

**ANNUAL STRATEGY PLAN
FOR
SERVICE-DISABLED VETERAN-OWNED SMALL
BUSINESSES**

Description of Department or Agency Implementation Efforts

Date: January 28, 2005

Department or Agency: Department of the Treasury

**Department or Agency Contacts: Jesus Delgado-Jenkins
Acting Assistant Secretary for Management
Voice - (202) 622-0410
Fax - (202) 622-6464
Jesus.Delgado-Jenkins@do.treas.gov**

Signature

**Virginia Bellamy-Graham
Director, Office of Small Business Development
Voice - (202) 622-2826
Fax - (202) 622-4963
VA.Bellamy-Graham@do.treas.gov**

Signature

**DEPARTMENT OF THE TREASURY
STRATEGY PLAN FOR
SERVICE-DISABLED VETERAN-OWNED
SMALL BUSINESSES**

STRATEGY PLAN - FISCAL YEAR (FY) 2005

STRATEGY PLAN: (i) Reserving agency contracts exclusively for service-disabled veteran businesses

	Activities	Milestones	Notes
Annual Strategy Plan FY 2005	<ul style="list-style-type: none"> <li data-bbox="380 597 1031 865">• Outreach—During Fiscal Year 2005, Treasury will conduct 12 small business Vendor Outreach Sessions (VOS), as well as participate in other outreach events nationwide for small businesses, to include Service-Disabled Veteran-Owned Small Business (SDVOSB), promoting networking which encourages potential teaming and joint ventures to help increase federal contracts and subcontract opportunities for Service-Disabled Veteran-Owned Small Businesses (SDVOSB). <li data-bbox="380 932 1031 1325">• Coordination – The Office of Small Business Development (OSBD) is continuing to coordinate with the Small Business Specialists (SBS) and Bureau Chief Procurement Officers (BCPOs), methods to increase small business participation in the federal procurement process, to include the (SDVOSB) community, as directed by the President Executive Order 13360. Additionally, The Bureau of Public Debt has placed a notification in the FedBizOPPs dated January 14, 2005, informing the public of their intent to target the small business community in future FedSource procurements. Also, they awarded the first SDVOSB sole source contract this fiscal year. 	<p data-bbox="1073 597 1350 651">Ongoing effort for Fiscal Year 2005</p> <p data-bbox="1073 932 1350 985">Ongoing effort for Fiscal Year 2005</p>	<p data-bbox="1375 597 1919 711">Treasury’s Office of Small Business Development (OSBD) activities are performed in support of government-wide small business policy and the OSBD mission.</p> <p data-bbox="1375 932 1944 1018">The OSBD has met with several of the SBS and BCPO and have appointments scheduled to complete the rest before the end of February 2005.</p>

	<ul style="list-style-type: none"> • Review/Monitor SDVOSB compliance in each bureau, by comparing the small business accomplishments to the negotiated SDVOSB goals with the U.S. Small Business Administration (SBA). • Webpage will be developed to discuss SDVOSB issues and compliance for both internal and external use 	<p>Is addressed during monthly meetings with Small Business Specialists</p> <p>Targeted for 2nd Quarter 2005</p>	<p>OSBD will assist SBS in addressing priority of compliance</p> <p>Needed to be in compliance with issuance of new Government-wide guidance in accordance with the President's Executive Order 13360</p>
--	--	---	---

STRATEGY PLAN: (ii) Encouraging and facilitating participation by service-disabled veteran businesses in competitions for awards of agency contacts

Annual Report	Key Milestones	Status	Comments
Annual Strategy Plan FY 2005	<ul style="list-style-type: none"> • VOS – On November 12, 2004, the OSBD held a specific session for Veteran-Owned and Service-Disabled Veteran-Owned Small Businesses. This session allowed the veteran-owned small businesses to have one-on-one visitations with at least 5 of our SBS in 15 minutes intervals, to share their abilities and capabilities to meet the agency’s needs, and to increase their procurement opportunities. It also provided an opportunity for small businesses to network and to consider Teaming and Joint Venturing. • Mentor-Protégé • FedBizOpps 	<p>Ongoing effort in Fiscal Year 2005</p> <p>Ongoing assistance to Small Businesses</p> <p>Ongoing assistance to Small Businesses</p>	<p>The OSBD has designated a senior Business Analyst to lead our efforts in (SDVOSB) compliance and subcontracting monitoring. She will also plan and lead a comprehensive SDVOSB and subcontracting compliance workshop at our annual small business training session in June 2005.</p> <p>Large and Small businesses are encouraged to participate in Treasury’s Mentor-Protégé Program, to provide developmental assistance in technical, managerial, financial, and other mutually beneficial assistance to aid protégés. To enhance the capabilities and abilities of the protégés to compete and obtain federal contracts as prime contractors.</p> <p>During the monthly VOS small businesses are constantly encouraged to take advantage of the opportunities posted in the FedBizOpps for federal procurement opportunities. Also, small businesses are encouraged to visit Treasury’s website Marketing Publications for procurement opportunities. The website has a link to FedBizOpps.</p>

