



## DCMA MANUAL 3101-04

### CUSTOMER SUPPORT

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| <b>Office of Primary Responsibility:</b> | Integrating Capability - Program Support   |
| <b>Effective:</b>                        | November 30, 2018  |
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| <b>New Issuance</b>                      |  |
| <b>Implements:</b>                       | DCMA-INST 3101, "Program Support," July 28, 2017   |
| <b>Incorporates and Cancels:</b>         | DCMA-INST 404, "Customer Satisfaction," September 4, 2012, as amended<br>DCMA-INST 407, "Customer Engagement (CE)," July 26, 2013, as amended<br>DCMA-INST 409, "Memorandum of Agreement for Contract Management," March 7, 2013, as amended<br>DCMA-INST 410, "Distinguished Visitor (DV) Notification," January 15, 2014, as amended |
| <b>Internal Control:</b>                 | Process flow and key controls are located on the Resource Page   |
| <b>Labor Codes:</b>                      | Located on the Resource Page   |
| <b>Resource Page Link:</b>               | <a href="https://360.dcm.mil/sites/policy/PS/SitePages/3101-04r.aspx">https://360.dcm.mil/sites/policy/PS/SitePages/3101-04r.aspx</a>  |
| <b>Approved by:</b>                      | David H. Lewis, VADM, USN, Director  |

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**Purpose:** This issuance, in accordance with the authority in DoD Directive 5105.64, Defense Contract Management Agency, implements policy, assigns responsibilities, prescribes procedures for:

- Customer engagement.

- Customer satisfaction.
- Distinguished visitor notification.
- Memoranda of Agreement for contract management support; and
- Implementing DCMA-INST 3101, Program Support.

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

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

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

a. Deliver global acquisition insight for all programs and high visibility commodities by providing objective, independent, relevant, timely, and actionable information to the Defense Acquisition Enterprise.

b. Develop robust relationships with internal and external customers to understand requirements; provide integrated, independent insight; inform and influence acquisition decisions; address issues; host distinguished visitors (DVs); and document partnerships through agreements when necessary.

c. Execute this manual in a safe, efficient, effective, and ethical manner.

**1.3. SUMMARY OF CHANGE.** The change to this issuance is administrative and updates the reference location of the Customer Satisfaction Survey.

## SECTION: RESPONSIBILITIES

**2.1. DIRECTOR, DCMA.** The DCMA Director will interface with strategic customers to exchange information on the DoD acquisition environment challenges, opportunities, issues, and concerns.

**2.2. EXECUTIVE DIRECTOR, PORTFOLIO MANAGEMENT AND BUSINESS INTEGRATION (PM&BI).** The Executive Director, PM&BI must:

- a. Establish and provide oversight of the strategic Customer Engagement (CE) process.
- b. Build coalitions with key customers and provides customer intelligence to the DCMA enterprise.
- c. Interface via Service Portfolio Directors with strategic customers at the Office of Secretary of Defense (OSD), Military Service Senior Acquisition Executives (SAE), and commanders of buying activities to understand the Defense acquisition environment, challenges, opportunities, issues, and concerns.
- d. Advise DCMA executive leadership on CE issues and assesses overall customer relationships for the Agency.
- e. Instill a culture of learning both within the PM&BI Directorate and across the Agency in the areas of strategic customer, acquisition enterprise, and DV engagements.
- f. Communicate to the Agency when an enterprise-level agreement is signed, significantly revised, or rescinded/terminated.

**2.3. SERVICE PORTFOLIO DIRECTORS.** The Service Portfolio Directors must:

- a. Provide annual CE input to the Integrated CE Plan (ICEP) for their portfolios to systematically and proactively engage with customers in an efficient and effective manner.
- b. Evaluate the “Internal Communication Strategy” submitted by Customer Liaison Representatives (CLRs).
- c. Conduct strategic level engagements with respective senior service and OSD acquisition officials to assess customer satisfaction (CS) and effectiveness of Agency support to their staffs.
- d. Prepare Commanders or Directors and Operational Units (OUs) for OSD forums and Overarching Integrated Product Team meetings.

**2.4. DIRECTOR, BUSINESS INTEGRATION CENTER (BIC).** The BIC Director must:

- a. Lead the development of the annual ICEP ensuring that strategic CEs are planned and synchronized to drive a “one team, one voice” result.

- b. Maintain oversight for Strategic CEs.
- c. Review and recommend the ICEP for the PM&BI Executive Director's approval.
- d. Post the approved ICEP to the Resource Page located within PM&BI's SharePoint library.
- e. Lead the quarterly review of the ICEP with CE stakeholders (e.g., CMO Commanders and Directors, etc.) which includes presiding over actions items, a status to completion review of open actions and determining effectivity for closure and oversight of updates to the ICEP.

**2.5. DIRECTOR, CUSTOMER ENGAGEMENT GROUP (CEG).** The CEG Director must:

- a. Support the CE process by providing resources, expertise, Resource Page materials, and coordinating mission execution through the Service Portfolio Directors and CLR's.
- b. Lead the in-depth analysis of historical agency CE data.
- c. Manage the Training, Outreach, and Education (TOE) briefing slide repository supporting education of external customers on the Agency's mission, organizational structure, functional capabilities and services.
- d. Monitor the execution of the ICEP and ensure that ongoing Customer Intelligence is collected and distributed via Strategic Customer Outreach Reports to ensure current, complete, and accurate data in support of the CE planning.

**2.6. DIRECTOR, CORPORATE INTEGRATION GROUP (CIG).** The CIG Director must:

- a. Provide input to and receive feedback from functional Component Heads and Operational Unit Commanders or Directors when issues/concerns/risks occur or actions may need to be taken in regards to DoD corporate suppliers.
- b. Provide annual CE input to the ICEP building process to systematically and proactively engage with major customers.

**2.7. DIRECTOR, SUSTAINMENT GROUP.** The Sustainment Group Director must:

- a. Provide input to Component Heads when issues/concerns/risks occur or action may need to be taken on high visibility commodities or other sustainment impacting trends.
- b. Provide annual CE input to the ICEP process to systematically and proactively engage with major customers.

**2.8. DIRECTOR, INDUSTRIAL ANALYSIS GROUP (IAG).** The IAG Director must:

- a. Support PM&BI Executive Director on engagements with strategic customers.

- b. Conduct strategic industrial base engagements across DoD.
- c. Provide annual CE input to the ICEP building process to systematically and proactively engage with major customers. Review existing IAG support agreements for accuracy and discuss potential workload.
- d. Perform duties as the Executive Agent for the Joint Industrial Base Working Group responsible for maintaining DoD-wide industrial base communication and operational linkages throughout the research and development, acquisition, logistics, and readiness communities.
- e. Support DoD Industrial Base Councils and Working Groups.
- f. Execute DCMA's Defense Industrial Base and Defense Infrastructure Sector Lead Agent responsibilities for the Defense Critical Infrastructure Program.
- g. Support the Service Portfolio and Operational Unit Directors with information needed to perform their customer support duties.

**2.9. DIRECTOR, PM&BI POLICY GUIDANCE AND TALENT MANAGEMENT DIVISION.** The Director, PM&BI Policy Guidance and Talent Management Division must:

- a. Assign a performance advocate (PA) to:
  - (1) Establish and maintain the DCMA CS administration program.
  - (2) Support of the execution of DV requirements.
  - (3) Facilitate the development, coordination, publication, notification, and files maintenance process of unclassified enterprise-level Memoranda of Agreement (MOAs) for contract management support.
  - (4) Manage and maintain DCMA's enterprise-level MOA library for contract management support.
- b. Assign staff to assist in maintaining customer support resource page materials, monthly and annual review cycles, administrative changes, tool enhancements, and training.

