

# VENTURES

**Kellyn Hooker, STRATFI Selection & Award PM** 

Program Year 26.1 STRATFI Notice of Opportunity Ask Me Anything, AFWERX Ventures (AFRL/RGV)

\*Information current as of July 2025 DISTRIBUTION A. APPROVED FOR PUBLIC RELEASE: DISTRIBUTION UNLIMITED, AFRI -2025-3378

### **Rules of Engagement**

- 1. Call is recorded and will be available on <u>AFWERX.com</u> and the TEAMS channel
- 2. Please save all questions for the end of the briefing.
- 3. Post questions in the Q&A section (not via chat)
- 4. Only questions regarding: PY26.1 STRATFI NOO will be answered on today's call and as time allows

#### **AGENDA**

- Purpose
- Eligibility
- Structure
- Matching Requirements
- Award History
- Notice of Opportunity
- Government's Role
- Next Steps

#### AFWERX · SPACEWERX VENTURES

#### BRIDGING THE VALLEY OF DEATH

#### STRATEGIC & TACTICAL FUNDING INCREASE PROGRAM: STRATFI | TACFI





Catalyze relationships between Air Force and Space Force end-users and acquisition professionals, private-sector innovators, and investors.



Bridge the capability gap between current SBIR/STTR Phase II efforts, resulting in SBIR/STTR Phase III scaling efforts that facilitate the delivery of strategic capabilities for the Department of the Air Force.

TACFI

**Tactical Funding Increase** \$375K-**\$**2M

STRATFI

Strategic Funding Increase \$3M-\$15M

#### **ELIGIBILITY**

Small Business Concern (SBC) must meet ALL of the following criteria.

- 1. Company is considered a SBC and eligible for a SBIR/STTR award
- 2. SBC is on an active SBIR/STTR PII or completed a SBIR/STTR PII within 2 years of Capability Package Submissions
- 3. The subject PII effort has not already been awarded a second (AKA "sequential") PII
- 4. At least 90 days have passed since the beginning of the associated PII execution
- 5. SBC is not executing a prior STRATFI effort at the time of submission
- 6. Anticipated work is to be performed in the United States

#### MATCHING OPTIONS

#### Defense-Only Dual-Use TACFI SRIP/STTP: Gov SRID/STTD: Private STRATFI SBIR/STTR: Gov SBIR/STTR: Gov: Private **DAF Customer** Notice of RFP Release and Contract Opportunity Award

#### **PY24 STRATFI/TACFI** RESULTS



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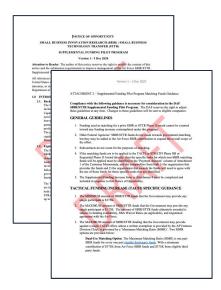
#### What to Know for PY26.1

- STRATFI-only cycle
- A SBC may be awarded only one STRATFI during its lifetime
- Updated guidance, documentation, and templates available on Teams channel (Look for PY26.1 in the Header)
- Condensed Capability Package
- Submission Quad Chart Attachment to Collaboration Agreement
- Save feature added to App Ingest Submission as of PY25.1 cycle
- Signed Finance Acceptance Memo no longer required
- Government POC Kick-Off Meetings after selection

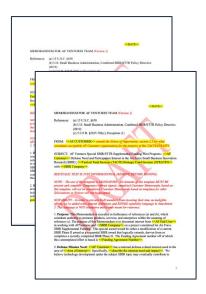




### **Notice of Opportunity**



Notice of Opportunity Matching Funds Guidance



Combined End-User/Customer Collaboration Agreement\*



Private Funding Letter Gov Funding Letter Spend Plan

\* O-6/GS-15 minimum signatory. For STRATFI, org must be at the Strategic Level (i.e. Customer signatory must be the PEO/Deputy)

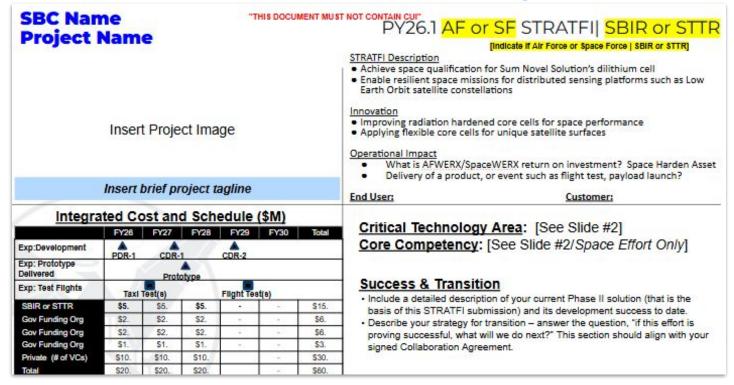
### **Capability Package & Other Documents**

