

**The Headwaters Fund
Grant Fund Application Coversheet**

Date of application: **August 20, 2021**

Organization Name: **Humboldt State University Sponsored Programs Foundation (HSU-SPF), Northern California Procurement Technical Assistance Center (Norcal PTAC)**

Director/CEO: **Kacie Flynn, Executive Director, HSU-SPF**

Contact Person Name and Title: **Kristina Kunkel, Program Director, Norcal PTAC**

Contact Phone: **707-499-9248** Contact Email: **kristina.kunkel@humboldt.edu**

Contact Address: **1 Harpst St, Building 71, Arcata, CA 95521**

Total current year organizational budget: **\$1,062,780.00** # of FTE employees: **7.725**

Summarize the organization's mission (in the space provided):

Our mission is to advance entrepreneurship and economic growth through procurement technical assistance for all businesses in Northern California. We help our clients identify, obtain, and perform on prime and subcontracting opportunities with local, state, tribal and federal governments. We support all businesses in our service area, with an outreach emphasis on underserved businesses such as women, minority, LGBTQ+, and veteran owned businesses, and businesses located in low-wealth, rural, or disaster impacted areas.

Project title: **Win Contracts Humboldt!**

Please provide a less than 250 word summary of your project which answers the following questions: How will your project lead to improving the local economy and increasing the quality of life for local residents? What exactly are you going to do and for whom? Why is it necessary? What will be accomplished? How will you accomplish this?

Humboldt County businesses are missing out on major opportunities for growth in the government marketplace. Local business owners often do not know that the government could be a potential customer, or are discouraged by the confusing paperwork and policies. Government agencies can save money and reduce their carbon footprint contracting with local businesses, but they struggle to find qualified vendors.

Norcal PTAC can help resolve this disconnect. We propose a four-part project that consists of:

- 1. Marketing and outreach hyper-targeted to Humboldt County businesses.**
- 2. A series of workshops to get businesses ready to sell to the government.**
- 3. One-on-one personalized advising with our Procurement Specialists that will continue beyond the project.**

4. A panel presentation & networking event with government agency representatives.

By implementing these strategies to train and assist local businesses on how to successfully sell their products or services to city, county, state, and federal agencies, Norcal PTAC will play a critical role in increasing market access, economic mobility, and resiliency for Humboldt County firms. By helping local owners be competitive in the government marketplace we will increase the amount of state and federal dollars distributed into our local economy. Additionally, contracts won by local businesses will improve the economy by creating and retaining jobs.

Specific training topics will include: Intro to Government Contracting, Socio-Economic Certifications Overview, Market Research: Which Government Agencies Buy What I Sell, How to Market Yourself to Government Agencies, Intro to Public Works Contracting, and Public Works: Bidding and Estimating.

Amount requested: **\$29,446.00** Total project cost: **\$58,892.00**

Grant timeline: Period covered: **Jan 1, 2022 to June 30, 2023**

Total match amount: **\$29,446.00**

Match amount as % of total project budget: **50%**

(Required 50% total project match for implementation, 25% of total project for planning)

Cash match: **\$29,446.00+**

****\$29,446.00 is allocated from our federal budget as Cash Match, but additional funding is also set aside to provide additional free one-on-one consulting services to businesses at the end of this project. Time and effort from government agency partners is also excluded from the budget.**

Cash match as % of total project budget: **50%**

(Required: 25% of total project for implementation, 12% of total project for planning)

In-kind match: **\$0.00**

In-kind match as % of total project budget: **0%**

Number of new FTE jobs created, if funded: **30 new OR retained jobs**

Number of FTE jobs retained, if funded (jobs that would otherwise be eliminated): **30 new OR retained jobs**

Number of permanent, long term, private sector jobs to be created: **N/A**

Please provide a brief explanation of how job creation/retention numbers were calculated: **The Defense Logistics Agency estimates that, on average, each \$50,000 contract award retains or creates one job. We estimate that Humboldt County businesses will win at least \$1.5 million in government contracts which accounts to 30 new or retained jobs.**

Type of project: Planning Implementation

Geographic focus of project: **Humboldt County**

Which Industry is your project working with (check off all that apply):

- Diversified Health Care
- Specialty Food, Flowers and Beverages
- Building and Systems Construction
- Investment Support Services
- Management and Innovation Services
- Niche Manufacturing
- Tourism
- Forest Products
- Arts and Culture
- Alternative Agriculture

****As a federally funded program, we are currently not legally permitted to work with cannabis businesses because it is federally illegal, though this may change with future federal legislation.**

Strategy being employed to promote economic development (check off all that apply):

- Supporting development of pre-permitted commercial space
- Reducing regulatory bottlenecks for business retention or creation
- Supporting economic development infrastructure
- Developing new strategies for economic development
- Providing access to external markets or plugs the economic leaks
- Retaining and growing existing businesses
- Providing workforce training
- Increasing the number of new businesses
- Leveraging future funding or projects
- Reducing poverty by helping people to develop business skills
- Other (describe):

Are any of the following components required, and if so are they in place already? (check off in left column if required, then check of “yes” or “no” for if they are in place already)

- | | | |
|---|---|-----------------------------|
| <input type="checkbox"/> Building permits | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| <input checked="" type="checkbox"/> Market research | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| <input type="checkbox"/> Legal review | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

Regulatory approval Yes No

Consultants hired Yes No

Staff hired Yes No

ATTACHMENT 02: Explanation of Narrative Questions (HSU SPF: Norcal PTAC)

1. Describe the need for your project and how it will improve the economy.

The State of California is the fifth largest economy in the world and spends more than \$12 billion per year on goods and services. There are limitless government contracting opportunities within the North Coast region and beyond, and nearly all businesses in the industry clusters identified in Prosperity! 2018 have potential to pivot into government contracting or grow existing contracts.

Government agencies WANT to buy from local small businesses in Humboldt County. However, agency representatives share with us that they struggle to find qualified contractors in our region. They often purchase supplies and services from businesses outside our region, resulting in massive losses to our local economy. In addition, small businesses located in economically disadvantaged areas like Humboldt County are often unaware that the government buys what they sell, or are too overwhelmed by complex and confusing procurement systems to become eligible or competitive to win contracts. Recent market research revealed that our rural clients, especially in Humboldt, are winning significantly less contracts than their urban counterparts, and we are motivated to change that.

The government can be a difficult customer to acquire, and that is why we exist. The Norcal PTAC is hosted by HSU SPF and our mission is to advance entrepreneurship and economic growth through free procurement technical assistance for all businesses in Northern California. In 2020, Norcal PTAC's team of experts helped clients win more than \$314 million in contract awards, retaining or creating over 6,000 jobs in Northern California. With Headwaters funding, we will introduce more Humboldt County businesses to new revenue streams through government contracting, and build capacity for existing government contractors to win even more awards.