**2.10. CUSTOMER ENGAGEMENT SPECIALIST (CES).** The CESs support the mission of the Service Portfolio Directors and must:

- a. Provide annual CE input to the ICEP building process.
- b. Maintain a Service focused Customer Outreach Effectiveness Scorecard (COES). See Resource Page for COES Standard Operating Procedure (SOP).

- c. Monitor the execution of portfolio focused CE events.
- d. Coordinate, monitor, and report all aspects of customer outreach involving Agency leadership. Prepare and finalize all customer outreach briefings, reports, and products used by Agency personnel during their CE activities.
- e. Conduct strategic level CEs, when delegated by the Service Portfolio Directors.
- f. Analyze strategic customer issues and develop solutions that meet customer expectations.
- g. Manage Agency support to a Military Service/non-DoD customer portfolio of programs with a focus on major/non-major and high visibility programs.
- h. Plan external and internal senior leader meetings and engagements. Shape Agency policy positions for senior leader engagements with external customers. Serve as the focal point for integrated strategic, operational, and tactical enterprise-wide analysis of major/non-major programs contained in the portfolio.
- i. Monitor the Customer Engagement Inbox for impending CEs or DV visits.

**2.11. CUSTOMER LIAISON REPRESENTATIVE (CLR).** The CLRs must:

- a. Engage with customer organizations to provide situational awareness to alert Agency leadership of significant changes in programs (cost, schedule, performance, funding, etc.), organization (e.g., Program Executive Officers (PEOs), Program Managers (PMs), Procuring Contracting Officer (PCO) assignments), processes or capabilities.
- b. Develop an annual Internal Communications Strategy (ICS) that includes TOE targeting CMO support needs. TOE events will ensure strategic level customers understand the DCMA Mission, Goals/Initiatives and Support Services
- c. Update the COES each quarter to assess the quality of the relationship between the customer and DCMA office of primary responsibility (OPR) with a Green, Yellow or Red rating. See Resource Page for COES Standard Operating Procedure (SOP).
- d. Provide customer intelligence and feedback acquired through daily engagements through the Customer Priority Workload Summary (CPWS), Long Range Customer Workload Projection (LRCWP) and weekly activity reports to the enterprise for better resource alignment and to support customer needs.
- e. Develop a TOE Plan for incorporation into their portfolio division's annual CE plan.
- f. Provide training to DCMA functional proponents on customer initiatives, organizational structures, business processes, and other key information to benefit Agency mission accomplishment.

g. Assist OU, Contract Management Office (CMO) leadership and functional specialists to clarify and resolve customer concerns.

**2.12. EXECUTIVE DIRECTOR, FINANCIAL AND BUSINESS OPERATIONS.** The Executive Director, Financial and Business Operations must:

a. Advise the DCMA Director, Deputy Director, and other Agency Component Heads on the financial impacts related to endorsing contract management support agreements.

b. Review and coordinate on all pending contract management support agreements involving the commitment of Agency resources. Consider CMO/Center staffing requirements.

**2.13. GENERAL COUNSEL.** The Office of General Counsel must:

a. Provide legal advice and recommendations pertaining to the governing authority and regulations permitting DCMA (and organizational elements within the Agency) to enter into agreements with external customers for the purpose of providing contract management support.

b. Assist Action Officers (AOs) in drafting and/or reviewing contract management support agreements.

**2.14. DIRECTOR, CORPORATE OPERATIONS.** The Director, Corporate Operations must:

a. Ensure DCMA Organizational Chart on the Resource Page is up-to-date.

b. Review and approve for release documents such as the DV Read-ahead Package, corrective action requests, corrective action plans, etc., to members of the U.S. Congress and their staff.

**2.15. OPERATIONAL COMPONENT HEADS.** Operational Component Heads must:

a. Provide annual CE input to the ICEP building process and identify CE stakeholder(s).

b. Provide functional/operational/tactical support to strategic CEs with senior customers (OSD/SAE/PEO/Buying Command leadership) and foreign customers when major DCMA operational issues/improvement opportunities exist, when there is evidence of significant customer dissatisfaction, when direct commercial sale support is required, or requested by the Executive Director, PM&BI.

c. Systematically and proactively engage with major customers and industry counterparts at their office locations, functional forums, symposiums, and conferences to understand strategic and operational customer issues, concerns, requirements, and levels of satisfaction affecting their components.

- d. Advise the Agency of substantive customer issues gathered during their CEs.
- e. Provide subject matter experts (SMEs) and staff assistance to the PM&BI Executive Director on the TOE process.
- f. Provide HQ SMEs and staff assistance to support OU staffs on CE issues upon request.
- g. Sponsor and approve operational-level agreements for contract management support requested by the external customers.
- h. Manage the processes associated with operational-level agreement development, coordination, publication, and maintenance processes.
- i. Communicate to the Agency when an operational-level agreement is signed, significantly revised, or rescinded/terminated.
- j. Assign staff to facilitate the development, coordination, publication, notification, and files maintenance process of unclassified organizational-level agreements for contract management support.
- k. Assign an Operational Customer Support Administrator (OCSA) and alternate to manage and process CS surveys, DV notifications for the respective region using the link provided on the Resource Page.

**2.16. EXECUTIVE DIRECTOR, SPECIAL PROGRAMS.** The Executive Director, Special Programs must:

- a. Sponsor and approve operational-level agreements for contract management support requested by the external customers working Special Access Programs (SAPs) or programs requiring Sensitive Compartmented Information (SCI).
- b. Assign staff to facilitate the development, coordination, publication, notification, and files maintenance process of classified organizational-level MOAs for contract management support (e.g., AOs, administrators, analyst).
- c. Initiate contact with the cognizant CMO Commander/Director for assistance on unclassified efforts as necessary.
- d. Maintains a library of all active and inactive, classified, operational-level MOAs.
- e.. Ensure the Commanders/Directors, Special Programs CMOs comply with the Agency's Program Support policy and meet the intent of this manual to the maximum extent practicable for all SAP and SCI.

**2.17. COMMANDERS/DIRECTORS, CMOs AND CENTER DIRECTORS.** The Commanders/Directors, CMOs and Center Directors must:

- a. Provide Operational Component Heads with any tactical level CE information needed for higher-level PEO, strategic engagements.
- b. Assign a CMO/Center Customer Support Administrator (CSA) and alternate to manage and process CS surveys, and DV notifications for their respective organizations using the link provided on the Resource Page.
- c. Stand-up and maintain a documented process for managing CS surveys.
- d. Coordinate, notify, document, and track action items of DV visits.
- e. Document support provided to Program Management Offices (PMOs) by employing comprehensive MOAs (a bilateral or multilateral document) or a unilateral Letter of Commitment (LOC).
- f. Maintains a local library of all active and inactive agreements.

**2.18. CUSTOMER SUPPORT ADMINISTRATORS (CSA).** CSAs must:

- a. Manage their organization's CS survey program:
  - (1) Review, distribute, and close CS surveys.
  - (2) Coordinate with their customer and other organizations, as needed. Document corrective action for negative surveys (surveys with negative comments or a rating of 3 or below) in the "Corrective Action" field provided in the Agency's authorized CS tool. Initiate contact with the cognizant CMO Commander or Director to validate CS surveys and actively resolve negative results.
  - (3) Coordinate and seek support from their organizations, as needed, to validate customer issue(s) and determine appropriate action(s).
- b. Support the execution of DV requirements:
  - (1) Coordinate the DV visit.
  - (2) Prepare (tailor) the DV read-ahead package.
  - (3) Coordinate with the DCMA Director of Strategic Communications for releasing of any materials to Congressional Members.
  - (4) Report substantive customer issue(s) during the DV visit that requires DCMA Leadership visibility.
  - (5) Document the DV engagement.