- Capability Package Elements
  - Company Information
    - Company Description and Profile
    - Key Personnel, Shareholders, etc.
    - Ownership Profile
  - Phase II Overview
  - Summary of Pending Contract Awards
  - Supporting Documents
    - SBC Registration (Attch)
    - Private Funding Cap Table (Attch)
    - Foreign Disclosure Form (Attch)

- Other Documents
  - Spend Plan & Milestones Worksheet
  - Matching Funds Letter(s)
    - Private
    - Government
  - Customer/End User Collaboration Agreement
    - Submission Quad Chart (Attch)
    - Non-proprietary Work Plan (Attch)
  - Contracting MOU
  - Phase II Contract (to include Modifications)
  - Phase III Contract (if used as Funds Match)

## Capability Package & Other Documents (cont'd)

#### **Submission Chart Example**



### **Common Mistakes = Incomplete Packages**

- Missing Elements of Capability Package
- Missing/Outdated SBC Registration
- Missing Private Funding Capitalization Table
- Missing/Incorrect POCs:
  - End-User/Customer/TPOC/SIPR/Staff Function POC Info
- Incorrect Document Signatories
- Contracting Acceptance/Contract Award Responsibility
- Inaccurate Funds Match (Phase III's, Ineligible 3rd Party, etc)
- Milestones and Funding Alignment
- Missing Info/Altered Quad Charts
- Using Previous Edition Forms | Look for PY26.1 in the Header

# **Submission Checklist: The Ingest Assistant**

PY26.1 AppSheet Ingest Assistant	
STRATFI/TACFI Website: https://afwerx.com/stratfi-tacfi	
Questions regarding this memorandum can be addressed to afri-rgv.stratfi-tacfi@us.af.mil	
IMPORTANT: In an effort to prepare you for a successful package submission it is highly encouraged to fill out and follow this template as it will expedite the submission process. All information entered should directly align with/be extracted from your submission documents.	Prior to starting your application process, ensure you have completed the following:  1) Reviewed PY26.1 Guidance Documentation  2) Reviewed PY26.1 Submission Templates  3) Obtained the required signatures for all of the submission documents provided.
CAULTION: WHILE USING THE APP INGREST:  DUE TO INDIVIDUAL/USER CACHE SETTINGS, IT IS POSSIBLE BROWSER HISTORY WILL CLEAR AUTOMATICALY AND ALL  PREVIOUSLY ENTERED INFORMATION WILL BE LOST EVEN WITH THE AUTO-SAVE FEATURE. IT IS HIGHLIY SUGGESTED ALL  INFORMATION BE ENTERED IN ONE SITTING, WITHOUT INTERUPTION.	
Instruction	s: Open App Ingest, Populate Information, Upload Documents, Click Submit Package
Description	Response
Page 1 - INTRO	7000 1000
Are you submitting this STRATFI package for: STRATFI	
Are you submitting this STRATFI package for Air Force or Space Force	
Are you submitting this STRATFI package for SBIR or STTR Funding	
Page 2 - MEMORANDUM FOR SBC STRATFI PARTICIPANTS	GOV POC Response
Read Important information and click: Accept	
	N. Southern Control
Page 3 - CAPABILITY PACKAGE (Provided by SBC)	SBC POC Response
ATTACH a copy of the "CAPABILITY PACKAGE" (Note: Only attach the documents requested, do not combine with any other documents Provide a brief company description/history in relation to capabilities of the proposed effort. (250 word limit)	
"Company Profile" Information:	
Small Business Concern (SBC) Name	
Street Address	
Suite/Unit/etc (optional)	
City	
State	
Zip Code	
SBC POC	
SBC POC Email	
SBC POC Phone #	
DUNS (Data Universal Number System (DUNS) Number)	
CAGE - (Commercial and Government Entity (CAGE) Code)	
Is your company currently doing business under any other name?	
If Yes, provide the name. (i.e. 'd.b.a' or sub-corporation)	
Where are the operating locations of your company?	

