



01 February 2010

Mr. Rick Cassady
United States Transportation Command
508 Scott Drive, Building 1900
Scott AFB, IL 62225-5357

Subject: Defense Coordination Transportation Initiative (DTCI) Small Business Interaction Report

Reference: Contract Number: HTC711-07-D-0032

Dear Mr. Cassady,

In accordance with the Small Business Plan Menlo Worldwide Government Services hereby submits the subject deliverable, due to the United States Transportation Command on 1 February 2010. Following are the Small Business Outreach actions Menlo accomplished during the period 01 November 2009 through 31 January 2010.

1. Menlo's efforts to ensure that all categories of small businesses have been given an equitable opportunity to compete for subcontracts.

Total Carriers Invited to Bid	196
Total Carriers Returning Bids	119
Total SB Invited to Bid	51
Total SB Returning Bids	31

- a. Verified Small Business list currently contains (as of 1/21/10) 384 vetted small businesses with current CCR profiles
 - a. HUBZone = 6 (1.6%); 26 have applied for HUBZone certifications (6.8%)
 - b. VOSB = 117 (30.5%)
 - c. SDVOSB = 40 (10.4%)
 - d. SDB = 99 (25.8%)
 - e. WOSB = 106 (27.7%)
 1. Small Business List decreases as SBC is made aware of businesses being ruled out of scope or not interested in DTCI
- c. Small Businesses currently under contract
 - i. As of 1/21/10 there are 111 SB's under contract with Menlo
 1. 26 are WOSB (23.4%)
 2. 26 are VOSB (23.4%)
 3. 8 are SDVOSB (7.2%)
 4. 30 are SDB (27.0%)
 5. 10 are HUBZone (9.0%) – 31 SB's have applied for certification

through the SBA

d. Small Business Transportation Awards (per Cumulative report - Inception through 16 January 2010)

Category	Goal	Actual
WOSB	2.00%	9.80%
VOSB	2.60%	11.74%
SDVOSB	2.60%	1.63%
SDB	6.50%	9.81%
HUBZone	1.40%	1.49%
Total Small Business Transportation		\$105,110,448

2. Menlo's outreach efforts to identify various categories of small businesses to facilitate their participation as subcontractors.

- a. Performed initial profile checks for 84 businesses – this included CCR profile checks to determine small business status and special classifications.
 - i. If and when the business registers on the Menlo master carrier list, the SBA profile is verified
 1. 82 businesses registered online this quarter and were vetted through their CCR and SBA profiles
 - a. Sent SB criteria to 8 new registrants to determine if they qualify as a small business concern
 - ii. SBC sent CCR registration documents to 35 new SB registrants that did not have a CCR Profile and qualified as small business concerns
 1. DUNS Guidance Document – To obtain a DUNS number
 2. Table of Small Business Size Standards – To determine which NAICS Code(s) to register under
 3. CCR Handbook – This documents walks through the online registration with greater detail and has the CCR Help Desk number
 - iii. Ran DNB checks on 65 SB's that registered online this quarter
 1. This information is used later in the contracting process
 2. 3 areas reviewed: Commercial Credit Score Class, Paydex, and Financial Stress Class
- b. SBC periodically checks all VOSBs for a Vetbiz profile and sends information that Vetbiz is now verifying VOSB and SDVOSB status and how to register
 - i. Vetbiz information sent to 8 carriers this quarter
- c. 65 small businesses were checked for HUBZone eligibility this quarter
 - i. November 2009 - advised 8 SBs their address fell in a HUBZone and they could possibly qualify for the HUBZone certification if other criteria was also met
 - ii. December 2009 – advised 1 SBs their address fell in a HUBZone and they could possibly qualify for the HUBZone certification if other criteria was also met
 - iii. January 2010 – advised 3 SBs their address fell in a HUBZone and they could possibly qualify for the HUBZone certification if other criteria was also met

d. Other Outreach

- i. Attended 1 NDTA Luncheons during the quarter
- ii. 3 November 2009 – Sent SBA Newsletter regarding seminar series on Exports & Growing Business Internationally to 566 Small Businesses
- iii. 3 November 2009 – Sent SBA Newsletter to 5 Woman Owned Small Businesses in Missouri regarding WIN seminar at SEMO on November 14th (Women Inspiring Entrepreneurship)
- iv. 10 November 2009 – Reached out to 135 SDVOSB's found on the CCR under NAICS code 484121 that were not on the current list and had never been reached out to before. (3 emails failed)
- v. 16 November 2009 – Sent registration link to (b)(4)
- vi. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs" to 126 WOSB's
- vii. 1 December 2009 – (b)(6) and (b)(6) hosted Webinar for the ATA (American Trucking Association)
- viii. 15 December 2009 – Sent registration link to (b)(4)
(b)(4)
(b)(4)
and (b)(4)
- ix. 22 December 2009 – Sent registration link to (b)(4)
(b)(4)
- x. 21 January 2010 – Emailed 17 Small Business concerns currently under contract with expired CCR's to confirm if still in business

3. Assistance provided to various categories of small businesses to facilitate their participation as small businesses.

- a. November 2009 - Forwarded instructions on how to obtain a SCAC code to 1 small business on the master carrier list
- b. Sent reminders to 105 SBs that their CCR profiles were to expire in the current month of the quarter, information regarding how to renew, and the CCR Help Desk # (CCR is now giving a 1 month leeway to accommodate the businesses who have yet to change their TPIN log in into a hard password log in)
 - i. November – 51 to expire
 - ii. December – no notice given (SBC on maternity leave)
 - iii. January – 54 to expire

