

Procurement Technical Assistance Program

Annual Report 2018-2019

The Procurement Technical Assistance Center (PTAC) is the qualified entity that provides such services to small businesses statewide. The PTAC's fiscal year is from September 15, 2018 to September 14, 2019.

The following information is reported to the Office of Economic Development and International Trade (OEDIT) by the PTAC and is to be included in the annual report submitted to the General Assembly per the C.R.S 24-48.5-121. This is the fifth year of six years of funding that this information will be reported.

Colorado PTAC clients reported winning 3,430 contracts with a value of \$646,975,424.

| Statutory Requirements Descriptions | Statutory Requirements | Actual |
|---|-------------------------------|---------------|
| The number of new and active businesses that the PTAC served | 100 | 650 |
| The number of counseling hours that the PTAC provided | 1,500 | 2,527 |
| The number of events that the PTAC sponsored or participated in | 65 | 165 |
| Did the PTAC obtain at least \$200,000 in gifts, grants, or donations | \$200,000 | \$235,087 |
| Did the PTAC obtain the required minimum amount of gifts, grants or donations in cash (\$50,000 for the period 2018-19) | \$50,000 | \$99,167 |
| What portion of the gifts, grants, or donations did the PTAC use | Up to 100% | 100% |

* In any year the PTAC raises more cash than is required, the excess is applied to the following year's requirement. Therefore, \$49,167 will be applied to next year's requirement.

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

Milestone Type:Success Story, Milestone Date:9/15/2018-9/14/2019

Milestone Detail General

Client: Mountain Horse LLC (905954)

Counselors: Dennis Casey

Milestone Date: 8/23/2019

Milestone Type: Success Story

Milestone Amount: 0

Initial Amount: 0

Subject: Awardee on \$950M IDIQ

Center: Colorado PTAC

Funding Source: DLA

Notes:

Team PTAC:

Mountain Horse Solutions is proud to announce that we've been selected as one of 11 prime contractors on a new 10-year, potential \$950M Air Force Aircrew Equipment Delivery IDIQ.

<https://www.govconwire.com/2019/08/air-force-taps-11-firms-for-potential-950m-aircrew-equipment-delivery-idiq/>

The contract kick-off is next week. This solicitation was the one where Dennis assisted us with providing the local DCMA contacts as required by the solicitation. As we are likely the smallest government contractor on this award, we are very excited about the opportunities that this contract may bring. As PTAC clients, please let us know if we need to submit any official documentation in order for you to track this award in your "win" column.

Thanks again for your help on this solicitation, as well as all of your assistance and training throughout the years!

Sincerely,
Jennifer Sheehan
Mountain Horse Solutions
Jennifer.Sheehan@mtnhorse.com
M: (615) 260-7254
www.mtnhorse.com

*Mountain Horse is a VA CVE-certified SDVOSB and SBA-certified HUBZONE Small Business.

Milestone Type:Success Story, Milestone Date:9/15/2018-9/14/2019

Milestone Detail General

Client: ADCO Hearing Products (904561)

Counselors: Tom Thompson

Milestone Date: 2/28/2019

Milestone Type: Success Story

Milestone Amount: 3,000,000

Initial Amount: 0

Subject: Success Story

Center: Colorado PTAC

Funding Source: DLA

Notes:

SUCCESS STORY FORMAT

a. Client name: ADCO Hearing Products

b. Client address: 4242 Broadway, Englewood CO 80113-4635

c. Client point of contact, telephone and fax number: Abby Armijo, (303) 794-3928, abby@adcohearing.com

d. Contracting agency point of contact, telephone, fax number, contract number, and dollar value if applicable:
VETERANS AFFAIRS, DEPARTMENT OF Contract 36C79118K0175, \$242,282.13 - FEDERAL EMERGENCY
MANAGEMENT AGENCY (Contract: 70FB8018P00000012) \$31,828.25 - VETERANS AFFAIRS,
DEPARTMENT OF (Contract: 36C79119K0019) \$1,082.79

e. Narrative description of the issue(s): Help with two VA RFPs that Client has never done. Also help with VCE prior to responding to RFPs.

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

Tom helped us to get our SDVOSB four years ago (and has answered quite a few questions for me since then).

At the time we were up for renewal on an existing VA contract, which we had a small piece of four years ago. We won that piece again with Tom's help, and then when the contract RFQ came up again last year we were awarded 95% of that contract. The amount noted on the award is \$10M, but it will far surpass that within the 5-year term.

We have also won a second federal (VA) contract last year, although there is no written dollar amount for the contract (I would ballpark around \$1M). This is for a five-year term.

We are the prime contract on both of these VA contracts.

We also have a GSA contract that we finalized early last year. While Tom didn't help us with the actual proposal, he

did answer several questions for us early on when we were doing our research.

In the last four years we have done recurring business, including small contracts, with FEMA, DoD, Department of the Army, Navy and Air Force, DOJ, Bureau of Prisons, and probably 20 more government entities and state agencies.

I hope this helps! Sorry for the rushed response – I'm trying to answer emails in between meetings. If you would like more detail please let me know.

