

Beyond Phase II/ Mentor Protégé Program Training Week



Shelly Thomas

**Assistant Director
DCMA Mentor Protégé Division**

DoD Mentor Protégé Semi-Annual Report (SAR)

Report Completion Instructions

- DFARS Appendix I-112.2
- Mentors must report on the progress made under active mentor-protégé agreements semiannually for the periods ending March 31st and September 30th throughout the program participation term of the agreement.
- Reports are due 30 days after the close of each reporting period.
- Reports are required for all agreements that were **ACTIVE** during the six month reporting period; even if there was not any fiscal or developmental activity.



Section A – General Information

Section A - General Information	
Agreement Number/Task Order/Delivery Order	<input type="text"/> (Reimbursable Only)
Type of Agreement:	<input type="checkbox"/> Reimbursable <input type="checkbox"/> Credit
Period of Performance (Official Dates IAW Contract/Modifications or DCMA Credit Mentor-Protégé Agreement (MPA) Approval Letter)	Months of Performance End of Current Report
Start Date:	<input type="text"/>
End Date:	<input type="text"/>
Mentor Firm	Mentor Firm POC
Name:	Name:
Street Address1:	Title:
Street Address2:	Phone:
City:	Fax:
State:	Email:
ZIP:	
CAGE:	
DUNS:	
Protégé Firm	Protégé Firm POC
Name:	Name:
Street Address1:	Title:
Street Address2:	Phone:
City:	Fax:
State:	Email:
ZIP:	
CAGE:	
DUNS:	
Defense Agency Sponsor	Defense Procurement Contracting Officer (PCO) (if Reimbursable)
<input type="checkbox"/> Air Force	DCMA Mentor-Protégé Division Chief POC (if Credit)
<input type="checkbox"/> Army	Name:
<input type="checkbox"/> Navy	Street Address1:
<input type="checkbox"/> DCMA	Street Address2:
<input type="checkbox"/> DIA	City:
<input type="checkbox"/> DLA	State:
<input type="checkbox"/> MDA	Phone:
<input type="checkbox"/> NGA	Fax:
<input type="checkbox"/> NSA	Email:
<input type="checkbox"/> Other (specify)	DoDAAC:

Protégé must complete all fields, to include Cage, DUNS and POC information

Mentor must complete all fields, to include Cage, DUNS and POC information

This should be the Sponsoring agency POC/DCMA POC



Section C – Expenditures to HBCU, MI, PTAC or SBDC

Include full descriptions of the type of training and services provided. Include name & type of Institution.

Section C - Expenditures to HBCU, MI, PTAC or SBDC (During Period of This Report)							
(This section applies to BOTH reimbursable and credit agreements)							
Date	Amount	Cumulative Amount	Name of Institution				Detailed Description of Service or Training
			Type of Institution (mark one)				
			HBCU	MI	PTAC	SBDC	
07/15/2015	\$25,000	\$25,000	George Mason University (GMU)				Classroom CMMI Training
			x				
08/15/2015	\$25,000	\$50,000	George Mason University (GMU)				On-Site SCAMPI B Training
			x				
Total	\$0	\$0.00					



Section D – Labor, ODC & Other Incidental Costs to Mentor

Section D - Labor, ODC, & Other Incidental Costs to Mentor
 (This section applies to BOTH reimbursable and credit agreements)

Date	Amount	Cumulative Amount	Cost Type (mark one)			Detailed Description
			Labor	ODC	Incidental Costs	
05/15/2015	\$25,000	\$25,000	X			Program Management
06/15/2015	\$2,500	\$27,500		X		Mentor Travel to PMR
06/15/2015	\$2,750	\$30,250			X	Protégé Travel, Conference Fees
Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

Costs should be in accordance with approved Gantt Chart & Budget, and fall within FAR 31 Standards (Reasonable, Allowable & Allocable). ODC's should be defined, labor costs should be broken down into monthly increments.