VOSB assistance

- i. (b)(4)
 - a. 12 November 2009 – Confirmed Procurement wants to move forward with this contract
 - i. Emailed POC to confirm interest
 - b. 21 December 2009 – Contract documents re-sent
 - c. 12 January 2010 – Discussed TX Worker's Comp regulations and possible waiver for DTCL
 - d. 20 January 2010 – Gave POC Procurement's contact information regarding questions about rates and going ct in place
- ii. (b)(4)

- a. 3 November 2009 – Sent SBA Newsletter regarding seminar series on Exports & Growing Business Internationally to 566 Small Businesses
- b. 13 November 2009 – Spoke to POC regarding his unhappiness with DTCL
 - i. Gave POC DTCL PMO office number and advised Menlo's Director of Contracts
- c. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
- iii. (b)(4)
 - a. 16 November 2009 – Spoke to POC regarding DTCL sites in New England
 - b. 30 November 2009 – Urged HUBZone certification if all criteria were able to be met
- iv. (b)(4)
 - a. 2 November 2009 – Advised their CCR expires in November
 - b. 12 November 2009 – Emailed to see if they planned on revising their rates
 - c. 6 January 2010 – Advised their CCR expires in January
 - d. 11 January 2010 – Advised their CCR expired and how to renew
- v. (b)(4)
 - a. 7 January 2010 – Motor carrier contract documents and Phase 3-5 rate worksheets sent
 - b. 21 January 2010 – Urged HUBZone certification if all criteria were able to be met
 - i. 22 January 2010 – Confirmed they will apply once they can meet the "35% employees reside in HUB" criteria
- vi. (b)(4)
- a. 6 January 2010 – Advised their CCR profile expired
- vii. (b)(4)
 - a. 12 November 2009 – Confirmed their partners backed out and therefore are not interested in pursuing DTCL at this time
 - b. 19 November 2009 – Corresponded via email regarding their new partnership with Landstar
 - i. Company to move forward under (b)(4) arm which is small business under 488510
- viii. (b)(4)
- a. 21 January 2010 – Urged HUBZone certification if all criteria were able to be met
- ix. (b)(4)
 - a. 2 November 2009 – Advised CCR will expire in November
 - b. 6 January 2010 – Advised CCR will expired in January
 - c. 11 January 2010 – Advised CCR profile expired and how
- x. (b)(4)

- a. 5 November 2009 – Sent carrier profile to complete and submit to Procurement
 - b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
- xi. (b)(4)
- a. 6 January 2010 – Advised CCR will expire in January
- xii. (b)(4)
- a. 22 January 2010 – Followed up with POC regarding their etwork training date and to confirm they will attend
- xiii. (b)(4)
- a. 13 November 2009 – Sent Vetbiz information
 - i. Confirmed address for HUBZone eligibility check
- xiv. (b)(4)
- a. 7 December 2009 – Spoke to POC regarding their CCR being renewed and their renewed interest in DTCI
 - i. Sent carrier profile to be updated and re-submitted
- xv. (b)(4)
- a. 2 November 2009 – Advised CCR will expire in November
 - b. 6 January 2010 – Advised CCR will expire in January
 - c. 19 January 2010 – Advised CCR profile expired and how to renew
- xvi. (b)(4)
- a. 6 November 2009 – Master Co Broker contract and Phase 1-5 rate worksheets sent
 - b. 12 November 2009 – Received and saved updated rates
 - c. 17 November 2009 – Followed up with POC regarding submission of their carrier profile
 - d. 18 November 2009 – Gave Procurement's contact information to POC for questions about rate worksheets
 - e. 20 November 2009 – Rate worksheets received and saved
- xvii. (b)(4)
- a. November 2009 – Spoke to POC regarding his connection with the Mentor/Protégé Project Coordinator
 - i. Worked on getting a meeting set up with Menlo's Director of Contracts and USTRANSCOM's Director of Small Business Programs to hear the Coordinator's briefing
 - b. 6 January 2010 – Spoke to POC multiple times regarding the Mentor Protégé conference in March
 - i. Gave Procurement's contact information
 - c. 7 January 2010 – Spoke to POC regarding his HUBZone application status – SBA told him it should be approved by the end of January
 - i. Forwarded this information to Procurement
 - d. 8 January 2010 – Master Co Broker contract and Phase 3 – 5 rate worksheets sent
- xviii. (b)(4)
- a. 2 November 2009 – Advised CCR expires in November
- xix. (b)(4)

