

Responsible Office: Office of Small and Disadvantaged Business Utilization (Code K)
Subject: Outreach



Office of Small and Disadvantaged Business Utilization (Code K)

Office Work Instruction

OUTREACH

Approved by: _____

Ralph Thomas, III

Associate Administrator for

The Office of Small and Disadvantaged Business Utilization

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DOCUMENT HISTORY LOG

<u>Status</u> <u>(Baseline/ Revision/ Canceled)</u>	<u>Document</u> <u>Revision</u>	<u>Effective</u> <u>Date</u>	<u>Description</u>
Baseline		2/4/00	

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1.0 Purpose

The purpose of this OWI is to document the procedures used by Code K to provide outreach to small, minority and women owned businesses, prime contractors, not for profit organizations, and other government agencies.

2.0 Scope and Applicability

2.1

This OWI documents the process to conduct conferences, forums, and training, distribute standard information packets, develop promotional literature, and conduct the Minority Business and Advocates Awards Program.

2.2

This OWI applies to the Code K organization.

3.0 Definitions

- 3.1 AA. Associate Administrator
- 3.2 AO. Action Officer
- 3.3 Blue Line. Final version of document before going to print
- 3.4 Code A. Office of the Administrator
- 3.5 Code K Mailing Lists. List of businesses and individuals designated to receive Code K mailings.
- 3.6 MBAA. Minority Business and Advocates Awards
- 3.7 Shared drive. Code K computert network shared drive located at:
Code_k on 'hqdata2' (U:)

4.0 References

- 4.1 Conferences, Forums, and Training Evaluation Form (OSDBU Form 123)
- 4.2 Conferences, Forums, and Training Evaluation Form Summary (OSDBU Form 124)
- 4.3 MBAA Ceremony Survey (OSDBU Form 116), located at: Code_k on 'hqdata2' (U:)
- 4.4 MBAA Nomination Evaluation Form (OSDBU Form 117), located at: Code_k on 'hqdata2' (U:)
- 4.5 MBAA Program Checklist (OSDBU Form 120), located at: Code_k on 'hqdata2' (U:)
- 4.6 MBAA Program Evaluation Summary (OSDBU Form 118), located at: Code_k on 'hqdata2' (U:)
- 4.7 Meeting Logistics Checklist (OSDBU Form 121), located at: Code_k on 'hqdata2' (U:)

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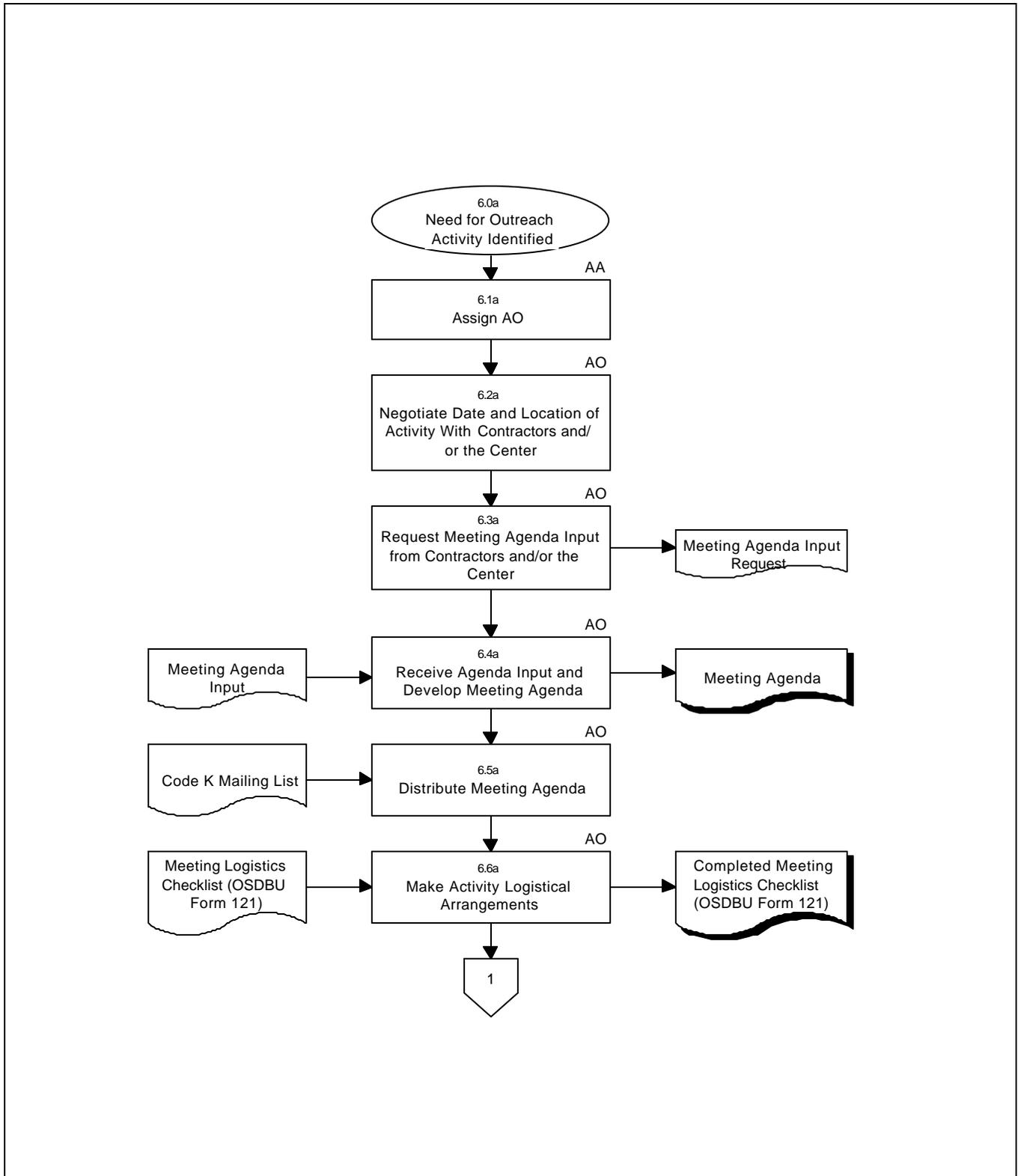
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- 4.8 NASA Strategic Management Handbook (NPG 1000.2)
- 4.9 NASA Strategic Plan (NPD 1000.1)
- 4.10 Problem Solving Request Form (OSDBU Form 105), located at: Code_k on 'hqdata2' (U:)
- 4.11 Routing/Closeout Form (OSDBU Form 122), located at: Code_k on 'hqdata2' (U:)

