DOES THE COMMANDER SUPPORT THE PROGRAM (E.G., HAS SUCH SUPPORT BEEN EXPRESSED IN WRITING OR OTHERWISE TO STAFF ELEMENTS AND/OR THE COMMUNITY AT LARGE)? PROVIDE COPIES OF ANY WRITTEN GUIDANCE SIGNED BY THE COMMANDER.

5. WHAT EFFORTS HAVE BEEN MADE TO IMPRESS THE IMPORTANCE OF THE SMALL BUSINESS PROGRAM ON PROGRAM EXECUTIVE OFFICERS (PEOs), PROJECT MANAGERS (PMs), DIRECTORS OF CONTRACTING, BUYERS, AND TECHNICAL PERSONNEL? PROVIDE COPIES OF ANY WRITTEN GUIDANCE.

6. HAVE ANY TRAINING COURSES OR SEMINARS BEEN CONDUCTED BY THE SADBU OFFICE FOR MEMBERS OF THE ACQUISITION COMMUNITY?

TYPE OF TRAINING _____

FREQUENCY/DATES _____

ESTIMATED ATTENDANCE _____

7. EVALUATE THE ADEQUACY OF SADBUs FACILITIES, AND STAFFING. IS THE SADBUs OFFICE EASILY ACCESSIBLE TO SMALL BUSINESS FIRMS?

8. HAS A SPECIFIC INDIVIDUAL OR POINT OF CONTACT BEEN DESIGNATED TO ASSIST SMALL R&D FIRMS REGARDING R&D PROCUREMENT AND/OR PARTICIPATION IN THE SBIR PROGRAM?

NAME _____

TITLE _____

8A. LIST/DISCUSS INITIATIVES UNDERTAKEN TO ASSIST SMALL RESEARCH AND DEVELOPMENT (R&D) FIRMS INTERESTED IN THE SBIR PROGRAM:

9. HAS A SPECIFIC INDIVIDUAL OR POINT OF CONTACT BEEN DESIGNATED TO ASSIST HISTORICALLY BLACK COLLEGES AND UNIVERSITIES/MINORITY INSTITUTIONS (HBCUs/MIs) PARTICIPATION?

NAME _____

TITLE _____

9A. LIST/DISCUSS INITIATIVES UNDERTAKEN TO ASSIST HBCUs AND MIs:

10. HAS A SPECIFIC INDIVIDUAL OR POINT OF CONTACT BEEN DESIGNATED TO ASSIST SMALL DISADVANTAGED BUSINESS (SDB) PARTICIPATION?

NAME _____

TITLE _____

10A. LIST/DISCUSS INITIATIVES UNDERTAKEN TO ASSIST SDBs:

11. HAS A SPECIFIC INDIVIDUAL OR POINT OF CONTACT BEEN DESIGNATED TO ASSIST WOMEN-OWNED SMALL BUSINESS (WOSB) PARTICIPATION?

NAME _____

TITLE _____

11A. LIST/DISCUSS INITIATIVES UNDERTAKEN TO ASSIST WOSBs:

12. HAS A SPECIFIC INDIVIDUAL OR POINT OF CONTACT BEEN DESIGNATED TO MANAGE THE HISTORICALLY UNDERUTILIZED BUSINESS ZONE (HUBZone) PROGRAM?

NAME _____

TITLE _____

12A. LIST/DISCUSS INITIATIVES UNDERTAKEN TO ASSIST HUBZone FIRMS:

13. HAS A SPECIFIC INDIVIDUAL OR POINT OF CONTACT BEEN DESIGNATED TO MANAGE THE SERVICE DISABLED VETERANS PROGRAM?

NAME _____

TITLE _____

13A. LIST/DISCUSS INITIATIVES UNDERTAKEN TO ASSIST SERVICE DISABLED VETERAN OWNED FIRMS:

14. DISCUSS THE EXTENT OF SMALL BUSINESS SPECIALIST PARTICIPATION IN EACH OF THE FOLLOWING ACTIVITIES/PROCESSES:

- A. INTEGRATED PROCESS TEAMS (IPT) (PROVIDE LIST)
 - B. PARTICIPATION IN ACQUISITIONS PLANNING MEETINGS (NUMBER IN FY04)
 - C. DEVELOPMENT OF ACQUISITION PLANS (NUMBER IN FY04)
 - D. RECAPITALIZATION DECISIONS (COMPONENT BREAKOUT)
 - E. REVIEW OF DD 2579 (PROVIDE LOG)
 - F. DEVELOPMENT OF EVALUATION CRITERIA TO SUPPORT SB UTILIZATION
 - G. REVIEW OF SF 294/295 ON SUBCONTRACT PERFORMANCE
 - H. SOURCE SELECTION PROCESS
 - I. GSA SCHEDULE DECISIONS (PROVIDE ADVICE ON SB PROGRAM SOURCES)
 - J. AREA SMALL BUSINESS COUNCIL
 - K. ADVANCE PLANNING BRIEFINGS WITH INDUSTRY (APBI) PARTICIPATION
15. DISCUSS YOUR OUTREACH PROGRAM. PROVIDE A LIST CONFERENCES ATTENDED AND ORGANIZED/HOSTED IN FY04 AND FY05 THRU FIRST QUARTER.
16. HAVE STAFF VISITS BEEN CONDUCTED OF SUBORDINATE ACTIVITIES? IF NONE HAVE BEEN CONDUCTED, LIST DATES AND LOCATIONS OF PLANNED VISITS.
17. LIST PUBLICATIONS AVAILABLE FOR DISSEMINATION TO SMALL BUSINESS FIRMS FROM THIS ACTIVITY. (PROVIDE SAMPLES OF LOCALLY DEVELOPED PUBLICATIONS AND WEBSITE)
18. PROVIDE COPIES OF ANY COMMAND SOPs THAT GOVERN THE SMALL BUSINESS PROGRAM.
19. DESCRIBE SPECIFIC INVOLVEMENT IN YOUR COMMAND'S ACQUISITION PLANNING PROCESS. HOW DOES YOUR COMMAND USE ADVANCED PROCUREMENT PLANNING INFORMATION (FAR 5.404)?

20. WHAT IS THE COMMAND/ACTIVITY POLICY/POSITION REGARDING SELFMARKETING BY 8(a) FIRMS? ARE TECHNICAL PERSONNEL AVAILABLE TO MEET WITH 8(a) FIRMS?

20A. HOW MANY 8(a) FIRMS VISITED YOUR LOCATION DURING FY04.

20B. HOW MANY AWARDS WERE MADE RESULTING FROM 8(a) VISITS/PRESENTATIONS?

21. IS THERE A LOCAL DATABASE OR FILE THAT CONTAINS A LISTING OF COMPETENT SMALL BUSINESS SOURCES? IS IT BROKEN OUT BY SMALL BUSINESS CATEGORIES SUCH AS 8(a), HUBZONE, WOSB, SDVOSB, etc.?

22. HOW MANY SUBCONTRACTING PLANS WERE REVIEWED DURING FY04?

22A. HOW MANY WERE FOUND INADEQUATE? (5% SDB OBJECTIVE IAW DFARS 219.705-4)

22B. WHAT FOLLOW-UP ACTION WAS TAKEN?

22C. LIST INITIATIVES UNDERTAKEN REGARDING SB, SDB, WOSB and SDVOSB SUBCONTRACTING:

22D. EXPLAIN HOW YOUR COMMAND MONITORS/FOLLOWS-UP ON PERFORMANCE TO SUBCONTRACTING PLANS FOR IN-HOUSE OR DLA ADMINISTERED CONTRACTS

22E. IS THE COGNIZNT SBA REGIONAL OFFICE GIVEN A COPY OF THE AWARD DOCUMENT AS SET FORTH IN FAR 19.705-6(A)?

23. HOW MANY SMALL BUSINESS PROGRAM SET-ASIDES HAVE BEEN SUCCESSFULLY INITIATED BY THE SADBUDURING THE LATEST COMPLETE FISCAL YEAR?

NO. _____ \$ VALUE _____ (ESTIMATED)

23A. ARE PARTIAL SMALL BUSINESS SET-ASIDES BEING USED IN SOLICITATIONS? IF NO, EXPLAIN WHY NOT?

23B. HOW MANY CONTRACTS WERE AWARDED AS PARTIAL SET-ASIDES?

24. IS A CLASS SET-ASIDE LIST IN USE? (ATTACH COPY)

25. ARE BROAD AGENCY ANNOUNCEMENTS IN USE? (ATTACH COPY)

26. HOW DOES YOUR ACTIVITY PERFORM "MARKET RESEARCH" TO ASCERTAIN QUALIFIED SMALL BUSINESS SOURCES TO SATISFY AGENCY NEEDS?

27. IS A SMALL BUSINESS TECHNICAL ADVISOR ASSIGNED TO THE SMALL BUSINESS OFFICE?

IF NONE ASSIGNED, EXPLAIN.

