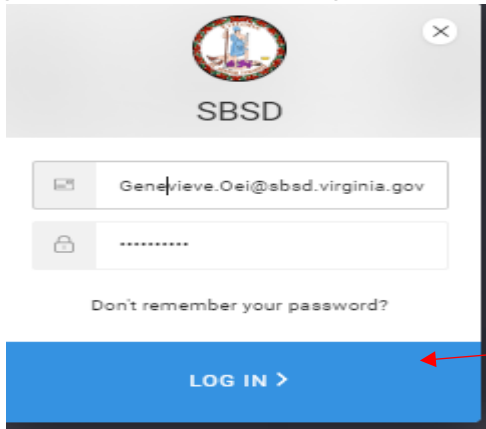


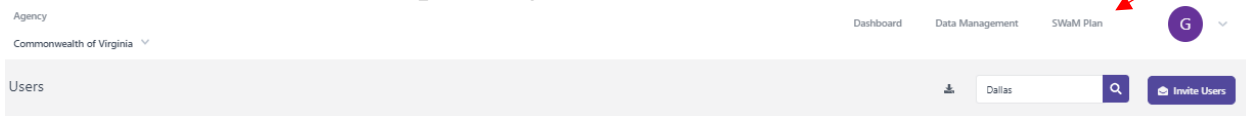


Submitting the Annual SWaM Plan (Only SWaM Plan Administrators have this capability):

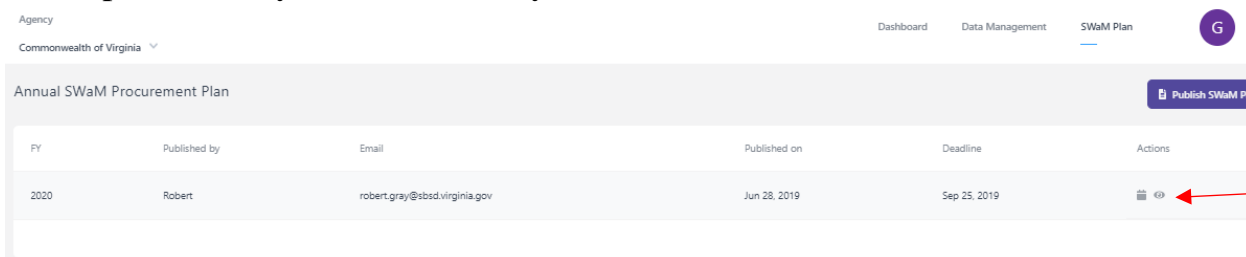
1. Log into Dashboard using state e-mail address and password. Click Login.



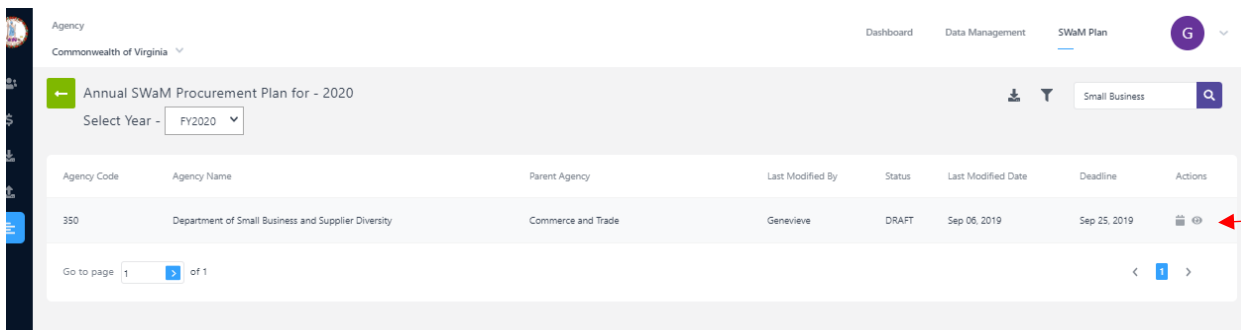
2. Click SWaM Plan Tab at top of Page.



3. You will see a page that has information about when the SWaM plan was published and who it was published by. Click on the eyeball icon under actions.



4. You will see information about your Agency's SWaM Plan. Click on the eyeball icon under actions again.



5. You will now see the instructions page for completing the SWaM Plan. Click on the proceed to form button.

Agency  
Commonwealth of Virginia

Dashboard Data Management SWaM Plan

SWaM Plan Instruction

Commonwealth of Virginia  
FY2020 Agency SWaM Procurement Plan Online Guidance

**\*\*\* Due September 25, 2019 \*\*\***

You must use the online format to prepare the FY2020 Plan

Code of Virginia § 2.2-4310 (B):  
All public bodies shall establish programs to facilitate the participation of Small businesses and businesses owned by Women, Minorities, and Service Disabled Veterans in procurement transactions. The programs established shall be in writing and shall comply with the provisions of any enhancement or remedial measures authorized by the Governor, and shall include specific plans to achieve any goals established therein. State agencies shall submit annual progress reports on Small, Women, Minorities, and Service Disabled Veterans procurement to the Department of Small Business and Supplier Diversity in a form specified by the Department.