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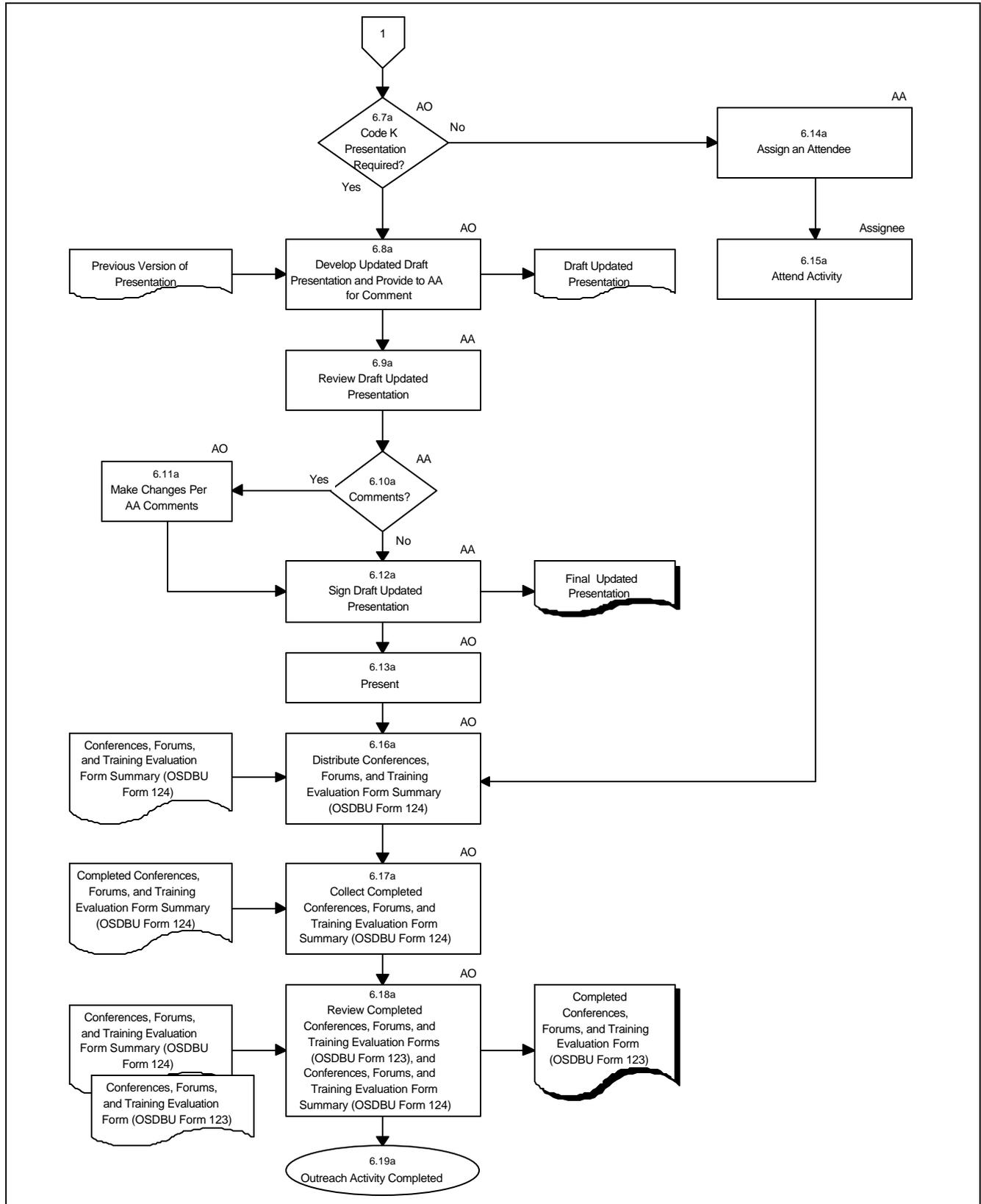
5.0 Flowchart

Flow (a) - Conduct Conferences, Forums, and Training



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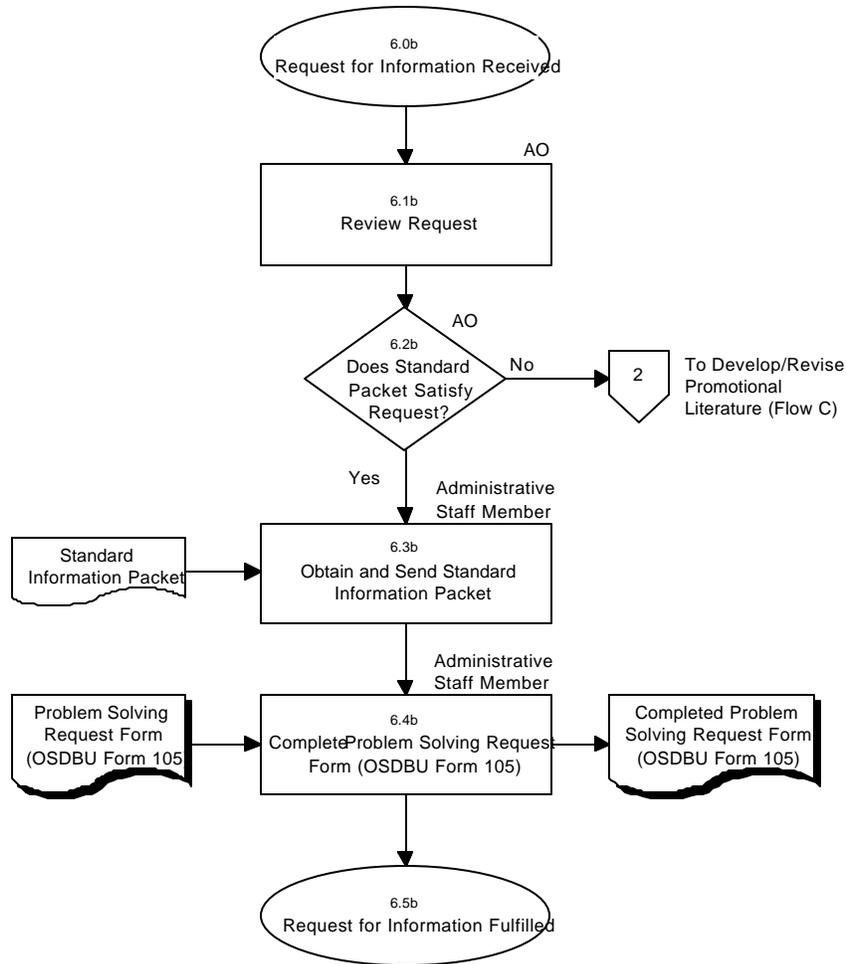
Flow (a) - Conduct Conferences, Forums, and Training - continued



CHECK THE MASTER LIST at <http://hqiso9000.hq.nasa.gov>
 TO VERIFY THAT THIS IS THE CORRECT VERSION BEFORE USE

