

Data Collection Template

Pilot Program to Incentivize Contracting with Employee-Owned Businesses

Authorized under Section 874, National Defense Authorization Act for Fiscal Year 2022

- I. Program/Contract Information *(Contracting Officer to complete)*
 - A. Cognizant Contracting Activity: *(Buying office, Command, Department or Agency):*

 - B. Contract Number:
 - C. Description of Requirement: *(Product, quantity, period of performance):*

 - D. Total Contract Value:
 - E. Amount Obligated by Fiscal Year:

- II. Prime Contractor Information *(Contracting Officer to complete)*
 - A. Contractor Name:
 - B. Contractor CAGE:
 - C. Contractor's SBA business size (at the end of the reporting period):
Choose an item.

- III. Contractor Feedback *(Contracting Officer to collect answers from participating Contractor and may attach copies of contractor correspondence that address these questions.)*
 - A. How many years has the contractor been wholly-owned by its employee stock ownership plan?
Choose an item.

 - B. How has being a wholly-owned ESOP affected retention rates?
Choose an item.

 - C. Under the ESOP structure, employee's average retirement savings have:
Choose an item.

 - D. Under the ESOP structure, the company's plan value/annual share price has:
Choose an item.

 - E. Has the contractor experienced challenges in attracting and retaining a talented workforce in a competitive market? If Yes, please explain.
Choose an item.

Pilot Program to Incentivize Contracting with Wholly Employee Stock Ownership Plan Businesses

- F. Has the contractor experienced any challenges related to its corporate ownership structure that hinder its ability to contract with the DoD to scale their technologies and capabilities? If Yes, please explain.

Choose an item.

- G. Has the contractor experienced any challenges related to its corporate ownership structure in obtaining capital needed to bridge the funding gap between prototype demonstration and full-scale development? If Yes, please explain.

Choose an item.

IV. Contracting Officer Feedback (*Contracting Officer to complete*)

- A. Rate the contractor performance on prior contract.

Choose an item.

- B. Rate the contractor performance during follow-on contract.

Choose an item.

- C. Identify and discuss any benefits or disadvantages the contracting activity or agency may have experienced using the pilot program.

- D. Identify any best practices the agency/component may have implemented as a result of the pilot program.

- E. Please provide any other feedback or information the agency would like to share on the experience using the pilot program. Expand on other Yes/No drop-down fields as necessary.