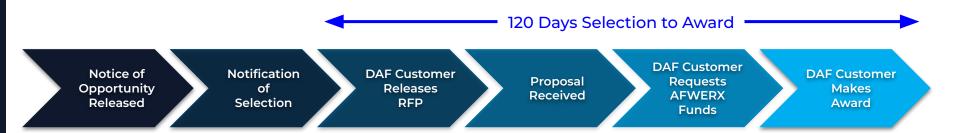
### **Government Roles and Responsibilities**

#### All Supporting Functional POC's are identified in the Collaboration Agreement.

- **End User:** DAF organization is and/or will be the primary user/supporter of solution.
- **Customer:** Organization which will procure and/or sustain the effort/solution.
- TPOC (Technical POC): Work closely with the company during TACFI/STRATFI execution to achieve project success.
- **FM (Financial Management):** The support financial manager who is responsible for transmitting the matching funds to the executing contracting office. Help facilitate the smooth utilization of the funds coming from AFWERX and other offices that may be contributing funds to the efforts.
- **PK (Contracting):** The supporting contracting office who is responsible for the creation of the request for proposal, award of the contract action and administration of the action.

**Customer Org PK determines contracting strategy: Phase IIB or Sequential** 

### **Steps to Award**



#### For Success:

- Customer PK has RFP 90%+ complete prior to selection notification
- SBC has Proposal 90%+ complete prior to selection notification

#### Timeline:

- RFP release < 20 days from notification
- RFP to Final Proposal <25 days from RFP release
- Funds request to AFWERX <50 days from Final Proposal
- PR request to contract award in <25 days

### **Next Steps**

Official Notice of Opportunity available at:

https://afwerx.com/stratfi-tacfi/

#### **STRATFI Submission window:**

Opens Monday, July 28th and closes at Noon ET on Wednesday, August 28th.



#### **STILL HAVE QUESTIONS?**

Open Topic Phase I: afrl.rgv.pl@us.af.mil Open Topic Phase II: afrl.rgv.p2@us.af.mil Specific Topic: af.sbir.sttr.workflow@us.af.mil **STRATFI/TACFI:** afrl.rgv.stratfi-tacfi@us.af.mil

# Financial Management / Contracting (cont'd) Steps to Award

All guidance is outlined in the Contracting Overview Guide, and we'll cover in Govt Onboarding

- 1. SBC & Gov POCs receive selection notification
- 2. Gov POCs receive Funding Assurance Letter
- 3. Customers FM/PK validate matching funds put forth in Funding Letters
- 4. Customers PK Builds Acquisition Strategy

  Determine if effort will be awarded via modification (SBIR Phase IIb) or new award (Sequential Phase II)
- 5. Pre-RFP requirements document of effort (SOO/SOW, IGCE, ect) dictated by local acquisition policies and procedures
- 6. Solicitation of Proposal (RFP release) 20 calendar days from selection notification
- 7. After receipt of the proposal, either directly from the SBC or through the coordinated DSIP/AFVentures POC, the contracting officer will begin the internal screening for completeness 25 calendar days from selection notification
- 8. Once determined complete by the CO, the proposal will be evaluated by TPOCs as listed in the Collaboration Memo
- 9. Negotiations will begin, upon approval, by the CO and TPOC
- 10. PRIOR to award a Certified PR request must be submitted to AFVentures FM
- 11. Once the requested info is received and validated by AFVentures, you will receive a Certified PR
- 12. Receive the certified PR, execute the modification/award the new contract, send contract files to the AFWERX team 25 calendar days from selection notification

# Financial Management / Contracting

- Email/POC signifying that as a functional community they are willing and able to accept the work associated with awarding and executing a Phase II contract
- · Customer FM/PK responsible for coordinating incoming SBIR/STTR and non-SBIR/STTR matching funds

#### **SBIR/STTR Funds**

- Funds Assurance Memo for RFP release will be provided to functional POCs in capability package approval notification email
  - · Certified funding document will be provided to awarding PK office after receipt of final proposal
- Final proposal reviewed by AFRL/RGF for propriety of funds to ensure scope properly aligned with 3600 RDT&E funds
- · Form 9 Purchase Request (PR) will be sent by AFRL/RGF to awarding PK office
  - AFRL/RGF will request PR info such as awarding PK DODAAC, awarding PK org/office symbol, PC
     Code, contract #, est. contract award date, amount of SBIR funds requested, PoP, POCs, etc.
- AFRL/RGF will review contract award and ensure posted correctly in Accounting System