(6) Actively engage cognizant CMO's on all DV visits to ensure DV issues are properly resolved in cases where CMOs can closeout the action.

c. Support the execution of the MOA requirements:

(1) Develop, coordinate, publish, and maintain MOAs for contract management support. Communicate the status of each agreement with all members of the impacted Product Support Team and CMO Program Support Teams.

(2) Maintain a local library of all active and inactive agreements.

**2.19. OPERATIONAL CUSTOMER SUPPORT ADMINISTRATOR (OCSA).** OCSAs must:

a. Manage and coordinate the implementation of this manual. Address issuance issues/concerns of the DV, CS, CE, and MOA processes to the Integrating Capability Inbox.

b. Review surveys pertaining to their organization to assure timely:

(1) Reassignment of misrouted surveys.

(2) Correction of unidentified process, product/service, and customer organization.

(3) Closeout of survey.

c. Assist CSAs with root cause analysis, validation of issue, and acceptable corrective action to ensure customer concerns are addressed in a timely fashion for maintaining good customer relations.

d. Take immediate action to remedy the situation with the respective organization when the corrective action is incomplete or untimely.

**2.20. DCMA EMPLOYEES.** DCMA employees must:

a. Communicate to their customers to provide feedback for their products and services via the Agency's authorized CS tool.

b. Include the following statement in cover letters or emails accompanying all product transmittal documents or in emails after providing a service: "DCMA appreciates your feedback. Please complete a brief survey (link located on the Resource Page) to help us better support your needs."

c. Submit feedback regarding DCMA internal procedures, processes or products used to perform duties, generate external products, and deliver services to the customer.

## SECTION 3: CUSTOMER ENGAGEMENT

### 3.1. OVERVIEW.

a. CEs facilitate the collection of valuable management information allowing DCMA to properly align agency services to the requirements of the defense acquisition enterprise in order to improve effectiveness, efficiencies, operational capability, and capacity. Accordingly, DCMA leaders determine the appropriate engagement and plan, execute, and document formal CEs as outlined within this issuance. CE occurs at all levels of the Agency and there are two types of CEs: informal and formal. This section applies to all formal CE activities and provides guidance on the type of information to be collected, documentation and analysis required of the information. All DCMA Leaders with CE requirements identified in Section 2 of this manual are required to develop and execute CEs and to disseminate the results of each planned engagement at the discretion of the Senior Leader conducting the event. Primary and conditional responsibilities for formal engagements are summarized in the CE Crosswalk (see Resource Page).

b. Informal engagement occurs daily (usually at the CMO level) as DCMA executes its mission. These daily CEs are documented in emails, contract files, meeting minutes and other records.

c. Formal engagement occurs when the DCMA Director, Deputy Director or Component Heads interface with strategic customers at the OSD, Military Service SAEs, PEOs, commanders of buying activities, combatant commanders, Foreign Governments, and industry leaders. All formal CEs should follow the plan-do-check-act process as identified in paragraph 3.3. of this issuance. Only DV engagement is an exception to paragraphs 3.3.a. and 3.3.b. processes because of its unplanned and short notice nature; but must follow paragraphs 3.3.c. and 3.3.d. to report, prepare, conduct, and document the DV engagement.

### 3.2. CE INFRASTRUCTURE.

a. Information relating to customers is found in many locations and in many forms. The challenge exists in gathering the myriad of customer-related information and effectively assembling that information in a way that makes it readily accessible and shared across the enterprise. The Strategic Customer Outreach Report shares information and documents action to help customers achieve desired outcomes and is available at the issuance Resource Page. The Strategic Customer Outreach Report provides efficient, effective, and timely distribution of customer intelligence. Accordingly, CE stakeholders must document **formal** CEs. Refer to CE Crosswalk Table found on the Resource Page for typical examples of formal CEs.

### 3.3. CE EXECUTION.

a. **Plan (Assess).** The CEG led by the Service Portfolio Directors will perform in-depth analysis of historical CE data identifying strategic/functional/operational issues, opportunities, customer goals, initiatives, priorities, objectives, training gaps/needs and customer (dis)satisfaction and forward findings and recommendations to the PM&BI Executive Director thru the BIC Director. Annually the PM&BI Executive Director will issue a CE tasking memorandum to Component Heads to begin the Integrated CE Plan process. This tasking memo

will provide general direction on key initiatives, themes, specific customer segments of focus and other information necessary to create continuity of purpose during planned engagements. The tasking memo will also include a timeline for: submittal of CE recommendations, review of CE recommendations, identification of stakeholders, quarterly stakeholder review meetings, updates and posting the approved ICEP to the issuance Resource Page.

**b. Do (Build the ICEP).** The BIC will analyze and consolidate all proposed CE recommendations to develop the draft annual ICEP. This consolidation enables vertical (by service/function) and horizontal (Regions) visibility to promote coordinated CEs by Agency Leadership. The Enterprise Customer Contact List and PEO portfolios (including information on external customers' mission, vision, weapon system responsibilities, organizational structures, senior leader biographies) are located on the PM&BI Web page under the Service Division Products to help facilitate development of the ICEP (a hyperlink is provided on the Resource Page).

(1) In developing ICEP the following must be considered for each CE, the:

- Date of engagement
- Method of engagement
- Strategic themes to be communicated
- Current customer issues/concerns
- Length of time since prior formal engagements
- Customer requested engagements
- Planned industry/customer conferences and symposiums
- CS feedback/survey data with negative trends
- High risk processes/suppliers/workload/resource indicators.

(2) Review the ICEP. BIC Director will post the draft ICEP to the issuance Resource Page for review and comments. Comments will be adjudicated by CE stakeholders. The BIC Director will incorporate all changes/updates.

(3) Approve the ICEP. The BIC Director forwards the draft ICEP to the PM&BI Executive Director for final approval.

(4) Post the ICEP. The BIC Director will post the approved ICEP to the issuance Resource Page in accordance with (IAW) the timeline in the Annual CE Planning tasking memo issued in the month of July by the Executive Director, PM&BI. All DCMA CE stakeholders must be ready for execution by 1 October (same year) to flexibly implement, and periodically adjust their CE plans to meet mission requirements/challenges.

**c. Check (Execute).** Prior to the meeting, CE stakeholders will:

(1) Prepare for Engagement:

- (a) Verify the schedule, location, and other logistical arrangements of the visit and

notify the appropriate personnel of any changes.

(b) Coordinate with customer, PM&BI Executive Director, CLR (when applicable), Functional and/or Region representatives on new customer issues/concerns, topics of interest, and other opportunities to be included on the agenda.

(c) Use the Sustainment Critical Parts List and the LRCWP documents as supplemental inputs to frame discussion with each customer. These documents are accessible from PM&BI Webpage or the hyper-links from the Resource Page of this policy.

(d) Review and finalize the agenda, read-ahead briefing, and all documents required prior to the meeting.

(e) Use the provided standard DV Read-Ahead template (located on the Resource Page) to tailor the DV read-ahead package to the facilities and/or programs specific for the DV visit. This requirement extends to situations where the CMO is not visited or involved in the DV visit. DV Formal Documentation User Guide is provided on the Resource Page of this issuance to detail special requirements for appropriate safeguards and dissemination of sensitive DV information or FOR OFFICIAL USE ONLY (FOUO) materials for visits by members of congress and visits by foreign DVs.

(2) Conduct the Engagement:

(a) Take this opportunity to convey DCMA successes, operational challenges, and opportunities to improve the working relationships and operations between the two organizations.

(b) Obtain direct senior CS feedback on DCMA performance.

(c) Identify opportunities for continuous process improvement.

(3) Document the Engagement. For analysis and planning purposes, personnel who conduct the engagement must:

(a) Document the results (information collected and actions) whether it was planned (identified on their annual CE plans) or unplanned (ad hoc and DV engagements) via a Strategic Customer Outreach Report (see Resource Page). The purpose of documenting the results is to standardize CE input and capture details of engagements for future planning. The BIC relies on documented inputs from all Agency components responsible for formal strategic CEs to ensure a fully integrated Agency CE Plan. The Strategic Customer Outreach Report is only used for formal level of CEs occurring at the Strategic customer level. For informal CEs, continue to document those engagements as determined by the person conducting the engagement.