Regards,

Abby Armijo
President
ADCO Hearing Products

Milestone Type: Success Story, Milestone Date:9/15/2018-9/14/2019

Milestone Detail General

Client: SEGRITY LLC (905649)

Counselors: Tom Thompson

Milestone Date: 2/28/2019

Milestone Type: Success Story

Milestone Amount: 58,151.52

Initial Amount: 0

Subject: Success Story

Center: Colorado PTAC

Funding Source: DLA

Notes:

SUCCESS STORY FORMAT

a. Client name: SEGRITY LLC

b. Client address: 2650 East 40th Ave. Denver, CO 80205

c. Client point of contact, telephone and fax number: Veronica Ferro, +1 303 293 5939 ext 6; cell # 1 720 305 7899; fax # N/A

d. Contracting agency point of contact, telephone, fax number, contract number, and dollar value if applicable: Total revenue for 2018 is \$872,166.

*** Attached is our past performance ***

e. Narrative description of the issue(s):

SEGRITY has been a PTAC client for several years now. We are not only grateful for the high quality level of service we receive in every engagement (from consulting to training) but we also have grown our business as a result of the support received from PTAC.

Tom Thompson has been instrumental in advising us how to approach a proposal writing, how to find government opportunities and how to reach out to government officials.

Lorna Gunning has been instrumental in providing feedback to enhance our capability statement, our past performance and how to present our company to the USBR as well as how to find past performance from PTAC Training classes are always very well delivered with professionals of high caliber.

From these sessions we don't only learn applicable tools, techniques and get guidance for our business but we also have met high quality professionals we currently work with (Example: Karri Palmetier and Meghan Leemon).

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

As a result of the PTAC influence in our company we have been able to:

1) Bid and win about 80% of the RFPs that we respond for Federal (US Bureau of Reclamation, USACE) and Local Colorado customers like Denver Water and Colorado Springs Utilities

2) We have been able to increase our federal and Colorado revenue

In 2016 local Colorado revenue was \$ 36K

In 2017 federal and local Colorado revenue was \$ 118K

In 2018 federal and local Colorado revenue was \$ 285K

Here it's our 2018 Financial History

Year Forecasted Revenue Actual Revenue Actual %

2018 \$601,650 \$872,166 31.28%

3) SEGRITY Business Accomplishments

? 7 years in business

? 75+ projects delivered

? 25+ delighted clients (U.S., Australia, Canada, Latin America & Singapore)

- 60% Private

- 30% State

- 10% Federal

? Employs 7 people including 2 principals, 1 full time and 4 temporary employees (U. S. Veterans)

? Grew revenue from \$95K in 2012 to \$872K in 2018

? Maintained positive cash flow yearly

? Maintained positive net profit yearly

? Signed multi year contracts with Denver Water, Colorado Springs Utilities

? Renewed multi year contracts with Northern California Power Agency (NCPA), Snohomish County Public Utility District

? Renewed yearly contract with South East Alaska Power Agency (SEAPA)

Milestone Type: Success Story, Milestone Date:9/15/2018-9/14/2019

Milestone Detail General

Client: Hartech Group, LLC (905152)

Counselors: Kathryn Lobdell

Milestone Date: 2/26/2019

Milestone Type: Success Story

Milestone Amount: 0

Initial Amount: 0

Subject: GSA schedule reinstated with help from PTAC- GS21F073BA

Center: Colorado PTAC

Funding Source: DLA

Notes:

From: Jennifer Harsha [mailto:jenharsha@hartechgroup.com]

Sent: Tuesday, February 26, 2019 8:50 AM

To: Kathryn Lobdell <k.lobdell@coloradoptac.org>

Subject: RE: Please share your success!

Kathryn

I have been meaning to contact you. It wasn't as much of a win of an award but almost as good, with your help. I had contacted you about 6 months ago because GSA schedule was trying desperately to remove us from the contract as we had not sold the \$25,000 from the GSA schedule. The problem was that our Contracting Officer did not inform us that our submittal for the normal updates didn't go through and we were off the catalog for about 4-5 months during the end of year and was not in the system for any awards due to this issue. You had put me in touch with Michelle Leshe, Rocky Mountain Region, GSA, SBA gal. We were finally able to meet, and we laid out our issues with the GSA and how they have worked over time to cancel our contract, but they are not interested in helping my woman owned small business. She assisted us and she found again that we, were yet again off the catalog for unknown reasons.

She worked behind the scenes at GSA, Heartland Office to get them to at least make attempts forward. We did have to finally go to Senator Cory Gardner's office to lay out our case that we have \$19 Million in awarded contracts with DLAA but can't get \$25,000 sold on GSA. The Senator's office started a Congressional Review of our case at GSA. We were found to be in compliance by the Chief Branch Officer and was granted a five-year extension as a GSA contractor.

It was because you were willing to go the extra mile to assist me, to find the right person to start the conversation and it helped me know that I was on the correct path, that something was wrong with the Heartland Office-GSA. I have told Michelle and the Senator's staff that there is other small businesses (At least 3 that I am aware of in the last two years) that GSA has done this too and didn't have the resources available to them as I had, with our PTAC Counselors assisting us.

