

Procurement Technical Assistance Program (PTAC)

Annual Report 2015-2016

The Colorado Procurement Technical Assistance Center (PTAC) is a nonprofit organization that receives \$200,000 funding from the State of Colorado from state funds via the Office of Economic Development and International Trade (OEDIT) and \$470,980 from a federal grant that the nonprofit receives directly from the Defense Logistics Agency of the Department of Defense. The PTAC provides free specialized and professional technical assistance to individuals and businesses that are seeking to pursue and successfully perform under contracting and subcontracting opportunities with the Department of Defense, other federal agencies and/or state and local governments. The PTAC's fiscal year is from September 15, 2015 to September 14, 2016.

The following information is reported to OEDIT by the PTAC and is included in their annual report submitted to the General Assembly pursuant to C.R.S 24-48.5-121. This is the second year of six years of funding for which this information will be reported.

Statutory Requirements Descriptions	Statutory Minimum Requirements	Actual
The number of new and active businesses that the PTAC served	100	689
The number of counseling hours that the PTAC provided	1,500	2,158
The number of events that the PTAC sponsored or participated in	65	204
Did the PTAC obtain at least \$200,000 in gifts, grants, or donations	\$200,000	\$270,890
Did the PTAC obtain the required minimum amount of gifts, grants or donations in cash (\$40,000 for the period 2015-16)*	\$40,000	\$55,500
What portion of the gifts, grants, or donations did the PTAC use	Up to 100%	100%

--Based on the above information reported by the PTAC, the PTAC has met all required metrics of the statute with no exceptions--

* In any year that the PTAC raises more cash than is required, the excess is applied to the following year's requirement. Therefore, \$15,500 from the 2015-2016 fiscal year could be applied to the future year's requirement, along with \$11,000 from the 2014-2015 fiscal year.