We envision a level playing field in the government marketplace, where all businesses have equitable access to resources and support for contracting success. We propose to work toward this future for Humboldt County businesses through a four-part project:

- **Marketing and outreach** hyper-targeted to Humboldt County businesses. We find that many business owners on the North Coast are not aware that they can find a new customer in the government marketplace, and they do not know that free assistance exists right in their neighborhood!
- **A series of workshops** to get businesses ready to sell to the government. We will bring our expert Procurement Specialists to Humboldt County to facilitate free workshops; topics are outlined in our attached Timeline.
- **A panel presentation & networking event.** We will facilitate a free panel presentation with our existing government partners in purchasing roles from Pelican Bay State Prison, Humboldt State University, Caltrans District 1, Redwood Community Energy Authority, County of Humboldt, Cities of Arcata, Eureka, Fortuna, California Department of General Services and more. Businesses will have the opportunity to create invaluable connections and learn about selling to the government directly from the source.

- **One-on-one consulting.** Businesses will receive personalized government contracting assistance from our team of expert Procurement Specialists. We assign one Specialist to each client and that Specialist is available to the client indefinitely to answer any questions related to government contracting via confidential counseling. Our Specialists will hold business owners' hands as they navigate the complex world of government processes and regulations.

The primary risk to the success of our event is COVID-19. These events will be much more beneficial if we can hold them in-person, which is why we are proposing to begin our project in 2022. However, if COVID-19 persists, we do have a contingency plan in place. We are very experienced at planning and hosting virtual events, and we can still provide a beneficial and educational experience for business owners virtually if necessary, including all workshops, counseling, and the panel presentation.

2. What are the measurable objectives of your project? Quantify the expected outcomes.

- **Improves Market Competitiveness:** *At least 20 unique business owners* or representatives will attend one or more workshops leading up to the panel presentation. *At least 40 unique business owners* or representatives will attend the panel presentation and networking event. These events will improve market competitiveness for these businesses within the government marketplace.
- **Benefits Clusters/major Industries as Identified in CEDS:** We will perform targeted outreach to *all six industry clusters* identified in CEDS as Targets of Opportunity, and *three of the four major contributing industries*, to invite them to participate in this project. As a federally funded program, we are currently not permitted to work with cannabis businesses because it is federally illegal, though this may change with future federal legislation. *Building & Construction* will receive extra attention; businesses in this industry will be invited to attend workshops and 1:1 consulting sessions with Construction & Public Works Specialist Edward Duarte. All businesses who participate will be exposed to revenue growth opportunities through government contracting.
- **Job Creation/Retention:** Humboldt County businesses will win *at least \$1.5 million* in government contracts, measurable within eight months following the workshops and panel presentation. The Defense Logistics Agency estimates that, on average, each \$50,000 contract award retains or creates one job. This influx of revenue will create or retain *at least 30 jobs* within eight months, and the impact will continue to grow past the period of the project. The first contract is always the most difficult to win, but positive performance on one contract often leads to more contracts.
- **Drives Capital Investment:** Business growth from government contracts is very likely to drive capital investment, but this is outside of our scope and we are not able to quantify this potential impact.
- **Business Creation/Growth/Retention:** In 2020, we helped clients pivot to government contracting when commercial sales were impacted by COVID-19. Many of these clients won government contracts that helped their businesses stay afloat that would have otherwise shuttered. We were nationally recognized by the Association of PTAC's for our support of one of these clients. Travel Well Inc.'s business operations were down nearly

95% and the owner was forced to close down her retail stores. She was about to dip into her 401k and lay off staff. Norcal PTAC worked with the client to develop a proposal to deliver food boxes to nonprofits during COVID-19, and the client won their very first federal contract for more than \$30 million total. The full press release detailing the client's story is available [here](#). Tracking businesses retained is outside of our scope, but we are confident that we can continue to support businesses who are at risk of closing their doors.

3. Describe what you will do to achieve your objectives. Describe how you will measure progress towards your objectives.

To achieve our objectives, we will leverage existing qualified staff for planning and implementation. We will implement a robust marketing campaign hyper-focused on Humboldt County businesses or entrepreneurs in the industries identified in Prosperity! 2018, consisting of digital and newspaper advertisements, physical flyers and mailers, social media posts, and more. We will also utilize partners with local programs such as the Small Business Development Center and Chambers of Commerce who have large small business networks we can tap into.

To increase access to opportunities for training attendees we will provide expert one-on-one advising as well as host agency buyers and representatives from various local governments in the form of a panel where community members can learn how to do business with each agency and how to find contracting opportunities.

We have an existing complex client database, Neoserra that will be utilized to monitor and track all clients, training events, and metrics, and measure progress toward our objectives, at no cost to the Headwaters Fund. We also have access to software that tracks contracts won by our clients and will be utilizing that to measure our job creation and retention goal.

4. Describe the work which has already been done to ensure that this project will be a success (i.e. prior research, planning or permitting).

In 2018, we received Headwaters funding to host the North Coast Procurement Expo, the first large scale procurement event to be held in Humboldt County. We received overwhelmingly positive feedback from businesses and agency vendors alike. The following is a small sampling of quotes from our event evaluation surveys:

- “Very helpful – opened my eyes to new opportunities in business.”
- “Extremely useful and well presented.”
- “This workshop gave me some knowledge on a great way to expand our business”
- “[Norcal PTAC] are people with information (knowledge) and resources. So helpful!”
- “Attending today’s workshop may mean the difference for us having increased sustainability!”

We exceeded our target attendance goal at this event, but it was not easy! We learned that a robust marketing campaign including print and digital advertising and physical mailers is essential to reach rural businesses.

In 2020, our clients won more than \$314 million in government contracts, nearly twice as much as in 2019. The PTAC program is well established nationwide; in 2019, PTACs across the U.S. served over 57,000 clients and helped them win more than \$24 billion in government contracts and subcontracts.

5. List the jobs directly created as an outcome of the successful implementation of this project, titles, roles/general responsibilities, expected employers and expected wages.

We estimate that \$1.5 million in contracts won by local businesses will create or retain at least 30 jobs at an average salary of \$50,000, per estimates from the Defense Logistics Agency. Job titles will vary across industries and could essentially include any worker at any company who wins a government contract. When a business wins their first contract, they develop what the government calls “past performance”, which increases the likelihood that they will win more contracts moving forward. We expect that these businesses will continue to create or retain 30 jobs annually for years to come.

6. If appropriate, explain how the project will protect and or improve the natural environment in one or more of the categories listed below.

Local contract and subcontract participation decreases the total carbon footprint of construction, management, forestry and all other government contracting projects. As we increase local business participation in government contracts, we reduce carbon emissions for miles traveled and supplies shipped from out-of-area contractors.