(b) Formal documentation will contain at a minimum:

- Name of primary DCMA official
- Date of visit and meeting location
- Customer name
- Major topics discussed (details of the engagement)
- Any commitments made by DCMA or the customer (include OPR, office of coordinating responsibility and need date)

**d. Act (Evaluate).**

(1) Collect/Share Continuous Improvement Ideas/Feedback:

- Share customer intelligence during Sustainment Group, Corporate Alliance Network, CMO, and Agency leadership meetings
- Provide recommendations based on customer feedback
- Assign action items where appropriate coordinating with Component Heads, Region Commanders, and CLR's to disseminate CE documentation
- Correct customer organization when necessary
- Coordinate assigned action items
- Assure timely responses and acceptable actions
- Closeout of CE documentation at completion

(2) Review/Update ICEP. The BIC Director will hold a quarterly meeting with all CE components to review the ICEP.

(a) CE components will be prepared to discuss what has changed, what is working and what is not.

(b) CE components will validate plan for upcoming quarter.

(c) When changes to the ICEP are required, the BIC Director will post the updated ICEP updates to the site.

(3) Update COES. All CESs will update their respective COES and assess measures of the scorecard at the end of each quarter (Jan, Apr, Jul, and Oct).

**e. Ad Hoc CEs.** An unscheduled engagement not in the CE plan is defined as an “ad hoc” meeting/engagement, for example when:

- A DCMA representative is invited to formally meet with an external customer at the senior executive service (SES), or flag officer level
- A DV (refer to Glossary) visits the Agency or contractor under the cognizance of DCMA

(1) CSAs must send an encrypted email notification to “Customer Engagement Inbox” no later than 3 days before their “ad hoc” engagement with strategic customers or political

officials using the link provided on the Resource Page. The e-mail notification must include the following information: (and telephone, if of a critical nature):

(a) Subject Line:

- Ad Hoc Meeting with SES or Flag Officer, or DV
- DV Notification – Name of DV and organization (e.g., Air Force, Army, Navy, Congress, and/or foreign government)

(b) Body of the notification:

- Purpose of the meeting/visit
- Date of meeting/visit. (Due to force protection requirements, do not provide a specific date of the visit. Provide the week of the meeting/visit beginning on the Monday of the week of the visit)
- Names(s)/Rank(s)/Service/Title(s)/Agency/Company
- Location of meeting/visit
- Issues or concerns, if any
- Program or weapon system interested/impacted
- DCMA POC: (i.e., name, telephone, CMO, region Operational Unit (as applicable))

(4) CESs must monitor the **Customer Engagement Inbox** for incoming pre-visit notifications, determine the purpose of the engagements, and timely (within 24 hours, if it is required to) apprise DCMA senior leaders of schedule arrivals, departures, and recommended personnel involvement with the impending CEs or DV visits.

### 3.4. INTERNAL COMMUNICATION STRATEGY (ICS).

**a. Purpose.** The CLR's develop and execute an annual ICS targeting OUs/Contract Management Offices (CMOs) with the greatest need of support for their intelligence particular to a customer base. The intent of the ICS is to ensure internal customers understand, share and collect feedback to support resolutions of major customer issues and concerns with OUs. The outcome of ICS outreach events provide valuable insightful information for the annual ICEP assessment planning phase and during the quarterly ICEP reviews.

**b. Identify OUs/CMOs that require engagements for the upcoming fiscal year.** CLR's should use a risk-based approach when identifying OUs/CMOs that require engagement, taking into consideration:

(1) Volume of customer workload administered by CMO.

(2) Criticality of customer workload administered by CMO (e.g., high priority program/contracts administered by CMO, etc.).

(3) Customer issues, priorities and concerns (e.g. programmatic issues, customer metrics driven issues (e.g., contract closeout, on-time delivery, etc.) identified within/by OUs and

CMOs.

**c. ICS Development.** Annually (fiscal year) CLR's will develop an ICS for OU/CMO required engagements based on their risk based approach. CLR's will record planned ICS events in their Customer Outreach Plan (COP). The COPs will be maintained on the CEGs approved records repository site. The COPs will be reviewed and updated each quarter (Jan, Apr, Jul, and Oct).

**d. ICS Execution.** During the execution of an ICS engagement, CLR's will facilitate communication between the customer and any OU/CMO operating under non-typical circumstances and/or constraints to improve customer understanding of CMO operations (i.e., DCMAI CMO operating in a host nation support environment). This serves to convey the priorities of the customer while helping the OU/CMO manage customer expectations. The CLR will develop a comprehensive briefing package to support the engagement and will host virtual engagements with the OU/CMO partners identified in the ICS every quarter to ensure internal customers understand Intel shared and collect feedback on how to improve support to them. Engagements will be held at the Group Leader level or higher.

**e. Documentation/Distribution.** CLR's will prepare a Strategic Customer Outreach Report entry after each engagement. All documentation for ICS engagements will reside in the CEG library.

## SECTION 4: CUSTOMER SATISFACTION (CS)

### 4.1. OVERVIEW.

a. Supported by the Agency authorized CS Tool, this process solicits feedback from both external customers (DoD, civilian agency, and contractor personnel) and internal customers (DCMA employees) to promote/improve an Agency-wide customer focused culture and streamline Agency processes.

b. The Agency authorized CS Tool Survey provides one measure of the overall health of the Agency. The survey measures satisfaction and importance of individual capabilities on a transactional basis. Additionally, CS Surveys provide actionable feedback regarding customer complaints and concerns that must be addressed within the Agency.

c. This Section establishes the CS Survey Management infrastructure, defines the process and sub-processes for gathering, processing, monitoring, assessing, and reporting of CS. This process provides guidance to CMO/Center CSAs, OCSAs on processing and handling of negative feedback and recognizing employees who receive positive feedback. The intent is to improve organizational performance as well as customer experiences by providing Agency leaders feedback to make continuous improvements on delivering the Program Support Capability. This manual seeks to align our customer performance goals IAW Section 8070, Public Law 102-172, "The Department of Defense Appropriations Act for Fiscal Year 1992," Public Law 111-352, "Government Performance and Results Modernization Act of 2010", Executive Office of the President, "Delivering on the Accountable Government Initiative and Implementing the GPRA Modernization Act of 2010," Executive Order 13571, "Streamlining Service Delivery and Improving Customer Service."

### 4.2. CUSTOMER SATISFACTION INFRASTRUCTURE.

**a. Agency Authorized Customer Satisfaction Tool.** The CS Tool application:

(1) Captures feedback from both internal and external customers pertaining to the Agency's key capabilities to measure the quality of information (accurate and complete), meeting schedule needs (timely), employee attitude (professional/courtesy), and importance (impact on your job).

(2) Offers all customers the opportunity to comment on satisfaction and importance of Agency capabilities; or to submit general non-capability specific feedback.

(3) Pinpoints specific areas of CS with Agency capabilities at the transactional level.

**b. Accessibility.** Survey access is widely available as a link on the Agency home page, on product transmittal documents, emails to external customers, and in information technology applications frequently used by external customers.

**c. Customer Satisfaction Survey.** The CS Survey:

(1) Measures the quality and timeliness of capabilities; value added, and employee professionalism and courtesy in delivering program support capability. Survey feedback and employee comments are focused on providing managers the necessary information to assess and improve capabilities or organizational performance.

(2) Serves as a primary indicator of CS used by the cognizant Agency activities.

