


TABLE OF CONTENTS

SECTION 1:	PURPOSE AND BACKGROUND.....	4
SECTION 2:	OBJECTIVES.....	5
SECTION 3:	INFORMATION FOR CONSULTANTS.....	6
SECTION 4:	RFP EVALUATION AND SELECTION PROCESS.....	7
SECTION 5:	SCOPE OF WORK.....	10
SECTION 6:	GENERAL STAFFING/OPERATING REQUIREMENTS.....	11
SECTION 7:	PROPOSAL SUBMITTAL INSTRUCTIONS.....	12
SECTION 8:	EVALUATION CRITERIA.....	14
EXHIBIT A:	LETTER OF INTEREST/INTENT TO RESPOND FORM.....	16
EXHIBIT B:	RESPONDENT – GENERAL INFORMATION.....	17
EXHIBIT C:	ANNUAL BUDGET EXAMPLE.....	18
EXHIBIT D:	BUDGET NARRATIVE EXAMPLE	19
EXHIBIT E:	PERFORMANCE GOAL EXAMPLE.....	20
EXHIBIT F:	CASH MATCH CONTRIBUTION FORM	21
ATTACHMENT G:	SUBRECIPIENT AGREEMENT EXAMPLE	
ATTACHMENT H:	MT PTAP STANDARD OPERATING PROCEDURES	
ATTACHMENT I:	ANNUAL BUDGET TEMPLATE	
ATTACHMENT J:	PERFORMANCE GOAL TEMPLATE	

KEY DUE DATES, POC AND BASIC INSTRUCTIONS

Big Sky Economic Development Authority (Big Sky EDA) Request for Proposals (RFP) for a subrecipient to serve a five-county region.

<p>Due Dates: </p> <p>Letter of Interest (EXHIBIT A) is due <u>by 5:00 p.m. on Monday, March 9th, 2020</u></p> <p>Response to RFP is <u>due by 5:00 p.m. on Friday, May 15th, 2020</u></p>	<p>RFP Project</p> <p>Entity to provide procurement technical assistance to companies in a five-county region as a subrecipient to Big Sky Economic Development Authority</p>	<p>Letter of Interest Complete, sign and email the <i>Letter of Interest</i> form, (I A) to the contact person listed below <u>by 5:00 p.m. on March 9th, 2020.</u></p> <p>Completed Proposals Email one electronic copy of a final, completed proposal to the contact person listed below. Final proposals must be submitted no later than <u>5:00 p.m. on Friday, May 15th, 2020</u></p>
<p>RFP Questions</p> <p>Questions regarding this RFP should be emailed to Deanna Langman at: langman@bigskyeda.org Questions will be accepted until Thursday, May 7th, 2020 at 5:00 p.m.</p> <p>Questions will be answered within two (2) working days of receipt. All Q&As will be posted publicly at bigskyeconomicdevelopment.org</p> <p>Any modifications to this proposal as a result of questions received will be posted at bigskyeconomicdevelopment.org</p>	<p>Contact Information</p> <p>Deanna Langman Montana PTAP Manager: Big Sky Economic Development 222 North 32nd Street, Suite 200 Billings, MT 59101</p> <p>Phone: 406-869-8410 Fax: 406-256-6877 Email: langman@bigskyeda.org</p>	

Disclaimer: This RFP does not constitute a subrecipient agreement or contract. Montana PTAP shall not be liable for any loss, expense, damage or claim arising out of advice given or not given or statements made or omitted to be made in connection with this RFP.

SECTION 1 PURPOSE AND BACKGROUND

Purpose

The Montana Procurement Technical Assistance Program (PTAP) at Big Sky EDA in Billings is requesting proposals from eligible entities interested in operating a full-time Procurement Technical Assistance Center (PTAC) in Helena or Bozeman, Montana. Eligible entities include states, local governments, universities/community colleges and local nonprofit economic development organizations. The size of the government marketplace is substantial. Every day, federal, state and local agencies purchase a wide array of products and services from the most common to the most sophisticated. This can present excellent business opportunities for MT companies but to be successful, they must prepare and acquire knowledge. PTACs specialize in helping companies find, bid and win government contracts. The center will require at least one full-time government contracting advisor that will provide consulting, training and technical assistance to businesses pursuing and performing on government contracts. The advisor will assist companies located in the counties of Gallatin, Park, Madison, Lewis & Clark & Broadwater.