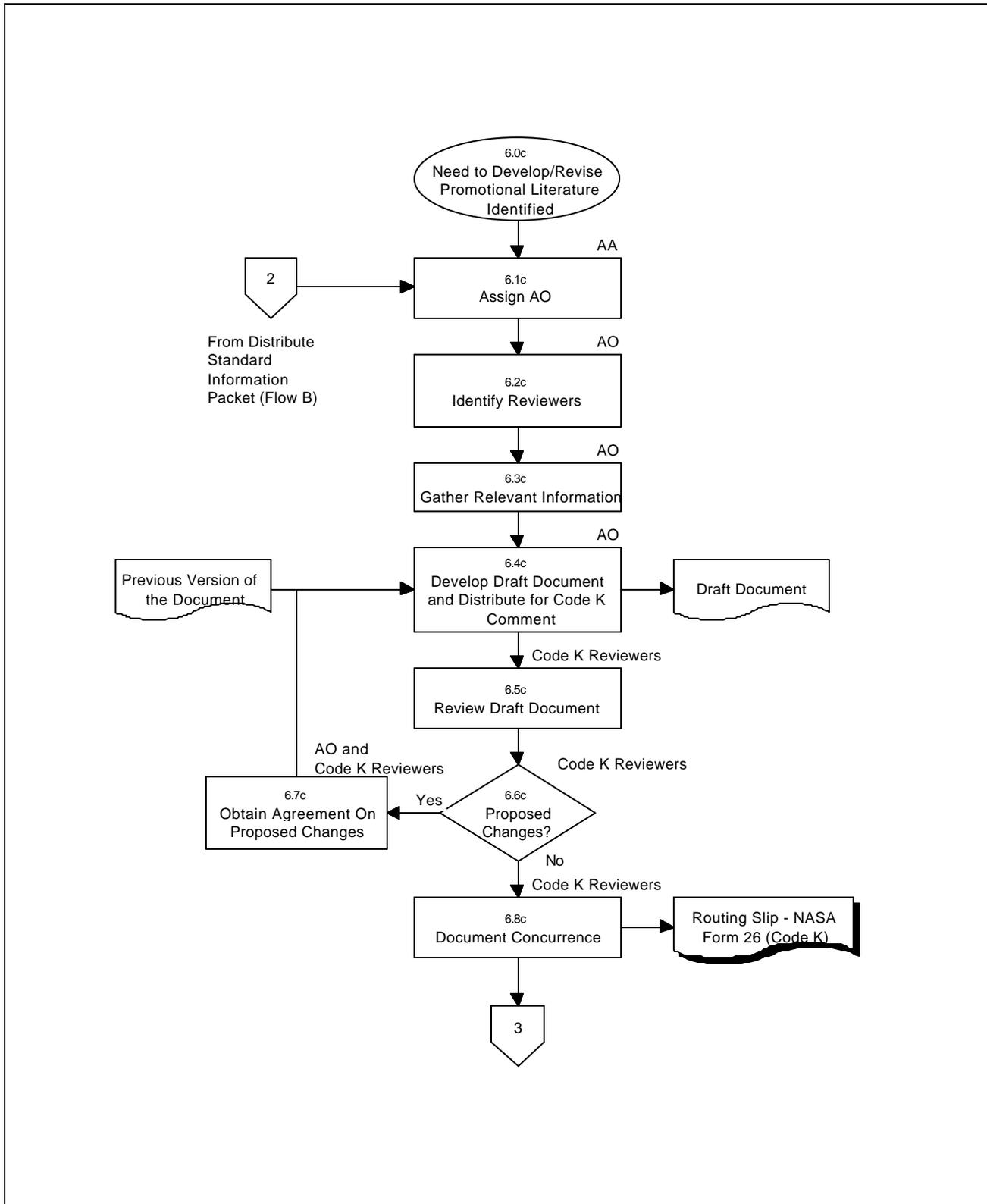
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Flow (b) - Distribute Standard Information Packet



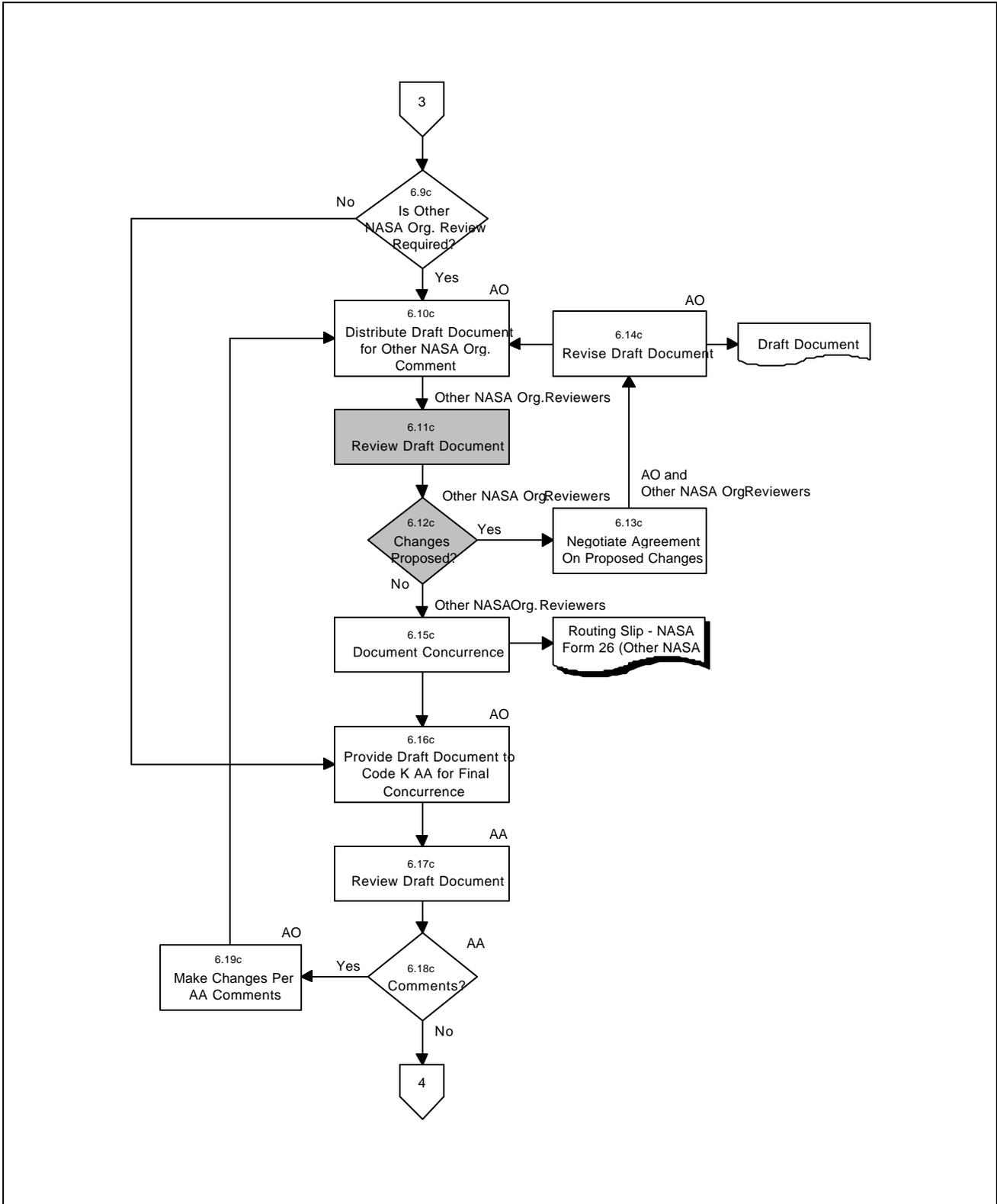
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Flow (c) – Develop/Revise Promotional Literature



