

APTAC Body of Knowledge Competency Guide

A. Program Requirements & Management

A.9 Program Metrics

Description

The term “metrics” means units and methods of performance measurement. The Defense Logistics Agency (DLA) directs Procurement Technical Assistance Centers to collect and report as specified in the Solicitation for Cooperative Agreement Application Section III.E and its amendments on forms designated 1806 or 1806T. The program manager must keep track of amendments and supplemental instructions from the DLA program office, and comply with all data management and reporting requirements. Local host organizations, third party sponsors, and/or sub recipients may need additional metrics. There are several aspects of program activity to consider in collecting and reporting metrics.

- 1. What to measure:** Examples include number of clients served, amount of time spent counseling, client status (active, inactive, prospective), number of events sponsored or supported, number of people in attendance at events, number and dollar value of contracts awarded to clients, number of jobs created or retained, client types (service, supply, manufacturer, construction, etc.), business type (large, small, 8(a), WOSB, VOSB, etc.), clients served by distressed area, county, Congressional District or zip code, etc.
- 2. How to measure:** Examples of vehicles to collect data include reports required from clients; voluntary testimonials; information collected by PTAC personnel from public sources (such as FPDS and comparable state/local sources); counselor input to database from counseling sessions; tools for using metrics, etc.
- 3. Other considerations:** Determinations must be made with regard to issues such as the method of measurement, the frequency of measurement and reporting, clear understandings of definitions such as "active" and "inactive" clients; differences between DLA definitions, host organization definitions, third party sponsors or other stakeholder definitions.

Terminology. Host is the organization within which the PTAC center operates. Recipient is the organization which receives the federal funds from DLA. Host and recipient may be the same organization, or host may be a sub-recipient, operating the center on "pass-through" funds from recipient. The program manager must understand these legal relationships.

Methods

In preparing periodic applications to DLA to obtain the PTAC designation and funding, goals must be established for categories specified in the SCAA, and for such other categories as the host organization or third party sponsors may require. These goals must be realistic and achievable, and must be supported by rationale.

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Throughout the period of performance, data must be collected timely and kept up to date. The program manager must ensure that quality and timeliness of all data collection meets standards established for the center, such as by conducting periodic audits.

The center either contracts with a database contractor or constructs and maintains a similar system. In either case, the system needs to be tailored to accommodate both the DLA 1806 or 1806T and other reporting requirements, such as to support host organization reports.

The program manager must ensure that any employee who abuses the data collection, data entry, or data reporting processes will be promptly reprimanded and, if appropriate, disciplined, and the data will be corrected. The event will be reported to DLA in the quarterly narrative report, item 8, including corrective actions.

References and resources

Current Solicitation for Cooperative Agreement Applications (SCAA), including all amendments.

Individual host organization policies and procedures

Federal Procurement Data System