7. Explain how the project contributes to the quality of life for Humboldt County residents.

We have identified Humboldt County in its entirety as an **underserved population** when it comes to winning government contracts. Furthermore, we will specifically target our outreach to underserved populations within the County, like women, minorities, and veterans. When dollars are injected into the local economy through government contracts, and jobs are created or retained, all Humboldt County residents benefit.

Our training on government certifications is especially valuable for women, people of color and veteran-owned businesses. These trainings will focus on how to acquire and utilize socio-economic certifications that qualify businesses to compete on set-aside contracts with limited competition, as well as contracts with DBE or DVBE requirements, where a percentage of the total dollars awarded must go to DBE or DVBE certified firms. These certifications give businesses a leg up in the government marketplace and increase their likelihood of winning awards.

Our workshops will **strengthen community leadership** by training small business owners on how to represent themselves to government agencies; these skills can be applied to the commercial sector as well.

Our Construction/Public Works Specialist Edward Duarte will work closely with clients one-on-one and in specialized trainings to support construction-related firms, **improving existing infrastructure**.

8. Explain the capacity of your organization, staff and project partners.

Since the establishment of the Norcal PTAC at HSU SPF in 2013, we have assisted 2,174 unique businesses in the Northern California region obtain just over one billion dollars in local, state and federal government prime contracts and subcontracts.

Our Procurement Specialists are experts with a combined 241 years of experience in government contracting. Sr/Lead Procurement Specialist Christina Jones is an expert business consultant and

facilitator with over 20 years of experience in developing process improvement and training programs to position small businesses for government sales. Procurement Specialist Nanci Pigeon began her contracting career as an active duty Air Force enlisted member and upon retirement from active duty, she transitioned to the federal contracting workforce, and then joined the Norcal PTAC team. Construction & Public Works Specialist Edward Duarte is the founder and retired CEO of Aztec Consultants, a San Ramon-based professional construction management company and general contracting firm. These people are passionate mentors, authorities in the field, and enthusiastic cheerleaders for underserved small business success.

Our administrative team is skilled in supporting and marketing procurement events in Humboldt County and beyond. Norcal PTAC Assistant Director Taylor Bowes has nearly a decade of experience leading non-profit marketing and outreach for programs such as the Disadvantaged Business Enterprises Supportive Services Program and several state and federally funded programs at a large non-profit, United Way. Our Training Coordinator James Forrest is a skillful and compelling event host who has hosted or presented at 70 events over the past 12 months. Our Design & Marketing Assistant Megan Bender is a former producer for North Coast News and is well connected to local media outlets.

Primary project partners are government agency representatives who are specifically tasked with either purchasing goods and services or increasing small and diverse business participation in the government marketplace. Their titles are “Buyer”, “Small Business Advocate”, “Small Business/Disabled Veteran Outreach Specialist” and similar. We closely collaborate with countless government agencies, including Caltrans, Pelican Bay State Prison, California Department of General Services, Humboldt State University, local cities and counties, and more. These contacts consistently express their need for qualified vendors in our region. All of these agency partners will be invited to attend and participate in the panel presentation and networking event. Their contributions are not encompassed in the match budget, but each participating representative will be paid by their agency to participate in our events.

Contract management will be conducted through HSU SPF, an auxiliary organization to Humboldt State University under the direction and control of a Board of Directors. HSU SPF is a California nonprofit, public benefit corporation, incorporated in 1952. HSU SPF currently manages a portfolio of more than 600 active projects worth approximately \$110 million and employs nearly 1,000 staff.

9. If you will be using grant funds to hire expertise please list the consultants or firms you are considering.

All staff proposed on this project are existing HSU-SPF staff. We will utilize local print media for advertising the events. We will hire local businesses for the event venue, catering, and wherever possible to support the event. We will also utilize the local ACV airport for staff flying into the area for the workshops.

10. Describe how you will acknowledge the Headwaters Fund in your work.

For all marketing materials, including but not limited to print and digital advertisements, event registration pages, flyers, social media, event signage, and our website, we will prominently feature the Headwaters Fund logo and when feasible, a statement that this project is funded by the Headwaters Fund.

ATTACHMENT 03: Project Timeline and Milestones

Ongoing	Provide 1:1 Counseling to Humboldt County clients. <i>Ongoing throughout the project timeline and beyond.</i>
January-April 2022	Begin targeted Marketing and Outreach to Humboldt County businesses. Begin booking venues and travel plans. Milestone: We will perform targeted outreach to all six industry clusters identified in CEDS as Targets of Opportunity, and three of the four major contributing industries, to invite them to participate in this project.
April-May 2022	Workshops <i>Tentative Workshop Titles:</i> <ul style="list-style-type: none">• <i>Introduction to Government Contracting</i>• <i>Socio-Economic Certifications Overview</i>• <i>Market Research: Which Government Agencies Buy What I Sell?</i>• <i>How to Market Yourself to Government Agencies</i>• <i>Introduction to Public Works (Full Day Course)</i>• <i>Public Works: Bidding & Estimating</i> Milestone: At least 20 unique business owners or representatives will attend one or more workshops leading up to the panel presentation.
May 2022	Panel Presentation & Networking Event with Government Agencies Milestone: At least 40 unique business owners or representatives will attend the panel presentation and networking event.
March 2023	Report on Contracts Awarded Milestone: Humboldt County businesses will win at least \$1.5 million in government contracts, measurable within eight months following the workshops and panel presentation, creating or retaining at least 30 jobs.

Note: We did not see a period of performance defined within the Grant Announcement. We are open to adjusting our timeline if needed.

ATTACHMENT 04: Project Budget

Project Expense Item	Total Cost (\$)	Requested Amount from Headwaters Grant Fund	Amount from Matching Funds	Source of Matching Funds
Direct Salaries & Wages				DLA Cooperative Agreement
Staff 1: Taylor Bowes, Assistant Program Director	6,188.00	0.00	6,188.00	
Staff 2: James Forrest, Training & Program Coordinator	4,394.00	4,394.00	0.00	
Staff 3: Christina Jones, Sr/Lead Procurement Specialist	4,128.00	2,064.00	2,064.00	
Staff 4: Nanci Pigeon, Procurement Specialist	6,592.00	3,296.00	3,296.00	
Staff 5: Megan Bender, Graphics & Design Assistant	3,120.00	3,120.00	0.00	
Staff 6: Edward Duarte, Construction & Public Works Specialist	6,000.00	0.00	6,000.00	
Sub-total: all Direct Salaries & Wages	30,422.00	12,874.00	17,548.00	
Benefits & Payroll Taxes	9,936.00	4,572.00	5,364.00	
Travel				
Air travel, hotel, rental car, & per diems for Ms. Jones, Ms. Pigeon, and Mr. Duarte	5,100.00	5,100.00	0.00	
Local mileage for Ms. Bowes, Mr. Forrest, and Ms. Bender	134.00	0.00	134.00	
Sub-total: all Travel	5,234.00	5,100.00	134.00	
Other Expenses				
Print and digital advertising	7,000.00	3,500.00	3,500.00	
Mailers	1,000.00	0.00	1,000.00	
Venue expenses for workshops and panel	1,800.00	1,800.00	0.00	
Food and beverages for workshops and panel	1,600.00	1,600.00	0.00	
Name badges, other event supplies	400.00	0.00	400.00	
Sub-total: all Other Expenses	11,800.00	6,900.00	4,900.00	
Overhead: Non-staff related				
Printer expenses for flyers, banners	1,500.00	0.00	1,500.00	
Indirect Costs	0.00	0.00	0.00	
Sub-total: all Overhead	1,500.00	0.00	1,500.00	
All Overhead Costs as a % of Total Project Cost	3%	0%	5%	
Total Project Cost	58,892.00	29,446.00	29,446.00	