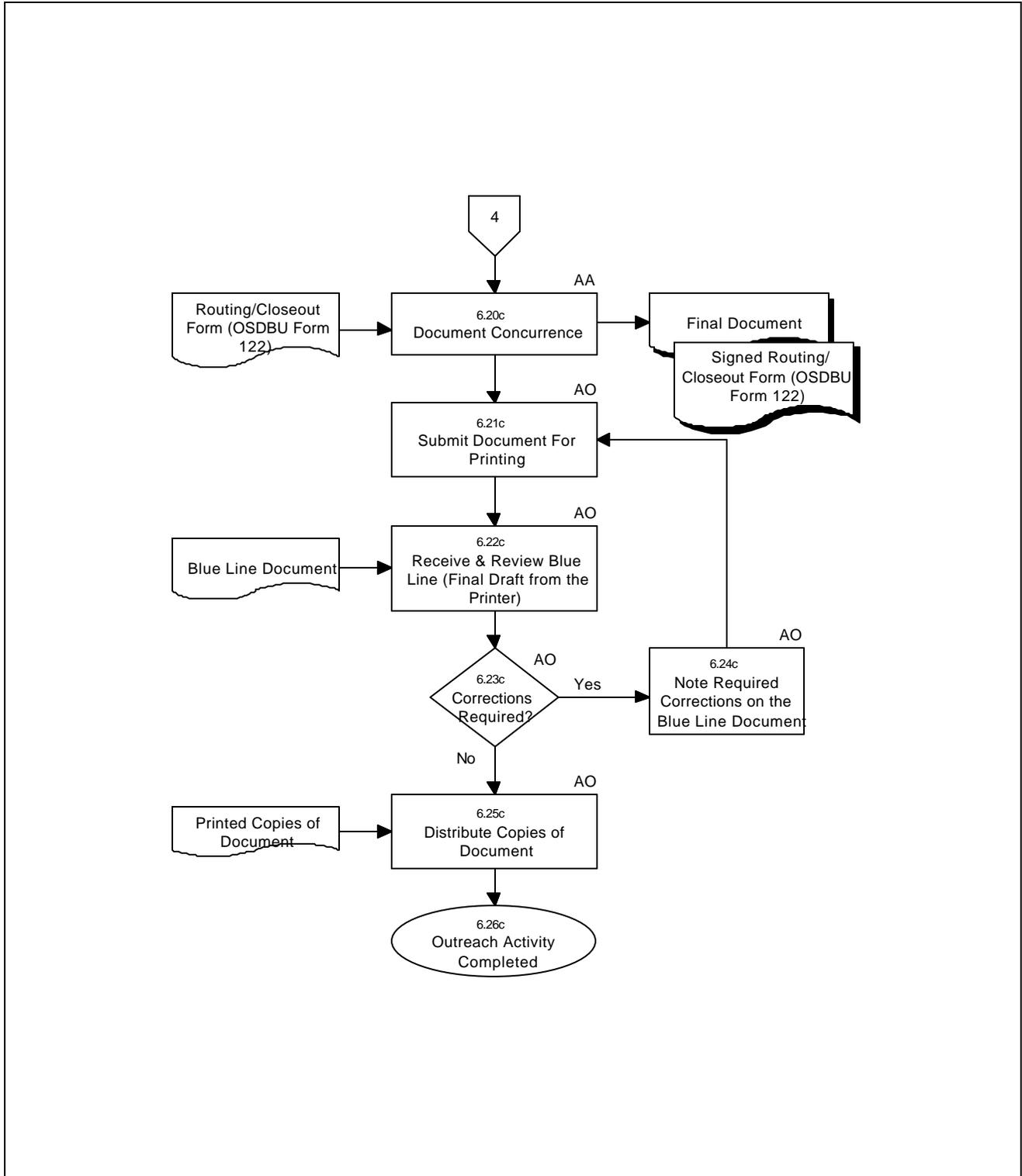
Responsible Office: Office of Small and Disadvantaged Business Utilization (Code K)
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Flow (c) – Develop/Revise Promotional Literature - continued