- a. 2 November 2009 – Advised CCR profile states IRS Validation failed and possibility of getting updated
 - i. Confirmed if they had a SCAC
- xx. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 3 November 2009 - Advised CCR profile was missing mandatory information and how to fix
 - c. 21 January 2010 – Advised CCR expired and how to renew
- xxi. (b)(4)
 - a. 2 November 2009 – Advised CCR profile was missing mandatory information and how to fix
 - b. 18 December 2009 – Helped POC get into contact with (b)(4)
 - c. 23 December 2009 – Followed up with POC regarding certificate of insurance
 - d. 7 January 2010 – Forwarded certificate of insurance to Contracts Administrator
- xxii. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 6 January 2010 – Advised CCR expires in January
 - c. 19 January 2010 – Advised CCR expired and how to
- xxiii. (b)(4)
 - a. 21 January 2010 - Advised CCR expired and how to renew
- xxiv. (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
- xxv. (b)(4)
 - a. 13 November 2009 – Sent Vetbiz information
 - i. Confirmed address for HUBZone eligibility check
- xxvi. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
- xxvii. (b)(4)
 - a. 13 November 2009 – Sent registration link
 - b. 17 November 2009 – Forwarded carrier profile to be completed and sent to Procurement
 - i. Confirmed they were awaiting SCAC code before registering
- xxviii. (b)(4)
 - a. 10 November 2009 – Advised CCR status is IRS Validation Failed
- xxix. (b)(4)
 - a. 13 November 2009 – Sent Vetbiz information
 - b. 22 December 2009 – Corresponded with POC regarding their small business categories and followed up regarding submission of their carrier profile
 - c. 28 December 2009 – Received, saved, and forwarded carrier profile to Menlo procurement

- d. 30 December 2009 – Motor carrier contract documents and phase 3-5 rate worksheets sent
- e. 13 January 2010 – Received partial contract documents
 - i. Advised POC what was missing
- f. 19 January 2010 – Received more partial contract documents
 - i. Advised POC what was missing and the appropriate format
- xxx. (b)(4)
- a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
- xxxi. (b)(4)
- a. 11 November 2009 – Responded to emails regarding next steps in the program and submitting their carrier profile
- xxxii. (b)(4)
- Vetbiz information
- b. 7 January 2010 – Advised Procurement the updated CCR now states SDVOSB
- xxxiii. (b)(4)
- a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
- b. 7 January 2010 – Advised Procurement the updated CCR now states SDVOSB
- xxxiv. (b)(4)
- a. 2 November 2009 – Advised CCR expires in November
- xxxv. (b)(4)
- a. 2 November 2009 – Advised CCR expires in November
- b. 4 January 2010 – Advised CCR profile expired and how to renew
- xxxvi. (b)(4)
- a. 16 November 2009 – Master Co Broker Contract sent
- b. 18 November 2009 – Phase 3-5 rate worksheets sent
- c. 19 November 2009 – Gave POC Procurement's contact information to discuss desire to put in rates for Red River
- d. 20 November 2009 – Received partial contract documents
 - i. Advised POC of missing documents and errors
- e. 7 January 2010 – Gave One Network's contact information to help with set up process
- f. 22 January 2010 – Followed up with POC regarding their One Network training date and to confirm they will attend
- xxxvii. (b)(4)
- a. 2 November 2009 – Followed up with POC regarding their HUBZone application
 - i. They're in process of sending final documents to SBA
- b. 4 November 2009 – Phase 1-5 rate worksheets sent
- c. 16 November 2009 – Forwarded new POC information to Aurora for Master Carrier list
- xxxviii. (b)(4)

- a. 2 November 2009 – Advised CCR expires in November
 - b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - c. 6 January 2010 – Advised CCR expires in January
 - d. 19 January 2010 – Advised CCR profile expired and how to renew
- xxxix. (b)(4)
 - a. 6 January 2010 – Advised CCR expires in January
 - b. 19 January 2010 – Advised CCR profile expired and how to renew
- xl. (b)(4)
 - a. 6 January 2010 – Advised CCR expires in January
 - b. 19 January 2010 – Advised CCR profile expired and how to renew
 - i. Gave CCR Help Desk number to help with their renewal
- xli. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 6 January 2010 – Advised CCR expires in January
 - c. 11 January 2010 – Advised CCR profile expired and how to renew
- xlii. (b)(4)
 - a. 21 December 2009 – Followed up with Procurement on their behalf to confirm next steps
 - i. Was advised the rate addenda was being created 10 November
- xlili. (b)(4)
 - a. 16 November 2009 – Gave POC Procurement's contact information
 - b. 17 November 2009 – Followed up with POC regarding submission of their carrier profile
 - i. Master Co Broker contract and rate worksheets sent
 - c. 18 November 2009 – Spoke to POC regarding business structure and possible need for air contract instead of co broker agreement previously sent
 - d. 19 November 2009 – Discussed with POC who procures the air contracts
 - i. Gave POC different Procurement contact information
- xliv. (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - b. 24 November 2009 – Urged HUBZone certification if all criteria were able to be met
 - c. 19 January 2010 – Returned voicemail and am having POC send me their carrier profile to forward to Procurement
- xlv. (b)(4)

- a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
- xlvi. (b)(4)
- a. 14 January 2010 – Re-forwarded carrier profile to Procurement on behalf of POC
- a. 2 November 2009 – Advised CCR expires in November
 - b. 3 November 2009 – Advised CCR profile was missing mandatory information and how to fix
 - c. 6 January 2010 – Advised CCR expires in January 22, 2010
 - d. 19 January 2010 – Advised CCR profile expired and how to renew
- a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
- a. 2 November 2009 – Advised CCR expires in November
 - b. 19 January 2010 – Advised CCR profile expired and how to renew
- a. 13 November 2009 – Sent Vetbiz information
 - b. 15 November 2009 – Received, saved, and forwarded carrier profile to Procurement for review
 - i. Confirmed with POC they will get a SCAC if Menlo is interested
 - 1. Sent SCAC instructions
- a. 29 December 2009 – Answered COR's question regarding their SB classification
- a. 9 November 2009 – Received and saved carrier profile for Procurement to review
- a. 24 November 2009 – Urged HUBZone certification if all criteria were able to be met
- a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - b. 20 January 2010 – Sent Indian Incentive Program letter to be updated and signed for year 2009
- a. 4 January 2010 – Advised CCR profile expired and how to renew
- a. 2 November 2009 – Advised CCR expires in November