Match Sources:

The match source for this proposal is an annual \$600,000 Defense Logistics Agency Cooperative Agreement. The fully executed FY 2020-2021 contract is attached to this application. The FY 2021-2022 award is currently being negotiated with our funder and a fully executed contract will be issued on or before Aug 31, 2021. FY 2021-2022 is Year 2 of a 5-year consecutive non-competitive solicitation that is only available to the current awardee (HSU-SPF: Norcal PTAC).

ATTACHMENT 05: Board of Directors

HUMBOLDT STATE UNIVERSITY SPONSORED PROGRAMS FOUNDATION BOARD OF DIRECTORS 2020-2021

Dale Oliver, <i>Board President</i> College of Natural Resources & Sciences FR 101B dale.oliver@humboldt.edu	W 826-4921	Dean Director (Term ends September 2022)
Tom Jackson President's Office SH 224 tom.jackson@humboldt.edu	W 826-3311	Ex-Officio Director (Permanent)
Jenn Capps Provost/V.P. Academic Affairs SH 216B jec159@humboldt.edu	W 826-3722	Ex-Officio Director (Permanent)
Jason Meriwether, V.P. Enrollment Management SH 215B jason.meriwether@humboldt.edu	W 826-3361	Ex-Officio Director (Permanent)
Frank Whitlatch, V.P. University Advancement NHW 202 frank.whitlatch@humboldt.edu c	W 826-5101	Ex-Officio Director (Permanent)
Peter Alstone Env. Resources Engineering HGH 116C peter.alstone@humboldt.edu	W 826-3135	Faculty Director (Term ends September 2021)
Taylor Bloedon Kinesiology & Recreation Admin. KA 326 tkb95@humboldt.edu	W 826-5967	Faculty Director (Term ends Spring 2021)
Carly Marino Library Special Collections LIB 307 cm2816@humboldt.edu	W 826-4955	Faculty Director (Term ends September 2022)

Katia Karadjova
CNRS Librarian
LIB 111D
katia.karadjova@humboldt.edu

W 826-5617

Faculty Director
(Term ends September 2023)

Jeffrey Kane
Forestry & Wildland Resources
NR 220
jk55@humboldt.edu

W 826-5622

Faculty Director
(Term ends September 2023)

Amber Gaffney
Psychology
BSS 442
amg44@humboldt.edu

W 826-4313

Faculty Director
(Term ends September 2024)

C.D. Hoyle
Physics & Astronomy
SCI A 466B
cdh33@humboldt.edu

W 826-3235

Faculty Director
(Term ends September 2024)

Jason Ramos
Tribal Gaming Commission
Blue Lake Rancheria
P.O. Box 428, Blue Lake, CA 95525
JRamos@tgc.bluelakerancheria-nsn.gov

W 668-5300

Community Director
(Term ends September 2024)

Amelia Towse
Associated Students
act71@humboldt.edu

Undergraduate Student Director
(Term ends May 2022)

Samantha Diel
Associated Students
smd885@humboldt.edu

Graduate Student Director
(Term ends May 2022)

ATTACHMENT 06: IRS Tax Status

COPY

Internal Revenue Service

Date: August 4, 2004

Humboldt State University Sponsored Programs
Foundation
P.O. Box 1185
Arcata, CA 95518-1185

Department of the Treasury
P. O. Box 2508
Cincinnati, OH 45201

Person to Contact:

Linda A. Hill 31-08001
Customer Service Representative

Toll Free Telephone Number:

8:00 a.m. to 6:30 p.m. EST
877-829-5500

Fax Number:

513-263-3756

Federal Identification Number:

94-6050071

Dear Sir or Madam:

This is in response to the amendment to your organization's Articles of Incorporation filed with the state on May 3, 2004. We have updated our records to show the name as indicated above.

In February 1952, we issued a determination letter that recognized your organization as exempt from federal income tax. Our records indicate that your organization is currently exempt under section 501(c)(3) of the Internal Revenue Code.

Our records indicate that your organization is also classified as a public charity under sections 509(a)(1) and 170(b)(1)(A)(iv) of the Internal Revenue Code.

Our records indicate that contributions to your organization are deductible under section 170 of the Code, and that you are qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Internal Revenue Code.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely,