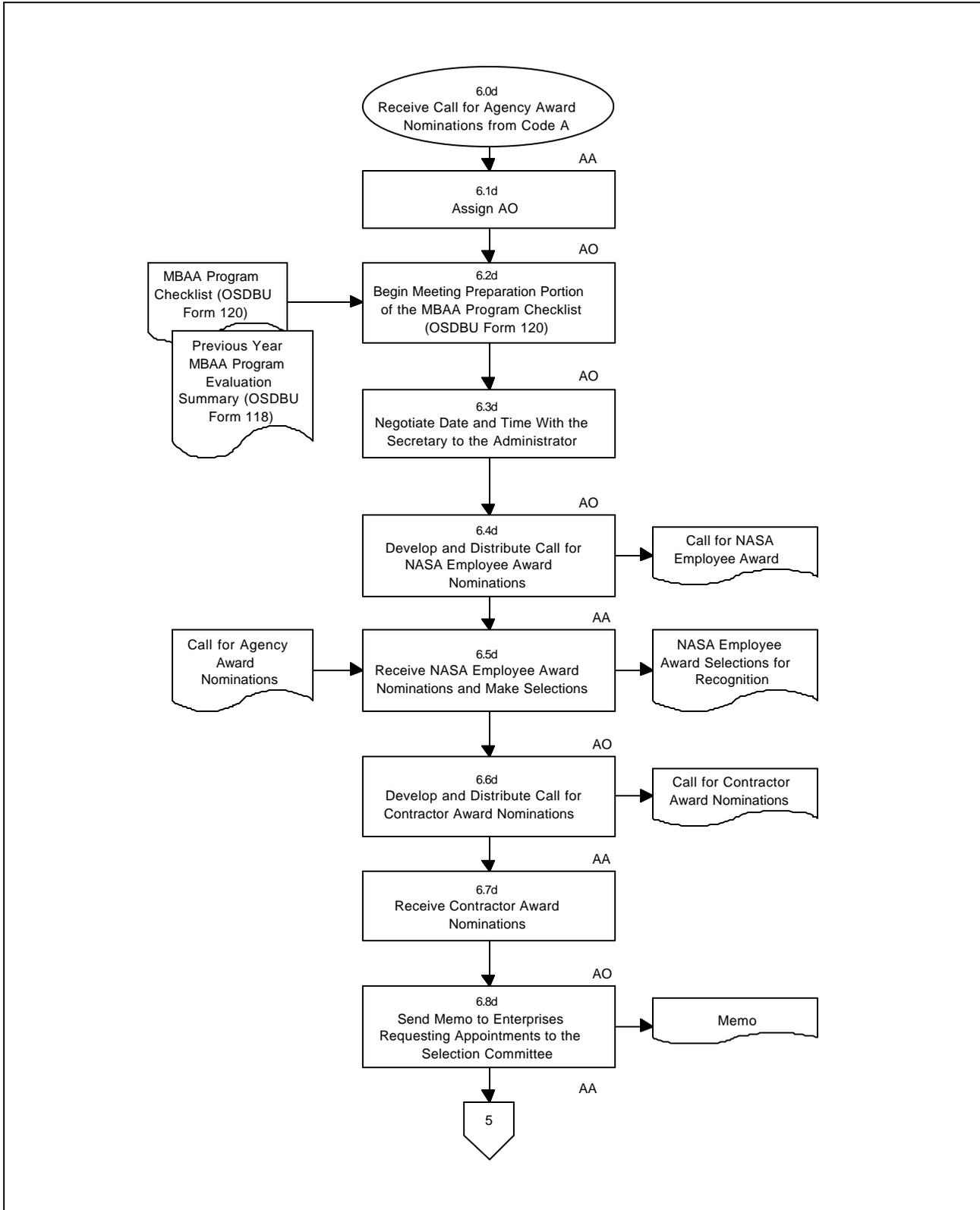
Responsible Office: Office of Small and Disadvantaged Business Utilization (Code K)
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Flow (c) – Develop/Revise Promotional Literature - continued



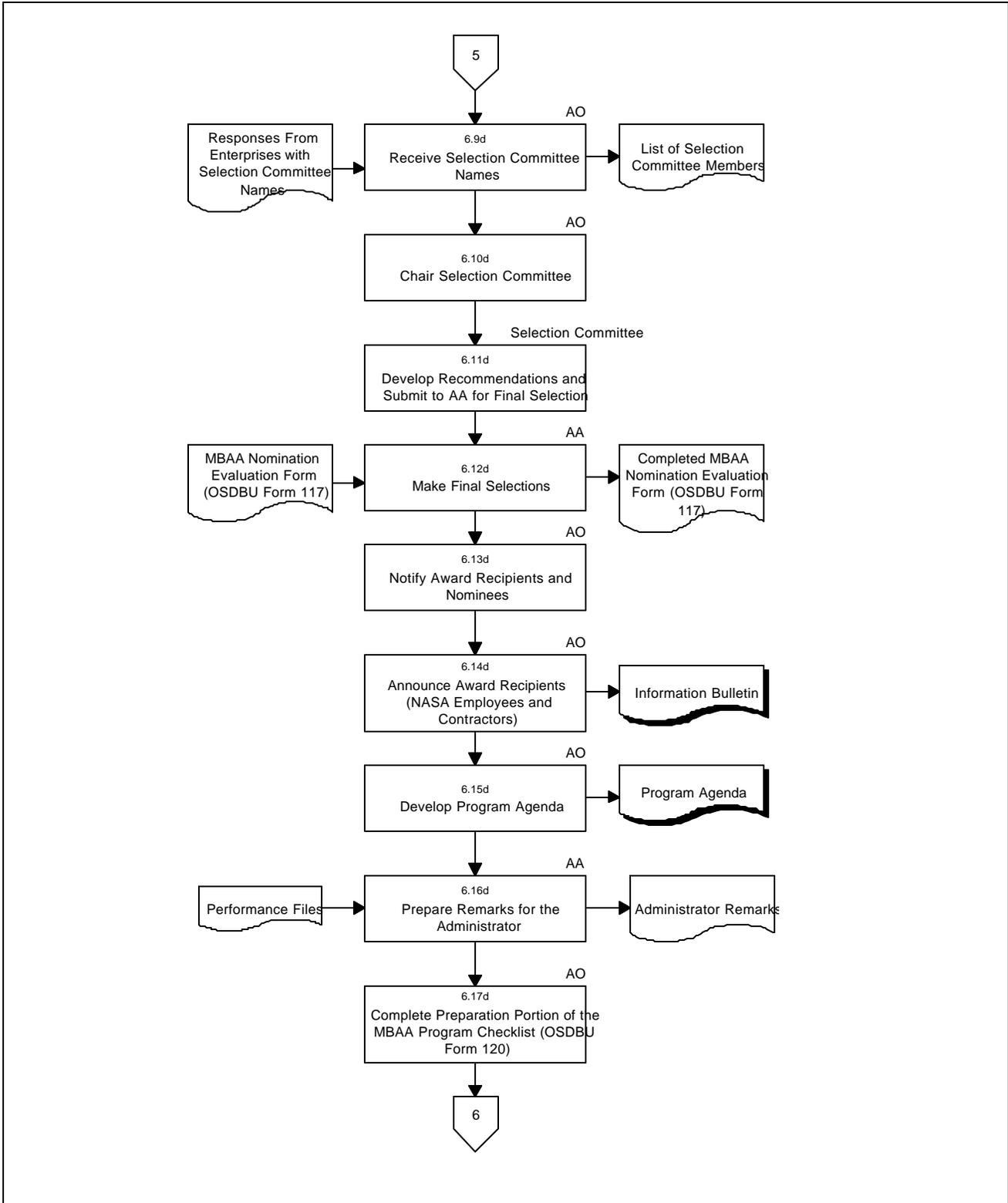
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Flow (d) - Conduct MBAA Program



