APTAC Body of Knowledge Competency Guide
   A. Basics of Contracting with Government Entities
     A.3 Client Intake

APTAC
Association of
Procurement Technical Assistance Centers

Description

Procurement Technical Assistance Center (PTAC) Programs are governed by the Solicitation for Cooperative Agreement Applications (SCAA), administered by the Defense Logistics Agency (DLA). The SCAA contains information that generally defines the relationship the PTAC needs to have with a client. However, it is incumbent upon each PTAC to further define that relationship according to local circumstances.

The objective of Client Intake is for the PTAC to obtain a general understanding of the company/firm or individual, and their immediate goals and capabilities for seeking business with Federal, State or Local government entities.

Initial Counseling Session

The Initial Counseling Session is the first official meeting held by a PTAC with an individual or firm. This session is to be used to 1) determine if the individual or firm has <u>potential</u> to do business with the Federal, State or Local Government entities, as either a Prime Contractor, or Subcontractor, and 2) for the PTAC to thoroughly explain the scope, including limitations of the services that the PTAC may provide the client. Those firms that are determined to have potential to be government contractors would then be maintained as active PTAC clients and will continue to be afforded whatever assistance needed consistent with the PTAC's scope of services. The following is a highly recommended check list for use during the initial counseling session.

1. How did the firm learn of PTAC?
2. Did the firm review the PTAC web site that describes PTAC's offered services?
3. Did the firm submit a PTAC registration or application Form with the appropriate disclaimer?
4. Does the firm have a physical presence or is their primary place of business in the PTAC's assigned geographical area?
5. Does the firm have a business plan that includes the government market?
6. How long has the firm been in business? Two years or more?
7. Is the firm eligible under the law to do business with the government? For example, have they been debarred from doing business with the government for any reason?
8. Does the firm have the financial stability to pursue government contracts?
9. Does the firm have E-Commerce capability, computers, on-Line banking etc.
10. Does the firm have an Employer Identification Number (EIN) with the IRS, and not using a personal social security number?
11. Does the firm have positive past performance in commercial and/or government work?
12. Does the company have a preference for the Federal, State, Local, or Tribal market, is their focus on all government entities?
13. Has the firm obtained a Dun and Bradstreet (DUNS) number?

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14. Has the firm registered with the System for Award Management (SAM) and SBA's Dynamic Small Business Search (DSBS), and are all sections complete?
15. Has the firm registered with the State Purchasing's web site?
16. Does the firm have a Capability Statement for marketing its products/services?
17. Has the firm correctly identified its small business and eligible socio-economic status, if applicable?
18. What formal government contracts training has the firm had?
19. What are the firm's immediate government contract goals?
20. Does the firm appear to have the resources, the willingness and capability to dedicate the time and effort it will take to be successful in the government marketplace?
21. Does the client agree to respond to surveys regarding PTAC services, and government contract awards, when requested by the PTAC?

If the firm does have potential for seeking government contracts, schedule a follow up counseling session. If agreed to by the client, include the establishment a search profile of their products and services that will facilitate identification of government contract opportunities.

References

Solicitation for Cooperative Agreement Applications (SCAA), July 7, 2010, Section III C. Methods and Procedures