



## DCMA Manual 2302-03

# ADMINISTRATION OF THE DOD MENTOR PROTÉGÉ PILOT PROGRAM

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David H. Lewis, VADM, USN, Director

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**Purpose:** This issuance, in accordance with the authority in DoD Directive 5105.64, DoD Instruction 4205.01, and HQ DCMA General Order No. FY05-11:

- Provides and defines procedures for the DCMA Mentor Protégé team to provide the DoD Office of Small Business Programs and the cognizant DoD Components with administration of their Mentor Protégé agreements and an accurate determination of the performance level of each agreement to include the reported progress made by the protégé in employment, revenues, and participation in DoD contracting during the review period.

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## **SECTION 1: GENERAL ISSUANCE INFORMATION**

**1.1. APPLICABILITY.** This issuance applies to all DCMA activities unless higher-level regulations, policy, guidance, or agreements take precedence.

**1.2. POLICY.** It is DCMA policy to:

a. Provide clarity and consistency across DCMA's Small Business Compliance Center (SBCC) and Small Business (SB) Office as it relates to the processes and procedures for performing administration of DoD Office of Small Business Programs (OSBP) and the cognizant DoD Components Mentor Protégé (MP) Agreements.

b. Execute this Manual in a safe, efficient, effective, and ethical manner.

## **SECTION 2: RESPONSIBILITIES**

### **2.1. DIRECTOR, DCMA.** The DCMA Director will:

- a. Implement SB program policy as set forth in DoDI 4205.01, “DoD Small Business Programs (SBP).”
- b. Disseminate the Agency goals as established by DoD OSBP.
- c. Appoint a full time SB Director responsible for Agency SB policy, programs, and procedures.

### **2.2. HEAD OF CONTRACTING ACTIVITY (HCA).** The HCA will:

- a. Monitor Agency SB achievements including socio-economic categories to ensure Agency SB goals assigned by DoD OSBP are achieved.
- b. Provide guidance and direction to the SBCC, as necessary in executing SB policy.

### **2.3. SB DIRECTOR.** The SB Director will:

- a. Represent the Agency Director on all SB matters.
- b. Serve as the Agency SB Ombudsman.
- c. Support Agency Initiatives such as the Service Requirements Review Board, Corporate Assessment Initiative.
- d. Advise and assist the Contracts Directorate, Program Managers, and requirements personnel on all matters that affect SB throughout the acquisition process.
- e. Administer the Memorandum of Understanding (MOU) between DCMA and DoD OSBP.
- f. Establish Agency’s policies, guidance, and procedures for the SB programs and for the selection and appointment of SB Professionals as appropriate.
- g. Advise cognizant DoD Components of any significant event or situation that may affect accomplishments, either positively or negatively, of contract SB subcontracting goals.
- h. Provide advice and counsel to the HCA on all SB matters as required.

### **2.4. SB SPECIALIZED SUPPORT GROUP SUPERVISOR.** The SB Specialized Support Group Supervisor will:

- a. Serve as technical authority and advisor to the Contracts Directorate, SB Office Director, and the SBCC on SB Programs administered by DCMA such as the DoD MP Pilot Program.

- b. Be responsible for oversight and management of the DoD MP Pilot Program.
- c. Plan, provide leadership, technical and administrative supervision to SB Center Team Leads and SB Professionals for the effective utilization of all resources.
- d. Interface with Legislative Branch, the military services, the Office of the Secretary of Defense, other Government agencies and various industry associates.