Janna K. Skufca

Janna K. Skufca, Director, TE/GE
Customer Account Services

ATTACHMENT 07: PTAC OPERATIONAL BUDGET

EXPENSE	DESCRIPTION	Account Number	DLA	GO-Biz	Total Budget
			Federal	State	
PERSONNEL - SALARIES					
					\$ -
Salaries Benefited	Program Director: Kristina Kunkel	601810	\$ 83,754	\$ -	\$ 83,754
Salaries Benefited	Asst Director: Taylor Bowes	601810	\$ 34,377	\$ 35,888	\$ 70,265
Salaries Benefited	Sr/Lead Procurement Specialist Christina Jones	601810	\$ 46,609	\$ 27,314	\$ 73,923
Salaries Benefited	Procurement Specialist: Thomas Burns	601810	\$ 31,200	\$ 54,100	\$ 85,300
Salaries Benefited	Design & Marketing Assistant: Megan Bender	601810	\$ -	\$ 40,321	\$ 40,321
Salaries Non benefited	Program Coordinator: James Forrest	601840	\$ 11,440	\$ 24,124	\$ 35,564
Salaries Non benefited	Procurement Specialist Leonard Bean	601840	\$ 9,152	\$ 32,869	\$ 42,021
Salaries Non benefited	Procurement Specialist Liz Brazil	601840	\$ 41,195	\$ 60,100	\$ 101,295
Salaries Non benefited	Construction Specialist Ed Duarte	601840	\$ 7,800	\$ 8,000	\$ 15,800
Salaries Non benefited	Procurement Specialist Nanci Pigeon	601840	\$ 17,953	\$ 36,691	\$ 54,644
Salaries Non benefited	Procurement Specialist Mary Jo Juarez	601840	\$ 2,995	\$ 7,399	\$ 10,394
Salaries Non benefited	Procurement Specialist Joseph Moore	601840	\$ 8,486	\$ 20,792	\$ 29,278
Salaries Total			\$ 294,961	\$ 347,598	\$ 642,559
FRINGE & BENEFITS					
Benefits Reimbursed		603000			\$ -
FRINGE					
OASDI	6.20%	603001	\$ 18,288	\$ 21,310	\$ 39,598
WORKERS COMPENSATION	1.04%	603007	\$ 5,811	\$ 3,574	\$ 9,385
UNEMPLOYMENT INSURANCE	3.30%	603010	\$ 12,978	\$ 11,343	\$ 24,321
MEDICARE	1.45%	603012	\$ 4,277	\$ 4,984	\$ 9,261
BENEFITS					
RETIREMENT	10.00%	603005	\$ 19,594	\$ 20,754	\$ 40,348
HEALTH	contact Pre-Award office about current rates	603004	\$ 76,294	\$ 26,357	\$ 102,651
DENTAL	1.99%	603003	\$ 5,526	\$ 4,081	\$ 9,607
VISION	0.45%	603013	\$ 882	\$ 1,456	\$ 2,338
LIFE	0.10%	603011	\$ 196	\$ 323	\$ 519
Fringe & Benefits Total			\$ 143,846	\$ 94,182	\$ 238,028
TRAVEL					
Domestic Travel In-state		606001	\$ 7,926	\$ 1,000	\$ 8,926
Domestic Travel Out-of-state		606002	\$ 13,080		\$ 13,080
International Travel		606830	\$ -		\$ -
Travel Total			\$ 21,006	\$ 1,000	\$ 22,006
SUPPLIES					
Supplies		660003	\$ 2,160		\$ 2,160
Supplies Total			\$ 2,160	\$ -	\$ 2,160
OTHER EXPENSES					
Printing, marketing materials		660090	\$ 2,000		\$ 2,000
Space rental for events		660090	\$ 3,513		\$ 3,513
Advertising		660090	\$ 4,800	\$ 15,500	\$ 20,300
Laptop		660090	\$ 2,000		\$ 2,000
Postage		660090	\$ 173		\$ 173
Memberships		660090	\$ 5,357		\$ 5,357
Software		660090	\$ 6,864	\$ 4,500	\$ 11,364
Client Database		660090	\$ 1,000		\$ 1,000
BidMatch		660090	\$ 7,250		\$ 7,250
Telecom		660090	\$ 2,820		\$ 2,820
Professional Development		660090	\$ 2,250		\$ 2,250
					\$ -
In-Kind					\$ -
Caltrans Redding					\$ -
ATT					\$ -
					\$ -
Other Expenses Total			\$ 38,027	\$ 20,000	\$ 58,027
SUB-CONTRACTOR					
Sub-contract (first 25K, incurs IDC)		613810			\$ -
Sub-contract (no IDC)		613820			\$ -
Sub-Contractor Total			\$ -	\$ -	\$ -
EQUIPMENT					
Equipment >\$ 5,000.00		619001			\$ -
Equipment < \$ 5,000.00		619810			\$ -
Equipment Total			\$ -	\$ -	\$ -
TOTAL DIRECT COSTS			\$ 500,000	\$ 462,780	\$ 962,780
INDIRECT COSTS	20%	662994	\$ 100,000	\$ -	\$ 100,000
TOTAL COSTS			\$ 600,000	\$ 462,780	\$ 1,062,780
MTDC			\$ 500,000	\$ 462,780	\$ 962,780

*Modified Total Direct Costs (MTDC) consists of all salaries and wages, fringe benefits, materials, supplies, services, travel and subgrants and subcontracts up to the first \$25,000 of each subgrant or subcontract (regardless of the period covered by the subgrant or subcontract). Modified total direct costs shall exclude equipment (hardware which exceeds the unit cost of \$5000) capital expenditures, charges for patient care, tuition remission, rental costs of off-site facilities, participant support costs, scholarships, and fellowships as well as the portion of each subgrant and subcontract in excess

COST SHARING COOPERATIVE AGREEMENT			
1. AGREEMENT NO SP4800-20-2-2056		2. THIS AGREEMENT INCORPORATES BY REFERENCE THE PTAP GENERAL TERMS AND CONDITIONS VERSION 1.3, ISSUED SEPTEMBER, 2019. Located at: https://www.dla.mil/SmallBusiness/PTAP/Resources/	
3. FUNDING OPPORTUNITY NO: DLA-202001 A-B			
4. ISSUED BY Defense Logistics Agency Office of Small Business Programs 8725 John J. Kingman Road, Suite 1127 Ft. Belvoir, VA 22060-6221		5. ADMINISTERED BY ONR Seattle Regional Office 300 Fifth Avenue Suite 710 Seattle, Washington 98104	
6. RECIPIENT DUNS: 014302074 CAGE Code: 2F322 HUMBOLDT STATE UNIVERSITY SPONSORED PROGRAMS FOUNDATION 1 Harpst Street, SBS 427 ARCATA, California 95521-8299		7a. PAYMENT WILL BE MADE BY DoDAAC: SL4701 DFAS EBS Entitlement P.O.Box 182317 Columbus, Ohio 42318	
7b. Advance Payment <input type="checkbox"/> IS <input checked="" type="checkbox"/> IS NOT AUTHORIZED			
8. ACCOUNTING AND APPROPRIATION DATA AA-9700100 5100 001 7000215 4100 S33189		9. FEDERAL FUNDS OBLIGATED \$600,000.00	
10. PERIOD OF PERFORMANCE STARTS 09-01-2020 ENDS 08-31-2021		11. PERIOD OF PERFORMANCE IS Base	
12a. NON-DISTRESSED AREA BUDGET		12d. DISTRESSED AREA BUDGET	
Personnel: \$430,501.00		Personnel: \$0.00	
Fringe Benefits: \$190,996.00		Fringe Benefits: \$0.00	
Travel: \$21,006.00		Travel: \$0.00	
Equipment: \$0.00		Equipment: \$0.00	
Supplies: \$2,160.00		Supplies: \$0.00	
Contractual: \$0.00		Contractual: \$0.00	
Other: \$48,126.00		Other: \$0.00	
Total Direct Charges: \$692,789.00		Total Direct Charges: \$0.00	
Indirect Costs: \$307,211.00		Indirect Costs: \$0.00	
TOTAL: \$1,000,000.00		TOTAL: \$0.00	
12b. GOVERNMENT'S SHARE OF NON-DISTRESSED BUDGET \$600,000.00 or 60.00%		12e. GOVERNMENT'S SHARE OF DISTRESSED BUDGET \$0.00 or 0.00%	
12c. RECIPIENT'S SHARE OF NON-DISTRESSED BUDGET \$400,000.00 or 40.00%		12f. RECIPIENT'S SHARE OF DISTRESSED BUDGET \$0.00 or 0.00%	
13a. THE NON-DISTRESSED SERVICE AREA IS Alameda County Contra Costa County Del Norte County Humboldt County (Continued on Page 4)		13b. THE DISTRESSED AREA IS (Continued on Page 4)	
14a. SIGNATURE OF RECIPIENT DocuSigned by: <i>Kacie Flynn</i> 778F1AA3FF8A405...		15a. SIGNATURE OF GRANTS OFFICER	
14b. NAME & TITLE OF SIGNER Kacie Flynn, Executive Director		15b. NAME & EMAIL OF GRANTS OFFICER Resweber, Robin L. (robin.resweber@dla.mil)	
14c. DATE SIGNED August 14, 2020		15c. DATE SIGNED 14 August 2020	