28. HOW MANY BUNDLED CONTRACTS/SOLICITATIONS WERE ISSUED IN FY04? PROVIDE CONTRACT VALUE.

28A. WHAT MEASURES WERE TAKEN TO MITIGATE IMPACT ON SMALL BUSINESS?

28B. WHAT WAS THE IMPACT ON SMALL BUSINESS?

28C. ON EACH BUNDLED ACQUISITION, DID THE PCO PREPARE A WRITTEN MEMORANDUM ASSESSING THE BENEFITS FROM BUNDLING IN ACCORDANCE WITH ASA/ALT MEMORANDUM OF 19 OCT 2000. PROVIDE AN EXAMPLE. WAS THE DIRECTOR, ARMY SADBUC NOTIFIED IF A PROPOSED ACQUISITION STRATEGY INVOLVED SUBSTANTIAL BUNDLING THAT WAS UNNECESSARY, UNJUSTIFIED, OR NOT IDENTIFIED AS BUNDLED BY THE ACTIVITY?

28D. WAS THE SBA PCR NOTIFIED PRIOR TO AWARD OF A BUNDLED CONTRACT?

28E. WERE INCUMBANT SMALL BUSINESSES NOTIFIED OF THE BUNDLING INTENTION 30 DAYS PRIOR TO THE RELEASE OF SOLICITATION IAW FAR 10.001(C)(2) AND FAR 19.202(E)(iii)?

28F. WAS THE DIRECTOR, ARMY SADBUC NOTIFIED IF A PROPOSED ACQUISITION STRATEGY INVOLVED SUBSTANTIAL BUNDLING THAT WAS UNNECESSARY, UNJUSTIFIED, OR NOT IDENTIFIED AS BUNDLING?

29. WHAT PERCENTAGE OF YOUR TOTAL U.S. DOLLAR BASE IS TYPICALLY AVAILABLE TO SMALL BUSINESS?

30. WHAT IS THE STATUS OF ASSIGNED TARGETS? EXPLAIN WHY TARGETS HAVE NOT BEEN MET AND THE PLAN FOR IMPROVING THE PERFORMANCE.

31. TO WHAT EXTENT HAS THE COMPETITION ADVOCATE INTERACTED WITH THE SADBUC REGARDING SMALL BUSINESS COMPETITIVENESS ISSUES? (FAR 6.501(C))

32. DESCRIBE YOUR WORKING RELATIONSHIP WITH THE SMALL BUSINESS ADMINISTRATION LIAISON OFFICE. HOW DO THEY GET INVOLVED IN THE ACQUISITION PROCESS PRIOR TO REVIEW OF THE DD FORM 2579?

STAFF ASSISTANCE REVIEW IN-BRIEFING GUIDE

I. PROGRAM MANAGEMENT

A. MISSION (Command and SADBUs Office)

B. COMMAND ORGANIZATION (Command and staff organization. Includes separate portrayal of major subordinate commands, installations, and activities. Include a matrix of supported Program Executive Officers if applicable)

C. COMMAND EMPHASIS (High priority major command/activity acquisition programs or initiatives)

D. SADBUs RESOURCES (Major and subordinate command small business specialists. Portray/describe command and staff relationships.)

II. PROGRAM PERFORMANCE

(For trend analysis, use individual visual aids/graphs to portray the current fiscal year-to-date plus the last two fiscal years for each of the following):

A. PRIME CONTRACT AWARDS

1. Small Business (SB)
2. Small Business Set Asides (SBSA)
3. Small Disadvantaged Business (SDB)
 - (a) 8 (a)
 - (b) Non-8 (a)
4. Women-Owned Small Business (WOSB)
5. Historically Underutilized Business Zone (HUBZone)
 - (a) Set Aside
 - (b) Sole Source
6. Service-Disabled Veteran-Owned Small Business (SDVOSB)
7. Historically Black Colleges and Universities and Minority

Institutions (HBCUs/MIs)

B. SUBCONTRACT AWARDS

Note: Visual aids/Charts should reflect the MACOM's overall goal and results along with a portrayal of the performance of the individual subordinate commands/installations/activities.

C. CONTRACT OPPORTUNITIES NOT AWARDED (Indicate by MACOM/subordinate command/activity, the number, dollar amount, and reason(s) the awards were not made.)