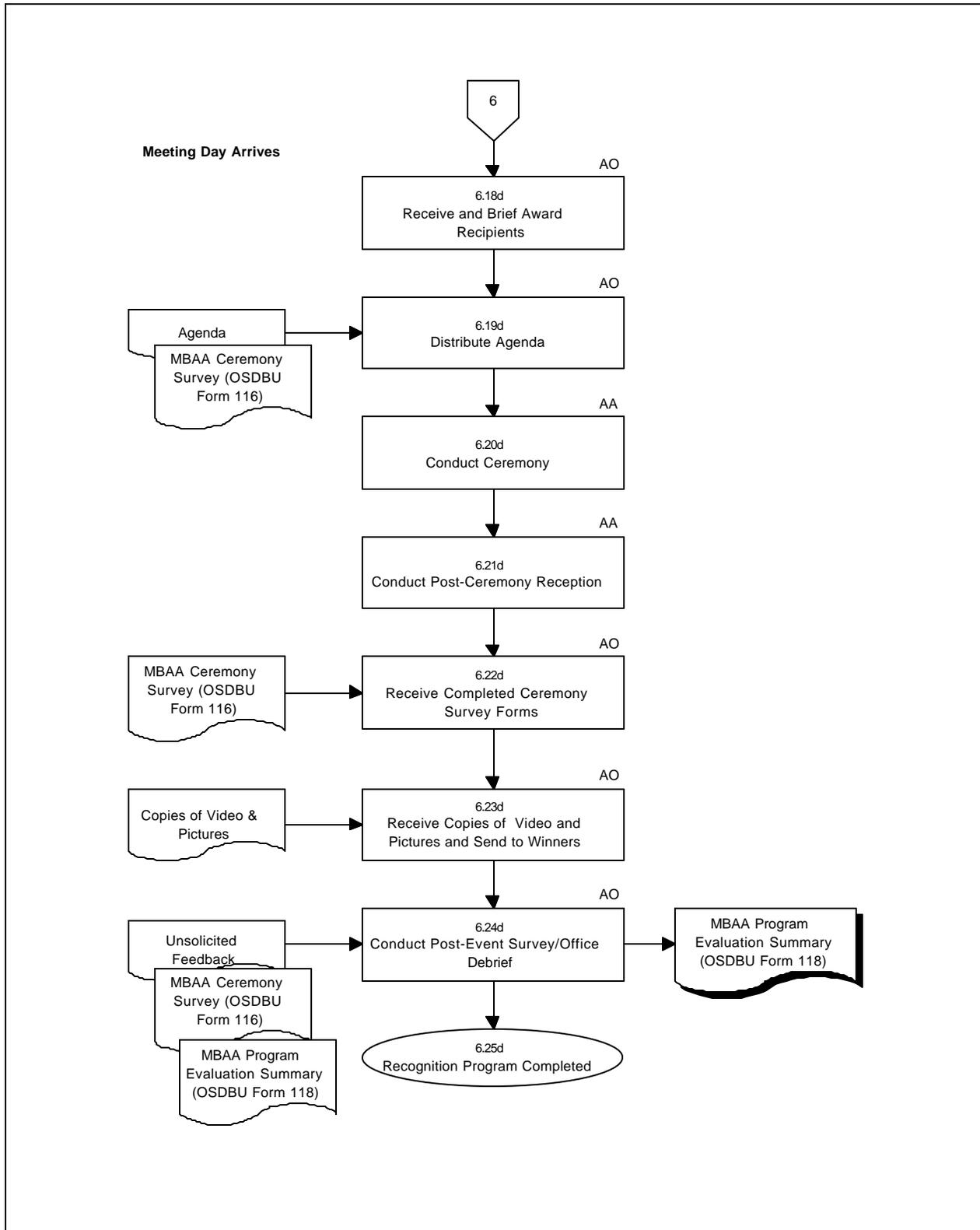
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Flow (d) - Conduct MBAA Program - continued



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Flow (d) - Conduct MBAA Program - continued



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6.0 Procedure

Flow A. Conduct Conferences, Forums, and Training

<u>Step</u>	<u>Actionee</u>	<u>Action</u>
6.0a		<p>Outreach activities include conferences, forums and training. Conferences are held throughout the year with two major conferences held semi-annually. The two major conferences are the NASA/JPL High Tech Small Business Conference (hosted at the Jet Propulsion Laboratory) and the NASA New England Business and Technology Conference (hosted a rotating New England State).</p> <p>There are two major Forums. They are the Quarterly Aeronautics Small Disadvantaged Business Forum (held annually at each NASA Aeronautics Center) and the Semi-Annual Science Forum (held annually at each NASA Science Center).</p> <p>The Training and Development for Small Business in Advanced Technologies is held 3-4 times a year at various locations. The Socio-economic Procurement as a Business Alternative training course is internal and is held at various NASA Centers 3-4 times a year.</p> <p>Other outreach activities may result from requests from the small business community and be incorporated into the Code K program.</p>
6.1a	AA	Assign a cognizant action officer to conduct the outreach activity.
6.2a	AO	Negotiate date and location of activity with contractors and/or the Center. Contractors are involved in the coordination of the training, and the two major NASA Conferences. NASA Centers are involved in the coordination of the major Forums. This is done via phone and/or email.
6.3a	AO	Request meeting agenda input from contractors and/or the Center. The action officer works with the contractors to develop the agenda for the conferences, forums and training. The request to the contractors/Centers could be sent via email, phone, or FAX.
6.4a	AO	Receive agenda input and develop meeting agenda. The meeting agenda input from the contractors/Centers could be sent via email, phone, or FAX. Based on the input from the contractors/Center the meeting agenda is developed.
6.5a	AO	Distribute the Meeting Agenda to the audience via email, mail, or fax. The audience includes activity registrants and individuals on the Code K Mailing Lists. The Meeting Agenda/announcement may be posted on the Code K web site.
6.6a	AO	Make activity logistical arrangements as specified in the Meeting Logistics Checklist (OSDBU Form 121). Complete the Meeting Logistics Checklist (OSDBU Form 121) to ensure that all logistics are addressed.
6.7a	AO	A presentation is generally required during conferences and training. Forums rarely require presentations. If a Code K presentation is required, go to Step 6.8a. If a Code K presentation is not required, go to Step 6.14a.
6.8a	AO	Develop Updated Draft Presentation based on the previous version of the presentation (if available). The Updated Draft Presentation should include relevant and current information about the topic being discussed. The Updated draft presentation is provided to the AA for comments.
6.9	AA	Review updated draft presentation to ensure that it includes relevant and current information about the topic being discussed.
6.10a	AA	If AA has comments, go to 6.11a. If AA does not have comments, go to 6.12a.