AGREEMENT NO	SP4800-20-2-2056		
PROGRAM PLANS INCLUDE THE ESTABLISHMENT OF FACILITIES IN THE PLACE(S) LISTED (the location in the first block is the principal place of performance)			
Arcata, California 95521-8299			
San Francisco, CA			
ANY CHANGE TO FACILITY LOCATIONS IN THIS BLOCK IS A SIGNIFICANT DEVELOPMENT THAT THE RECIPIENT IS REQUIRED TO REPORT TO THE GRANTS OFFICER AS SOON AS IT IS KNOWN			
17. INDIRECT (F&A) COST RATES APPROVED FOR USER ARE LISTED			
INSTITUTION	RATE	BASE	LOCATIONS
Humboldt State University SPF	45.00	MTDC (PROV)	On Campus
Humboldt State University SPF	22.50	MTDC (PROV)	Off Campus
18. SUBAWARDS APPROVED ARE LISTED			
DESCRIPTION			
None.			
19. THIRD PARTY IN-KIND CONTRIBUTIONS INCLUDED IN THE BUDGET AND APPROVED FOR USE TO MEET COST SHARING REQUIREMENTS			
DONOR	DESCRIPTION	AMOUNT	
California DOT	Training space: w/ AV donation for 8 events @ \$687 per use	\$5,499.00	
ALLOWABLE EXPENDITURES FOR EQUIPMENT AND OTHER CAPITAL ASSETS ARE LISTED (see 2 CFR 200.439)			
DESCRIPTION			AMOUNT
None.			
Expenditures for equipment and other capital assets, third party in-kind contributions, subawards, and indirect (F&A) costs using rates not listed are unallowable without prior approval.			

AGREEMENT NO	SP4800-20-2-2056
Required reporting periods, forms, format, data elements, frequency, due date, and procedures for interim and final performance reports are in Appendix A of the Terms and conditions. See Block 2.	
Performance goals for the period of performance on page 1 are:	
1. Number of new clients	188
2. Hours of counseling time	2500
3. Number of participated events	35

AGREEMENT NO	SP4800-20-2-2056	
CONTINUATION PAGE		
13a. THE NON-DISTRESSED SERVICE AREA IS (cont)	13b. THE DISTRESSED AREA IS (cont)	
Marin County Mendocino County Napa County San Francisco County San Mateo County Santa Clara County Shasta County Siskiyou County Solano County Sonoma County Trinity County		

ADDITIONAL NOTES
<p>Section 889 of the National Defense Authorization Act (NDAA) for Fiscal Year (FY) 2019 (Public Law 115-232) prohibits the head of an executive agency from obligating or expending loan or grant funds to procure or obtain, extend, or renew a contract to procure or obtain, or enter into a contract (or extend or renew a contract) to procure or obtain the equipment, services, or systems prohibited systems as identified in section 889 of the NDAA for FY 2019.</p> <p>To implement this requirement, in accordance with 2 CFR 200.216, DoD Grants Officers shall include a condition in all awards that are issued on or after August 13, 2020.</p> <p>The condition shall include language enacting section 889 of the NDAA for FY 2019 by prohibiting the recipient and subrecipient from entering into contracts (or extending or renewing contracts) with entities that use covered telecommunications equipment or services. This prohibition shall apply even if the contract is not intended to procure or obtain any equipment, system, or service that uses covered telecommunications equipment or services.</p> <p>For the purposes of this condition,</p> <p>1. COVERED TELECOMMUNICATIONS EQUIPMENT OR SERVICES means any of the following:</p> <ul style="list-style-type: none"> • Telecommunications equipment produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliate of such entities); • For the purpose of public safety, security of government facilities, physical security surveillance of critical infrastructure, and other national security purposes, video surveillance and telecommunications equipment produced by Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliate of such entities); • Telecommunications or video surveillance services provided by such entities or using such equipment; or • Telecommunications or video surveillance equipment or services produced or provided by an entity that the Secretary of Defense, in consultation with the Director of the National Intelligence or the Director of the Federal Bureau of Investigation, reasonably believes to be an entity owned or controlled by, or otherwise connected to, the government of a covered foreign country. <p>2. COVERED FOREIGN COUNTRY means the People's Republic of China.</p>



Lee Cunningham
825 W 14th Street
Eureka, CA 95501

August 16, 2021

Headwaters Fund
825 5th Street
Eureka, CA 95501

To whom it may concern:

I would like to take this opportunity to highly recommend the services of NorCal PTAC. Unless you are a small business you cannot possibly understand the services provided by this amazing organization. When I started, breathing life back into a 65 year old business, it was a most daunting task and had it not been for the help and guidance I received from NorCal PTAC I might not have been successful.

In a rural economic environment, one needs all the business one can get. As anyone who lives in Humboldt knows it is not easy to build a sustainable business in this depressed economy. For this reason government contracting is a blessing....but wait. Unless you know how to market to the government, you face the frustration of looking at good contracts but not being able to access them. It is in this situation that PTAC is a fantastic asset. Their training sessions and their one-on-one help with experienced and knowledgeable advisors can take a small business from fear to success.

The proposed project is really brilliant. I, for one, can speak to the knowledge of Christina Jones. She focused my HubZone business and showed me how to market, contract and succeed. To have a panel such as the one suggested is sorely needed. People in Humboldt need assistance; we value and use it. We love Humboldt and want to make our home area successful. Projects like the one proposed will further that mission.

I cannot close without a special acknowledgement to Kristina Kunkel. I sit on the High Speed Rail Board Business Advisory Council, the Cal Trans State Small Business Council, and Chair the DGS Small Business Council. I say this not so you know how many committees I sit on but my depth of experience in reviewing individuals such as Kristina across the state. This woman is a super star and we are so lucky to have her. Her projects succeed because she is bright, articulate and the hardest of workers. I so support this project and am happy to answer any additional questions.

Thanks for your consideration and I am here to help in any way I can.

Sincerely,

A handwritten signature in blue ink that reads 'Lee Cunningham'. The signature is fluid and cursive, written over the printed name and title.