- lviii. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 6 January 2010 – Advised CCR expires in January
 - c. 19 January 2010 – Advised CCR profile expires and how to renew
- lix. (b)(4)
 - a. 18 December 2009 – Sent CCR registration help documents
- lx. (b)(4)
 - a. 27 November 2009 – Sent portal log in information
- lxi. (b)(4)
 - a. 19 November 2009 – Sent carrier profile to be completed and submitted to Procurement
- lxii. (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
- lxiii. (b)(4)
 - a. 6 January 2010 – Advised CCR expires in January
- lxiv. (b)(4)
 - a. 17 November 2009 – Master Co Broker contract and rate worksheets sent
- lxv. (b)(4)
 - a. 11 November 2009 – Forwarded carrier profile to Procurement for review
 - b. 6 January 2010 – Advised their CCR expires in January
 - c. 19 January 2010 – Advised their CCR expired and how to renew
- lxvi. (b)(4)
 - a. 30 November 2009 – Received contract documents
 - b. 23 December 2009 – Sent carrier profile to be completed and submitted to Procurement
 - i. Confirming with Procurement how to proceed (2 businesses – 1 broker, 1 carrier)
 - c. 24 December 2009 – Sent CCR registration help documents for the 2nd entity
 - d. 30 December 2009 – Confirmed CCR profile now shows small business status
 - i. Advised POC the legal business name which includes LLC needs to be consistent across all contract documents
 - e. 31 December 2009 – Sent Vetbiz information
 - f. 19 January 2010 – Received and saved Certificate of Insurance for the contract packet
 - g. 21 January 2010 – Received all missing contract items with the exception of the operating authority
 - i. Corresponded about what was needed
 - h. 22 January 2010 – Corresponded regarding proper operating authority needed for the contract

- i. Sent FMCSA link to get a copy of their common carrier operating authority (only had brokerage authority on hand)
- lxvii. (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
- lxviii. (b)(4)
 - a. 23 December 2009 – Advised POC their CCR profile was missing mandatory information and how to update
- lxix. (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
- lxx. (b)(4)
 - a. 13 November 2009 – Sent Vetbiz information
 - b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
- lxxi. (b)(4)
 - a. 6 January 2010 – Advised CCR expires in January
 - b. 11 January 2010 – Advised CCR profile expired and how to renew

SDVOSB assistance

- lxvii. (b)(4)
 - a. 16 November 2009 – Spoke to POC regarding DTCL sites in New England
 - b. 30 November 2009 – Urged HUBZone certification if all criteria were able to be met
- lxviii. (b)(4)
 - a. 2 November 2009 – Advised their CCR expires in November
 - b. 12 November 2009 – Emailed to see if they planned on revising their rates
 - c. 6 January 2010 – Advised their CCR expires in January
 - d. 11 January 2010 – Advised their CCR expired and how to renew
- lxix. (b)(4)
 - a. 7 January 2010 – Motor carrier contract documents and Phase 3-5 rate worksheets sent
 - b. 21 January 2010 – Urged HUBZone certification if all criteria were able to be met
 - i. 22 January 2010 – Confirmed they will apply once they can meet the "35% employees reside in HUB" criteria
- lxx. (b)(4)
 - a. 12 November 2009 – Confirmed their partners backed out and therefore are not interested in pursuing DTCL at this time
 - b. 19 November 2009 – Corresponded via email regarding their new partnership with (b)(4)

- i. Company to move forward under arm which is small business under 488510 (b)(4) (c)(4)]
- lxxvi. (b)(4)
a. 21 January 2010 – Urged HUBZone certification if all criteria were able to be met
- lxxvii. (b)(4)
a. 22 January 2010 – Followed up with POC regarding their One Network training date and to confirm they will attend
- lxxviii. (b)(4)
a. 13 November 2009 – Sent Vetbiz information
i. Confirmed address for HUBZone eligibility check
- lxxix. (b)(4)
a. 6 November 2009 – Master Co Broker contract and Phase 1-5 rate worksheets sent
b. 12 November 2009 – Received and saved updated rates
c. 17 November 2009 – Followed up with POC regarding submission of their carrier profile
d. 18 November 2009 – Gave Procurement's contact information to POC for questions about rate worksheets
worksheets received and saved
- lxxx. (b)(4)
a. 13 November 2009 – Sent Vetbiz information
i. Confirmed address for HUBZone eligibility check
- lxxxi. (b)(4)
a. 13 November 2009 – Sent registration link
b. 17 November 2009 – Forwarded carrier profile to be completed and sent to Procurement
i. Confirmed they were awaiting SCAC code before registering
- lxxxii. (b)(4)
a. 13 November 2009 – Sent Vetbiz information
b. 22 December 2009 – Corresponded with POC regarding their small business categories and followed up regarding submission of their carrier profile
c. 28 December 2009 – Received, saved, and forwarded carrier profile to Menlo procurement
d. 30 December 2009 – Motor carrier contract documents and phase 3-5 rate worksheets sent
e. 13 January 2010 – Received partial contract documents
i. Advised POC what was missing
f. 19 January 2010 – Received more partial contract documents
i. Advised POC what was missing and the appropriate format
- lxxxiii. (b)(4)
a. 11 November 2009 – Responded to emails regarding next steps in the program and submitting their carrier profile
- lxxxiv. (b)(4)
a. 7 January 2010 – Sent Vetbiz information

