

ATTACHMENT

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Mentor-Protégé Template

**D.C. Public Library
Office of Procurement**

Mentor-Protégé Pilot Program

Pilot Agreement Template

Firms that have been approved as mentors in the DCPL Mentor-Protégé Pilot Program and have identified a protégé firm must submit a signed mentor-protégé agreement for their mentor-protégé relationship in response to the applicable DCPL solicitation designated for the pilot program. Protégés must be certified local, small, disadvantaged business enterprise (LSDBE) firms. Firms not certified by the Department of Small & Local Business Development are ineligible for participation in the pilot DCPL Mentor-Protégé Program.

This template is provided for the DCPL's pilot Mentor-Protégé Agreement and must be executed by the Mentor firm and Protégé firm participating in Solicitation No. DCPL-2015-R-0034 for Design-Build Services for the Cleveland Park Library.

1. Program Overview:

The Mentor-Protégé program is designed to motivate and encourage large business prime contractor firms to provide mutually beneficial developmental assistance to local, small, disadvantaged businesses certified by the Department of Small & Local Business Development.

The D.C. Public Library (DCPL), in a collaborative relationship with the Department of Small & Local Business Development, will maximize every effort to connect companies that are simpatico. The arrangement must benefit both, or it doesn't work. For instance, bringing together mentor firms and protégé firms that are in the same or similar line of business creates a good match. The "minority" status of the young company will assist the mentor in gaining major DCPL contracts, and the experience of the mentor company will flow to the protégé.

This pilot program seeks to bring together experienced firms serving as Mentors with less-experienced firms serving as Protégés in a mentor/protégé arrangement in a formal written commitment of at least a year.

The mentor firm must be strong financially, be profitable for at least the past two years. Both Mentor and Protégé firms must be in good standing in the District government marketplace.

The Protégé firm can have only one mentor at a time. The Mentor firm can provide significant assistance. For instance, a mentor may provide you with:

- Technical and management assistance. The mentor's expertise, resources and capabilities are made available to you.
- Subcontract support. Your mentor can enter into a joint-venture arrangement with you to compete for DCPL, District government, federal government and other contracts with the private sector, non-profit organizations, other state and local governments or international firms.
- Assistance in performing prime contracts through joint-venture arrangements with LSDBE businesses.

2. Developmental Assistance:

The forms of developmental assistance that a mentor firm can provide to a protégé firm can include:

- Management guidance related to
 - Financial management
 - Organizational management
 - Overall business management and planning
 - Business development
- Technical assistance
- Rent-free use of facilities and/or equipment
- Temporary assignment of personnel to the protégé firm
- Property
- Loans
- Any other types of mutually beneficial assistance

3. Agreement Information:

Period of Performance: *State the period of time (in months) over which the Mentor-Protégé Agreement will be in effect – cannot exceed length of pilot program.*

Number of Months:	
Anticipated Start Date:	Date of Contract Award
Anticipated Completion Date	

4. Mentor Firm Information. *Provide the following.*

Name of Firm/POC:	
Address:	
Telephone/:	
Fax:	
Email:	
Homepage:	
Industry:	

4. Mentor Historical Background. *Provide a brief summary about the company, including the company profile, and historical and recent activities and accomplishments under the District's LSDBE program. This entails any subcontracts awarded to LSDBE firms based on awards from any District agency where Mentor firm is/was the prime contractor. If none, state none.*

5. **Potential Subcontracts.** *The dollar value and type of subcontracts to be awarded the protégé firm consistent with this pilot program and the period of time over which they will be awarded. Please note fiscal year referenced below is based on the DCPL's fiscal year, which runs October 1 through September 30. The projected subcontracts will only be based on the anticipated award from this pilot program and should only reflect that period.*

Estimated Potential Subcontract Awards to this Protégé			
Fiscal Year	Number	Dollar Amount	Type
FY-		\$	
FY-		\$	

6. **Protégé Eligibility.** *Provide a statement that the protégé firm is currently eligible pursuant to the requirements of LSDBE certification. Protégé firms must provide a copy of their LSDBE certification to the Mentor firm as proof of eligibility to participate in the DCPL Pilot Mentor-Protégé Program.*

7. **Protégé Firm Information.** *Provide the following.*

Name of Firm:			
Address:			
Telephone:			
Fax:			
Email:			
Homepage:			
Industry/Bus. Type: <i>(e.g. list in percentages)</i>	Construction:		
	Manufacturing:		
	Manufacturing/ Supply:		
	Service:		
Year Established:			
Number of Employees:			
Annual Gross Revenue: <i>(for previous fiscal year)</i>			
LSDBE Dates:	Cert. Date:		Expiration Date:

Protégé-Obtained District Subcontract Awards. *The number and total dollar amount of District agency subcontract awards obtained by the protégé firm during the three preceding fiscal years (if any). Please note fiscal year here represent the government's fiscal year which runs October 1 through September 30. If None, insert None in "Number" column for each fiscal year.*