Lee Cunningham
BT Metals CEO

HUMBOLDT STATE UNIVERSITY

Contracts & Procurement

Dear Headwaters Fund:

I am writing this letter to express our appreciation of the Norcal PTAC as an HSU campus-hosted program and strongly support their grant proposal for the Headwaters Fund.

Norcal PTAC's mission is to expand the field of contracting to include more small and disadvantaged businesses. As Director of the Contracts & Procurement and Accounts Payable departments at HSU, I and my team are frequently seeking out local vendors in our procurement efforts. While we prefer using local Humboldt County vendors, this can be a challenge for a number of reasons. We are thankful that the PTAC already assists local businesses with expanding their capacity to serve as vendors and partner with PTAC regularly to support our vendors. But from what I understand, the trainings detailed under their Headwaters grant proposal would bring a closer focus to our local area, boosting local contracting readiness and expanding the eligible vendor pool. Not only would this benefit local business owners and boost the local economy, but it would make it easier for HSU to offer contracts to and secure quality services from conveniently located local businesses.

HSU would certainly be interested in participating in the government panel presentation Norcal PTAC is proposing for next Spring. We believe in the mission and their capability to advance it within our community and would like to support it however possible. If the Headwaters Fund is able to assist in this goal, we would strongly encourage this contribution.

Thank you for your consideration.

Sincerely,

Tawny J. Fleming
Director of Contracts, Procurement & Accounts Payable
Humboldt State University

DEPARTMENT OF TRANSPORTATION

1656 UNION STREET
EUREKA, CA 95501
PHONE (707) 441-5692
FAX (707) 445-5367
TTY 711
www.dot.ca.gov



*Making Conservation
a California Way of Life.*

August 13, 2021

TO WHOM IT MAY CONCERN:

RE: Northern California Procurement Technical Assistance Center for Headwaters Fund

Norcal PTAC's Program Director Kristina Kunkel contacted me recently about their grant project proposal titled "Win Contracts Humboldt!" and after reviewing their plan I write you today to voice my full-throated support for this proposal.

The California Department of Transportation's District 1 has proudly partnered with the Northern California Procurement Technical Assistance Center (Norcal PTAC) in the pursuit of supporting entrepreneurship along the North Coast, as well as more broadly across Northern California. Caltrans is committed to utilizing certified Small Businesses (SB), Disabled Veteran Business Enterprises (DVBE) and Disadvantaged Business Enterprises (DBE). Because of the billions of dollars that our department spends each year maintaining our state's roadways and infrastructure we take these goals very seriously and pursue every opportunity for partnerships that further our work with small businesses; and Norcal PTAC is by far one of greatest partners in this work.

As a Small Business Advocate for my Department and District I have many responsibilities to our local small business constituents: this includes advocacy, technical assistance, and acting as liaison to our many procurement officers. Even with the significant time allocated in my schedule for these duties it is still impossible for me to meet with and provide the substantive and quality attention that each prospective and existing small business seeking to work with Caltrans needs to succeed. Norcal PTAC have proven to be the solution for those businesses who require additional assistance or more expertise in nurturing their fledgling business.

In referring small businesses to work with Norcal PTAC I have zero reservations and know that they will receive professional assistance from an experienced organization that wants to see them succeed as much as they do. In following up with my numerous referrals to them I have never had a small business owner come back to me and voice dissatisfaction; on the contrary everyone that I solicit feedback from has had nothing but praise for the variety of business assistance services that Norcal PTAC has offered to them. I believe their award of this grant would greatly enable them to expand the reach of their services to Humboldt County and to the many business owners working in a myriad of burgeoning industries that are driving the economic expansion in this corner of the state.

And my belief about Norcal PTAC's capability is not mere speculation. I have seen firsthand the innovative and targeted approach that Norcal PTAC can execute with sufficient resources. As recently as last month I participated in a matchmaking style event that Norcal PTAC organized and facilitated that allowed government representatives to connect in a 1 on 1 capacity with

August 13, 2021
Page 2

interested businesses; This event was a huge success for participants on both sides of the table and demonstrate the innovative approach and deft capabilities that Norcal PTAC can offer during these ongoing economically challenging times.

The benefits of Norcal PTAC also aren't exclusive to our Department. The PTAC has been an instrumental and driving force for local city and county agencies, other state agencies, and federal programs who all have their own small business goals to meet. Their bespoke approach to services allows them to meet the unique needs of each business they work with to help them meet their individual goals of working with government.

I cannot recommend highly enough the Norcal PTAC for this project proposal grant; the work that they passionately do has far-reaching impact both in the public and private sectors. It is my hope that through this grant we will be able to partner with them once again to make this project a success and continue supporting our local small business entrepreneurs through information, education, and outreach.

Sincerely,

A handwritten signature in black ink, appearing to read 'A Morgan'.

AARON MORGAN
Small Business Liaison
District 1
California Department of Transportation
1656 Union Street
Eureka, CA 95501
Phone (707) 296-4063
Email: aaron.morgan@dot.ca.gov

August 12, 2021

Dear Headwaters Fund,

I am writing this letter to enthusiastically support Norcal PTAC's proposal for Headwaters funding. The State of California Department of General Services (DGS) has enjoyed of the support of the Norcal PTAC since 2013 by working together to register, train, and certify Small Businesses (SB) and Disabled Veteran Business Enterprises (DVBE). This support has improved the availability and diversity of suppliers and vendors to California's state, counties, cities, school districts, universities, and public utilities. The number of certified SBs and DVBEs has increased because of the joint efforts of DGS, county procurement directors, and the Norcal PTAC. We look forward to continuing and growing this relationship, particularly in Humboldt County.

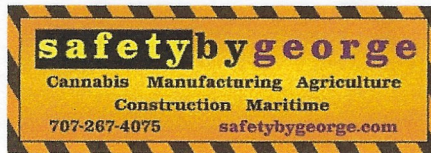
The State of California often has trouble identifying and reaching qualified and capable vendors in rural parts of California, including Humboldt County. We are thrilled to partner with Norcal PTAC on this proposed Headwaters project to build up the capacity of small and diverse businesses on the North Coast. We look forward to participating in the government panel presentation and networking event to meet potential vendors. I am confident that this project will create economic benefit for the residents of the County of Humboldt, and enhance our eligible contractor pool to benefit the State of California as well.

Norcal PTAC's dedication to the small and diverse business community, under the current leadership of Director Kristina Kunkel and Assistant Director Taylor Bowes, is substantial, continuous, and unwavering. The Norcal PTAC is an invaluable partner for the state's efforts to expand its procurement diversity in Northern California. DGS highly endorses the Norcal PTAC to provide government contracting services to the North Coast region through the Headwaters program.

Please feel free to contact me by phone at 916-230-4417 or by email at wayned.gross@dgs.ca.gov if you have any questions.