Scorecards / Goal Sets / FY 15 - PGM YR 7 - CUMULATIVE GOALS

Goal Set Name: FY 15 - PGM YR 7 - CUMULATIVE GOALS

Definition: DLA 1806 (FY 15 - PGM YR 7) CUMULATIVE

Goal Set Type: Centers Counselor/Centers: ☀

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Data Elements	Current Period	Cumulative to	Date	Goal	% Goal
				(Cumulative)	Reached
1. (7) Active Client Base					*
2. (a) Active Clients (last 12 mos., including Bid Match activity)	3,080	3,080		2,500	123%
3. (b) Active Clients (last 12 mos., excluding Bid Match activity)	1,870	1,870		0	*
4. (c) Active Bid Match Clients (last 12 mos.)	2,121	2,121		0	*
5. (8) Number of Sponsored Outreach Events	204	204		72	283%
6. (9) Number of Supported but Non-Sponsored Outreach Events	7	7		60	12%
7. (10) Total attendees at Outreach Events in (8) & (9) Above	3,364	3,364		0	*
8. (11) Initial Counseling with all Small Business Concerns	190	190		520	37%
9. (a1) Small Disadvantaged/Minority-Owned Business Concerns	68	68		160	43%
10. (a2) Small Certified Disadvantaged Business Concerns	6	6		0	*
11. (b) Woman-Owned Small Business Concerns	58	58		115	50%
12. (c) HUBZone Small Business Concerns	1	1		4	25%
13. (d) Service-Disabled Vet-Owned Small Business Concerns	20	20		60	33%
14. (12) Initial Counseling with other than Small Business Concerns	5	5		16	31%
15. (13) Initial Counseling with Distressed Area Concerns	0	0		0	*
16. (14) Follow-up Counseling with All Small Business Concerns	4,519	4,519		3,000	151%
17. (a1) Small Disadvantaged/Minority-Owned Business Concerns	1,710	1,710		1,150	149%
18. (a2) Small Certified Disadvantaged Business Concerns	444	444		0	*
19. (b) Woman-Owned Small Business Concerns	1,445	1,445		975	148%
20. (c) HUBZone Small Business Concerns	106	106		40	265%
21. (d) Service-Disabled Vet-Owned Small Business Concerns	818	818		440	186%
22. (15) Follow-up Counseling with other than Small Business Concerns	108	108		60	180%
23. (16) Follow-up Counseling with Distressed Area Concerns	0	0		0	*
24. (17) # OF PRIME CONTRACTS RECEIVED BY CLIENTS					*
25. (a) Recv'd by all category Small Businesses (Fed+DoD+State)	698	698			*
26. (b1) Recv'd by Small Disadv/Minority-Owned Businesses (Fed+DoD+State)	229	229			*
27. (b2) Recv'd by Small Certified Disadv Businesses (Fed+DoD+State)	102	102			*
28. (c) Recv'd by WO Small Businesses (Fed+DoD+State)	185	185			*
29. (d) Recv'd by HUBZone Small Businesses (Fed+DoD+State)	31	31			*
30. (e) Recv'd by Svc-Disabled Vet-Owned Small Bus (Fed+DoD+State)	243	243			*
31. (f) Recv'd by Other Than Small Businesses (Fed+DoD+State)	28	28			*
32. (g) Awarded by DoD to all categories of Businesses (DoD)	205	205			*
33. (h) Awarded by Fed agencies to all Businesses (Fed)	435	435			*
34. (i) Awarded by State/Local Gov to all Businesses (State)	86	86			*
35. (18) DOLLAR VALUE OF PRIME CONTRACT AWARDS					*
36. (a) Recv'd by all category Small Businesses (Fed+DoD+State)	\$213,661,061.98	\$213,661,061.98			*
37. (b1) Recv'd by Small Disadv/Minority-Owned Businesses (Fed+DoD+State)	\$87,884,186.44	\$87,884,186.44			*
38. (b2) Recv'd by Small Certified Disadv Businesses (Fed+DoD+State)	\$62,145,325.51	\$62,145,325.51			*
39. (c) Recv'd by WO Small Businesses (Fed+DoD+State)	\$56,336,295.07	\$56,336,295.07			*
40. (d) Recv'd by HUBZone Small Businesses (Fed+DoD+State)	\$7,931,580.61	\$7,931,580.61			*
41. (e) Recv'd by Svc-Disabled Vet-Owned Small Bus (Fed+DoD+State)	\$54,158,803.71	\$54,158,803.71			*
42. (f) Recv'd by Other Than Small Businesses (Fed+DoD+State)	\$2,672,409.48	\$2,672,409.48			*
43. (g) Awarded by DoD to all categories of Businesses (DoD)	\$131,278,503.08	\$131,278,503.08			*
44. (h) Awarded by Fed Agencies to all Businesses (Fed)	\$83,857,738.72	\$83,857,738.72			*
45. (i) Awarded by State/Local Gov to all Businesses (State)	\$1,197,229.66	\$1,197,229.66			*
46. (19) # OF SUBCONTRACTS RECEIVED BY CLIENTS					*
47. (a) Recv'd by all category Small Businesses (Fed+DoD)	3	3			*
48. (b1) Recv'd by Small Disadv/Minority-Owned Businesses (Fed+DoD)	2	2			*
49. (b2) Recv'd by Small Certified Disadv Businesses (Fed+DoD)	2	2			*
50. (c) Recv'd by WO Small Businesses (Fed+DoD)	2	2			*
51. (d) Recv'd by HUBZone Small Businesses (Fed+DoD)	0	0			*
52. (e) Recv'd by Svc-Disabled Vet-Owned Small Bus (Fed+DoD)	0	0			*
53. (f) Recv'd by Other Than Small Businesses (Fed+DoD+State)	0	0			*
54. (g) Awarded by State/Local Gov to all Businesses (State)	0	0			*
55. (20) DOLLAR VALUE OF SUBCONTRACT AWARDS					*
56. (a) Recv'd by all category Small Businesses (Fed+DoD)	\$9,008,261.50	\$9,008,261.50			*
57. (b1) Recv'd by Small Disadv/Minority-Owned Businesses (Fed+DoD)	\$8,261.50	\$8,261.50			*
58. (b2) Recv'd by Small Certified Disadv Businesses (Fed+DoD)	\$8,261.50	\$8,261.50			*