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<u>Step</u>	<u>Actionee</u>	<u>Action</u>
6.11a	AO	Make changes per AA comments.
6.12a	AA	Validate and sign the Updated Draft Presentation. The Updated Draft Presentation becomes the Final Updated Presentation after being signed by the AA.
6.13a	AO	Present to the audience at the conference, forum or training activity.
6.14a	AO	Distribute Conferences, Forums, and Training Evaluation Form (OSDBU Form 123) to the audience after the presentation on the day of the activity.
6.15a	AO	Collect Conferences, Forums, and Training Evaluation Form (OSDBU Form 123) from the audience before they leave.
6.16a	AO	Review the Completed Conferences, Forums, and Training Evaluation Forms (OSDBU Form 123). Conferences, Forums, and Training Evaluation Form Summary (OSDBU Form 124) based on Action officer notes and the Completed Conferences, Forums, and Training Evaluation Forms(OSDBU Form 123).
6.17a		Outreach activity completed.

Flow B. Distribute Standard Information Packet

<u>Step</u>	<u>Actionee</u>	<u>Action</u>
6.0b		Requests for information are received from internal (Headquarters, Centers) and external sources (business, general public, or others). Requests come by phone, mail, fax, or email.
6.1b	AO	Review the request to determine if the Standard Information Packet includes the requested information.
6.2b	AO	If the Standard Information Packet satisfies the request, go to Step 6.3b. If Standard Information Packet does not satisfy the request, go to off-page connector #2 in the Develop Promotional Literature Flowchart (Flow C).
6.3b	Administrative Staff Member	Obtain the Standard Information Packet from inventory and send it to the requestor. Duplicates of the Standard Information Packet can be made from the original copy, which is maintained in Code K. The Standard packet is distributed in hardcopy form by mail.
6.4b	Administrative Staff Member	Complete Problem Solving Request Form (OSDBU Form 105) based on information provided in the original request by the requestor.
6.5		Request for Information Fulfilled.

Flow C. Develop Promotional Literature

<u>Step</u>	<u>Actionee</u>	<u>Action</u>
6.0c		AA determines that promotional literature must be developed or revised to respond to the internal/external requestor. Requests are received from internal (Headquarters, Centers) and external sources (business, general public, or others). The request comes by phone, mail, fax, or email.
6.1c	AA	Assign a cognizant action officer to conduct the promotional literature development/revision.

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<u>Step</u>	<u>Actionee</u>	<u>Action</u>
6.2c	AO	Identify Reviewers based on topic and specifics of request. Reviewers are subject matter experts throughout NASA Headquarters or Centers. For example Code K is requested to provide a story on small business success in Space Science. Code S (Space Science) would be identified as a reviewer for the story because they are the experts on Space Science.
6.3c	AO	Gather relevant information to answer specific issues, questions, etc. presented in the request. The information gathered comes from cognizant Headquarters offices and Centers.
6.4c	AO	Develop the draft document based on information gathered and previous version of the document. Distribute the draft document (hard copy) with routing slip to Code K staff for comment and review, as directed by the AA.
6.5c	Code K Reviewers	Review draft document for content, flow, clarity, and accuracy. Proposed changes are noted on the hardcopy.
6.6c	Code K Reviewers	If there are proposed changes, go to Step 6.7c. If there are no proposed changes, go to Step 6.8c.
6.7c	Action Officer and Code K Reviewers	Obtain agreement on proposed changes. Obtain consensus through discussion with Code K reviewers (individually or as a group). If agreement can not be reached, the AA will be consulted for resolution.
6.8c	Code K Reviewers	Document Concurrence. Each reviewer signs off on a routing slip (NASA Form 26) accompanying the draft document.
6.9c	AO	If other NASA organization review is required (as defined in Step 6.2c), go to Step 6.10c. If no other NASA organization review is required, go to 6.16c.
6.10c	AO	Distribute draft document (hard copy) with routing slip to other NASA organizations for comment and review. Distribute to reviewers as defined in Step 6.2c
6.11c	Other NASA Org. Reviewers	Review draft document for content, flow, clarity, and accuracy. Proposed changes are noted on the hardcopy.
6.12c	Other NASA org. Reviewers	If there are changes proposed, then go to Step 6.13c. If there are no changes proposed, go to Step 6.15c
6.13c	AO and Other NASA Org Reviewers	Negotiate Agreement on proposed changes. Obtain consensus through discussion with Other NASA Org. Reviewers (individually or as a group). If agreement can not be reached, the AA or designee of the disagreeing Other NASA Org. will be consulted for resolution. Code K AA has final authority.
6.14c	Revise Draft Document	Develop revised draft document based on negotiated changes.
6.15c	Other NASA Org. Reviewers	Document Concurrence. Each reviewer signs off on a routing slip (NASA Form 26) accompanying the draft document.
6.16c	AO	Provide draft document to Code K AA for Final Concurrence. Each reviewer signs off on a routing slip (NASA Form 26) accompanying the draft document.
6.17c	AA	Review draft document for content, flow, clarity, and accuracy. Proposed changes are noted on the hardcopy.

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<u>Step</u>	<u>Actionee</u>	<u>Action</u>
6.18c	AA	If the AA has comments, go to Step 6.19c. If the AA does not have comments, go to Step 6.20c.
6.19c	AO	Make changes per AA comments.
6.20c	AA	Document Concurrence. AA completes and signs the Routing/Closeout Form (OSDBU Form 122).
6.21c	AO	Submit document for printing to Headquarters Printing and Design shop in electronic form.
6.22c	AO	Receive and review blue line for proper formatting.
6.23c	AO	If corrections are required, go to Step 6.24c. If no corrections are required, go to Step 6.25c.
6.24c	AO	Note required corrections on the blue line Document.
6.25c	AO	Distribute copies of the document to affected internal organizations and external organizations that are included in the Code K Mailing Lists. The documents are distributed by mail.
6.26c	AO	Outreach activity completed.

Flow D. Conduct MBAA Program

<u>Step</u>	<u>Actionee</u>	<u>Action</u>
6.0d	AA	Receive call letter from Code A announcing request for nomination for Agency Minority Business and Advocates Awards (MBAA) Exceptional Achievement Medal Program by internal mail. Letter includes Awards Categories, criteria for award, due date, and point of contact. Letter is usually initiated November annually.
6.1d	AA	Assigned to action officer knowledgeable with the MBAA process.
6.2d	AO	Begin process by reviewing MBAA Program Checklist (OSDBU Form 120) and executing actions in preparation of the MBAA program. Previous MBAA Program Evaluation Summary (OSDBU Form 118) are reviewed for lessons learned. Checklist is located in MBAA file on shared drive.
6.3d	AO	Contact Administrators secretary and schedule date, time and details of MBAA program. Communicate by email and follow up with phone call.
6.4d	AO	Develop and distribute call for NASA Employee Award Nominations. The letter is sent to NASA Center Directors. The letter includes criteria for award and due date. It is sent by internal mail.
6.5d	AO	Receive Employee nominations from field Centers. Nominations are forwarded from Centers to Code K and time-date stamped upon arrival. Nominations not received by due date are disqualified. Code K office staff evaluates nominations and makes selections. AA has final selection authority over nominations and may elect not to confer an award if not satisfied with nominations.
6.6d	AO	Prepare letter to send to Centers and prime contractors to announce the solicitation of nominations for MBAA contractor awards. The letter also announces the date, time, place, and due date. Other detail information about