For more information on Big Sky EDA and Montana PTAC, refer to:

1. <https://www.bigskyeconomicdevelopment.org/>
2. <http://www.montanaptac.org>

Background

Located nationwide and in United States' territories, PTACs play an important role in economic development by serving as a resource for businesses participating in the government marketplace. Per the national Association of Procurement Technical Assistance Centers (APTAC) <http://www.aptac-us.org/>: *In 2018, PTACs provided assistance to over 54,000 businesses that were successful in winning over **\$26 billion** in government prime and subcontracts. These national results are consistent from year to year. Each year, businesses assisted by Montana PTAC consistently win **\$80-\$120 million** in government prime and subcontract awards.*

PTACs are funded through the PTAP - authorized by Congress in 1985 - and **cost-sharing** cooperative agreements between the Department of Defense (DoD) and eligible program participants. The program is administered by Defense Logistics Agency (DLA). **The guidelines for the PTAP can be found in the DLA Terms and Conditions: [here](#)**



A familiarity with - and understanding of – DLA's Terms and Conditions is imperative for entities interested in responding to this proposal.

In Montana, Big Sky EDA is the lead center and holds the cooperative agreement with DLA to provide PTAC services to companies throughout the state. This is accomplished through **subrecipient agreements** with eligible entities across Montana. Big Sky EDA manages the PTAP funds and provides monthly reimbursement to subrecipients. The Montana PTAP manager provides leadership, support, operational guidance and training to subrecipients and advisor/s. Subrecipients must adhere to all applicable program rules and regulations as stipulated in DLA's Terms and Conditions and Montana PTAC Standard Operating Procedure (SOP). Big Sky EDA has hosted the statewide program since 1994.

Certain sections of DLA's Terms and Conditions (such as distressed budget analysis, surveys, etc.) are the sole responsibility of Big Sky EDA as the recipient of the cooperative agreement. Please pay special attention to the counseling/reporting requirements in Appendix A.

There are currently seven PTAC locations in Montana: Billings at Big Sky EDA, Bozeman at Big Sky EDA, Missoula at the University of Montana, Kalispell at Montana West Economic Development, Hamilton at Ravalli County Economic Development Authority, Great Falls at Great Falls Development Authority and Lewistown at Snowy Mountain Development Corporation. <https://www.montanaptac.org/locations/>

These centers, over the last twenty years have provided 92,790 hours of counseling and sponsored or co-sponsored 924 training sessions. During that time, Montana PTAC clients secured **\$2,580,535,492** in federal, state and local prime and subcontract awards.

For more information on the Procurement Technical Assistance Program (PTAP) and Procurement Technical Assistance Centers (PTACs) nationwide refer to:

1. <http://www.dla.mil/SmallBusiness/Pages/ptap.aspx>
2. <http://www.aptac-us.org/>

SECTION 2 COOPERATIVE/SUBRECIPIENT AGREEMENTS

Cooperative/Subrecipient Agreements

The subrecipient agreement that results from this RFP process will be for a base year performance period which begins on August 1st and ends on July 31st. After the base year, there will be potential for four additional 12-month periods, known as options. Prior to the beginning of each program year, Big Sky EDA negotiates the budget and program objectives with each subrecipient and generates new agreements for the upcoming performance period. If the occasion warrants, funding is prorated for PTACs joining the network in the midst of a program year, although this is not preferred.

Ideally, the respondent to this RFP will be prepared to operate its PTAC on August 1st, 2020.

Application for funding (to DLA) is an annual process for all base and option years. Big Sky EDA submits its annual funding request to DLA for base and/or option years on April 2nd. Existing subrecipients are required to submit projected budgets to the Montana PTAP manager during the first week of March in anticipation of submittal of the statewide budget/funding application to DLA.