Total District Subcontract Awards			
Fiscal Year	Number	Funded Contract Value	Dollar Amount Received
FY-		\$	\$
FY-		\$	\$
FY-		\$	\$

Protégé-Obtained District Prime contract Awards. *The number and total dollar amount of District prime contract awards obtained by the protégé firm during the two preceding fiscal years (if any). Please note fiscal year here represent the government's fiscal year which runs October 1 through September 30. If None, insert None in "Number" column for each fiscal year.*

Total District Prime Contract Awards			
Fiscal Year	Number	Funded Contract Value	Dollar Amount Received
FY-		\$	\$
FY-		\$	\$
FY-		\$	\$

8. **Protégé Firm Historical Background.** *Provide a brief summary about the company, including the company profile, and historical and recent activities and accomplishments. Indicate whether your company is a local, small, disadvantaged business enterprise (LSDBE). Include a description of the company's ability to participate in the DCPL Mentor-Protégé Program without impairing the company's day-to-day operations (i.e., business management, revenue stream).*

9. Value to the D.C. Public Library. Provide a summary of the value(s) this agreement will bring in support of the DCPL's/ mission(s).

10. Metrics. *The success of the DCPL Pilot Mentor-Protégé Program will be measured by a system of metrics designed to ensure achievement of revenue and contracting awards. The Mentor firm, following review by the Protégé firm, will submit a monthly status report to the DCPL Chief Business Officer and Chief Procurement Officer. Program progress will be measured monthly and in the final report. In addition to the developmental assistance plan, provide factors to assess the protégé firm's developmental progress under the Program. Mandatory metrics will include but are not limited to the following:*

The quantitative measures for the success of this program will include:

- *Planned tasks started on time; planned tasks behind schedule*
- *Planned tasks completed on time; planned completions behind schedule*
- *Development program on/off schedule*
- *Revenue of Protégé firm increased as a result of this pilot*
- *Status of monthly and final report submission.*

11. Termination Procedures (Mentor Firm).

For Cause: *Provide procedures for the mentor firm to terminate the mentor-protégé agreement for cause which provide —*

- *The protégé firm shall be furnished a written notice by the Mentor firm of the proposed termination, stating the specific reasons for such action, at least 30 days in advance of the effective date of such proposed termination.*
- *The protégé firm shall have 30 days to respond to such notice of proposed termination, and may rebut any findings believed to be erroneous.*
- *Upon prompt consideration of the protégé firm's response, the mentor firm shall either withdraw the notice of proposed termination and continue the protégé firm's participation, or issue the notice of termination.*

The decision of the mentor firm regarding termination for cause, conforming with the requirements of this section, shall not be final and is contingent upon a final decision by the DCPL Chief Business Officer.

12. Termination/Penalty Procedures (DCPL). *If a contract is awarded, this agreement cannot be Terminated by the Mentor firm or the Protégé firm during this pilot except as stated in Section 10 above. However, if the Mentor firm violates the Mentor-Protégé Agreement, the DCPL Chief Business Officer shall assess a penalty against the Mentor firm equivalent to 20% of the total contract price. The 20% shall be deducted from invoice payments. In addition to the 20% deduction, the Mentor firm shall be prohibited from participating in the DCPL Mentor-Protégé program for three (3) years. The 20% contract payment deduction and the 3-year prohibition from participation in the DCPL Mentor-Protégé firm will also be filed with the D.C. Department of Small and Local Business Development.*

13. Additional Terms and Conditions. *Describe any other additional terms and conditions as may be agreed upon by both parties.*

All correspondence and inquiries will be addressed to the Points of Contact that you provide below.

14. Mentor Firm Point of Contact (POC).

Name:	
Title:	
Address:	
Telephone/ext.:	
Fax:	
E-mail:	

15. Protégé Firm Point of Contact (POC).

Name:	
Title:	
Address:	
Telephone/ext.:	
Fax:	
E-mail:	

16. Report & Review Requirement. *Attach a statement from each firm indicating their willingness to comply with the Program's reporting and review requirements (i.e., the monthly and final reports. The Mentor and Protégé must also include in their statements they will provide data on employment and revenues for one year after the conclusion of the agreement.*

17. Program Review. At the conclusion of the mid-term 6-month period in the DCPL Mentor-Protégé Pilot program (out of a 12-month agreement) the Mentor firm (prime contractor) and the Protégé (LSDBE) firm shall formally brief the DCPL Chief Business Officer and Chief Procurement Officer regarding program accomplishments as it pertains to the approved Mentor-Protégé Agreement for this pilot program.

The Mentor and Protégé firms shall submit a "lessons learned" evaluation to the DCPL Chief Business Officer and Chief Procurement Officer detailing the successes and recommendations for improvement at the conclusion of the 12-month agreement.

18. Signature of Each Party. *The Mentor and Protégé are required to sign and date this agreement. Titles of the individuals must also be included.*

Mentor

Protégé

Printed Name

Printed Name

Signature

Signature

Title

Title

Date

Date