- b. 7 January 2010 – Advised Procurement the updated CCR now states SDVOSB
- lxxxv. (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - b. 7 January 2010 – Advised Procurement the updated CCR now states SDVOSB
- lxxxvi. (b)(4)
 - a. 16 November 2009 – Master Co Broker Contract sent
 - b. 18 November 2009 – Phase 3-5 rate worksheets sent
 - c. 19 November 2009 – Gave POC Procurement's contact information to discuss desire to put in rates for Red River
 - d. 20 November 2009 – Received partial contract documents
 - i. Advised POC of missing documents and errors
 - e. 7 January 2010 – Gave One Network's contact information to help with set up process
 - f. 22 January 2010 – Followed up with POC regarding their One Network training date and to confirm they will attend
- lxxxvii. (b)(4)
 - a. 21 December 2009 – Followed up with Procurement on their behalf to confirm next steps
 - i. Was advised the rate addenda was being created 10 November
- lxxxviii. (b)(4)
 - a. 16 November 2009 – Gave POC Procurement's contact information
 - b. 17 November 2009 – Followed up with POC regarding submission of their carrier profile
 - i. Master Co Broker contract and rate worksheets sent
 - c. 18 November 2009 – Spoke to POC regarding business structure and possible need for air contract instead of co broker agreement previously sent
 - d. 19 November 2009 – Discussed with POC who procures the air contracts
 - i. Gave POC different Procurement contact information
- lxxxix. (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - b. 24 November 2009 – Urged HUBZone certification if all criteria were able to be met
 - c. 19 January 2010 – Returned voicemail and am having POC send me their carrier profile to forward to Procurement
- xc. (b)(4)
 - a. 13 November 2009 – Sent Vetbiz information
 - b. 15 November 2009 – Received, saved, and forwarded carrier profile to Procurement for review

i. Confirmed with POC they will get a SCAC if Menlo is interested

1. Sent SCAC instructions

- xc. (b)(4)
 - xcii. (b)(4)
 - xciii. (b)(4)
 - xciv. (b)(4)
 - xcv. (b)(4)
 - xcvi. (b)(4)
 - xcvii. (b)(4)
- a. 24 November 2009 – Urged HUBZone certification if all criteria were able to be met
 - a. 18 December 2009 – Sent CCR registration help documents
 - a. 27 November 2009 – Sent portal log in information
 - a. 17 November 2009 – Master Co Broker contract and rate worksheets sent
 - a. 11 November 2009 – Forwarded carrier profile to Procurement for review
 - b. 6 January 2010 – Advised their CCR expires in January
 - c. 19 January 2010 – Advised their CCR expired and how to renew
 - a. 23 December 2009 – Advised POC their CCR profile was datory information and how to update
 - a. 13 November 2009 – Sent Vetbiz information
 - b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"

HUBZone assistance

- i. (b)(4)
 - ii. (b)(4)
 - iii. (b)(4)
 - iv. (b)(4)
- a. 15 December 2009 – Confirmed HUBZone certification effective and expiration dates
 - a. 21 January 2010 – Advised CCR expired and how to renew
 - i. We believe them to be out of business based on no known phone numbers in service
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - b. 20 January 2010 – Sent Indian Incentive Program letter to be updated and signed for year 2009
 - a. 5 November 2009 – POC states HUBZone certified but it's not showing on the CCR/SBA Profiles yet
 - i. Worked with POC to get letter of certification (eventually this was verified on the profiles as well)
 - ii. Forwarded carrier profile to Procurement for review

- b. 6 November 2009 – Master Co Broker Agreement and Phase 1-5 rate worksheets sent
- c. 9 November 2009 – Spoke to Menlo team and forwarded information to POC to confirm 2007 Excel is an acceptable format for the rate worksheets
- d. 10 November 2009 – Received, saved, and forwarded rate worksheets to Procurement
- e. 13 November 2009 – Received contract documents
 - i. Advised POC of needed revisions and missing documents
 - ii. Advised POC of legal business name to match across all documents
- f. 16 November 2009 – Received updated documents
- g. 17 November 2009 – Contract sent to Director of Contracts for first signature
- h. 5 January 2010 – Procurement working on rate addenda
- i. (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - b. 15 December 2009 – Confirmed HUBZone certification expiration
 - i. 5 January 2010 – Procurement worked on rate addenda