STRATEGY PLAN: (iii) Encourage agency contractors to subcontract with service-disabled veteran businesses and actively monitoring and evaluating agency contractors' efforts to do so

Annual Report	Key Milestones	Status	Comments
Annual Strategy Plan FY 2005	<ul style="list-style-type: none"> • On November 5, 2004, veteran-owned small businesses were afforded the opportunity to meet with large prime contractors on a one-on-one basis, during our Prime VOS. This allowed the small businesses to market for subcontracting opportunities with the large primes. • Treasury's Small Business Program Handbook chapters address SDVOSB Strategy, and subcontracting opportunities, and provide guidance to assist small businesses to the maximum practicable extent possible to achieve federal procurement opportunities. • Treasury's SBS informs the large prime contractor during the award stage of federal procurements, of the importance of meeting the subcontracting compliance. The SBS Review/Monitor subcontracting procurements for compliance. The SBS also will review data input by prime contractors in the newly developed eSRS subcontracting database. 	<p>May 20, 2005 is the next Prime VOS</p> <p>Ongoing Policy</p> <p>Ongoing effort for Fiscal Year 2005, and addressed during monthly VOS</p>	<p>Will continue implementation</p> <p>The OSBD reviews SDVOSB and subcontracting strategies regarding any proposed SDVOSB activities with the bureaus quarterly.</p> <p>The OSBD monitors the bureaus on a quarterly basis to ensure compliance</p>

STRATEGY PLAN: (iv) Training agency personnel on applicable law and policies relating to participation of service-disabled veteran businesses in Federal contracting;

Annual Report	Key Milestones	Status	Comments
Annual Strategy Plan FY 2005	<ul style="list-style-type: none"> <li data-bbox="388 440 520 467">• Training <li data-bbox="388 688 615 716">• Off-site Training <li data-bbox="388 932 1024 1081">• Treasury’s Small Business Program Handbook chapter addresses SDVOSB Strategy, and assisting small businesses on having the maximum practicable opportunities to participate as prime and subcontractors. 	<p data-bbox="1056 440 1283 496">Monthly Training is held during the VOS</p> <p data-bbox="1056 683 1234 711">Ongoing efforts</p> <p data-bbox="1056 927 1224 954">Ongoing effort</p>	<p data-bbox="1344 440 1906 618">Training is provided to the SBS, Business Analysts, and other treasury staff during the VOS on various topics, which includes the OSBD ongoing training related to Treasury’s Small Business Program Handbook chapter addressing SDVOS, and the agency’s mission.</p> <p data-bbox="1344 683 1881 894">The employees are encouraged to sign-up and attend off-site training classes on small business development and small business program goals. These classes are listed in their Individual Development Plans. Also, the SBA take advantaged of free classes offered by other public and private sector clients</p> <p data-bbox="1344 927 1902 1073">The Director of OSD will continue to update Treasury’s Small Business Program handbook on requisition review, Subcontracting, Mentor-Protégé Program, Bundling, SDVOSB and other small business programs.</p>

STRATEGY PLAN: (v) Disseminating information to service-disabled veteran businesses that would assist these businesses in participating in awards of agency contracts.

Annual Report	Key Milestones	Status	Comments
Annual Strategy Plan FY 2005	<ul style="list-style-type: none"> • Information Dissemination • Small Business Marketing Publications • Registration Data-base for contractor to register for Vendor Outreach Sessions (VOS) 	<p>Update Completed October 2004</p> <p>Update Completed October 2004</p> <p>This is current and ongoing</p>	<p>Maintain a Robust small business procurement assistance website at www.treas.gov/sba. Also, hard copies of small business procurement events data are disseminated during the monthly VOS</p> <p>Forecast of Contract Opportunities, Historical Top 25 Data, and Subcontracting Opportunities Directory-available electronically and in hard copy with information on each bureau</p> <p>The OSBD website at www.treas.gov/sba is user friendly and contains guidance for small businesses to register appointments to visit with SBS and/or bureau managers, prime contractors, and special guest during the VOS.</p>