**d. Customer Support Administrator Access Levels.** Administrator access can be granted by the supervisor via Internal Web Access Management. Three types of access are defined in CS Survey Tools: Administrator, Group Administrator, and Super Administrator.

(1) Administrator access is granted to CSAs for processing and reviewing surveys pertaining to their cognizant activities to assure timely responses and distribution.

(2) Group Administrator access is granted to the OCSAs for reviewing surveys pertaining to their organizations to assure timely response and acceptable corrective action.

(3) Super Administrator access is granted only to the headquarters PA and program analysts to remove invalid surveys or to correct inverted surveys.

#### **4.3. PROCESS CUSTOMER SATISFACTION SURVEYS.**

**a. Overview.** The CS Survey is a powerful tool for collecting, assessing, and measuring the degree of CS with Agency internal and external capabilities. This section provides step-by-step guidance on administrating, documenting corrective action, and closing CS surveys to ensure current, complete, and accurate data in the CS database. The cross-functional processes flowcharts help clarify the relationship between steps in a process and helps identify focal points. See Resource Page for process flowcharts.

##### **b. Monitor Customer Satisfaction Results and Corrective Action.**

(1) After a customer completes the survey, the survey is automatically submitted to the Agency's authorized CS tool. CSAs will receive an email alert when a customer submits a survey for their organization. CSAs are empowered to manage their CS surveys.

(2) CSAs promptly review the survey and take appropriate action, as needed:

(a) Coordinate with cognizant activities to disseminate customer feedback.

(b) Reassign misrouted surveys.

(c) Correct unidentified process/product/service/customer organization.

(d) Correct inverted surveys.

- (e) Coordinate required corrective action for low rating surveys.
- (f) Closeout.

1. Correct Unidentified or Incorrectly-Identified Entries. Occasionally, customers may manually type in the capabilities or their organization instead of selecting entries from the provided dropdowns. Those data entries will show as “not reported” and will skew the data analysis.

2. Disseminate CS Survey.

a. If the survey contains positive feedback (overall satisfaction ratings of 4, 5 or 6 and/or complimentary narrative) regarding an employee, the CSA will forward the survey to the employee and their supervisor.

b. If the survey includes a rating of 4, 5, or 6, and there are no negative comments, the CSA may close the record immediately following appropriate notification to a recognized employee and their supervisor.

3. Reassign Misrouted Survey. If the survey is incorrectly attributed to an organization, notify your OCSA or the PA to reassign the survey to the correct organization.

4 Correct Inverted Survey. If the survey contains positive feedback but a rating of 3 or below (comments are inverted with ratings), the CSA seeks clarification with the customer and forward new ratings with proper supported emails/documentation to the PA for correction. With that, the PA who has the Super Administrator access rights will then create a new survey to reflect the new (corrected) ratings and reference the original survey; afterward, delete the inverted one.

**c. Document Corrective Actions.** Required only for external CS Surveys. (For Internal CS Surveys, proceed to paragraph 4.3. d. below). If the survey rating is 3 or below on questions 1 to 4, or there are negative comments, the CSA will (for external surveys only):

- (1) Inform cognizant Activity/Manager/Supervisor.
- (2) Notify the CLR's regarding significant CS issues at their buying activity as a courtesy.
- (3) Coordinate corrective action with the appropriate functional specialist.
- (4) Initiate resolution within 5 working days.
- (5) Document follow-up actions in the corrective action block of the survey in the Agency's authorized CS tool.
- (6) Assure resolution is completed.

**d. Close Customer Satisfaction Surveys.** The CSA will:

- (1) Close surveys within 30 days.
- (2) Periodically annotate status in the Corrective Action block of the survey in the Agency's authorized CS tool regularly follows-up, and close accordingly.

**e. Verify Customer Satisfaction Survey Data.** The OCSA will:

- (1) Monitor timely corrective action with the respective Agency field offices in cases where ratings do not meet required performance levels.
- (2) Follow-up to ensure customer concerns are properly addressed in a timely manner in order to assure and maintain good customer relations.
- (3) Review surveys pertaining to their Activity, at a minimum on a daily basis, to assure timely responses and acceptable corrective action by the succeeding month to synchronize the population of data compilation.

**4.4. MONITOR AND REPORT CUSTOMER SATISFACTION TRENDS.**

**a. Data Compilation.** Is used to gain insight, from the customer's perspective, on what the Agency is doing right, what is working or not working, as well as specific problems or issues which may be identified and resolved.

**b. Data Analysis.** Monthly, the PA will:

- (1) Conduct analysis of CS survey data.
- (2) Summarize ratings by Components and field offices.
- (3) Identify areas for continuous improvement.
- (4) Share best practices.
- (5) Provide Monthly Data Analysis Report on CS ratings.
- (6) Assure availability of reports/data cubes/ad hoc queries regarding CS ratings and trends.
- (7) Share and disseminate data analysis.

**c. Trends Analysis and Monitoring.**

(1) To ensure appropriate management officials and CLR's are aware of and understand customer concerns and issues, the PA conducts monthly analyses of survey data and reports findings.

(2) Functional leads assist OCSAs with root cause analyses and validation of issues identified for their respective functional areas.

(3) CLR's review all surveys from their buying activity to look for issues. CLR's collaboratively assist and take appropriate action to resolve negative trends that cross Agency Activities.

(4) The OCSA monitors overall CS levels and conducts further analysis of surveys. The OCSAs:

(a) Brief the Operational Component Heads.

(b) Take the following actions to document and improve their CS trends:

1. Perform root cause analysis collaboratively.

2. Notify Managers/Supervisors of negative trends.

3. Refer to the PA for resolution of customer issues/problems, which relate to Agency Issuances.

4. Coordinate with functional leads and CLR's to determine the root cause(s) of customer dissatisfaction on systemic issues.

5. Provide recommendations/improvement plans to improve negative CS trends.

6. Monitor and notify Agency Activities of improvements made.

**d. Performance Review.**

(1) Monthly, PA reports on Agency satisfaction ratings and trends.

(2) PA provides Monthly Analysis Reports to OCSA/CSAs. OCSA/CSAs review these Monthly Analysis Reports and share data with their chain of command.

(3) PA provides data analysis annually for external surveys through DCMA Financial and Business Operations to support OMB's Program Assessment Rating Tool IAW GPRA.

**e. Targeted Surveys.** The PA:

(1) Receives a targeted survey.

(2) Collaborates with all the organizations to design tailored questions for targeted surveys directed by Agency leadership.

(3) Determines the population of employees to be surveyed.

(4) Develops a Tasking Memo for the targeted survey.

(5) Distributes the targeted survey.

(6) Collects and analyzes the survey feedback. Share and disseminate data analysis and use for improvements.

(7) Provides the analysis results to Agency leadership.

## **SECTION 5: MEMORANDA OF AGREEMENT (MOAs) FOR CONTRACT MANAGEMENT SUPPORT**

**5.1. OVERVIEW.** This section provides high-level procedures for initiating, coordinating, staffing, executing, and archiving MOAs focused on contract management support. Enterprise-level and operational-level agreements require close adherence to established administrative procedures and will normally dictate the appropriate Component Head or Agency leader signature. Enterprise-level agreements require the resources of two or more Component Heads and must be approved by the DCMA Director. Component Heads with the necessary resources to provide desired customer support may enter an operational-level agreement focused on specific contract management support. For example, The Executive Director, Contracts may enter an agreement providing desired support from the Business Operations Center, Property Group. CMO-level agreements will normally focus on supporting a major program or family of programs or for sharing communication expectations with the buying activity. CMO Commanders/Directors must follow the tenants established by their Component Head and staff. The issuance Resource Page provides AOs with tools necessary to create new agreements such as template documents and links to guiding administrative procedures for the coordination, staffing, executing, and archiving of Agreement documents. See the DCMA Correspondence Management Website in for additional administrative guidance.