1. SDBs

(a) Direct (unrestricted with 10% preference)

(b) Set-Asides

(c) 8(a)

2. HBCU/MIs

III. PROGRAM INITIATIVES AND OUTREACH

A. PROGRAM INITIATIVES (Outline and discuss innovative approaches, quantifiable and anticipated results including how you are complying with the with the DOD Small Business Reinvention Program)

B. SPECIAL OUTREACH

C. PROCUREMENT CONFERENCES (Indicate the number attended and tentatively scheduled for the current fiscal year and graphically portray the number of conferences attended during the past two fiscal years.)

D. QUALIFIED SUPPLIERS (using the current and the last two fiscal years, indicate the number of small business firms, contract awards, and dollar amounts of the awards to firms identified through conferences and other outreach efforts.)

E. HBCU/MIs (Location and number of HBCU/MIs contacted, the number of contracts and dollar value awarded a result of outreach efforts.)

IV. PROGRAM ASSESSMENT

A. FY GOAL ACHIEVEMENT (Analysis of current results and projected year-end goal achievement.)

B. LESSONS LEARNED (Discuss successful and unsuccessful SADBUs program issues. As applicable, provide recommendations for program improvement and/or problem resolution.)

C. PROGRAM STRATEGY (Outline and discuss methods to build and sustain program improvement in the out-years.)



DEPARTMENT OF THE ARMY
OFFICE OF THE SECRETARY OF THE ARMY
OFFICE OF SMALL AND DISADVANTAGED BUSINESS UTILIZATION
106 ARMY PENTAGON
WASHINGTON DC 20310-0106

17 APR 2005

MEMORANDUM FOR MACOM COMMANDERS

SUBJECT: Policy Letter 05-05, U. S. Army Small and Disadvantaged Business Utilization (SADBU) Awards Programs

1. Purpose. This Letter:

- a. Establishes criteria for the Army SADBU Major Command (MACOM) Small Business Program Awards.
- b. Establishes the criteria for the Army SADBU Specialist (SADBUS) of the Year Award.
- c. Sets forth procedures for preparing and submitting nominations.
- d. Assigns responsibility for administering the program to the Army SADBU Office.

2. Objective of Programs:

- a. MACOM Awards Program. Recognize superior performance for individual Small Business Programs Areas, as designated by the Director, Army SADBU, through a formal recognition program that encourages innovation and initiative at the MACOM level.
- b. Army SADBUS of the Year. Recognize the Army small business specialist who created/maintained a well-managed small business and HBCU/MI program, created challenging initiatives, and otherwise made significant contributions to both their Command's and the Army's small business program.

3. MACOM Awards Program.

a. Eligibility:

- U.S. Army Materiel Command (AMC)
- U.S. Army Corps of Engineers (ACE)
- Defense Contracting Command-Washington (DCCW)
- U.S. Army Intelligence and Security Command (INSCOM)
- U.S. Army Medical Command (MEDCOM)
- U.S. Army Medical Research and Materiel Command (MRMC)

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U.S. Army Surface Deployment and Distribution Command (SDDC)
U.S. Space and Missile Defense Command (SMDC)
U.S. Army Test and Evaluation Command (ATEC)
U.S. Army Contracting Agency (ACA)
National Guard Bureau (NGB)

b. Award Criteria MACOM Awards Program. MACOMs will be competitively evaluated against one another based on the following criteria. (The order of listing does not imply the order of importance).

(1) Percentage of assigned target achieved by the MACOM during the identified FY.

(2) Outreach initiatives undertaken by the MACOM that contributed to success of the evaluated program area and resulted in the continued improvement of the program area. (e.g., activity trade fairs, open houses, special outreach events or programs).

(3) Initiatives undertaken with Government Procurement Personnel to include Contracting, Program Management, HBCU/MI, and Small Business within the MACOM that increased effectiveness of the Small Business Program (e.g. training, recognition/incentive awards, acquisition planning). Demonstrate how the initiatives directly influenced the success of the small business program.

(4) Command involvement in supporting the program area that resulted in positive results for the Small Business Program.

(5) Public relations efforts made by the MACOM to promote the program area (e.g. print, radio and television). Describe the type of effort, date, and a very brief description of the content.

(6) Initiatives to support enhanced subcontracting opportunities for small businesses. Support of the Army Mentor Protégé Program can be considered in this area.

c. Preparing nominations.

(1) Army agencies will submit nominations through the OSADBU website www.sellingtoarmy.info by clicking on the "Register" button at the top of the page then clicking on "Army Awards Registration." Each MACOM AD will be issued an authentication code in order to create their own username and password. Once the username and password have been created they will no longer need to use the authentication code. The website will possess the capability to save, print and submit nominations electronically. The MACOM AD or their designated

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representative(s) will be responsible to enter the nomination for their respective Command.