**2.5. SBCC TEAM LEADS.** The SBCC Team Leads will:

- a. Represent DCMA at Monthly OSBP Program Managers Meetings. This is the responsibility of designated teams composed to assist the Military Departments and Services. Team Lead (see Team A Lead Structure - Appendix M, located on the Resource Page) will engage with all DoD MP Program Managers on changes to the program. Team B Team Lead assists as backup.
- b. Represent DCMA at OSBP Internal Working Groups. DCMA is currently assigned to one Internal Working Group: Academia Working Group. Team B works with the Academia Working Group which is comprised of the Historically Black College Universities/Procurement Technical Assistance Centers/Minority Institutions/Small Business Development Centers. Team A assists as backup.
- c. Represent DCMA on the DoD Nunn Perry Award Council. This is a once a year responsibility to meet with other DoD MP Program Managers to evaluate the entries for the Nunn Perry Award. This is the responsibility of the Team B Team Lead as the subject matter experts of the individual teams. Team A Team Lead assists as backup.
- d. Ensure Post Agreement Reporting by Team. Team A is responsible for the workload of the personnel assigned to Post Agreement Reporting. The Team Lead distributes their workload on a bi-monthly basis and reviews any report submissions prior to distribution to OSBP. Team B Team Lead assists as backup.
- e. Monitor DCMA Credit MP Agreement Proposals. This is the responsibility of the Team A Team Lead to accept new credit MP agreement proposals and the assignment of the proposal to a DCMA SB Professional. The Team Lead will be responsible for updating the DCMA Credit 175 MP agreement application log for all incoming credit agreements which is located on DCMA SB site page. The assignment of new credit agreements to a SB Professional is the responsibility of both Team Leads.
- f. Support DCMA Headquarters Taskings. Team B Team Lead is responsible for the coordination of all Corporate Management Council requests.
- g. Support Agency and DoD MP Outreach Events. This is a shared responsibility of both Team A and Team B Team Leads to represent DCMA and OSBP at geographically located SB events.

h. Develop the DoD Mentor Protégé Program (MPP) Executive Summary Report. Team A and Team B Team Leads rotate this responsibility yearly.

i. Ensure Semi-Annual Reporting. This will be a shared responsibility for Team A and Team B to track incoming Semiannual Reports (SAR) per team and to make sure that all documentation is uploaded to DCMA SB site page.

j. Conduct Monthly Staff Meetings. This responsibility rotates monthly between Team A and Team B Team Leads with collaboration between the two before the combined meeting. Team meetings are to discuss any program changes, workload questions, DCMA issues/concerns and open discussions.

k. Provide DCMA MP Master Spreadsheet. Team A is responsible for the review and update of the master spreadsheet after completion by the management analyst. Each Team Lead is responsible for reviewing its individual team's metric logs.

l. Respond to DCMA SB Director Requests. This is a shared responsibility between Team A and Team B Team Leads to acknowledge and complete all tasks as assigned by the DCMA SB Director.

m. Conduct Quarterly Program Management Reviews (PMR) Reporting. Team A Team Lead is responsible for the tracking and reporting of the PMR participation by the MP teams. Quarterly reports are provided to the Specialized Support Group Assistant Director.

n. Annual Performance Reviews. This is a shared responsibility between Team A and Team B Team Leads to review/revise and approve the reports completed by the MP teams. They are to ensure the signed report along with supporting documentation is uploaded into DCMA site page.

o. Ensure SAR Tracker Reporting. Team B Team Lead is responsible for the tracking of bi-annual SAR submissions and completion of review to OSBP.

p. Provide Travel Budget and Site Visits. Team B Team Lead is responsible for the execution and requesting of funds for all MP site visit travel. The Team Lead is responsible for requesting site visit requests from both MP teams on a quarterly basis.

**2.6. SMALL BUSINESS PROFESSIONALS.** The SB Professional will:

- a. Review all hybrid reimbursable and credit agreements.
- b. Review all semi-annual reporting.
- c. Perform post agreement reviews of protégés and-annual return on investment (ROI) report.

## SECTION 3: PROCESS

### 3.1. INTRODUCTION.

a. The purpose of the DoD MPP is to provide incentives to DoD prime contractors with approved Mentor-Protégé Agreements (MPA(s)) to assist SB firms and increase their overall participation as prime contractors and/or subcontractors. The program was established under Section 831 of the National Defense Authorization Act for Fiscal Year 1991 (Public Law 101-510). This is accomplished through technical and developmental assistance from the Mentor to the Protégé. The DoD program and eligibility requirements are provided in Appendix I of the Defense Federal Acquisition Regulation Supplement (DFARS). This program helps to sustain a competitive supplier base which contributes to affordability in current and future Defense acquisitions.

