PROCUREMENT SCORECARD
Update Chief Acquisition Officers'
Council
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Contracting
U.S. Small Business Administration

Statutory Requirements

- SBA is required to collect and report the extent of small business participation in Federal contracting.

- Agencies are required to report to the President actions planned to meet goals that were not met in the previous year.

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Small Business Procurement Scorecard

- Will eliminate duplicate reporting required under the President's Executive Order for such areas as contracting with service-disabled veteran-owned small business.

- Will mirror the President's Management Agenda scorecard.
    - SBA will manage the scoring rather than the Office of Management and Budget (OMB).
    - Status elements will be scored annually.
    - Progress elements will be scored semi-annually.

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Small Business Procurement Scorecard, continued...

- Is a collaborative effort between SBA and the acquisition community.
- FY 2007 will be the initial usage of the scorecard, based on FY 2006 data.
- Based on lessons-learned, we can fine-tune subsequent iterations.

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Benefits

- The scorecard will allow agencies to participate in scoring.
- Agencies will be able to determine their own progress targets and milestones.
- Agencies will receive credit for improvement, as well as for initiatives to increase small business procurement opportunities.

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Information to be Used

- Goaling data will be obtained from FPDS-NG.
- Progress data will be captured through periodic reporting, such as "Proud to Be" documents under the President's Management Agenda.

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Progress Element

- SBA will:
  - Issue a standard "Proud to Be" template for use by agencies.
  - Issue guidance on how progress will be measured.
  - Request that agencies complete and submit documents with targets and milestones.
  - Score submissions based on guidance provided.
  - Credit agencies for innovation and incremental progress.

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Challenges

- First "real" iteration of the scorecard will run somewhat slower than anticipated, as a result of FY 2005 data issues.
  - FY 2005 Goaling Report will probably have to be re-issued.
  - FY 2006 Goaling Report cannot be issued until FY 2005 data has been corrected and verified.
  - First "Real" Small Business Procurement Scorecard cannot be issued until FY 2006 Goaling Report is complete.

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Standards for Success, Green

1. Meet:
   - The small business goal, and,
   - Meet at least three of the other socio-economic goals (SDB, 8(a), HUBZone, Women-Owned and Service-Disabled Veteran-Owned)
2. Show improvement over the previous year in the remaining two categories.
3. Meet all Yellow Standards for Success

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Standards for Success, Yellow

1. Meet the small business goal, and at least two of the other socioeconomic goals, and show improvement in at least one of the remaining goals.

   OR

   Meet four socioeconomic goals.
2. Have implemented a strategy to increase the number of competitively awarded contracts to small businesses.

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Standards for Success, Yellow, continued...

3. Have demonstrated agency commitment to small business contracting at the Secretary, Administrator, or Director level.

4. Have a comprehensive small business program that includes written policies and procedures focused on improving the competitive environment and increasing small business participation in the procurement process.

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Standards for Success, Yellow, continued...

5. Have small business goal achievement as a rating element for acquisition personnel.

6. Work cooperatively with SBA on outreach and targeting initiatives.

7. Meet deadlines for all required strategic plans and annual reports due to SBA.

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Standards for Success, Yellow, continued...

8. Have a process to ensure that small business data is accurately reported in FPDS-NG.

9. Enforce small business subcontracting plans.

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Standards for Success, Red

- Fail to meet all of the Yellow Standards for Success.

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Moving Forward

- SBA to provide detailed guidance integrating scorecard progress elements into mid-year and end-of-year review processes in "Proud to Be" format. (February 2007)
- Agencies must report on progress elements at mid-year, and at end of year (April – May, and October – November, 2007, respectively)

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Sources of Information

- SBA Goaling Program Site
  - http://www.sba.gov/GC/goals/

- Goaling Guidelines
  - http://www.sba.gov/GC/goals/ggtotal71503.pdf

- Goaling FAQ
  - http://www.sba.gov/GC/goals/indexfaqs.html

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