(2) Each evaluated area will be limited to eight lines or approximately 50 words. Given these parameters, it is encouraged to efficiently list facts and relevant information. Nominations will only be judged based on content.

(3) Nominations must be submitted not later than 15 April of each year and should primarily focus on accomplishments during the year for which nominated (e.g., 2003 nominations should primarily address accomplishments during FY 2003). All MACOMs are encouraged to submit a nomination for each program area; small business, sub-contracting, mentor-protégé, HBCU/MI, woman owned small business, 8(a)/SDB, SDVOSB, and HUBZone.

d. Evaluation of nominations.

(1) Nominations will be evaluated by a panel chaired by the Director of the Office of Small and Disadvantaged Business Utilization, or designated representative, and will consist of representatives from Headquarters, Department of the Army.

(2) One MACOM will be selected for each category.

e. Award presentation. The Director, OSADBU will announce the award winners at an appropriate SADBU function and present a personalized plaque to the MACOM Representative during the banquet portion of the Army Small Business Training Conference, or other appropriate event.

4. Army SADBUS of the Year.

a. Eligibility.

(1) Any Army SADBUS (military or civilian) appointed by name and in writing by the Commanders of major commands, Commanders of major subordinate commands and installation, post, camp, station or activity commanders, serving in either full-time or part-time capacity is eligible for the award.

(2) The Associate Director (AD) of the MACOM Small and Disadvantaged Business Utilization offices may not be nominated for this award.

b. Award criteria. Any Army SADBUS nominated for this award must meet or exceed the following criteria: (The order of listing does not imply the order of importance).

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(1) Make significant contributions to and engage in special programs that result in continued improvement of the Department of the Army Small and Disadvantaged Business Utilization Program (e.g., activity trade fairs, open houses, special outreach events or programs).

(2) Demonstrate initiatives that produce a program that is innovative and dynamic, especially those initiatives that motivate people and generate enthusiasm.

(3) Demonstrate a well-managed program reflecting a high level of professionalism and competence in performing the duties of a SADBUS.

(4) Command involvement in supporting the program that resulted in positive results.

(5) Public relations efforts.

c. Preparing nominations.

(1) Army agencies will submit nominations through the OSADBU website www.sellingtontoarmy.info by clicking on the "Register" button at the top of the page then clicking on "SADBU Awards Registration." Each MACOM AD will be issued an authentication code in order to create their own username and password. Once the username and password has been created they will no longer need to use the authentication code. The website will possess the capability to save, print and submit nominations electronically. The MACOM AD or their designated representative(s) will be responsible to enter the nomination for their respective Command.

(2) Nominations must be submitted not later than 15 April of each year and should primarily focus on accomplishments during the preceding fiscal year. Each MACOM is encouraged to submit a nomination each year.

d. Evaluation of nominations. Nominations will be evaluated by a panel chaired by the Director SADBU, or designee, and will consist of representatives from Headquarters, Department of the Army. One individual will be selected as the award winner.

e. Award presentation. The Director, Office of Small and Disadvantaged Business Utilization, OSA, will:

(1) Announce the award winner no later than 1 June.

(2) Have a personalized plaque presented to the award winner at an appropriate event.

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(3) Have a command plaque, which will be rotated annually, presented to the command for which the award winner represents.

5. Point of Contact is LTC Jim Blanco, james.blanco@hqda.army.mil, (703) 693-6115.



Tracey L. Pinson
Director

Encl

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Enclosure

SADBU Specialist of the Year Award Selection Sheet

Ranking Scale: 1 2 3 4 5 per following values:

1-Poor; 2-Fair; 3-Satisfactory; 4-Good; 5-Exceptional

Name of Nominee:

No of years as SADBU Specialist:

Command Sponsor:

Nominating Official:

a. Significant contributions to and engage in special programs resulting in continued improvement of the DA SADBU Program to include:

Activity trade fairs
Open houses
Special Programs Outreach
Others

b. Demonstrates initiatives that produce a program that is innovative and dynamic, especially those initiatives that motivate people and generate enthusiasm.

c. Demonstrate a well-managed program reflecting a high level of professionalism and competence in performing the duties of a SADBUS.

d. Specific SADBU goal accomplishment.

e. Specific HBCU/MI goal accomplishment.

f. Specific Women-owned business accomplishments.

g. Specific NISH accomplishments.

h. Professional Education.

i. Awards/Letters/Certificates for Significant Recognition.

Other unique/significant/innovative accomplishments not designated above. (Identify accomplishment considered under these criteria):