Wayne Gross
Business Outreach Liaison
Department of General Services



safetybygeorge, LLC
3035 Shamberger Court #A
McKinleyville, California
707-267-4075
safetybygeorge@gmail.com

August 12, 2021

Kristina Kunkel
Program Director, Norcal PTAC

Re: Humboldt County Headwaters Fund, Letter of Support

To whom it may concern:

Please accept this document as a letter of support for Norcal PTAC's application to the County of Humboldt to receive grant funding from the Headwaters Fund.

My name is George Walker and I own a private consulting business called safetybygeorge, LLC. I am based in the town of McKinleyville. I have 2 part time employees. I attended a Cal Procure event in Eureka more than one year ago to seek new business. At that event I signed my workplace safety consulting business up to start the process to qualify as a Cal Procure participant. I met a representative from Norcal PTAC that day and have used the services of Norcal PTAC since then.

Norcal PTAC helped my business sign up with Cal Procure and helped me attain access to areas of request for bids that I could have never found on my own. I am a small business owner and Norcal PTAC has helped me immensely and don't understand why more do not take advantage. Nanci Pigeon is our assigned agent from Norcal PTAC, and I can always call her with any questions, and she walks us through the process, Nanci's calendar is always available with close appointments. I can say with confidence that Norcal PTAC has contributed to the success of my healthy business.

There is no doubt that new funds from new grants to Norcal PTAC would highly benefit those who qualify for their services. I still today stay in contact with Norcal PTAC. Please consider Norcal PTAC to receive grant funding since they have a proven track record to supporting business, local employment, and education of the process.

Sincerely,

George K Walker
Owner: safetybygeorge, LLC

NANCI R. PIGEON

Address: 805 Adobe Road, Fallon, Nevada 89406 **Phone:** 937.266.6002 **Email:** nanci.pigeon@gmail.com

□ EDUCATION

Master of Science in Strategic Purchasing (Aug 2003 – May 2005)

Air Force Institute of Technology, Dayton, OH

– GPA: 3.78/4.00

Bachelor of Science in Management (2002)

Park University Parkville, MO

– GPA: 3.85/4.00

– Graduated with Honors

□ PROFESSIONAL EXPERIENCE

Norcal PTAC, Arcata, CA

Procurement Specialist

Aug 19 - Present

Department of the Interior, Bureau of Reclamation, Sacramento, CA

Procurement Analyst

Apr 2018 – Aug 2019

Department of the Interior, Bureau of Reclamation, Sacramento, CA

Contracting Officer

Jun 2016 – Apr 2018

Department of Veteran Affairs, McClellan, CA

Network Contracting Office Training Officer

Jun 2013 – Jun 2016

Enterprise Sourcing Group, Wright-Patterson Air Force Base, OH

Procurement Analyst & Unit Acquisition Training Manager

Apr 2012 – Jun 2013

Enterprise Sourcing Group, Wright-Patterson Air Force Base, OH

Contract Negotiator

Jul 2011 – Apr 2012

Tetra Tech AMT, Beaver Creek, OH

Management Analyst

Sep 2010 – Jul 2011

Air Force Material Command, Wright-Patterson AFB, OH

Contracting Superintendent

Dec 2007 – Aug 2010

Certifications

- Certified Federal Contract Manager (CFCM)
- National Contract Management Association (NCMA)
- Federal Acquisition Certification in Contracting (FA-C), Level III

Military Service & Awards

- VA 80% Disabled Veteran
- Meritorious Service Medal (3), Commendation Medal (2), Achievement Medal (3), Good Conduct Medal (8)
- Joint Meritorious Unit Award, AF Outstanding Unit Award (3), AF Recognition Ribbon
- National Defense Service Medal (1 service star), Armed Forces Expeditionary Medal (1 service star), Southwest Asia Service Medal (1 service star), Global War on Terrorism Service Medal

Edward R. Duarte

Education:

B.S. Civil Engineering; 1963, California State University, Fresno
Graduate: Management Development for Entrepreneurs (MDE) Program at
the Anderson School of Business Management at UCLA; 2000

Licenses:

California General Engineering & Building Contractor (A&B) License #659133
Nevada General Building Contractor (B2) License #0037457
Arizona General Building Contractor (B-01) License #163143
Oregon General Building Contractor License #149224
Washington General Contractor License
#602308649

Affiliations:

Professional Member:

Design Build Institute of America (DBIA)
Construction Management Association of America (CMAA)
American Society of Civil Engineers (ASCE)
Associated Builders & Contractors (ABC)

Project Experience:

Mr. Duarte has supervised staff and personally been involved in the
cost estimating, construction, and project management of such
projects as:

New Children's Zoo - Oakland Zoo

Contract: \$6,200,000 Total cost of project: Over \$14,450,000

Berkeley Hills/Las Trampas Reservoir Replacement – E.B.M.U.D.

Cost: \$1,925,000

Repairs at Bullard Hall – Naval Postgraduate School, Monterey, CA

Cost: \$3,163,000

Construct a New Women's Special Housing Unit for the Federal Bureau of Prisons - Federal Corrections Institution in Dublin, CA

Cost: \$1,966,000

Seismic Upgrade, Renovation, and Restoration of the DeMartini Winery Building in Clayton, CA

Cost: \$4.3 million

Seismic Upgrade, Renovation and Restoration of the Lake Merritt Lakeside Bandstand in the Park for the City of Oakland.

Cost: \$1.5 million - 1998

Campus-Wide Site Improvements to Ohlone College in Fremont, CA

Cost: \$8.5 million - 1997-98

Christina Jones

www.linkedin.com/in/christina-jones-713b17b

Summary of Skills and Qualifications

Practiced industry professional with twenty years of experience in consulting, procurement, technical writing, training, process improvement, and strategic planning. Extensive experience as a business consultant, technical writer, facilitator and program manager within the government contracting industry.

Education:

Master of Science, Business Administration, Pepperdine University
Bachelor of Science, Business Administration, Cal State University Los Angeles

Core Competencies

- Certifications/GSA Schedule Prep
- Program Management
- Proposal Writing
- Business Development
- Outreach
- Procurement/Technical Assistance
- Training
- Word/Excel/PowerPoint
- Course Content Development
- Strategic Planning

Certificates:

Prevailing Wage - Certified Payroll & Labor Compliance Training
Federal Construction Contracting
The Complete FAR Guide 2018
Cost & Price Analysis
Shiplely Proposal Writing
Shiplely Capture Planning
Grant Development & Management School For Non-Profits
Preparing and Submitting Government Contract Proposals
Understanding The Federal Acquisition Process

Associations:

National Contract Management Association
Society of Technical Communication
Association of Procurement Technical Assistance Centers

Experience:

9/2016- Present	Procurement Specialist, Norcal PTAC
1/2008- Present	Principal Consultant, Province Consulting Group, Inc.
2/2011 – 11/2012	Government Procurement Consultant, SBA Orange County/Inland Empire Regional SBDC Network
1/1999-6/2007	Manager, Pacific Life Insurance Company