Ongoing, annual funding for Montana PTAP subrecipients is contingent upon DLA approval, the availability of federal funds and successful program performance.

SECTION 3 FINANCIAL MANAGEMENT AND REPORTING REQUIREMENTS

Subrecipients must have an electronic accounting/financial management system to separately track PTAC costs. All program costs, Big Sky EDA reimbursement and cash match contributions must be incorporated into one general ledger. Entities must submit monthly fiscal documentation to Big Sky EDA that includes:

- Documentation that reflects the local match and federal portion of Total Program Cost (TPC) according to the negotiated reimbursement rate
- An internal invoice that reflects the federal portion of TPC
- A cover letter (example will be provided)
- Standard Form 425 & 270

These documents are due by the 25th of each month. Subrecipients are reimbursed within 30 days of invoice submission.

Subrecipients are required to use MT PTAP's Customer Relationship Management system known as Neoserra and pay for its portion. The annual cost for an individual center is estimated to be \$2,025. Each subrecipient is invoiced directly from Outreach Systems. <http://www.outreachsystems.com/> Existing Neoserra subscriptions used by the respondent (such as for Small Business Development Centers or Women's Business Centers) cannot be used for PTAC as each location is administered by the Montana PTAC program manager and client information must be segregated and separate from other programs.



Due to accounting complexities and administrative burden, Montana PTAP does not generate program income or recognize in-kind match. All match must be non-federal and cash.

All subrecipients are required to comply with the program guidelines contained in the aforementioned Terms and Conditions and the Uniform Administrative Requirements which can found [here](#) Grant and agreement regulations specific to the Department of Defense (DoDGARs) can be accessed [here](#)

SECTION 4 ESTIMATED BUDGET/REIMBURSEMENT RATES/INDIRECT COSTS

Reimbursement Rates

Subrecipients incur 100% of the cost of operating a PTAC and receive monthly reimbursement from Big Sky EDA for the federal portion of TPC. Reimbursement rates are **determined on an annual basis** and based on a blended rate that considers the number of distressed vs. non-distressed counties. This can change from year to year based on DLA's required analysis of distressed counties. This year, subrecipient reimbursement is **estimated** to be at least 58% of TPC but could be up to 62%. For the purpose of developing a projected budget for this proposal, it is recommended that respondents apply **58%** in its assumptions. Please note that the rate will not be finalized until Big Sky EDA receives and fully executes its cooperative agreement from DLA, which typically occurs in June or July. For the last few years, reimbursement rates of 58%-62% have remained consistent **but could be less** if the number of distressed counties decreases substantially.



Estimated Budget:

The estimated annual budget for this center is **UP TO \$164,000**. This is an estimate of available TPC and can be adjusted down depending on the circumstances of individual respondents. TPC of \$164,000 (for this location) will be included as an assumption in Big Sky EDA's funding application to DLA in April, 2020. **Please note that Big Sky EDA will provide budget guidance to subrecipients but does not determine the budget.** The estimated annual budget projection includes salary, fringe, operating costs, travel/training and an appropriate allocation for general and administrative costs incurred by the subrecipient. **The budget is contingent upon DLA approval.**

Refer to Exhibit C for an annual budget summary example and to Attachment I for a detailed, annual template. Respondents to this RFP must submit a signed Attachment I. The availability of cash match contributions must be stipulated in advance and certified by an official of the proposer's organization on Exhibit F.

Indirect Cost Rate/Reimbursement:

Approved Federal Indirect Rate:

Indirect cost reimbursement can be included in the budget. If your organization has an approved federal indirect rate from its cognizant agency, the rate can be applied to direct costs.