WOSB assistance

- ii. (b)(4)
 - letter regarding seminar series on Exports & Growing Business Internationally to 566 Small Businesses
 - b. 13 November 2009 – Spoke to POC regarding his unhappiness with DTCL
 - i. Gave POC DTCL PMO office number and advised Menlo's Director of Contracts
 - c. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
- iii. (b)(4)
 - a. 3 November 2009 – Spoke to POC regarding rates being approved, however there is no guarantee of freight
 - i. Gave POC Procurement's contact number for feedback
 - ii. Advised POC still need Waiver of Subrogation on Worker's Comp to finalize contract
- iv. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - c. 6 January 2010 – Advised CCR expires in January
 - d. 11 January 2010 – Advised CCR expired and how to renew
- v. (b)(4)

- vi.
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs" (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 3 November 2009 – Advised CCR missing mandatory information and how to update
 - c. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - d. 6 January 2010 – Advised CCR expires in January
 - e. 11 January 2010 - Advised CCR expired and how to renew (b)(4)
 - vii.
 - a. 5 November 2009 – Sent carrier profile to complete and submit to Procurement
 - b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs" (b)(4)
 - viii.
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 3 November 2009 – Sent SBA Newsletter to regarding WIN seminar at SEMO on November 14th (Women Inspiring Entrepreneurship)
 - c. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - d. 19 January 2010 – Advised CCR expired and how to renew
 - ix.
 - (b)(4)
 - c. 21 January 2010 - Urged HUBZone certification if all criteria were able to be met
 - x.
 - (b)(4)
 - a. 22 December 2009 – CCR registration help documents sent
 - i. Co Broker agreement sent
 - b. 4 January 2010 – Suggested augmenting CCR with NAICS 488510 since brokerage
 - c. 5 January 2010 – Helped POC get answer to insurance questions
 - d. 15 January 2010 – Went through documents over the phone to ensure accuracy before sending via mail
 - e. 23 January 2010 – Received and reviewed contract documents
 - i. Advised POC of needed revisions and missing documents
 - ii. Received revisions; advised POC final piece is the insurance
 - f. 26 January 2010 – Emailed Procurement on their behalf to find out if rate worksheets were sent; if not, which ones should be sent
 - i. Confirmed with POC they can meet insurance requirements
 - xi.
 - (b)(4)

- a. 2 November 2009 – Advised CCR expires in November
 - b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - c. 6 January 2010 – Advised CCR expires in January
 - d. 21 January 2010 – Advised CCR expired and how to renew
- xii. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - c. 6 January 2010 – Advised CCR expires in January
 - d. 19 January 2010 – Advised CCR expired and how to renew
- xiii. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - c. 6 January 2010 – Advised CCR expires in January
 - d. 11 January 2010 – Advised CCR expired and how to renew
- xiv. (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - b. 19 January 2010 – Spoke to POC regarding their desire to do an air contract
 - i. Forwarded carrier profile to complete and submit
 - c. 21 January 2010 – Received, saved, and forwarded carrier profile to Procurement manager in charge of air for review
- xv. (b)(4)
 - a. 5 November 2009 – Forwarded carrier profile to complete and submit to Procurement for review
 - i. Forwarded contact information to Aurora to be added to master carrier list
 - b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
- xvi. (b)(4)
 - a. 3 November 2009 – Responded to email regarding the DTCL system under Menlo and the contract (compared to load boards previously used, etc.)
 - b. 4 November 2009 – Gave POC Procurement's contact information
 - c. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
- xvii. (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
- xviii. (b)(4)
 - a. 30 November 2009 - Urged HUBZone certification if all criteria were able to be met

- xix. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - c. 4 January 2010 – Advised CCR expired and how to renew
- xx. (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - b. 6 January 2010 – Advised CCR expires in January
 - c. 19 January 2010 – Advised CCR expired and how to renew
- xxi. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - c. 4 January 2010 – Advised CCR expired and how to renew
- xxii. (b)(4)
 - a. 4 November 2009 – Emailed POC to confirm still interested in contract and working on insurance requirements
 - b. 10 November 2009 – Received response from POC regarding interest and insurance situation
 - c. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - d. 22 November 2009 – Worked through final certificate of insurance issues
 - e. 30 December 2009 – Suggested augmenting CCR profile with NAICS 488510 since brokerage
 - f. 5 January 2010 – Contract sent to Director of Contracts for first signature
- xxiii. (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
- xxiv. (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - b. 7 January 2010 – Advised Procurement the updated CCR now states SDVOSB
- xxv. (b)(4)
 - a. 5 November 2009 – Sent carrier profile to complete and submit to Procurement for review
 - i. Suggested augmenting CCR with NAICS 488510 since brokerage
 - ii. Forwarded contact information to Aurora to be added to the master carrier list
 - b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
- xxvi. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November

- b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - c. 4 January 2010 – Advised CCR expired and how to renew
 - d. 11 January 2010 – Advised CCR expired and how to renew
- xxvii. (b)(4)
 - a. 16 November 2009 – Master motor carrier agreement and phase 3-5 rate worksheets sent
 - b. 19 November 2009 – Received contract documents and advised POC of needed revisions
 - c. 20 January 2010 – Spoke to POC regarding prioritizing rates before finishing contract (will help determine how competitive he'll be)
- xxviii. (b)(4)
 - a. 2 November 2009 – Advised CCR missing mandatory information and how to update
 - b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
- xxix. (b)(4)
 - a. 19 November 2009 – Spoke to POC regarding next steps to be considered for DTCI
 - i. Forwarded carrier profile to complete and submit to Procurement for review
 - b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
- xxx. (b)(4)
 - a. 12 November 2009 – Contacted POC regarding contract via email 1 more time (approved to close if no response)
- xxxi. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - c. 4 January 2010 – Advised CCR expired and how to renew
- xxxii. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - c. 6 January 2010 – Advised CCR expires in January
 - d. 19 January 2010 – Advised CCR profile expired and how to renew
- xxxiii. (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - i. Responded to email regarding next steps to be considered for DTCI
 - ii. Forwarded carrier profile to complete and submit to Procurement for review
 - b. 20 November 2009 – Emailed POC to confirm DUNS