b. Through the MP Pilot Program, large firms (DoD Mentors) receive financial and credit incentives to provide technology transfer and business assistance to Small Disadvantaged Businesses (SDB), Women-owned Small Businesses, Economically Disadvantaged Women-Owned Small Business, Service-Disabled Veteran-Owned Small Businesses (SDVOSB), Historically Underutilized Business Zone (HUBZone) firms, organizations employing severely disabled veterans and individuals, 8(a) or non-traditional defense contractors (pursuant to Section 2302 of Title 10, United States Code). DCMA SBCC, MP Team has been delegated authority on behalf of DoD OSBP to administer the MPP.

c. The purpose of the DCMA MP Team is to ensure all DoD MP agreements awarded by the DoD Components are properly approved, managed, and reviewed in accordance with DFARS Appendix I and DFARS Subpart 219.71, "Pilot Mentor-Protégé Program." The DoD MP Program applies to SDB, women-owned small businesses, economically disadvantaged women-owned small businesses, HUBZone small businesses, SDVOSB or an eligible entity employing severely disabled individual(s) (Reference DFARS Appendix I-102(b)).

d. The mission of the DCMA MP Team is to provide the DoD OSBP and the cognizant DoD Components with administration of their MP agreements and an accurate determination of the performance level of each agreement to include the reported progress made by the protégé in employment, revenues, and participation in DoD contracting during the review period.

e. The DCMA MP team works with the cognizant DoD Components in awarding hybrid and reimbursable agreements.

**3.2. AGREEMENT TYPES.** The DoD MP Program offers three types of agreements: Credit, Reimbursable, and Hybrid with processes for each defined below.

a. Credit Agreements. Credit agreements are those in which the mentor receives credit toward their SB subcontracting goals based on the unreimbursed costs incurred in providing developmental assistance to the protégé. Credit agreements are approved and managed by MP Team Leads within DCMA.

b. Reimbursable Agreements. Reimbursable agreements are those in which the mentor receives reimbursement for allowable costs of developmental assistance provided to the protégé. Reimbursable agreements are approved by the cognizant Component Director SB Professional. The DCMA MP team works with the cognizant DoD Components in awarding hybrid and reimbursable agreements.

c. Hybrid Agreements. Hybrid agreements allow the mentor and protégé to take options from the two agreement types: credit and reimbursable. This allows the mentor to receive credit toward SB subcontracting goals and receive reimbursement for the cost of developmental assistance provided to a protégé with each agreement while stating the limitations on which costs will be reimbursed and which will be credited. The cognizant Component Director of SB Professional approves hybrid agreements. The DCMA MP team works with the cognizant DoD Components in awarding hybrid and reimbursable agreements.

(1) Agreements are for 1 to 3 years during which the mentor provides guidance and assistance to the protégé. The cognizant Component Director may approve a possible extension of an additional 2 years, with an adequate justification detailing the unusual circumstances that warrant a term in excess of 3 years (Reference DFARS Appendix I -107(j)).

(2) For 2 years following completion of an agreement, the protégé is required to complete an annual post agreement report to show performance in employment, revenues, and participation in DoD contracts.

### **3.3. PROGRAM INITIATION.**

a. The DoD MP Program is initiated by the mentor completing the Mentor Protégé Program Mentor Application Forms (Appendix A) located on the Resource Page and submitting the application to DoD OSBP to PublicRelationsMP@osd.mil. DoD OSBP evaluates the application and sends acceptable mentors an approval letter.

b. Companies that have been approved as mentors in the Program and have identified a protégé firm must submit a signed MP agreement for each MP relationship to the Director, DoD OSBP. The Mentor-Protégé Program Agreement Template (Appendix C) is located on the Resource Page along with a list of DoD OSBP approved mentors.