### **5.2. SPECIAL PROGRAMS MOA ACTIONS.**

a. The Executive Director, Special Programs establishes MOAs with external customers working SAPs or programs requiring SCI and maintains surveillance of classified MOA administrative files. Once approved and signed, file and/or archive the classified MOAs IAW program security requirements.

b. Special Programs CMOs adhere to applicable program security requirements when determining who in the Agency they invite to participate on an agreement development team, parties to coordinate with for staffing, and team members to inform upon execution.

**5.3. ENTERPRISE-LEVEL MOA SOURCES.** Enterprise-level MOAs will typically originate from:

- a. Goals and objectives communicated and sponsored by the DCMA Director.
- b. As a direct result of an Agency senior leader workload acceptance decision.
- c. When the commitment of resources from two or more Component Heads is needed to support an agreement with an external customer.
- d. When the relative importance of a particular external customer rises to Agency Director-level.

### **5.4. ENTERPRISE LEVEL MOA LIBRARY.**

- a. A PM&BI issuance PA maintains surveillance of unclassified enterprise-level MOAs stored in the Agency's Support Agreement Library site.
- b. See issuance Resource Page for link to the site.
- c. Based on the anniversary month of the final signature date, a PM&BI issuance PA will identify existing enterprise-level MOAs requiring an annual review on a monthly basis and will initiate annual review procedures. A monthly status report will be generated and pushed to the division supervisor and the PM&BI Executive Director/Deputy Director.
- d. Upon completion of the enterprise-level MOA annual reviews, the PM&BI issuance PA will follow the procedures in paragraph 5.5.c. or 5.5.d.

#### **5.5. ENTERPRISE-LEVEL MOA ANNUAL REVIEW ACTIONS.**

a. Each month, the PM&BI issuance PA identifies those enterprise-level MOAs requiring an annual review and the enterprise-level AO responsible. See Resource Page, MOA Process Flow 2 for additional details.

b. The PM&BI issuance PA prepares an MOA review package and forwards to the cognizant, enterprise-level AO and creates a 30-day suspense for completion. The cognizant, enterprise-level AO will engage the specific external customer identified in the MOA to jointly determine the accuracy, currency, and/or necessity of the Agreement.

(1) Parties may make administrative and/or minor changes without securing formal signatures by the approving authorities. Document approval of administrative/minor changes through the use of email concurrence or by employing initialed pen-and-ink changes (on a hard copy document) and scanning/digitizing the revised and updated document.

(2) Significant revisions will require additional time. Both parties must coordinate a plan of action and new timeline to renegotiate the agreement, coordinate with organizational stakeholders, and obtain formal approving authority signatures. See Resource Page, MOA Process Flow 3 for the procedures on initiating a new MOA or significantly revising an existing MOA.

c. If the cognizant enterprise-level AO verifies with the external customer that the MOA is current and still required, notify the PM&BI issuance PA and provide documented changes of any minor administrative updates instituted during the annual review. The PM&BI issuance PA will mark the document as current, identify the most recent annual review date, and re-post the active, current enterprise-level MOA to the Agency's Support Agreement Library site.

d. If the cognizant enterprise-level AO verifies with the external customer that the MOA is no longer required or obsolete in its current form, notify the PM&BI issuance PA of this determination.

(1) The PM&BI issuance PA will coordinate with the PM&BI, Executive Director and in-turn the DCMA Director for situational awareness and concurrence. Jointly determine if the Agency should pursue a new/revised MOA or agree with rescinding per the customer recommendation.

(2) If rescinded or terminated, the PM&BI issuance PA will prepare a memorandum for the PM&BI Executive Director signature notifying the external customer and DCMA personnel of decision to rescind or terminate.

(3) The cognizant, enterprise-level AO will notify the external customer and provides a copy of the DCMA rescission/termination letter.

(4) The PM&BI issuance PA will mark the document as rescinded or terminated, identify the decision date, and move the marked-up document to the Archive folder in the approved record repository site. Retain IAW DCMA Record Retention Schedule, Section 400.03a.

(5) If the decision authority determines that the Agency should pursue new/revised MOA, refer to Resource Page, MOA Process Flow 3 for the procedures on initiating a new MOA or significantly revising an existing MOA.

## **5.6. INITIATING A NEW OR REVISED ENTERPRISE LEVEL MOA.**

a. A PM&BI issuance PA provides oversight of the development, coordination, publication, notification, and files maintenance processes of unclassified enterprise-level MOAs for contract management support.

b. Once the DCMA Director, PM&BI Executive Director or a DCMA Component Head (e.g., a sponsor) conveys a need for new (or revised) enterprise-level MOA and identifies the lead Agency stakeholder, the PM&BI issuance PA will provide administrative support and assist in initiating contact with a principal focal point in the customer organization.

c. The lead Agency stakeholder will engage a principal focal point in the customer's organization to:

- Refine requirement(s)
- Specify Agency support potential (in terms of knowledge, skills, resources, etc.)
- Seek agreement in the need for an MOA and for a timetable to set in place

d. If the external customer **does not** agree with the need for a MOA, the lead Agency stakeholder will convey that information to the PM&BI Executive Director and DCMA Director for situational awareness. Also convey that information to the PM&BI issuance PA, so that the MOA action item may be closed and the data may be shared with other Agency stakeholders.

e. If the external customer agrees with the need for an MOA, the lead Agency stakeholder negotiates Agency support with the external customer and provides the customer's requirements in a written document to an enterprise-level agreement AO (normally within PM&BI).

f. The enterprise-level AO forms an agreement development team comprised of SMEs from the headquarters staff and from field activities (as needed).

g. When the agreement development team creates a draft MOA, provide the draft to the PM&BI issuance PA who will initiate formal coordination following procedures specified in the DCMA Correspondence Procedures Manual. Consider socializing the document with the external customer to familiarize the terms and conditions prior to a more formal external staffing.

h. The PM&BI issuance PA compiles inputs/recommendations from Agency stakeholders and documents the internal Agency staffing process. Then, returns the draft, marked-up MOA document with all Agency stakeholder recommendations to the enterprise-level AO for consideration, adjudication, and for additional negotiation with the external customer (as needed).

i. The enterprise-level AO adjudicates and coordinates all comments/recommendations, then prepares and submits a Director's decision package following the guidance published by DCMA Correspondence Control. See the Correspondence Procedures Manual and Action Memo templates for additional guidance. Action Memo should prompt the Director for "Go-No Go" decision.

(1) If the DCMA Director determines that an MOA is not in the best interest of the Agency (based on input and perspectives of the Agency stakeholders), the PM&BI Executive Director or Agency's lead stakeholder will inform the external customer of the DCMA Director's decision.

(2) The PM&BI issuance PA documents the Director's determination in an MOA Archive file, informs Agency stakeholders by publishing an Informational Memo, and retains the documentation IAW DCMA Record Retention Schedule, Section 400.03a.

(3) If the DCMA Director determines that the team should continue to execute the MOA, the Agency's lead stakeholder will re-engage the external customer focal point (as needed) with a "revised draft" MOA document for staffing within the external customer's chain of command for an approving authority signature. Substantive changes will require additional DCMA Component Head coordination. Focus further coordination efforts on the functional or capability-based leadership team.

j. Once the Agency's lead stakeholder secures an external customer approving authority signature, return the signed document to the enterprise-level AO for internal DCMA staffing for signature.

(1) Follow the procedures specified in the DCMA Correspondence Management website for staffing a document for the DCMA Director's signature.

(2) Take action to ensure that the Office of General Counsel conducts a final review of the MOA document prior to sending the package into the DCMA Director's office for signature.

k. When the DCMA Director signs and executes the MOA, the enterprise-level AO will:

(1) Furnish a copy of the signed document to the lead Agency stakeholder who will in-turn, provide the document to the external customer focal point. Push the original, signed documents to the PM&BI issuance PA.