Negotiated Indirect Rate with Big Sky EDA:

If your organization does not have an approved federal indirect rate, a rate can be negotiated with Big Sky EDA that can be applied to PTAC direct costs only. In order to establish a negotiated rate with Big Sky EDA, you will need to provide three years of audited financial statements and we will work with you on this process. For the purpose of submitting a projected budget for this proposal, **use an indirect rate of 33.67%**. This

is Big Sky EDA's approved federal rate and will be used as a placeholder in the April budget assumptions to DLA. **Please note your actual rate will be a function of your audited statements and will likely be less.**

10% De Minimis Rate:

If the respondent chooses not to obtain a negotiated indirect rate with Big Sky EDA, a de minimis rate described in 2 CFR 200.414(f) is an option and can be used instead. Amounts for indirect costs and/or indirect rates (also known as "Facilities and Administrative," or F&A, costs or rates) incorporated into any specific award are subject to downward revision only. Amounts and rates may be adjusted (either upward or downward) for option period(s).

Cash Match:

Federal funds cannot be used to meet an entity's cash match contribution for a PTAC. Two or more entities may cooperate to meet the cash match contribution through *Memos of Understanding* (MOUs), but all financial management and reporting requirements are the responsibility of the successful respondent to this proposal.

Budget Line Items: (Please forward specific questions on any or all of the budget categories to Deanna Langman, langman@bigskyeda.org)

- 1. Personnel** List all of your personnel positions included in the budget. Describe each position's percent of time working on the program in terms of the time employed by you. For example, show a staff member who dedicates all of his or her time to the PTAC while employed as a 100% contributor, regardless of whether that person is a full or part-time employee. Less than 100% contributors are those personnel that share time between the PTAC and other programs in the course of their employment with you. Describe the position, location, and include the name of employee occupying positions that are filled.
- 2. Fringe Benefits** Show fringe benefit costs for each position you included in the budget.
- 3. Travel/Training:** Please see the example budget and narrative. Separate and describe the purpose of each travel item. Provide an estimate that includes, as applicable, the number of travelers, names of travelers, number of days lodging, airfare, meal allowance, rental car, conference registration fees, mileage and mileage rate, etc. Provide the basis for your estimates. Identify the course to include name, source and duration. There are two national conferences each year. PTAC government contractors receive quality, specialized training at these conferences. You may budget for one or both conferences. <https://www.aptac-us.org/aptac-conferences/>. There are four, in-state Montana PTAC meetings per year that are held in different locations throughout the state. It is expected that staff attend these meetings to discuss program operations/best practices/professional development, etc. There are other out-of-state training

courses that can be included in the budget, but it is recommended that you budget for the spring conference at a minimum. There is a multitude of free online training available to PTAC staff from various sources.

4. **Local travel:** Provide the purpose, mileage and mileage rate for any local travel. A summary entry may be made for recurring routine trips. Describe the basis for estimated amounts such as an estimated number of miles per year.
5. **Registration fees:** Registration fees related to travel should be listed with the related travel expense. Include conference, seminar, workshop and event fees.
6. **Equipment:** Equipment means tangible personal property (including information technology systems) having a useful life of more than one year and a per-unit acquisition cost which equals or exceeds the lesser of the capitalization level established by you for financial statement purposes, or \$5,000. Individual items costing less (e.g., most computers and printers) are supplies rather than equipment. Describe the purpose of any equipment and the basis for your estimated amounts. Where equipment is being replaced, provide the age of the equipment needing replacement and justify the need for its replacement. Note there is a Federal interest in any equipment that you acquire or improve under an award. Refer to the Part 5, 7 “Property Administration,” in the PTAP General Terms and Conditions. While equipment purchases of \$5,000 or more is allowed by the Uniform Administrative Requirements, it is not encouraged.
7. **Supplies:** General office supplies **should not be included** as these are usually included in an indirect pool and captured via an indirect rate. **Direct** PTAC supplies such as minor office furniture, computers, desks, etc., may be included.
8. **Contractual:** Itemize consultant and contractor costs (may not exceed 10% of total program cost). Include a description of the purchase and an explanation as to why it is necessary. Explain how costs were derived and include the basis for estimates (e.g., number of hours and the cost per hour).
9. **Other:** Items may include, but are not limited to, computer software, copying, postage, printing, publications, subscriptions and telephone. Itemize disparate items separately and describe the basis for their cost. Do not include generic, all-inclusive, items such as “event costs” or “utilities” without providing details.
 - a. **Rental expenses:** Show costs for **direct** rental of office space and other facilities. Include the address of the property and describe how it is priced such as an annual cost per square foot or a monthly or daily rental rate.
 - b. **Facilities and utilities:** If it is not part of indirect cost, include cost related to facilities and itemize different components such as electrical, telephone and internet access.
 - c. **Publications and subscriptions:** Itemize costs for each individual publication or subscription.