### **3.4. CREDIT PROCESS.**

a. The MP Team Lead receives the credit agreement proposal in the MP Inbox, DCMAHQSmallBusinessMentorProtege@dcma.mil, from the mentor along with all the supporting documentation required to review the proposal.

b. The MP Team Lead utilizes the credit application log to assign and track the incoming credit agreement proposals to an MP SB Professional for review.

c. The MP SB Professional reviews the proposal using the Mentor-Protégé New Agreement Checklist (Appendix D is located on the Resource Page) to determine mentor and protégé

eligibility and to ensure an achievable agreement is proposed. If incomplete, the agreement will be returned to the mentor within 14 calendar days of receipt for any additional information required.

d. After reviewing the agreement proposal, the MP SB Professional provides a written recommendation to the MP Team Lead for approval or denial into the program.

e. Once an agreement is approved, the MP Team Lead issues a letter approving the credit agreement to the mentor and the protégé with a copy to DoD OSBP. The MP Team Lead then assigns the agreement to a MP Small Business Professional.

f. Agreements that are denied are returned to the mentor to make the recommended changes.

### **3.5. HYBRID PROCESS.**

a. The mentor submits their proposal and all supporting documentation to the cognizant DoD Component.

b. The mentor meets with the MP Team Lead and the appropriate cognizant DoD Component SB manager to discuss the development of their proposed hybrid agreement.

c. The mentor prepares the proposed hybrid agreement and submits it for review to the cognizant DoD Component and to the MP Team Lead.

d. The MP Team Lead assigns the proposal to a MP SB Professional to review. The MP SB Professional provides a recommendation to the MP Team Lead for the first year of the agreement. This recommendation is provided to the cognizant DoD component in order to receive a tentative approval for the second year of the agreement.

e. The cognizant DoD Component initiates and secures funding for the reimbursable portion of the agreement.

f. The MP Team Lead assigns the agreement to a MP SB Professional to manage the agreement.

g. The cognizant DoD Component submits the contract award and all supporting documentation to the DCMA MP office to begin administration. DCMA performs an annual performance review and provides a recommendation regarding continuance of the agreement to the cognizant DoD Component. Administration of a hybrid agreement remains with the same SB Professional regardless of the phase, reimbursable or credit.

**3.6. REIMBURSABLE PROCESS.** Upon notification that a reimbursable agreement has been awarded by the cognizant DoD Component, the agreement is then assigned to a MP SB Professional by the MP Team Lead to manage. The contracting officer of the cognizant DoD Component must provide a copy of the contract, which includes the approved MP agreement and

all supporting documentation to the MP Team Lead, who forwards it to the MP SB Professional responsible for conducting the annual performance review.

## **SECTION 4: AGREEMENT MANAGEMENT**

### **4.1. EARLY ADMINISTRATION.**

a. Within 14 calendar days of an agreement assignment, the Small Business Professional contacts the mentor and protégé in an initial meeting to review the DoD MP Program agreement reporting requirements. A Mentor-Protégé New Agreement Template Appendix D is located on the Resource Page. Establish a standard DCMA template for credit, hybrid, or reimbursable agreements. The SB Professional also provides the mentor and protégé with the MOU Credit Hybrid Agreement Template Appendix E, located on Resource Page, as appropriate so the parties are aware of the level of information they are required to track and report throughout the program.

b. The MP SB Professional records and maintains documentation including pertinent data for each agreement. The MP Team Lead and the MP SB Professional maintain the MP spreadsheet of the scheduled review dates, report dates, and report approval dates with updates on a monthly basis. As required, the MP Team Lead will follow-up and provide feedback to all agreement participants in support of the program: DoD OSBP, the cognizant DoD Component, mentors, protégés, and/or firms providing developmental assistance on behalf of the mentor.

### **4.2. AGREEMENT ADMINISTRATION.**

a. Semiannual, annual, and post-agreement review reports are required for each agreement. Annual performance reviews are a major factor in determining the amount of reimbursement the mentor firm is eligible to receive in the remaining years of a contract. MP Small Business Professionals notify the cognizant DoD Component and the MP Team Lead of all issues affecting the agreements. Pursuant to Federal Acquisition Regulation (FAR) 31.109, approved mentor firms seeking either reimbursement or credit are strongly encouraged to enter into an advance agreement with the administrative contracting officer responsible for determining final indirect cost rates under FAR 42.705. The purpose of the advance agreement is to establish the treatment of accounting costs of the developmental assistance pursuant to the MP agreement prior to incurring any costs by the mentor firm. An advance agreement is an attempt by both the government and the mentor firm to avoid possible subsequent dispute based on questions related to reasonableness, accountability, or allowability of the costs of developmental assistance under the Program.