Best Regards,

Jennifer Harsha
Hartech Group, LLC

www.hartechgroup.com
317-691-1279/Fax: 800-783-6545

Milestone Type: Success Story, Milestone Date:9/15/2018-9/14/2019

Milestone Detail General

Client: ION Business Strategies (904586)

Counselors: Kathryn Lobdell

Milestone Date: 1/7/2019

Milestone Type: Success Story

Milestone Amount: 325,000

Initial Amount: 0

Subject: SUCCESS STORY - CO State contract award

Center: Colorado PTAC

Funding Source: DLA

Notes:

1. Contracting agency or Prime Contractor point of contact: Colorado State Office of Economic Security (CDHS)
2. Agency or Prime Telephone#: (303)866-3227
3. The contract number (if you have it): IFB1 IHGA 2019000068
4. Dollar value of award (if applicable): \$ 325,000
5. Narrative description of the success: Contract award as Prime Vendor: IFB for Professional Development Academy 2019- ECM 1811345; January to June 2019
6. Narrative describing PTAC's contribution to your success:
Bid was found through the PTAC Bid Match Service, and firm used PTAC for a Red Team Review.

Milestone Type: Success Story, Milestone Date:9/15/2018-9/14/2019

Milestone Detail General

Client: Red's Welding and Contracting (905110)

Counselors: Kathryn Lobdell

Milestone Date: 12/3/2018

Milestone Type: Success Story

Milestone Amount: 1,250

Initial Amount: 0

Subject: Success Story

Center: Colorado PTAC

Funding Source: DLA

Notes:

1. Contracting agency or Prime Contractor point of contact: CDOT
2. Agency or Prime Telephone#: N/A
3. The contract number (if you have it):
4. Dollar value of award (if applicable): \$ 125 PER HOUR
5. Narrative description of the success: GPC contract award as a subcontract welder. She helped them meet their SB goals.
6. Narrative describing PTAC's contribution to your success:
PTAC assisted with this firm's EDWOSB, WBE, SBE, DBE Certifications with SBA.gov and the City/County of Denver. Also the understanding of how to connect with government agency purchasing officers.

Lindsey McNamara [mailto:lindsey@redswelding.co]

Sent: Friday, December 07, 2018 4:09 PM

To: Kathryn Lobdell <k.lobdell@coloradoptac.org>

Subject: Success!

I landed my first genuine a sub contract based on my minority certifications! It was a CDOT job last week, welding together some of the stuff that gets buried in the concrete in the expansion joints... for \$125/hour and I'm going back next week for more :D

Lindsey

From: Lindsey McNamara [mailto:lindsey@redswelding.co]

Sent: Tuesday, December 11, 2018 8:17 PM

To: Kathryn Lobdell <k.lobdell@coloradoptac.org>

Subject: Re: Success!

You know, I'm not sure. I talked to the CDOT civil rights guy, and he pointed me to Flat Iron. I couldn't get past the gate keeper, so the next time I met with him, I mentioned that. He called up the office manager, she said it was okay for me to call her. She and I talked, and she gave me the name and number of the construction manager. I called and spoke with him briefly, and he said to send a follow up email. In my follow up email, I listed all of the ways I could help them meet their small business set aside goals, then named what I considered a fairly outrageous hourly rate. he responded with "i'm going to discuss this opportunity with my project manager", and then they started sending me paperwork. One day I checked my phone and their project engineer had called THREE TIMES to try to get me scheduled for that following monday.

I'm going back on wednesday for more work. There were a few things I did that were "no brainer, right thing to do" items that apparently set me apart from the standard run of welders.

Respectfully,

Lindsey McNamara

Owner

Red's Welding and Contracting

Milestone Type: Success Story, Milestone Date:9/15/2018-9/14/2019

Milestone Detail General

Client: Anchor Point (903355)

Counselors: Tom Thompson

Milestone Date: 9/19/2018

Milestone Type: Success Story

Milestone Amount: 492,852.28

Initial Amount: 0

Subject: Award

Center: Colorado PTAC

Funding Source: DLA

Notes:

SUCCESS STORY FORMAT

a. Client name: Anchor Point

b. Client address: 2131 Upland Avenue, Boulder CO 80304-0937

c. Client point of contact, telephone and fax number: Chris White, 303-665-3473, cwhite@anchorpointgroup.com

d. Contracting agency point of contact, telephone, fax number, contract number, and dollar value if applicable:
707.562.8737, DINDOLAXAMANA@FS.FED.US, contract #1291S818C0005, \$492852.28

e. Narrative description of the issue(s): Client needed someone to review the pricing section for clarity and format. The person that normal does it for them is no longer with them.

f. Narrative describing PTAC's contribution to the success story and the tangible results (include jobs generated or retained if possible):PTAC reviewed the spreadsheet and suggested some better column identification, real justifications for expenses, give a fully burden price, just be prepared to show how you got there. There were two columns with dollar figures after the total that he could not identify. Suggested he remove the contingency column. They gave grand total and added a management fee that he had already added above. His sheet showed 9 tasks and the SOW showed 8,