- i. Discussed need to have CCR profile searchable by the public if they move forward into contract as small business concern
- c. 23 November 2009 – Received, saved, and forwarded carrier profile for review
- xxxiv. (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - b. 4 January 2010 – Advised CCR expires in January
 - c. 19 January 2010 – Advised CCR expired and how to renew
- xxxv. (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - b. 24 November 2009 – Urged HUBZone certification if all criteria were able to be met
 - c. 19 January 2010 – Returned voicemail and am having POC send me their carrier profile to forward to Procurement
- xxxvi. (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Contracts: A Guide for Women Entrepreneurs"
- xxxvii. (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
- xxxviii. (b)(4)
 - a. 3 November 2009 – Sent HUBZone Help Desk number for POC to follow up on application status and confirm they applied
 - i. Sent SBA Newsletter to regarding WIN seminar at SEMO on November 14th (Women Inspiring Entrepreneurship)
 - b. 4 November 2009 – Master motor carrier and phase 1-5 rate worksheets sent
 - c. 5 November 2009 – Forwarded carrier profile to be completed and submitted to Procurement for review
 - i. Received, saved, and forwarded carrier profile
 - ii. Confirmed their address is in a HUBZone
 - d. 12 November 2009 – Received certificate of insurance
 - i. Advised POC the Additional Insured and Waiver of Subrogation were missing
 - e. 13 November 2009 – Received, saved, and forwarded rate worksheets
 - i. Worked with insurance agent to get proper certificate of insurance
 - f. 17 November 2009 – Received updated contract documents
 - i. Worked with Risk Management on approving their worker's compensation situation (owner operators)

- g. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - i. Contract sent to Director of Contracts for first signature
- xxxix. (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
- xl. (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - b. 20 January 2010 – Sent Indian Incentive Program letter to be updated and signed for year 2009
- xli. (b)(4)
 - a. 2 November 2009 – Advised CCR missing mandatory information and how to update
 - b. 13 November 2009 – Gave POC CCR Help Desk number
 - c. 7 December 2009 – Forwarded carrier profile to be completed and submitted to Procurement for review
- xlii. (b)(4)
 - a. 6 November 2009 – Spoke to POC regarding next steps and that Procurement would contact them if interested
 - b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - c. 3 December 2009 – Forwarded carrier profile to Procurement for feedback on behalf of the POC
- xlili. (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - b. 15 December 2009 – Confirmed HUBZone certification expiration
 - c. 5 January 2010 – Procurement worked on rate addenda
- xliv. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - c. 6 January 2010 – Advised CCR expires in January
 - d. 11 January 2010 – Advised CCR profile expired and how to renew
- xlvi. (b)(4)
 - a. 3 November 2009 – Sent SBA Newsletter to regarding WIN seminar at SEMO on November 14th (Women Inspiring Entrepreneurship)
 - b. Gave (b)(6) contact information (of (b)(4) as a possible contact for brokered loads
- xlvii. (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - b. 15 December 2009 – Confirmed address is in a HUBZone but not certified

- xlvii.
 - (b)(4)
 - a. 9 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - b. 21 January 2010 – Advised CCR expired and how to renew
 - xlviii.
 - (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - c. 6 January 2010 – Advised CCR expires in January
 - d. 19 January 2010 – Advised CCR profile expired and how to renew
 - xlix.
 - (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - i.
 - (b)(4)
 - ber 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - ii.
 - (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - iii.
 - (b)(4)
 - a. 13 November 2009 – Sent Vetbiz information
 - b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"

SDB assistance

- i.
 - (b)(4)
 - irmed HUBZone certification
 - effective and expiration dates
 - ii.
 - (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - iii.
 - (b)(4)
 - a. 12 November 2009 – Confirmed their partners backed out and therefore are not interested in pursuing DTCL at this time
 - b. Company to move forward under (b)(4) arm
 - iv.
 - (b)(4)
 - a. 21 January 2010 – Urged HUBZone certification if all criteria were able to be met
 - v.
 - (b)(4)
 - a. 4 January 2010 – Advised CCR expired and how to renew
 - vi.
 - (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - vii.
 - (b)(4)
 - a. 2 November 2009 – Advised CCR will expire in November
 - b. 6 January 2010 – Advised CCR will expired in January

- c. 11 January 2010 – Advised CCR profile expired and how to renew
- viii. (b)(4)
 - a. 6 January 2010 – Advised CCR expires in January
 - b. 20 January 2010 – Sent Indian Incentive participation letter to POC to be updated
- ix. (b)(4)