(2) Work with the PM&BI issuance PA to inform the Agency of this new/revised MOA by drafting and staffing for signature a PM&BI Executive Director memorandum advertising the new/revised agreement. Follow procedures specified in the DCMA Correspondence Management website.

(3) Ensure the PM&BI issuance PA uploads a signed copy of MOA to the Agency's Support Agreement Library site. Archive pertinent documentation and retain IAW the DCMA Records Retention Schedule.

### **5.7. OPERATIONAL-LEVEL MOA ACTIONS.**

a. Operational-level agreements typically focus on operational Center support or multi-CMO support provided to meet specific customer requirements that do not rise to the enterprise-level.

b. Operational-level AOs manage MOA development, coordination, publication, notification, and maintenance processes for their respective component heads.

(1) The Resource Page provides AOs with tools necessary to create new agreements such as template documents and links to guide administrative procedures for the coordination, staffing, executing, and archiving of agreement documents. See the DCMA Correspondence Management website for additional resources.

(2) Take action to ensure that the DCMA assigned legal counsel conducts a final review of the MOA document prior to sending the package to the Component Head for signature.

c. Upload a signed copy of the MOA to the Agency's Support Agreement Library site that may be accessed and referred to when conducting annual MOA reviews. Furnish final, signed copies to other parties involved in the MOA.

d. Operational-level AOs informs Agency stakeholders of any new or revised operational-level MOAs by drafting and staffing for signature a Component Head memorandum advertising the new/revised agreement. Follow procedures specified in the DCMA Correspondence Management website.

e. DCMA organizations and personnel who support the customer must take action to review and comply with terms of the agreement.

f. When an operational-level MOA is rescinded/terminated, the AO:

(1) Notifies applicable personnel that the MOA was rescinded/terminated.

(2) Coordinate with the Agency Support Agreement Manager and ensure the MOA is marked-up as rescinded/terminated (include date) and moved to the Agency's MOA archive site. Retain IAW DCMA Record Retention Schedule, Section 400.03a.

## **5.8. CMO-LEVEL MOA ACTIONS.**

a. CMOs must document support provided to DoD PMOs by employing comprehensive MOAs (a bilateral document) when:

(1) A program, project or system manager technical representative is resident at a contractor's facility for which DCMA has cognizance per the Federal Directory of Contract Administration Services Components and to comply with Defense Federal Acquisition Regulation Supplement (DFARS) Procedures, Guidance and Information 242.74.

(2) A PMO requests a CMO to perform duties beyond traditional Contract Administration Services (CAS) functions delineated in Federal Acquisition Regulation (FAR) 42.302 and/or DFARS 242.302. CMO Commanders/Directors must proceed with caution in this instance as such a request may prompt a formal workload acceptance decision to account for resources expended.

(3) A PMO requests an agreement to document specific work activities, to clarify communication processes or procedures and/or to better manage mutual expectations.

(4) A higher-level Agreement (e.g., DoD or DCMA enterprise-level) stipulates a need for a more localized Agreement.

b. Lead CMO Program Integrators (PIs), or PIs reporting to the Lead CMO (if applicable) will coordinate the development of overarching agreements with the PM, and the PI/Program Support Teams (PST), and Support PIs/Teams of the other CMOs.

c. CMOs will employ MOAs as bilateral or multilateral documents endorsed by the CMO Commanders/Directors, PM (if bilateral), and other stakeholders (if multilateral) identifying the goals of DCMA support, to document communication frequency and types, points of contact, and other value added information.

d. CMOs should tailor CMO-level Agreements to meet the needs of the buying activity. For continuity across the Agency, CMO-level Agreement should include:

- Customer goals and/or expectations.
- DCMA and PMO contact information.
- PMO required surveillance duties (key performance parameters, knowledge, skills assessments, etc.) if applicable.
- Any contract administration functions withheld by the PMO.
- Any discretionary contract administration functions delegated by the PMO.
- PMO supplied data elements required to conduct DCMA surveillance.

- Contract number(s).
- Commercial and Government entity (CAGE) code(s).
- PMO specified reports and frequency.
- Quality Assurance Letter of Instruction, where applicable.
- Any local supplier metrics, if applicable.
- Contracting officer's representative responsibilities.
- Visit request procedures.
- Compliance with DFARS 242.2 and 242.74 requirements.
- Procedures/funding associated with PMO-requested DCMA travel.
- PM (or designee) signature.
- CMO commander/director (or designee) signature.

e. CMOs may also employ unilateral LOCs when a program, project or system manager is unwilling to enter into a MOA, but agrees that DCMA support to the program is desired. CMO Commanders/Directors will endorse the LOC as the single signatory. Follow the below procedures for administration of the LOC, substituting LOC for a MOA.

f. When not mandated to execute an MOA by a higher level authority, CMOs may document communication frequency and types, support expectations, points of contacts, and other value added information in their program support plan (PSP).

g. Take action to ensure that the DCMA assigned legal counsel conducts a final review of the MOA document prior to sending the package to the CMO Commander/Director for signature.

h. CMOs (normally through their PIs) must load the final, signed, and executed MOA into the Program PST Collaboration site. When a CMO-level MOA is signed, the proponent alerts applicable CMO team members and members of the PST.

i. CMOs (through their PIs and PSTs) must conduct annual reviews of their MOA(s) and update or revise them (as needed) in coordination with the PMO. CMOs repost the updated MOA(s) in the Program PST Collaboration site.

j. When a CMO-level MOA is rescinded/terminated, the CMO Commander/Director (normally through their PI) must:

- (1) Notify all Agency stakeholders that the MOA was rescinded/terminated
- (2) Mark the electronic document as rescinded/terminated (include date) and retain the document IAW DCMA Record Retention Schedule, Section 400.03A.

## Glossary

**G.1. Definitions.** Unless otherwise noted, these terms and their definitions are for the purpose of this policy issuance.

**Action Officer (AO).** A DCMA professional who serves as the SME and primary focal point for performing a specific activity. An AO assignment may take place at multiple organizational levels (e.g., Agency, Component, CMO or Center).

**Component Head.** The leader of a DCMA organization who reports directly to the Director.

**Corrective Action.** Improvements to an organization's processes taken to eliminate causes of non-conformities or other undesirable situations. It focuses on the systematic investigation of the root causes of non-conformities in an attempt to prevent their recurrence. To ensure that corrective and preventive actions are effective, the systematic investigation of the root causes of failure is pivotal. If a survey rating is 3 or below (low ratings) on questions 1 to 4, or if there are negative comments the CSA informs the CMO Commander, notify the CLR and coordinate with the appropriate functional specialist to initiate resolution within 5 working days.

**Customer.** An individual or organization that receives or solicits an output from a supplier; may be an external customer of the Agency (e.g., the DoD other US federal executive departments and agencies, independent agencies (e.g., NASA); foreign governments or international organizations (e.g. NATO) or an internal customer (e.g., DCMA activities and/or an individual Agency employee).

**Customer Liaison Representative (CLR).** Located at major Military Services, other DoD buying activities, or Headquarters, National Aeronautics and Space Administration that are the proponents for multiple, high-dollar DoD weapon systems, sustainment logistics and support contracts.

**Customer Priority Workload Summary (CPWS).** Customer intelligence on PEO/PM issues/concerns, senior customer feedback on DCMA performance, high priority sustainment parts, and workload shifts with greater than \$50 million financial impact within 18 months. The CPWS report provided monthly (on the 1st work day of the month) for CMOs and regional staffs to prioritize their efforts and make better operational/resourcing decisions in support of their Workload and Resourcing Room discussions. In addition, geographic CMOs use the list of high priority sustainment parts identified in the CPWS to help prioritize their efforts and internal resources. This report is accessible through the URL provided at the Resource Page of this Manual.