b. Reimbursable Agreement MOU Template Appendix F is located on the Resource Page. SARs are completed and submitted biannually by the mentor after being signed by both the protégé and the mentor, using the DoD Mentor Protégé Semiannual Report form. SARs cover the following periods of performance: October 1 through March 31<sup>st</sup> and April 1<sup>st</sup> through September 30 of each fiscal year and are due to the MP SB Professional, the cognizant DoD Component, and DoD OSBP no later than April 30<sup>th</sup> and October 31<sup>st</sup>, respectively. The MP SB Professional notifies the mentors and the protégés of the SAR requirement 45 calendar days prior to the required due date.

c. The MP Small Business Professional acknowledges receipt and conducts a review of the SAR for completeness and accuracy. Supporting documentation is provided by the mentor and the protégé for use by the MP Small Business Professional in verifying SAR data. If inaccuracies are found in the SAR, the MP Small Business Professional notifies the mentor and the protégé with a request for a corrective action plan (CAP). This request is made via email requesting the mentor and protégé provide the plan within 21 calendar days. The MP Small Business Professional works with the mentor and the protégé in resolving problems and corrective action planning. Upon review and approval, the mentor is required to submit a revised SAR. The recommended and approved SAR is then forwarded to OSBP DoD MP Program Manager.

d. The MP SB Professional advises the mentor and the protégé of the annual review schedule 60 calendar days prior to the review date in order to facilitate the review process and to provide the date for submission of the questionnaires. Appendix G Protégé Questionnaire and Appendix H Mentor Questionnaire are located on Resource Page. In preparation for the annual review, the mentor and protégé are requested to complete the Mentor and Protégé questionnaires and provide them to the MP SB Professional.

e. The MP SB Professional assesses whether an onsite meeting with the mentor and the protégé is required or if a virtual review will suffice. A virtual review consists of a telephonic discussion of reports that are shared electronically among the review participants.

f. The MP SB Professional conducts an annual performance review of the progress and accomplishments realized under approved MP agreements. The MP SB Professional will utilize the Credit Annual Review Form (Appendix J) and Reimbursable Annual Review Form (Appendix K), located on Resource Page, to verify and validate that protégé progress reported is accurate in the areas of employment, revenues, and participation in DoD contracts. Reviews are performed annually based upon the ending date of the agreement. The review should be completed within 30 calendar days, from the time the questionnaire is sent to the mentor and protégé until the report is distributed. Standard for report writing time is 10 calendar days.

g. Reviews must cover the following areas:

(1) Verify data provided on the SARs. The financial data captured in the SARs is validated against the cumulative financial data approved in the annual review.

(2) Analyze information as to whether all costs reimbursed to the mentor firm under the agreement were reasonably incurred to furnish assistance to the protégé in accordance with the MP agreement and applicable regulations and procedures.

(3) Validate whether the mentor and the protégé accurately reported progress made by the protégé in employment, revenues, and participation in DoD contracts during the period of performance.

(4) Verify milestone achievement.

(5) Assign Risk Ratings. The MP SB Professional assigns a risk rating to the annual review based on the achievements of the review year. Risk ratings are determined by assessing the semi-annual reports, milestone management, cost management, communication timeliness, and the personnel and business growth ROI of the protégé. MP agreements that are rated as high risk are monitored closely and if the program concludes with a high risk rating the mentor has a low probability of repeating in the DoD MP Program.

h. Risk is assessed as low, moderate, or high using the following general guidelines:

(1) Low Risk.

(a) Met all milestones.