Section E – Subcontracting Credit to be taken by Mentor

Section E - SB, SDB, SDVOSB, VOSB, WOSB or HUBZone Subcontracting Credit To Be Taken By Mentor (This section applies ONLY to credit agreements)			
<p style="color: red;">Mentors: Section E TOTAL CREDIT TO BE CLAIMED amounts (below) should be added to the eSRS Summary Subcontract Report (SSR) "REMARKS" Section providing the HBCU/MI/PTAC/SBDC, Labor, ODC and other Incidental Credits.</p>			
4X	3X	2X	1X
HBCU, MI, PTAC or SBDC Credits	Labor Credit	ODC Credit	Other Incidental Cost Credit
\$0.00	\$0.00	\$0.00	\$0.00
TOTAL CREDIT TO BE CLAIMED			
\$0.00			

- Section E is for Credit Agreements ONLY
- Multipliers are applied in accordance with dollar figures listed in Section C & D, multiplier amounts are listed above
- The amounts in this section should be added to the Mentor's Small Business dollar figures on the SSR in eSRS
- Credit dollars are applied to all applicable SB Categories associated with the Protégé



Section F – Developmental Assistance Provided / Milestones Achieved

Ensure that approved start/end dates are used and in accordance with the approved Gantt/Milestone chart for the agreement.

At a minimum,

Section F - Developmental Assistance Provided / Milestones Achieved

(This section applies to BOTH reimbursable and credit agreements)

changes of start dates, end dates, and negative variances must be briefly explained in the next section

	Developmental Tasks ¹	Approved, Planned or Actual Start Date	Approved, Planned End Date	Actual End Date	Estimate of Actual % Complete as of End of Report Period ²	Variance ²
1	ITIL v3: Achieving Foundation Certification	1/2/12	2/29/12	2/29/12	100%	-1
2	CISCO Certified Network Associate (CCNA)	9/15/11	1/8/12	1/8/12	100%	
3	Avaya Certified Implementation Specialist (ACIS)	9/15/11	8/3/12	8/3/12	100%	
4	ITIL v3: Service Manager Certification	6/18/12	9/10/12	9/10/12	100%	
5	2011 Mentor Protégé Workshop	11/4/11	11/4/11	11/4/11	100%	
6	2012 Growth Conference	2/6/12	2/8/12	2/8/12	100%	
7	2012 DoD Mentor Protégé Conference	3/5/12	3/8/12	3/8/12	100%	
8	Pipeline Tool	9/15/11	3/23/12	3/23/12	100%	
9	Secret Facility Clearance	2/29/12	2/29/12	2/29/12	100%	-1
10	CISCO Certified Design Associate (CCDA)	1/2/12	5/27/12	5/27/12	100%	
11	Strategic Consulting & Business Transformation Services	6/25/12	9/10/12	9/10/12	100%	
12	Capture & Proposal Management	8/1/12	8/31/12	8/31/12	100%	
13	Pricing & Training	8/2/12	9/1/12	8/2/12	100%	29
14	CVOICE	5/7/12	10/1/12	8/30/12	100%	31
15	CISCO IP Part I v8.0	5/7/12	10/1/12	9/11/12	100%	20
16	BPF Tool	6/2/12	6/2/12	6/2/12	100%	
17	2012 NAVY Blue Coast Matchmaking Conference	6/11/12	6/12/12	6/12/12	100%	

Negative variances (in red) will require a Corrective Action Plan, addressing why the Milestone was missed or behind scheduled. Unless a CR has already been approved.

Section G – Developmental Task Budget



ed column should match the
 ement cost (for the entire
 e agreement) whether for 1,
 s. Costs for each task (and
 should correlate to the
 nical/cost proposal.

Section G - Developmental Task Budget						
(This section applies to BOTH reimbursable and credit agreements)						
Developmental Tasks	Base			As of End of This Report Period		
	Total \$ Budgeted for Task	Planned \$ Expended as of End of This Report Period	Actual \$ Incurred as of End of Report Period	% of Planned \$ Incurred as of End of This Report Period	\$ Variance	Cost Overrun or Surplus
1	ITIL v3: Achieving Foundation Certification	\$4,944	\$4,944	\$4,944		
2	CISCO Certified Network Associate (CCNA)	\$10,320	\$10,320	\$10,320		
3	Avaya Certified Implementation Specialist (\$6,135	\$6,135	\$6,135		
4	ITIL v3: Service Manager Certification	\$22,249	\$22,249	\$22,249		
5	2011 Mentor Protégé Workshop	\$0	\$0	\$0		
6	2012 Growth Conference	\$0	\$0	\$0		
7	2012 DoD Mentor Protégé Conference	\$1,425	\$1,425	\$1,425		
8	Pipeline Tool	\$0	\$0	\$0		
9	Secret Facility Clearance	\$0	\$0	\$0		
10	CISCO Certified Design Associate (CCDA)	\$1,118	\$1,118	\$1,118		
11	Strategic Consulting & Business Transform	\$45,060	\$45,060	\$45,060		
12	Capture & Proposal Management	\$30,060	\$30,060	\$30,060		
13	Pricing & Training	\$12,060	\$12,060	\$12,060		
14	CVOICE	\$2,322	\$2,322	\$2,322		
15	CISCO IP Part I v8.0	\$2,322	\$2,322	\$2,322		