**Customer Support Administrators (CSA).** Individuals appointed by the CMO to manage the Customer Satisfaction Survey applications. CSAs review, distribute, and close surveys; coordinate with customers, as needed; and document corrective action for negative surveys. CSAs also to coordinate the DV visit, prepare and post the DV read-ahead package, and report substantive customer issue(s) during the DV visit use the Agency Authorized CE tool.

**Customer Satisfaction Survey.** A powerful tool that offers both internal and external

customers the opportunity to comment on satisfaction and importance of DCMA processes, products, and services. It is one measure of the overall health of the Agency for reporting IAW GPRA to the Board of Directors and Office of the Secretary of Defense Performance Contract.

**DCMA Annual CE Tasking Memo.** This memo will provide guidance and general direction on key initiatives, themes, specific customer segments of focus, and other information necessary to create continuity of purpose that DCMA components will consistently use to develop, coordinate, and execute CE activities during planned engagements.

**DCMA Integrated CE Plan (ICEP).** A consolidation of all planned strategic CEs from DCMA components, this integrated plan enables vertical (by service/function) and horizontal (among CMOs) integration to promote joint, non-redundant, CE across the Agency.

**DCMA Standard DV Read-Ahead Package.** A “standardized Agency set of requirements” used in collecting and sharing information with our DVs. Step-by-step instructions on collecting data and how to build slides are available under the Tools/Template section of Resource Page.

**Distinguished Visitor (DV).** A DCMA DV designation is assigned to:

- Any 3-star general/flag officer or above;
- Any government official with rank equivalent to a 3-star general/flag officer or higher (Members of Congress, Tier-3 SES officials, etc.);
- Any SAE, PEO, the Director, OSD Office of Performance Assessments and Root Cause Analysis;
- Any foreign military officer/government official of equivalent rank/position to those listed above on an official visit (as defined by DoD Directive 5230.20, “Visit and Assignments of Foreign Nationals”);
- Any other individual designated by the Operational Unit (Region) or CMO commander/director; and,
- Any other DV Group or individual identified in the office of the Secretary of Defense, Director or Administration and Management Memorandum “Revised Department of Defense (DoD) Order of Precedence”.

**DV Pre-Visit Notification.** An encrypted e-mail notification sent to the “CustomerEngagementInbox” to apprise DCMA leadership of scheduled arrivals, departures and recommended personal involvement with DVs. The cognizant CMO commanders/directors or deputy (or their designated streamline commanders) provides a pre-visit notification of all DV visits 3 days prior to the visit.

**External Customer.** Buying activities that submit feedback regarding DCMA capabilities delivered or provided by the Agency (DoD, civilian agency, and contractor personnel).

**Foreign Distinguished Visitor (DV).**

- Foreign DV visits to DCMA activities are visits normally sponsored by the foreign embassy and coordinated /processed by DCMA Security Division.
- Foreign DV visits to cleared contractor facilities are visits that the foreign DV has prior approval to visit. In these cases, the foreign DV is normally sponsored by the program

office, contractor, or other DoD elements and may not directly involve DCMA; therefore, they are not required to notify DCMA Security Division.

- Refer to DV Formal Documentation User Guide on the Resource Page for processes and procedures about preparing and sharing information with Foreign DVs.

**Formal CE.** Interface with key customers to: (1) understand the contract administration requirements, acquisition environment challenges, opportunities, issues and concerns; and (2) share DCMA's strategic focus, priorities, initiatives, and issues in work. These are important events that facilitate the collection of valuable management information allowing DCMA to properly align agency services to the requirements of the defense acquisition enterprise in order to improve effectiveness, efficiencies, operational capability, and capacity.

**Informal Engagement.** Occurs daily as the Agency executes its core CAS functions and other missions. Daily CEs throughout the enterprise are documented in emails, contract files, meeting minutes, or other informal means.

**Internal Customer.** DCMA employees submit feedback regarding DCMA capabilities used to perform their duties or to generate products or deliver services to customers.

**Inverted Survey.** If the survey contains positive feedback but a rating of 3 or below (comments are inverted with ratings), the CSA seeks clarification with the customer and forward new ratings with proper supported emails to PA for correction.

**Long Range Customer Workload Projection (LRCWP).** Customer intelligence on workload shifts with significant financial impact (greater than \$100 million) and projected in the 18 to 36 month timeframe. The LRCWP is organized by Service and provided quarterly to operational component heads, sector division directorates, and operation customer management specialist.

**Low Rated Survey.** Surveys scored 3 or below for the overall customer satisfaction where the CSA did not respond/document the initiation of corrective actions within 5 working days.

**Operational Customer Support Administrator (OCSA).** Manage and coordinate the implementation of this Manual for the headquarters (for Component Heads), Operational Component Heads, and Operational Centers. Assist customer engagement administrators in validation of issues, and address policy issues/concerns to the policy PA to ensure timely processing and adherence to this Manual. Manage and coordinate the implementation of the customer satisfaction surveys by reviewing to ensure timely processing, routing, corrective action, and closeout.

**Operational Units.** DCMA organizational entity charged with ensuring mission accomplishment for their organization. For purposes of this manual only, Operational Units include: East, Central, and West Component Units, the International Directorate, and the Special Programs Directorate.

**Resource Page.** An OPR maintained web page containing policy issuance information relating to a particular issuance and hyperlinks to associated material such as policy history (superseded versions of the issuance), additional guidance, tools, process flows and key control table, charts, related correspondence/ memorandums, training, forms, templates, higher-level

statutory/regulatory documents, competencies/ certifications, performance metrics/standards, etc.

**Strategic Customers.** Customer at OSD level, military service senior acquisition executives, program executive officers, commanders of buying activities and industry leaders.

**Subject Matter Expert (SME).** A person with expert knowledge and deep understanding of a particular process and function and who is an authority in a particular area or topic. SMEs are responsible for defining the business processes, policies, and the application requirements within a function.

**GLOSSARY****G.2. ACRONYMS.**

|       |   |
|-------|---|
| AO    | action officer                                    |
| BIC   | Business Integration Center                       |
| CAS   | contract administration services                  |
| CE    | customer engagement                               |
| CEG   | Customer Engagement Group                         |
| CES   | customer engagement specialist                    |
| CIG   | Corporate Integration Group                       |
| CLR   | customer liaison representatives                  |
| CMO   | contract management office                        |
| COES  | Customer Outreach Effectiveness Scorecard         |
| COP   | Customer Outreach Plan                            |
| CPWS  | Customer Priority Workload Summary                |
| CS    | Customer Satisfaction                             |
| CSA   | customer support administrator                    |
| DFARS | Defense Federal Acquisition Regulation Supplement |
| DV    | Distinguished Visitor                             |
| GPRA  | Government Performance and Results Act            |
| IAG   | Industrial Analysis Group                         |
| IAW   | in accordance with                                |
| ICEP  | Integrated CE Plan                                |
| ICS   | Internal Communication Strategy                   |
| LOC   | letter of commitment                              |
| LRCWP | Long Range Customer Workload Projection           |
| MOA   | memoranda of agreement                            |
| OCSA  | operational customer support administrator        |
| OPR   | office of primary responsibility                  |
| OSD   | Office of the Secretary of Defense                |
| OU    | Operational Unit                                  |
| PA    | performance advocate                              |
| PEO   | program executive officer                         |
| PI    | program integrator                                |
| PM    | program manager                                   |
| PMO   | program management office                         |
| PM&BI | Portfolio Management and Business Integration     |

|     |                                     |
|-----|-------------------------------------|
| PSP | program support plan                |
| PST | program support team                |
| SAE | senior acquisition executive        |
| SAP | Special Access Programs             |
| SCI | Sensitive Compartmented Information |
| SES | senior executive service            |
| SME | subject matter expert               |
| TOE | training, outreach, and education   |

## **References**

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