(b) All changes to milestones, deliverables, tasks, costs per task, or schedule changes are pre-approved by:

1. Reimbursable. Authorized by DoD MPP SB Professional and/or Procurement Contracting Officer (PCO).

2. Credit. Approved by DCMA MP Team Lead.

3. All planned tasks are started, on-schedule, and completed on time.

4. All semiannual reports are timely, accurate and complete, with no more than one revision per 6-month period.

5. Costs on Semi-annual reports are clearly described and identify the related milestone and/or task number.

6. Credit Only. All cost X authorized multipliers are applied as credits to SB goals.

7. Credit Only. Summary Subcontracting Reports (SSR) remarks identify all credits applied from DoD MP agreements by protégé, amounts X multipliers, and SB category.

(2) Moderate Risk.

(a) Milestones. Two or more not met within 15 calendar days of approved schedule.

(b) Semi-annual Report received 3 to 10 calendar days after due date.

(c) Semi-annual Report: Discrepancies resolved in two revisions/replacements.

(d) Cost on Semi-annual Report are not clearly described; do not clearly relate to the costs and/or tasks proposed for the Agreement. Associated milestone or task numbers omitted.

(e) Semi-annual Report. Developmental task overruns were explained and/or pre-approved.

(f) Credit Only. Errors in amounts and/or categories of credits applied to SB goals.

(g) Credit Only. Credits applied not well detailed in SSR remarks.

(3) High Risk.

(a) Milestones. Three or more not met within 15 calendar days of approved schedule.

(b) Semi-annual Report received more than 10 calendar days after due date.

(c) Semi-annual Report. Discrepancies unanswered or not corrected within two revisions/replacements.

(d) Semi-annual Report. Developmental task overruns exist, are not explained, and/or have not been pre-approved.

(e) Costs on Semi-annual Report are not described; do not relate to costs and/or tasks proposed for the Agreement. Associated milestone or task numbers omitted.

(f) Credit Only. Credits earned not applied to SB goals.

(g) Work occurring outside period of performance, sufficient funding, without approval of the DoD MPP SB Professional and PCO, or for credit, approval of the DCMA MP Team Lead.

(h) Overall conditions give rise to a formal CAP. For reimbursable Agreements, corrective action through and approved by the DoD MPP SB Professional and PCO. For credit, approving authority is the DCMA MP Team Lead. CAPs are approved.

#### **4.3. CONCLUSION OF REVIEW.**

a. At the conclusion of the review, the SB Professional completes either the DCMA Credit Annual Review form (Appendix J) or the DCMA Reimbursable Annual Review form (Appendix K), located on the Resource Page. As part of the reimbursable annual review, the SB Professional must make a recommendation to the cognizant DoD Component regarding continuance or termination of the program based on their risk rating. Additional recommendations specific to any concerns in the program may also be made. The completed annual review form is reviewed and approved and signed by the MP Team Lead. The MP SB Professional distributes the signed annual review form to the MP Team Lead, DoD OSBP, and the cognizant DoD Component. DoD OSBP receives all reviews and reports at [dodmpp@osd.mil](mailto:dodmpp@osd.mil).

- b. After completion and approval by the MP Team Lead, the MP SBProfessional schedules meetings with each mentor and protégé to verify and validate the data and to define the ROI.
- c. The management analyst updates the assignment log with the date the review rating report was forwarded to the MP Team Lead, the date the report was sent to contractor, and the review recommendation.
- d. The SB Professional uploads the review on DCMA site page and files all associated review documentation in accordance with DCMA-MAN 4501-04, "Records Management."

#### **4.4. PROGRAM MANAGEMENT REVIEWS (PMR).**

- a. PMR discussions include certification and milestone achievement, status of training, incurred expenditures, and additional accomplishments achieved during the period of performance.
- b. PMRs are conducted for each agreement to discuss the performance of the agreement with the mentor and the protégé. The frequency of the PMRs is contingent upon the annual review risk rating.
- c. For credit agreements, the DCMA SB Professional schedules the review. If the agreement has a high risk rating, PMRs should be conducted as frequently as deemed necessary. If the risk rating is low, the PMRs may be as infrequent as every 6 months.
- d. For reimbursable agreements, the PMR is scheduled by the cognizant DoD Component program manager. PMR discussions include certification and milestone achievement, status of training, incurred expenditures, and additional accomplishments achieved during the period of performance.