All data in section G is cumulative from the start of the agreement, and applies to both reimbursable and credit agreements. List ALL approved tasks on Gantt/Milestone Chart.



Section H – Other Developmental Assistance Provided

An explanation may be entered for each developmental task which has a positive (overrun) variance dollar figure in the previous section.

DCMA and the Sponsoring Agency must be provided copies of all training certificates upon completion.

Section H - Other Developmental Assistance Provided (This section applies to BOTH reimbursable and credit agreements)	
Date	Capabilities Enhanced (e.g., database developer can now do web development as result of Mentor training)
11/4/2011	2011 NGA Mentor Protégé Workshop: See attachment 1
2/6/12-2/8/12	2012 Growth Conference: See attachment 1
3/5/12-3/8/12	2012 DoD Mentor Protégé Conference: See attachment 1
6/11/12 - 6/12/12	2012 Navy Blue Coast Matchmaking Conference: See attachment 1
8/28/2012	AFCEA 5th Annual Warfighter IT Industry Day: See attachment 1
Date	Certifications Received (e.g., ISO 9001:2000, MCSE, etc.) - Please send certificate copy(ies) to DCMA Program Manager)
1/2/12-2/29/12	ITIL v3: Achieving Foundation Certification: See attachment 1
1/4/12-1/8/12	Cisco Certified Network Associate (CCNA): See attachment 1
6/18/12-9/10/12	ITIL v3: Service Manager Certification: See attachment 1
7/30/12-8/3/12	Avaya Certified Implementation Specialist (ACIS): See attachment 1
05/24/12 - 05/27/12	Cisco Certified Design Associate (CCDA): See attachment 1
Date	Technology Transferred (Please provide detailed description associated with milestone(s))
2/29/2012	Secret Facility Clearance: See attachment 1



Section I – Protégé Revenue, Employees, Prime Contracts & Subcontracts

Section I - Protégé's Revenue, Employees, Prime Contracts & Subcontracts

Please note three rows of data; first row maintains baseline, second rows capture 6-months data in dollars and numbers categories. Third rows of data capture CUMULATIVE numbers and dollars from the start of the Mentor-Protégé Agreement.

Note: For the purposes of this Section, report only "obligated/funded" awards (prime and sub-contract) where dollars have been obligated with a line of accounting. **DO NOT REPORT** the IDIQ "estimated/potential value" type awards. Report only the TO/DO "funded/obligated" awards actually issued against the IDIQs. Do not report Charge Card orders or modifications that are not part of the contract award, unless they increase the value of the original award and are approved by the cognizant Contracting Officer. **DO NOT REPORT** awards that were finalized prior to the MPA, but awarded after the MPA, regardless whether the effort/work included both mentor and protégé participation. Contracts may be included if they are follow-on, add-on, new TO awards, or recompetes that were booked post MPA and/or are directly related to Mentor-Protégé developmental assistance efforts. "Informal" coordination between the mentors and protégés that results in award, but occurs prior to MPA contract award, will not be counted.

Six Month reporting period is either
1 October – 31 March
OR
1 April – 30 September

Must provide revenue for the reporting period for the SAR. Revenue is the protégé's revenue during six months.

Protégé's Revenue, Employees & Proposals					DoD Prime Contracts		DoD Subcontracts
Protégé's Gross Revenue During This Report Period (Dollars)	Protégé's Employees at End of This Report Period (Number)	Proposals Submitted to DoD by Protégé During Report Period (Number)	Proposals Submitted to Other Fed Agencies (Excluding DoD) by Protégé During Report Period (Number)		DoD Prime Contract Awards to Protégé (Number)	DoD Prime Contract Awards to Protégé (Dollars)	DoD Subcontracts From Mentor to Protégé (Number)
				<--Start of Agreement (As Reported on Original Agreement Form)-->			
				<--During Six-Month Period of This Report Only-->			
				Cumulative Awarded From Start of Agreement Through End of Report Period-->			

Report only "obligated/funded" awards (prime and sub-contract) where dollars have been obligated with a line of accounting. Do NOT report estimated or potential future awards.