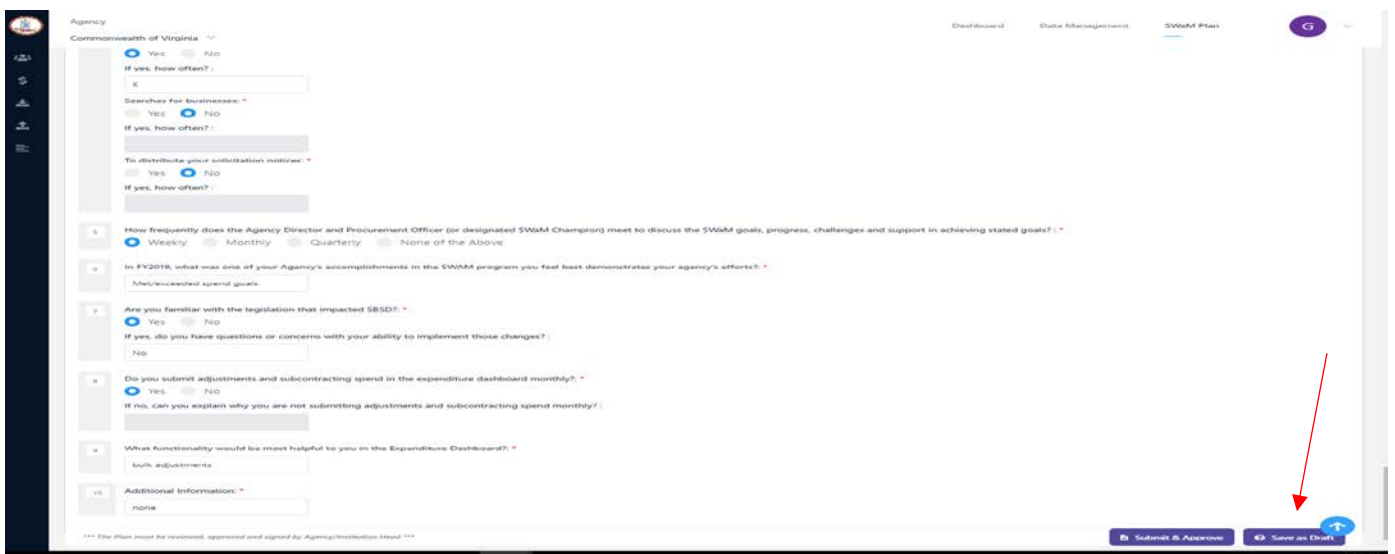
The procedure for submitting this year's Agency SWaM Plan is as follows:

- Click "Proceed to Form" to move to SWaM Procurement Plan Form.
- Complete all required fields within the Annual SWaM Plan.
- Agencies that have sub agencies need to either submit separate SWaM Plans for each sub agency or select the option to use the same SWaM plan for all sub agencies located at the top of the form.
- Select 'Save as Draft' Button to exit the plan and return at a later date to complete.
- Once complete select the 'Save and Submit' Button to route for Agency Head approval.
- Agency Head approval must be done electronically by the deadline established by DSBSD.

[Proceed to Form >>](#)

6. You will now be on your agency's SWaM plan. If you are a parent agency completing the plan on behalf of all of your sub agencies. There will be a box to click near the top of the page.

7. Complete the SWaM Plan. There is a save as Draft button if you want to save the Plan as a draft and come back to it later.



Agency  
Commonwealth of Virginia

Dashboard Data Management SWaM Plan

Yes No  
If yes, how often? :  
K

Searches for businesses :  
Yes No  
If yes, how often? :  
To distribute your solicitation notices :  
Yes No  
If yes, how often? :  
How frequently does the Agency Director and Procurement Officer (or designated SWaM Champion) meet to discuss the SWaM goals, progress, challenges and support in achieving stated goals? :  
Weekly Monthly Quarterly None of the Above

In FY2019, what was one of your Agency's accomplishments in the SWaM program you feel best demonstrates your agency's efforts? :  
Met/exceeded spend goals.

Are you familiar with the legislation that impacted SBSD? :  
Yes No  
If yes, do you have questions or concerns with your ability to implement those changes? :  
No

Do you submit adjustments and subcontracting spend in the expenditure dashboard monthly? :  
Yes No  
If no, can you explain why you are not submitting adjustments and subcontracting spend monthly? :  
When functionality would be most helpful to you in the Expenditure Dashboard? :  
both adjustments

Additional Information :  
none

\*\*\* The Plan must be reviewed, approved and signed by Agency/Institution Head \*\*\*

[Submit & Approve](#) [Save as Draft](#)

8. When you have completed your SWaM Plan, click the Submit and Approve button. You will be able to sign the SWaM Plan and it will be electronically sent to your agency head for them to approve.

Agency  
Commonwealth of Virginia

Dashboard Data Management **SWaM Plan**

Yes  No  
If yes, how often?:  
5

Searches for businesses: \*  
 Yes  No  
If yes, how often?:  
To distribute your solicitation notices: \*  
 Yes  No  
If yes, how often?:

5 How frequently does the Agency Director and Procurement Officer (or designated SWaM Champion) meet to discuss the SWaM goals, progress, challenges and support in achieving stated goals?: \*  
 Weekly  Monthly  Quarterly  None of the Above

6 In FY2019, what was one of your Agency's accomplishments in the SWaM program you feel best demonstrates your agency's efforts?: \*  
Met/exceeded spend goals.

7 Are you familiar with the legislation that impacted SBSD?: \*  
 Yes  No  
If yes, do you have questions or concerns with your ability to implement those changes?:  
No

8 Do you submit adjustments and subcontracting spend in the expenditure dashboard monthly?: \*  
 Yes  No  
If no, can you explain why you are not submitting adjustments and subcontracting spend monthly?:

9 What functionality would be most helpful to you in the Expenditure Dashboard?: \*  
bulk adjustments

10 Additional Information: \*  
none

\*\*\* The Plan must be reviewed, approved and signed by Agency/Institution Head \*\*\*

Submit & Approve Save as Draft

9. Once your agency head has electronically signed the SWaM Plan, it will be submitted to DSBSD electronically.