

**ANNUAL STRATEGIC PLAN (Revised)  
FOR  
SERVICE-DISABLED VETERAN-OWNED SMALL  
BUSINESSES**

**Description of Department or Agency Implementation Efforts**

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**Department: Department of the Treasury**

**Department Contacts: Sandra L. Pack  
Assistant Secretary for Management  
Voice - (202) 622-0410  
Fax - (202) 622-6464  
Sandra.Pack@do.treas.gov**

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**Signature**

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

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**Signature**

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

(REVISED)

**STRATEGIC PLAN: DESIGNATE A SENIOR-LEVEL OFFICIAL WHO SHALL BE RESPONSIBLE FOR DEVELOPING  
AND IMPLEMENTING THE AGENCY’S STRATEGY**

	<b>Activities</b>	<b>Milestones</b>	<b>Notes</b>
Annual Strategic Plan	<ul style="list-style-type: none"> <li>The Agency Head will designate a senior-level official who shall be responsible for developing and implementing the agency’s strategy. The senior-level official will ensure that the development and implementation of the agency’s strategy and achievements in furtherance of the strategy, will be included as an element in the Deputy Chief Acquisition Officer (DCAO), Director, Office of Small Business Development (OSBD), and the Bureau Chief Procurement Officers (BCPO) performance plans. The Director, OSBD will monitor the progress of the implementation and periodically report the progress to both the DCAO and the CAO and seek their support as required.</li> </ul>	Ongoing effort in Support of Executive Order 13360	The senior-level official in concert with the Director of the Office of Small Business Development and the Bureaus Small Business Specialists will be responsible for reviewing/monitoring the bureaus achievements on a quarterly basis.

**STRATEGIC PLAN: (i) Reserving agency contracts exclusively for service-disabled veteran businesses (Revised)**

	Activities	Milestones	Notes
Annual Strategic Plan	<ul style="list-style-type: none"> <li>• 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>   <li>• Coordination – The Office of Small Business Development (OSBD) is continuing to coordinate with the Small Business Specialists (SBSs) 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. Significantly, the Bureau of Public Debit 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, BPD awarded Treasury’s first SDVOSB sole source contract this fiscal year.</li>   <li>• 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).</li> </ul>	<p>Ongoing effort for Fiscal Year 2005 and upcoming fiscal years</p> <p>Ongoing effort for Fiscal Year 2005 and upcoming fiscal years</p> <p>Addressed during monthly meetings with Small Business Specialists</p>	<p>Treasury’s Office of Small Business Development (OSBD) activities are performed in support of government-wide small business policy and the OSBD mission. During the VOS, the OSBD will continue to emphasize to the bureaus SBS, the Contracting Specialists/Officers and Bureau Chief Procurement Officers (BCPOs) the importance of SDVOSB set-asides along with other small business program set-asides throughout the year. The SBS will communicate strategy and achievements to the OSBD. We have completed 5 local VOS, and 2 out-of-town VOS on December 7, 2004, Atlanta, GA with IRS and DHS, and January 27, 2005, Dallas, TX with IRS and BEP.</p> <p>The OSBD has met with several SBS and BCPOs and has appointments scheduled to complete the rest before the end of February 2005.</p> <p>OSBD will assist SBS in addressing priority of compliance.</p>

	<ul style="list-style-type: none"> <li>A webpage has been developed to make Treasury's Strategic Plan available to the public.</li> </ul>	Posted 2 <sup>nd</sup> Quarter 2005	The webpage is in compliance with issuance of new Government-wide guidance in accordance with the President's Executive Order 13360
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**STRATEGIC PLAN: (ii) Encouraging and facilitating participation by service-disabled veteran businesses in competitions for awards of agency contacts (Revised)**

	<b>Activities</b>	<b>Milestones</b>	<b>Notes</b>
Annual Strategic Plan	<ul style="list-style-type: none"> <li>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 5 of our SBS in 15 minute intervals, to share their abilities and capabilities to meet the agency's needs and to increase procurement opportunities. It also provided an opportunity for small businesses to network and to consider teaming and joint ventures.</li> </ul>	Ongoing effort in Fiscal Year 2005 and upcoming fiscal years	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.