Number of employees on LAST

Section I – Protégé Revenue, Employees, Prime Contracts & Subcontracts



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

*NOTE – Some award categories are FROM Protégé and some are awards TO Protégé

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

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

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



Section I – Protégé Revenue, Employees, Prime Contracts & Subcontracts

*NOTE – These award categories are awards TO Protégé, from ANY applicable source.

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

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

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

Cumulative: Awards that the Protégé has received since the START of the MP Agreement through the



Section I – Protégé Revenue, Employees, Prime Contracts & Subcontracts

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

*NOTE – These award categories are awards TO Mentor, FROM Protégé and awards FROM Protégé.

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

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

Cumulative: Awards that the Protégé has GIVEN since the START of the MP Agreement through the end of this Six-Month reporting period



Section J – DoD Subcontract Awards by Mentor

This section is to be completed by the Mentor for all summary subcontracting reporting

Section J - DoD Subcontract Awards by Mentor

The dollar amounts of subcontracting done by the mentor (under DoD contracts only) should be entered in the appropriate section(s) below via Electronic Subcontracting Reporting System (eSRS) Summary Subcontract Report (SSR) (former SF 295), or Subcontracting Report for Individual Contracts (ISR) (former SF294) to DoD (or to any DoD components) and any of those reports pertained to the same semiannual period covered by this report. Please indicate below whether the mentor did or did not submit any eSRS summary report(s) of DoD subcontracting for this semiannual report period. (Reference: FAR 52.219-9)

- NO, the mentor did not submit any eSRS report (SSR) of DoD subcontracting during the semiannual period covered by this report. (If no, you may proceed directly to the certification section of this report.)
- YES, the mentor did submit either an eSRS report of DoD subcontracting during the semi-annual period covered by this report. If yes, indicate the reporting period covered by the SSR or ISR below and then enter the appropriate subcontracting dollar figures in the appropriate section(s) on the next page.
- 1 Oct - 31 Mar (6 months - first half of government fiscal year)
- 1 Oct - 30 Sep (12 months - full government fiscal year)

The dollar figures shown on the eSRS SSR 6-month report (the report submitted in April) should be entered in section "A" below as shown on the SSR (former SF 295), if applicable. (See notes 1 & 2 below.)

The dollar figures shown on the SSR (former SF 295)/eSRS 12-month report (the report submitted in October) for the same fiscal year should be entered in section "B" below as shown on the eSRS SSR, if applicable. (See notes 1 & 2 below.)

When determining the DoD subcontracting dollar figures to enter below, please note that the eSRS SSR (former SF 295) reports submitted in April report the dollar figures for a 6-month period -- the first 6 months of the government fiscal year. However, the SSR reports submitted in October cover a 12-month period -- the entire government fiscal year -- and the 12-month report includes the dollars previously submitted on the 6-month report for the same fiscal year. Therefore, steps must be taken to avoid "double counting" the dollars reported on the 6-month SSR (Oct thru Mar -- first half of the government fiscal year) when calculating the SB category(ies) credit dollars for the second half of the fiscal year. When the 6-month and 12-month dollar figures (for the same fiscal year only) are entered in sections "A" and "B" below as described above, this form will automatically calculate the dollars figures in section "C" for the second half of the government fiscal year on which the SDB credit dollars for that period should be based.