Data Elements	Current Period	Cumulative to Date	Goal (Cumulative)	% Goal Reached
59. (c) Recv'd by WO Small Businesses (Fed+DoD)	\$9,008,260.00	\$9,008,260.00		*
60. (d) Recv'd by HUBZone Small Businesses (Fed+DoD)	\$0.00	\$0.00		*
61. (e) Recv'd by Svc-Disabled Vet-Owned Small Bus (Fed+DoD)	\$0.00	\$0.00		*
62. (f) Recv'd by Other Than Small Businesses (Fed+DoD+State)	\$0.00	\$0.00		*
63. (g) Awarded by State/Local Gov to all Businesses (State)	\$0.00	\$0.00		*

◆ Milestones / 10/8/2015, Rockford Gray, LLC Edit Reports More ▾

Client: Rockford Gray, LLC (908578)
 Counselors: Kathryn Lobdell
 Milestone Date: 10/8/2015
 Milestone Type: Success Story
 Milestone Amount: 787,900
 Initial Amount: 0
 Subject: contract award
 Center: @ Colorado PTAC
 Funding Source: DLA
 Notes

a. Client name: Rockford Gray, LLC
 b. Client address: 1675 BROADWAY STE 1275, Denver CO 80202-4891
 c. Client point of contact, telephone and facsimile number: Jennifer J. Miller, 303-572-3333
 d. Contracting agency point of contact, telephone and facsimile number, contract number and dollar value of award, if applicable: DHS: U.S. Secret Service; # hsss01-15-d-0004 for \$787,900
 e. Narrative description of the issue(s): Rockford Gray won a \$787,900 contract with the Secret Service for one year + 4 option years to provide IDIG MEDIA RELATIONS COURSES.
 f. Narrative describing the PTAC's contribution to the success story and the tangible results to include jobs generated and/or retained: Two PTAC counselors provided Red Team Review of Rockford Gray's draft proposal before they submitted their final proposal. This required reading the USSS Solicitation, making a draft checklist of items required in the proposal, and proofing their draft proposal submitting comments for improving their submission to meet responsive and responsible contract compliance requirements.


Below is the email from Jennifer Miller stating their success and appreciation:
 From: Jennifer Miller [mailto:jennifer@rockfordgray.com]
 Sent: Tuesday, October 06, 2015 10:44 AM
 To: Tom Thompson; Kathryn Lobdell
 Subject: Fwd: Colorado PTAC Yr. Qtr Survey

Hello Friends -

After much angst, patience and multiple updates to previously submitted proposals. We finally OFFICIALLY won the contract with the US Secret Service. It's one year gig with up to four option years totaling about \$787,900! Of course, I filed out the survey and included this award along with a few other recent ones (USPS OIG, Bureau of Prisons, Broadcasting Board of Governors)

This would not have happened without your support and guidance.

Thanks for all of your help!
 Jennifer Miller
 jennifer@rockfordgray.com
 O: 303 572 3333
 C: 303 808 3649
 Rockford Gray, LLC

Client:  Sterisil Inc. (904977)

Counselors:  Dennis Casey

Milestone Date: 9/30/2015

Milestone Type: Success Story

Milestone Amount: 492,313.56

Initial Amount: 0

Subject: **Army-wide contract awarded**

Center:  Colorado PTAC

Funding Source: DLA

Notes:

a. Client name: Sterisil Inc.