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

	Activities	Milestones	Notes
Annual Strategic Plan	<ul style="list-style-type: none"> <li>• 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.</li> <li>• Treasury's Small Business Program Handbook provide guidance to the OSBD and the Bureaus on assisting small businesses on how to obtain federal procurement contracts by addressing SDVOSB strategy and subcontracting opportunities, and by providing guidance.</li> <li>• Treasury's SBS' inform large prime contractors during the award stage of federal procurements of the importance of meeting subcontracting compliance. The SBS' review/monitor subcontracting plans for compliance. The SBS' also review data input by prime contractors in the newly developed eSRS subcontracting database.</li> </ul>	<p>May 20, 2005 veteran-owned small businesses met with Large Primes during VOS</p> <p>Ongoing policy</p> <p>Ongoing effort for Fiscal Year 2005, and is addressed during monthly VOS</p>	<p>Will continue implementation</p> <p>On a quarterly basis, the OSBD reviews SDVOSB and subcontracting strategies with the Bureaus.</p> <p>The OSBD monitors the Bureaus on a quarterly basis to ensure compliance.</p>

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

	<b>Activities</b>	<b>Milestones</b>	<b>Notes</b>
Annual Strategic Plan	<ul style="list-style-type: none"> <li>On-site training</li> </ul>	Monthly training is held during the VOS	Training is provided to the SBS', Business Analysts, and other Treasury staff during the VOS on various topics. This includes the OSBD ongoing training related to Treasury's Small Business Program Handbook addressing SDVOS and the agency's mission.
	<ul style="list-style-type: none"> <li>Off-site training</li> </ul>	Ongoing efforts	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. Employees also take advantage of free classes offered by other public and private sector clients.
	<ul style="list-style-type: none"> <li>Treasury's Small Business Program Handbook addresses: SDVOSB strategy, and assisting small businesses to participate as prime and subcontractors.</li> </ul>	Ongoing effort	The Director of OSBD will continue to update Treasury's Small Business Program Handbook on requisition review, Subcontracting, Mentor-Protégé Program, Bundling, SDVOSB and other small business programs.
	<ul style="list-style-type: none"> <li>Program Orientations provided to senior managers and program managers regarding SDVOSB</li> </ul>	June 2005	During Treasury's annual Awards ceremony, senior and program level managers along with the rest of the small business staff, received formal training from SBA's senior official, Teresa Lewis. In March of 2005, OSBD provided vital information to these managers regarding Department of Veteran Affairs (VETBIZ website).

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

	<b>Activities</b>	<b>Milestones</b>	<b>Notes</b>
Annual Strategic Plan	<ul style="list-style-type: none"> <li>• Information dissemination</li>   <li>• Small business marketing publications</li>   <li>• Registration data-base for contractor to register for Vendor Outreach Sessions (VOS)</li>   <li>• The U.S. Small Administration's (SBA) Office of Government Contracting (GC) Link</li> </ul>	<p>Update completed October 2004 for Fiscal Year 2005 – ongoing updates will continue throughout the year</p> <p>Update completed October 2004 for Fiscal Year 2005 – ongoing updates will continue throughout the year</p> <p>This is current and ongoing</p> <p>Updated August 2005</p>	<p>The OSBD maintains a robust small business procurement assistance website at <a href="http://www.treas.gov/sba">www.treas.gov/sba</a>. 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 are available electronically and in hard copy with information on each Bureau.</p> <p>The OSBD website at <a href="http://www.treas.gov/sba">www.treas.gov/sba</a> is user friendly and contains guidance for small businesses to register for appointments to visit with SBS' and/or Bureau managers and prime contractors, and to be a special guest during the VOS.</p> <p>A link to the SBA's GC website at <a href="http://www.sba.gov/GC">www.sba.gov/GC</a>, has been added to Treasury's OSBD website to provide additional procurement assistance to SDVOSB.</p>