#### **4.5. POST AGREEMENT REPORTS.**

- a. At the completion of a reimbursable or credit agreement, the agreement will be re-assigned to the post award Small Business Professional and moved to the Post Review column on the MP group database and the working file will be moved to the Post Folder on DCMA site page.
- b. Protégés are required to provide information on any developmental assistance that was received and their progress in obtaining new contracts for 2 fiscal years following the expiration of the program participation term, even if no activity has occurred (Reference FAR, Section I-112.2(b)). At the 1- and 2-year anniversary date of the conclusion of the term of the MP agreement, the post award Small Business Professional will send an email to the protégé requesting that they complete the DoD Protégé Post-Agreement Report Form Appendix L located on the Resource Page (Reference DFARS Appendix I-122-2(e) (2)). The protégé has 30 days after the anniversary date to respond to the request.

c. After the protégé submits the DoD Protégé Post Agreement Report, the Small Business Professional must complete the post review in 3 calendar days.

d. The post-agreement report is compared to the last annual review that was completed for the mentor/protégé. The Small Business Professional checks the following:

(1) Compare the number of employees.

(2) Compare the annual gross revenue.

(3) Check ending balances for all columns to see if the protégé has experienced growth since the completion of the agreement; especially for prime contract awards and proposals.

(4) Complete ROI spreadsheet. This will be copied and passed in email to DoD OSBP.

(5) After completion of the ROI analysis, an email containing the post award summary must be sent to DoD OSBP with a copy to the MP Assistant Director and the management analyst. DoD OSBP receives all reviews and reports at [dodmpp@osd.mil](mailto:dodmpp@osd.mil). An example of the completed email with the analysis is on the Resource Page.

(6) If data is not provided or is not verifiable, the MP SB Professional completes the report by outlining the reason why data verification could not be performed and utilizes the closeout review for report completion.

#### **4.6. TERMINATIONS.**

a. Mentors and protégés must send a copy of any mutually agreed upon termination notices to the appropriate SB manager for the cognizant DoD Component and to DCMA assigned to DCMA SB Professional. Then the assigned MP Small Business Professional completes a closeout annual review for the agreement. Post reviews are not completed on terminated agreements.

b. The MP SB Professional files all documentation for active reimbursable, hybrid and credit agreements, as well as performance reports in accordance with this-Manual.

## GLOSSARY

### G.1. ACRONYMS.

CAP	Corrective Action Plan
DCMA-INST	DCMA Instruction
DCMA-MAN	DCMA Manual
DFARS	Defense Federal Acquisition Regulation Supplement
FAR	Federal Acquisition Regulation
HCA	Headquarters of Contracting Agency
HUBZone	Historically Underutilized Business Zone
MOU	Memorandum of Understanding
MP	Mentor Protégé
MPP	Mentor-Protégé Program
OSBP	Office of Small Business Programs
PCO	Procurement Contracting Officer
PMR	Program Management Review
ROI	Return on Investment
SAR	Semiannual Report
SBCC	Small Business Compliance Center
SDB	Small Disadvantaged Business
SDVOSB	Service-Disabled Veteran-Owned Small Businesses
SSR	Summary Subcontracting Reports (SSRs)

## REFERENCES

DCMA Manual 4501-04, "Records Management," TBD  
DFARS Appendix I, "Policy and Procedures for the DoD Pilot Mentor-Protégé Program"  
DFARS Subpart 219.71, "Pilot Mentor-Protégé Program"  
DFARS Appendix I-102(b), "Participant eligibility"  
DFARS Section I-106(e), "Development of mentor-protégé agreements"  
DFARS Appendix I -107(j), "Elements of a mentor-protégé agreement"  
DFARS, Appendix I-113, "Performance reviews"  
DFARS 219.7103-2(h), "Contracting officer responsibilities"  
DoD Directive 5105.64, "Defense Contract Management Agency (DCMA)," January 10, 2013  
DoD Instruction 4205.01, "DoD Small Business Programs," June 8, 2016  
Federal Acquisition Regulation, as amended  
Public Law 101-510, "Section 831, "Mentor-Protégé Pilot Program," November 5, 1990  
United States Code, Title 10, Section 2302