Section J – DoD Subcontract Awards by Mentor

Part 1 - DoD Subcontracting Dollars for October - March (6 months)

(These dollar figures should be entered as shown on the eSRS SSR (former SF 295) report submitted in April)

Subcontracting to ALL Firms	
Total Dollar Value of all DoD Subcontracts Awarded by the Mentor to all firms (includes both large and small businesses, including Protégé, if applicable) as reported on the eSRS SSR (former SF 295) indicated above.	\$0

Subcontracting to SDB Firms Only	
Total Dollar Value of all DoD Subcontracts Awarded by the Mentor to SDB Firms (Including Protégé, if applicable) as reported on the eSRS SSR (former SF 295) indicated above.	\$0

Part 2 - DoD Subcontracting Dollars for October - September (12 months)

(These dollar figures should be entered as shown on the eSRS SSR (in lieu of SF 295) report submitted in October)

Subcontracting to ALL Firms	
Total Dollar Value of all DoD Subcontracts Awarded by the Mentor to all Firms (includes both large and small businesses, including Protégé, if applicable) as reported on the or eSRS SSR Report (former SF 295) indicated	\$0

Subcontracting to SDB Firms Only	
Total Dollar Value of all DoD Subcontracts Awarded by the Mentor to SDB Firms (Including Protégé, if applicable) as reported on the eSRS SSR (former SF 295) indicated above.	\$0

Part 3 - DoD Subcontracting Dollars for April - September (6 months)

(These dollar figures are calculated by subtracting the 6-month figures in section "A" above from the 12-month figures in section "B" above)

Subcontracting to ALL Firms	
Total Dollar Value of All DoD Subcontracts Awarded by the Mentor to all Firms (includes both large and small businesses, including Protégé, if applicable)	\$0

Subcontracting to SDB Firms Only	
Total Dollar Value of all DoD Subcontracts Awarded by the Mentor to SDB Firms (Including Protégé, if applicable)	\$0

Part 4 - SB/SDB Credit Taken (credit agreements ONLY)

Please indicate whether or not the SB category(ies) credit calculated in Section E of this report was claimed/included by the Mentor on the SSR (former SF 295) or eSRS Summary Report covering the same period as this report:

Yes

No

If no, please explain:

Data will section 9 of Summary Re

Part 4 is for Agreement and for Men claimed SB c eSRS



Section K – Termination of Agreement

Section K - Termination of Agreement	
Termination Requested By:	<input type="checkbox"/> Mentor <input type="checkbox"/> Protégé
Reason for Termination:	<input type="text"/>
If other, explain:	<input type="text"/>
Effective Date of Termination:	<input type="text"/>
Funds Deobligation Date:	<input type="text"/>
Funds Remaining:	<input type="text"/>

This section to be completed, by requestor, when a MP Agreement is terminated. Additional pages may be attached if necessary.



Section L - Certification

Section L - Certification		
By my signature below, I certify that the representations above are true and correct to the best of my knowledge.		
Date	Signature of Mentor	Title
By my signature below, I certify that I have reviewed and concur with the representations above and certify that they are true and correct to the best of my knowledge.		
Date	Signature of Protégé	Title

This section may be signed digitally OR on paper signed and dated, by both the Mentor & Protégé.



Section M – Distribution of Form

Section M - Distribution of Form	
Reimbursable Agreements:	<ol style="list-style-type: none"> 1. Cognizant Component Director of Small Business Programs 2. Contracting Officer 3. DCMA Mentor-Protege Division Chief 4. DCMA Program Manager 5. Cognizant Program Manager 6. OSD Director of Small Business Programs (Soft copy preferred, email to: programinformationmp@osd.mil)
Credit Agreements:	<ol style="list-style-type: none"> 1. Cognizant Component Director of Small Business Programs 2. DCMA Mentor-Protege Division Chief 3. DCMA Program Manager 4. OSD Director of Small Business Programs (Soft copy preferred, email to: programinformationmp@osd.mil)
<p>If clarification or assistance is needed in preparing this report, please contact your requisite DCMA MPP Program Manager, then your cognizant component MPP Program Manager, or the DoD Office of Small Business Programs, Mentor-Protégé Program Assistance, at 571-372-6312 or send email: osd.pentagon.ousd-atl.mbx.dod-mentor-protege-program@mail.mil</p>	

Dodmpp@osd



DCMA Point of Contact

Gerard "Eric" Hill (deployed) (NGA) –
Lisa Hostetler (MDA) - (857) 268-4559
William Hursey (NGA, DIA) – (214) 599-2441
Angela Dokes (Army) – (214) 599-2443
Kendra Kinnie (Army) – (214) 599-2444
Marilyn Messina (Navy, AF, NSA) – (224) 625-0080
Shelly Thomas (Team Lead) (214) 599-2445
Katelyn Nelson (Team Lead) (224-625-8283

Questions?