

CUSTOMER MEMORANDUM

Disclaimer: This FAQs document is intended to be a helpful resource for understanding the SBIR/STTR program. However, it is critical to understand that the information here does not override or take precedence over the official solicitation or Request for Proposal (RFP). The official solicitation/RFP is the primary document and should be followed in any instance of conflicting information.

CUSTOMER MEMORANDUM BACKGROUND

What is the Customer Memorandum?

The Customer Memorandum is a non-binding document that conveys the Department of the Air Force (DAF) or Joint customer's/end-user's interest in helping to transition your technology to the warfighter. This form requires three CAC-enabled signatures and is required when submitting your Phase II or Direct to Phase II (D2P2) proposal.

If multiple organizations are interested in our proposed solution, can we submit multiple memoranda?

Proposals are limited to one Customer Memorandum per Phase II or D2P2 proposal package. Choosing which organization to endorse your Memorandum is a strategic decision each company must make on their own. Considerations might include:

- Which customer has a higher profile?
- Who is better resourced to support your effort?
- Whose mission is more aligned with where your company plans to grow?
- Who do you enjoy working with?

Organizations that are not chosen for your Customer Memorandum can however submit a Letter of Support. You may submit more than one Letter of Support.

Are Letters of Support accepted and do they improve my proposal's chance of selection?

Letters of Support are accepted by AFWERX and are reviewed during proposal evaluation. While they can often help 'paint the picture' of one's proposed solution, they are not required, not graded, and do not impact scoring of the proposal.

May previously signed Customer Memorandum to be submitted with a new D2P2 proposal?

No, previously signed Customer Memorandums will not be considered, as the form itself is updated for each new solicitation.

Which Customer Memorandum version should be used?

The Customer Memorandum is updated every cycle, so it is imperative to utilize the correct version. Verify that the topic number in the form header matches the topic for which you are applying. The solicitation will provide the current Customer Memorandum template location and include instructions regarding the specific requirements.

How many signatures are required in the Customer Memorandum?

The Customer memorandum requires three CAC-enabled, digital signatures, which includes the TPOC, customer, and end-user. The TPOC must be a DAF member and can be the same person as either the customer or end-user. However, the customer and end-user must be two different people, from either the same or separate DAF or Joint organization(s).

CUSTOMER MEMORANDUM SIGNATORIES

Who are the customer organizations?

The primary customer organization is responsible for acquiring the solution on the end-user's behalf and supports the acquisition/fielding of the capability.

Who are the end-user organizations?

The primary end-User organization is the operational user that will directly benefit from the solution.

Who serves as TPOCs?

The TPOC is the technical on-site government representative for the contract. The TPOC is appointed by the Customer Memorandum's Customer and/or End-User signatories. The Primary TPOC must be a DAF military or civilian member.

What is a Joint Organization and how can it be utilized in the Customer Memorandum?

A Joint Organization is a military branch or Department of Defense agency outside of the DAF. These will be the individuals with whom you will be working, and who may be contacted during the course of your Phase II work.

While a Joint Organization may be your customer or end-user, it may not be your Technical Point of Contact (TPOC). Additionally, your proposed solution must still convey a DAF use case.

Can the TPOC, customer, and end-user be the same person?

The TPOC can be your customer or your end-user, however your customer and end-user must be two different people. See the Customer Memorandum's instructions for further guidance.

Is there a rank/grade requirement for the end-user or customer signatories?

There is no rank/grade requirement for the signatories, unless human subjects research might be involved in the proposed solution. In those cases, the DAF organization that agrees to endorse the Customer Memorandum must establish a Human Research Protection Program (HRPP) approved by AFMRA/SGE-C. A DAF Commander of the supporting DAF organization must be a signatory to indicate intent to establish a HRPP. In either case, signers should be in positions that allow them to speak for their organizations (i.e. individuals must understand and exert influence over operational needs, formal requirements, or funding).

Where can additional information regarding TPOC rules and responsibilities be found?

Refer to either the TPOC FAQs One-Pager or applicable Customer Memorandum, both are available in the Resources section of <https://afwerx.com/divisions/ventures/open-topic/>.

USEFUL RESOURCES**Navigating the SBIR/STTR Process**

AFWERX Ventures afwerx.com/divisions/ventures/overview
SpaceWERX Ventures spacewerx.us/space-ventures/overview
SBA - America's Seed Fund sbir.gov
Defense SBIR/STTR Innovation Portal dodsbirsttr.mil/submissions/login

Navigating DAF and Identifying Signatories

DAF Tech Connect airforcetechconnect.org
AFLCMC Small Business Support aflcmc.af.mil/small-business-office
DoD Military Departments defense.gov/Resources/Military-Departments/Defense
Innovation Marketplace defenseinnovationmarketplace.dtic.mil/industry-portal
AF Units Social Media af.mil/AF-Sites

Registration

System for Award Management sam.gov