b. Client address: 835 Hwy 105 Unit D, Palmer Lake, CO 81333

c. Client point of contact, telephone and facsimile number: Judi Abbott, (719)622-7200 x 218, jabbott@sterisil.com

d. Contracting agency point of contact, telephone and facsimile number, contract number and dollar value of award, if applicable: Angela Wilson, (256)895-8239

e. Narrative description of the issue(s): Client manufactures dental water purification systems for use on dental treatment units. US Army Dental Command wanted to standardize the devices throughout the entire Army and selected Sterisil's units. Sterisil sought PTAC's guidance on ensuing contract.

f. Narrative describing the PTAC's contribution to the success story and the tangible results to include jobs generated and/or retained: Situation presented to PTAC would have put the company in an adverse situation because the Army wanted to install these units in OConus locations under the same terms as the Conus where the company would have to visit each site for a pre-install meeting and get agreement with each site. Since the company had no representatives located in Europe the travel cost would have been cost prohibitive. PTAC reviewed the situation and the proposed work and noted to Sterisil that the Army was trying to use their GSA Schedule for the oconus locations where Steris had not agreed to do oconus work on their schedule and, because of that, the Army was in error by trying to hold them to the terms of their Schedule. Sterisil took the issue back to the Army and the Army agreed they were in error and restructured the oconus contract in order to address the difficulty with overseas travel and used open market purchasing methods appropriately. After award PTAC continued to advise client to ensure they can successfully complete the requirements. Conus award was for \$492,313.56 and the will be similar.

Client: CRCRFS, Inc. (965199)

Contact: Kathryn Row

Milestone Date: 3/8/2016

Milestone Type: Success Story

Milestone Amount: 45,000

Initial Amount: 0

Subject: Awarded Painting Contract at Poudre School District

Center: CO Colorado PTAC

Funding Source: DLA

Notes:

2/8/2016: I will follow up with Malyn to get dollar amount of contract and details.

Email received 4/16/2016 from Malyn:

Hello Kathryn,

I want to apologize this has taken me so long, but between my classes having over a month and a half of all kinds of sicknesses and flu in the house, I am running behind with pretty much everything.

Attached is a word document I write based on your template. Let me know if that works for your records keeping purposes.

I also wanted to ask when could we schedule a F2F meeting? There was a carpet cleaning bid in Greeley that was not awarded to us by a difference of approx. \$45,000 and I would like to review that one in person with you. Maybe there are lessons for me to learn there.

Best Regards,

Malyn Salazar

President & CEO

CRCRFS, Inc.

970-490-0103

SUCCESS STORY FORMAT

Client name:

Malyn Salazar, President & CEO of Colorado Residential, Commercial, Resort & Facilities Services, Inc. (CRCRFS, Inc.)

Client address: 1210 West 44th Street Suite K, Windsor, CO 80550

Client point of contact, telephone and fax number:

970-393-2455

crofn@gmail.com

Contracting agency point of contact, telephone, fax number, contract or bid number, and dollar value if applicable:

Poudre School District

Karen Wasy, CPPB, Senior Buyer, Purchasing Department

970-490-3518

kwasyl@poudre.pedsd.org

Bid Number: P3 #16-101-001 "District wide interior painting services"

Estimated dollar value: Approximately \$45,000.00

Narrative description of the asset(s).

This was the very first solicitation opportunity I bid on, and I basically decided to do it after attending a training session with the SBA group in Greeley/UNC, where I learned about the Rocky Mountain e-purchasing system and the existence of a PTAC Chapter in Fort Collins that could assist small businesses, free of charge, with the process of bidding in these contracts.

Narrative describing PTAC's contribution to the success story and the tangible results (include jobs generated or retained if possible):

PTAC's and Kathryn Row's contribution and help for us has been invaluable. Not only in navigating the bidding process and successfully securing this contract, but also in giving me the confidence and tips to continue looking for more business opportunities for my company.

Thanks to having this contract awarded, I was able to hire a full time employee to be able to fulfill the requests of our new client.

I personally have no words to express my gratitude for the coaching and assistance I have receive with the bidding process, as well as the impact in my confidence as business owner and the positive changes it had made for my sales and marketing strategies.