- d. Memberships: Itemize membership costs for business, technical and professional organizations. **Note that the costs of individual memberships are not allowable costs (e.g., personal memberships for your staff).**

10. Indirect Costs: Show your indirect cost base, rate and amount of indirect charges. Ensure calculations are clear, especially if you use more than one rate (for example, if you use on- and off-campus rates or different rates for separate locations).

SECTION 5 SCOPE OF WORK AND SERVICE DELIVERY AREA

Scope of Work

Big Sky EDA is currently assisting 185 businesses with their government contracting needs out of its Bozeman location. With a dedicated, full time employee and active outreach efforts, this client load is expected to increase and could be as high as 250 active clients. As a comparison, active clients in other Montana PTAC locations are as follows: Billings 277, Missoula 223 and Kalispell 245. There are 1202 active clients statewide (all seven locations).

As stated in Section 1, this Request for Proposal (RFP) is intended to solicit responses from eligible entities to operate a full-time PTAC to serve the five-county region mentioned above. Eligible entities should possess a stable financial and organizational history and display a long-term philosophical commitment to PTAP and to the value of the services a local PTAC provides.

The PTAC will assist businesses interested in, and capable of, selling their products and services to federal, state and local government agencies. The services provided by PTAC will include, but are not limited to:

- Provide counseling, training and educational services to enhance clients understanding of government contracting processes, policies, procedures and regulations.
- Evaluate clients' readiness to participate in the government marketplace.
- Assist clients with registrations and certifications related to government contracting.
- Provide timely, accurate advice on topics related to government contracting.
- Conduct training and outreach activities to meet identified needs in the service area.
- Promote PTAC services to businesses, resource partners and stakeholders.

- Participate in professional development opportunities and obtain professional certification from the Association of Procurement Technical Centers (APTAC) within a specified time frame.
- Maintain accurate, up-to-date client records and track results.
- Submit required financial and operational reports to PTAP program manager.
- Develop center resources, as needed.

Service Area:

To most effectively and efficiently meet the needs of Montana businesses, PTACs offer services on a regional basis. Service areas are based on many factors including population density, client demand and proximity to physical office locations. It is anticipated that the following counties would be included in the subrecipient’s service area: Gallatin, Park, Madison, Broadwater & Lewis & Clark.

SECTION 6 GENERAL STAFFING AND OPERATING REQUIREMENTS



Staffing:

Subrecipients hire their own employees and establish their own salary range.

Upon request, Big Sky EDA will provide salary data for various PTAC positions (and others that are similar) in our state and region. The minimum staffing requirement for a full-time center is one professional, full-time government contracting advisor, 100 percent dedicated to the PTAC. Full-time centers operate on an eight hour, five-day-per-week basis, excluding holidays and weekends.

Minimum qualifications for the government contracting advisor position are:

- A four-year degree from an accredited college or university, preferably in business, public administration or related discipline.
- Excellent oral and written communication skills.
- Proven ability to work both independently and as part of a team.
- Ability to conduct extensive procurement research and to interpret/convey technical information.
- General background in business management, small business ownership, purchasing or contract administration.

If requested, the Montana PTAP manager will participate in the staff selection and interview process. Example job descriptions are available upon request.

Operating Requirements:

The PTAC should be located in a professional, convenient environment that is easily accessible to clients and is compliant with the American with Disabilities Act (ADA). The facility shall have adequate parking as well as signage to indicate the PTAC's location. A fully-equipped private office is essential for the government contracting advisor due to the confidential nature of information provided during a counseling session. At a minimum, the PTAC must be open to the public during the normal business hours of the subrecipient organization.