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<u>Step</u>	<u>Actionee</u>	<u>Action</u>
		the MBAA program is also included.
6.7d	AO	Receive award nominations from contractors and Centers by due date.
6.8d	AO	Send Memo to Enterprises requesting appointment of members to participate on selection committee. Each Enterprise shall appoint only one and the chair of the committee shall be a representative from Code K.
6.9d	AO	Receive responses from Enterprises with appointment of representative to serve on the selection committee.
6.10d	AO	Chair the selection committee. The chairperson is responsible for articulating guidelines for evaluating the nominations, provides scoring criteria, and tallies all scores and submits the results to the AA for Code K. Meetings are held in the Code K conference room and are for answering questions or addressing any issues.
6.11d	AO	Tally all scores from selection committee and prepare nominations to submit to AA for final selection. Scores are tallied using the MBAA Nomination Evaluation Form (OSDBU Form 117) submitted by the selection committee members.
6.12d	AA	Final selections are made after careful review of the MBAA Nomination Evaluation Form (OSDBU Form 117). AA considers in ranking order the top nominations however, still uses "other factors" not necessarily scored by selections committee such as any knowledge of issues that would cause embarrassment to the agency or questions the authenticity of the program.
6.13d	AO	Notify winners. Additionally, winners are provided other detailed information about the program such as when, where, and how the program will take place and what to expect. The winners are notified by phone and followed up by official letter.
6.14d	AO	Announced winners via Code K Information Bulletin. Information Bulletin contains pertinent information about the MBAA awards program. It is sent out via broadcast fax to various mailing lists and is posted on the Code K Homepage. The Information Bulletin is a notice that is written in Code K.
6.15d	AO	Develop program agenda. Agenda contain the names of awards recipients and the order of program. The agenda is developed using information obtained during the nomination process.
6.16d	AA	Prepare remarks for the Administrator. AA provides remarks for Administrator. The remarks are developed based on a relevant theme or specific leadership message that is to be conveyed to the audience. The AA also relies on performance files and input from staff when formulating remarks.
6.17d	AO	All preparation steps are completed and checked off prior to the event.
6.18d	AO	Receive and brief award recipients. Approximately 1 hour before event, the award recipients arrive at a designated location for instructions on how the program will proceed.
6.19d	AO	Distribute awards program. The awards program is held in the Headquarters auditorium and Code K staff serves as hosts and pass out the awards program as the audience arrives. MBAA Ceremony Survey (OSDBU Form 116) is also included with the agenda.
6.20d	AO	Conduct ceremony. The awards program begins.
6.21d	AO	Conduct post ceremony reception. The reception is held in the lobby outside of

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		the auditorium. An announcement is made at the conclusion of the award ceremony about the reception.
6.22d	AO	Receive completed MBAA Ceremony Survey (OSDBU Form 116) on day of program or after day of program by mail.
6.23d	AO	Receive copies of video and pictures and send to recipients. The Headquarters photographer and NASA TV develops copies of pictures and video and sends to Code K.
6.24d	AO	Conduct post-event survey/Office Debrief. The Code K staff meets to discuss general feedback and review results of survey form and provide comments on MBAA Program Evaluation Summary (OSDBU Form 118).
6.25d		Program Complete.

7.0 Quality Records

<u>Record ID</u>	<u>Owner</u>	<u>Location</u>	<u>Record Media</u>	<u>NPG 1441.1 Schedule and Item Number</u>	<u>Retention/Disposition</u>
Meeting Agenda	Code K AO	Code K Files	Hardcopy	Schedule 1, Item 22	Permanent. Retire to FRC when 5 years old in 5 year blocks. Transfer to NARA when 10 years old.
Completed Meeting Logistics Checklist (OSDBU Form 121)	Code K AO	Code K Files	Hardcopy	Schedule 1, Item 25	Remove from related records and destroy or delete when work is completed or when no longer needed for operating purposes.
Final Updated Presentation	Code K AO	Code K Files	Hardcopy	Schedule 1, Item 22	Permanent. Retire to FRC when 5 years old in 5 year blocks. Transfer to NARA when 10 years old.
Conferences, Forums, and Training Evaluation Form (OSDBU Form 123)	Code K AO	Code K Files	Hardcopy	Schedule 1, Item 22	Permanent. Retire to FRC when 5 years old in 5 year blocks. Transfer to NARA when 10 years old.
Problem Solving Request Form (OSDBU Form 105)	Code K Admin. Staff Member	Code K Files	Hardcopy	Schedule 1, Item 25	Remove from related records and destroy or delete when work is completed or when no longer needed for operating purposes.
Routing Slip – NASA Form 26 (Code K)	Code K AO	Code K Files	Hardcopy	Schedule 1, Item 25	Remove from related records and destroy or delete when work is completed or when no longer needed for operating purposes.

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<u>Record ID</u>	<u>Owner</u>	<u>Location</u>	<u>Record Media</u>	<u>NPG 1441.1 Schedule and Item Number</u>	<u>Retention/Disposition</u>
Routing Slip – NASA Form (Other NASA Org.)	Code K AO	Code K Files	Hardcopy	Schedule 1, Item 25	Remove from related records and destroy or delete when work is completed or when no longer needed for operating purposes.
Final Document	Code K AO	Code K Files	Hardcopy	Schedule 1, Item 22	Permanent. Retire to FRC when 5 years old in 5 year blocks. Transfer to NARA when 10 years old.
Routing/ Closeout Form (OSDBU Form 122)	Code K AO	Code K Files	Hardcopy	Schedule 1, Item 25	Remove from related records and destroy or delete when work is completed or when no longer needed for operating purposes.
Information Bulletin	Code K AO	Code K Files	Hardcopy	Schedule 1, Item 22	Permanent. Retire to FRC when 5 years old in 5 year blocks. Transfer to NARA when 10 years old.
Program Agenda	Code K AO	Code K Files	Hardcopy	Schedule 1, Item 22	Permanent. Retire to FRC when 5 years old in 5 year blocks. Transfer to NARA when 10 years old.
Completed MBAA Program Evaluation Summary (OSDBU Form 118)	Code K AO	Code K Files	Hardcopy	Schedule 1, Item 22	Permanent. Retire to FRC when 5 years old in 5 year blocks. Transfer to NARA when 10 years old.