SECTION 7 PROPOSAL SUBMITTAL INSTRUCTIONS

Letter of Interest due by 5:00 p.m. Monday, March 9th, 2020

Submit a letter of interest/intent to respond (**Exhibit A**) by 5:00 p.m. on Monday, **March 9th, 2020**. The letter must be signed by an authorized representative and submitted via email to: Deanna Langman at langman@bigskyeda.org

RFP Response is due By 5:00 p.m. on Friday, May 15th 2020

An electronic copy and all attachments should be submitted via email to: Deanna Langman, MT PTAP Statewide Program Manager no later than 5:00 p.m. MST on Friday, May 15th, 2020.

Format

All proposals must be prepared on standard 8.5 x 11 inch paper and be typewritten. A one-inch margin at the top, bottom and sides of each page is required, and pages must be numbered consecutively. Organizational branding printed on pages, as well as page numbers, are excluded from the margin requirement. Typeface must be in a legible, 12 point minimum, font size.

Please submit information in the following order:

1. Executive Summary

Respondents must include an Executive Summary, not to exceed one page, which addresses the key requirements of this RFP. Any and all entities providing cash match contributions to the respondent through MOUs or other binding documents must be identified, as well as the amounts of their contributions. Points of contact information, DUNS numbers and Tax Identification Numbers (TINs) for all participating entities must be provided on a separate page affixed to the respondent's general information sheet, (**EXHIBIT B**). The Executive Summary must be signed in longhand by the proposing entity's agent or designee.

2. Certification of Cost Matching Funds (EXHIBIT F)

Cash match must be from a local source. Cash match cannot be federal funds.

Attach information that attests to the commitment of matching funds to your program. You may use the attached Certification of Cost Matching Funds Form (EXHIBIT F).

3. Program Narrative: (REFER TO EXHIBIT D - EXAMPLE)

Describe how you will comply with the “Program Requirements” part of the PTAP General Terms and Conditions, which are available [here](#). Include all information necessary for us to conduct an evaluation of your application using the evaluation factors below. Include an implementation plan including targets for significant implementation milestones such as the hiring of personnel and the opening of PTAC facilities. Identify targets for milestones as the number of calendar days elapsed following the start date of the proposed period of performance (which is August 1st). You are encouraged to propose and adhere to the most expeditious implementation plan possible, which we may regard more favorably when evaluating your application. Ideally, the respondent should be ready for PTAC operations on August 1st, 2020.

4. Personnel:

Attach information about each of the personnel positions included in your budget. Provide the position/s title. Upon execution of a subrecipient agreement, resumes for all direct PTAC personnel will be required.

5. Performance Goals (REFER TO EXHIBIT E – EXAMPLE)

Attach your proposed performance goals (ATTACHMENT J) and explain how you developed them. Include goals for 1) number of new clients; 2) hours of counseling time; and 3) number of participated events. Refer to the instructions for the DLA Form 1806 in Appendix A to the PTAP General Terms and Conditions for more information about your goals. **Suggested** performance goals are provided in EXHIBIT E.

6. Indirect Cost Memorandum:

Attach a copy of your approved, federal indirect rate memorandum. If the respondent is not submitting an approved, federal indirect rate memorandum, please include a page for this section that describes your intention.

7. Audit:

Attach a copy of your latest audit in accordance with Subpart F of 2 CFR Part 200 (formerly OMB Circular A-133). If you are a for-profit entity, attach a copy of your audit pursuant to 32 CFR §34.16. If available, you may provide the URL (i.e., web address) of an audit that is available on the internet in lieu of attaching a copy. If you did not expend Federal awards exceeding the thresholds that trigger these audit requirements, describe the amounts and sources of Federal awards that you did expend during your last fiscal year.

8. Budget (EXHIBIT C & ATTACHMENT I):

Attach a budget breakdown (ATTACHMENT I) that shows the individual line items of cost. EXHIBIT C provides a summary example and ATTACHMENT I is a detailed template. Refer to Section 3 above for examples and guidance on how to determine and describe budgeted costs.

SECTION 8 EVALUATION CRITERIA

The Montana PTAP manager and BIG SKY EDA executive team will review all RFP responses to ensure compliance with the instructions and submittal date specified. Proposals that are complete and submitted on time will be reviewed by a committee comprised, at a minimum, of: the Montana PTAP manager; a Montana PTAC government contracting advisor; and a BIG SKY EDA staff member. Respondents' proposals may be evaluated and scored on criteria that includes, but is not limited to, the following:

- a demonstrated understanding of PTAP;
- the level of interest displayed in operating a PTAC;
- organizational history and financial stability;
- the likelihood of an extended commitment to the program.

Responses to this RFP will be scored according to the point scale detailed on the next page.

Responses to this RFP will be scored on the following basis:

Understanding of PTAP and Scope of Work	
Respondent's level of interest and commitment - credibility and creativity of respondent's approach to implementing a PTAC according to DLA Terms and Conditions and other program guidelines:	30 points
Organizational History	
Eligible entity/length of time in existence:	5 points
Experience in one or more of the following areas: counseling; education/training; government contracting; economic/community development; technical assistance to business programs	10 points
Recognition/impact within the community and surrounding areas:	5 points
Financial Stability	
Availability of funds to meet cash match/cost sharing requirements (non-federal) on a short-and long-term basis:	20 points
Existence of an established accounting/financial management system and or software & availability of audited financial statements:	20 points
Operations	
Availability of a private, equipped office for counseling/accessibility of facilities to the public/willingness to place outside signage	10 points
Total:	100 points

EXHIBIT B
RESPONDENT – GENERAL INFORMATION

Legal Name of Entity (must match Montana Secretary of State):

Address:

Contact Name:

Contact Phone:

Contact Email:

Website/URL:

Brief Description of Entity:

Year entity established:

NAICs Code:

Entity FEIN:

Entity DUNS Number:

Entity Fiscal Year:

LEGAL ISSUES

Are there any pending lawsuits against your entity? (Include current mediation or arbitration matters.) If yes, please explain.

**EXHIBIT C – ANNUAL BUDGET EXAMPLE
REFER TO EXHIBIT I FOR A DETAILED BUDGET TEMPLATE**

		Federal	Local Match
SUMMARY OF TOTAL PROGRAM COST (TPC)	ANNUAL	58%	42%
PERSONNEL	\$72,500	\$42,050	\$30,450
FRINGE	\$26,100	\$15,138	\$10,962
TRAVEL	\$10,965	\$6,360	\$4,605
EQUIPMENT	\$0	\$0	\$0
SUPPLIES	\$1,000	\$580	\$420
CONTRACTUAL	\$6,125	\$3,553	\$2,573
DIRECT RENT	\$6,000	\$3,480	\$2,520
TOTAL DIRECT COSTS	\$122,690	\$71,160	\$51,530
TOTAL INDIRECT COSTS	\$41,310	\$23,960	\$17,350
TOTAL PROGRAM COSTS (TPC)	\$164,000	\$95,120	\$68,880



THIS PROJECTED BUDGET IS INTENDED TO BE AN EXAMPLE ONLY. ACTUAL PROJECTED COSTS WILL NEED TO BE DETERMINED BY RESPONDANT/SUBRECIPIENT **USING BUDGET TEMPLATE, EXHIBIT I**

EXHIBIT D – BUDGET NARRATIVE EXAMPLE

PTAC 2020-2021 Budget Narrative Example

1. Personnel/Fringe/Salary
 - a. Salary is based on established range per organization policy
 - b. TOTAL: \$72,500**
 - c. Fringe includes Fringe includes FICA, Medicare, 401(k) Match, Unemployment & Work Comp Insurance, Health, Vision, Dental, Life Insurance, Holiday, Vacation/Sick
 - d. TOTAL: \$26,100**
2. Travel/Training
 - a. In State
 - a. Four overnight trips within five-county service area @ \$206 each and seventeen-day trips during established office hours at \$75 per trip. This is based on actual expenses between Bozeman and Helena.
 - b. \$400 to attend the MDT Small Business Summit in Helena and \$400 to attend the Montana PTAC matchmaking event in Billings. Based on historical actual expenses from the past two years. \$400 each for four quarterly Montana PTAC meetings.
TOTAL: \$3,300
 - b. Out of State Travel:
 - a. Two APTAC conferences: The fall 2020 conference in Washington, DC, and the spring 2021 conference in Coeur d'Alene, ID. \$2,000 each which includes: airfare \$550, hotel \$1036, \$375 meals, \$39 transportation/taxi.
 - b. Out-of-state training opportunity such as APTAC Region 9 training, GSA workshop, Dept. of Defense Small Business Training Week, etc, **\$1,375.**
TOTAL: \$5,375
 - c. Training: **\$2,290-** conference/training registration fees
3. **Supplies, PTAC Specific (under \$5000)**
 - a. Brochures \$500
 - b. Collateral material \$500 - floor displays
4. Equipment
 - a. No equipment purchases
5. Contractual
 - a. Neoserra (CRM): \$2,025 cost share allocation
 - b. Dues and Subscriptions: \$600 includes: a computer-screen-sharing solution (JoinMe) that makes it easier to assist clients remotely for \$240, \$180 for Adobe Pro, \$180 for Go to Meeting, Skype, etc.
6. Advertising: \$2,000 for PTAC outreach/ training events and possibly a fall matchmaking event.
7. Event Venue Costs: \$1,500 for conference room rental/meeting rooms in outlying service area, etc.
8. Rent: \$6,000 - \$500 per month for 12 months
9. Indirect Costs: \$41,310
 - a. Federal indirect cost rate or negotiated rate with Big Sky EDA

EXHIBT E – PERFORMANCE GOAL EXAMPLE

A Helena or Bozeman Location - Gallatin, Madison, Park, Broadwater, Lewis & Clark & Meagher	B 2019/2020 Goals	C 2019/2020 YTD Actual thru February 4th	D Percent of Current Goal Achieved	E PROJECTED 2020/2021 New Client Goals
7. New Clients (cumulative)	96	76	79%	110
7.a Number of small business concerns in block	96	67	70%	110
7.b Number of distressed area concerns in block	NA	NA	NA	NA
7.c Number of covered small business in block	NA	NA	NA	NA
				PROJECTED 2019/2020 Active Client Goals
8. Active Clients	175	212	121%	225
8.a. Number of small business concerns in block	175	206	118%	225
8.b. Number of distressed area concerns in block	NA	NA	NA	NA
8.c. Number of covered small businesses in block	NA	NA	NA	NA
				PROJECTED 2019/2020 Counseling
9. Counseling Time (cumulative)	459	243	53%	495
9.a. Counseling time with small business concerns	459	230	50%	495
9.b. Counseling time with distressed area concerns	NA	NA	NA	NA
9.c. Counseling time with covered small businesses	NA	NA	NA	NA
10. Total participated events (cumulative)	8	4	50%	8

**EXHIBIT F- Certification of Cost Matching Funds
MT Procurement Technical Assistance Program (PTAP)**

This letter is to certify that matching funds as described below are available and committed to the proposed program during the proposed performance period starting August 1st, 2020 and ending July 31st, 2021.

Total cash contributions from the applicant:	
Total cash contributions from third parties:	
Total cash contributions (from all sources)	

For each individual third-party donor, list the exact amount of the cash and the combined total of both.

Name of 3 rd Party Contributor	Cash	Total

The undersigned certifies that no federal funds are being used as match, except those that are specifically authorized by law to be used as match and that the PTAC is not part of any other federal award program.

The undersigned certifies that in-kind that has been used as match on any other program requiring cost match has not been used as cost match on this program.

The undersigned certifies that PTAC clients, counseling hours, events, and contract award achievements are not reported as achievements of any other federal award.

Applicant Name:	
Signature:	
Name:	
Title:	
Date:	

*Ensure consistency with other application documents. Use a continuation sheet if necessary.