CCR will expire in January
- x. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 3 November 2009 – Sent SBA Newsletter to regarding WIN seminar at SEMO on November 14th (Women Inspiring Entrepreneurship)
 - c. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - d. 19 January 2010 – Advised CCR expired and how to renew
- xi. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - c. 6 January 2010 – Advised CCR expires in January
 - d. 21 January 2010 – Advised CCR expired and how to renew
- xii. (b)(4)
 - a. 12 November 2009 – Spoke to POC regarding his connection with the Mentor/Protégé Project Coordinator
 - i. Worked on getting a meeting set up with Menlo's Director of Contracts and USTRANSCOM's Director of Small Business Programs to hear the Coordinator's briefing
 - b. 6 January 2010 – Spoke to POC multiple times regarding the Mentor Protégé conference in March
 - i. Gave Procurement's contact information
 - c. 7 January 2010 – Spoke to POC regarding his HUBZone application status – SBA told him it should be approved by the end of January
 - i. Forwarded this information to Procurement
 - d. 8 January 2010 – Master Co Broker contract and Phase 3 – 5 rate worksheets sent
- xiii. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
- xiv. (b)(4)
 - a. 2 November 2009 – Advised CCR profile states IRS Validation failed and possibility of getting updated
 - i. Confirmed if they had a SCAC
- xv. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November

- b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - c. 6 January 2010 – Advised CCR expires in January
 - d. 19 January 2010 – Advised CCR expired and how to renew
- xvi. (b)(4)
 - a. 14 December 2009 – Forwarded profile to Procurement for review on behalf of the POC
- xvii. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 3 November 2009 - Advised CCR profile was missing mandatory information and how to fix
 - c. 21 January 2010 – Advised CCR expired and how to renew
- xviii. (b)(4)
 - a. 6 January 2010 – Advised CCR expires in January
 - b. 11 January 2010 – Advised CCR expired and how to renew
- xix. (b)(4)
 - a. 6 January 2010 – Advised CCR expires in January
 - b. 19 January 2010 – Advised CCR expired and how to renew
- xx. (b)(4)
 - a. 19 November 2009 – Advised CCR profile was missing mandatory information and how to fix
 - b. 18 December 2009 – Helped POC get into contact with Emptoris Help team
 - c. 23 December 2009 – Followed up with POC regarding certificate of insurance
 - d. 7 January 2010 – Forwarded certificate of insurance to Contracts Administrator
- xxi. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 6 January 2010 – Advised CCR expires in January
 - c. 19 January 2010 – Advised CCR expired and how to renew
- xxii. (b)(4)
 - a. 3 November 2009 – Responded to email regarding the DTCL system under Menlo and the contract (compared to load boards previously used, etc.)
 - b. 4 November 2009 – Gave POC Procurement's contact information
 - c. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
- xxiii. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 6 January 2010 – Advised CCR expires in January
 - c. 11 January 2010 – Advised CCR expired and how to renew

- xxiv. (b)(4)
 - a. 13 November 2009 – Sent Vetbiz information
 - b. 22 December 2009 – Corresponded with POC regarding their small business categories and followed up regarding submission of their carrier profile
 - c. 28 December 2009 – Received, saved, and forwarded carrier profile to Menlo procurement
 - d. 30 December 2009 – Motor carrier contract documents and phase 3-5 rate worksheets sent
 - e. 13 January 2010 – Received partial contract documents
 - i. Advised POC what was missing
 - f. 19 January 2010 – Received more partial contract documents
 - i. Advised POC what was missing and the appropriate format
- v. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 3 November 2009 – Advised CCR missing mandatory information and how to update
- vi. (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
- vii. (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - b. 30 December 2009 – Suggested augmenting CCR profile with NAICS 488510 since brokerage
- viii. (b)(4)
 - a. 4 November 2009 – Followed up with POC regarding legal business name update on CCR and D&B site
 - b. 18 November 2009 – Followed up with POC again regarding legal business name update on CCR and D&B site
 - c. 22 December 2009 – Contract sent to Director of Contracts for first signature
- ix. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - c. 4 January 2010 – Advised CCR expired and how to renew
 - d. 11 January 2010 – Advised CCR expired and how to renew
- x. (b)(4)
 - a. 6 January 2010 – Advised CCR expired and how to renew
- xi. (b)(4)
 - a. 6 January 2010 – Advised CCR expires in January
- xii. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
- xiii. (b)(4)



- [illegible]

- a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
- xxi. (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - b. 20 January 2010 – Sent Indian Incentive Program letter to be updated and signed for year 2009
- xxii. (b)(4)
 - a. 4 January 2010 – Advised CCR profile expired and how to renew
- xxiii. (b)(4)
 - a. 2 November 2009 – Sent Indian Incentive Program documentation to be completed to have on hand for next quarter if they are awarded business
 - b. 9 November 2009 – Discussed the IIP program with the POC
 - c. 27 November 2009 – Temporary SBC converted and contract document as pdf per request from POC (to be used with their subcontractors)
- xxiv. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
- xxv. (b)(4)
 - a. 6 November 2009 – Spoke to POC regarding next steps and that Procurement would contact them if interested
 - b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - c. 3 December 2009 – Forwarded carrier profile to Procurement for feedback on behalf of the POC
- xxvi. (b)(4)
 - a. 16 November 2009 – Received carrier profile in invalid format
 - i. Advised POC this must be submitted in Excel format
 - b. 8 December 2009 – Contract documents forwarded to Aurora to complete by the Temporary SBC
- xxvii. (b)(4)
 - a. 17 November 2009 – Emailed POC to get Schedule of Government Services updated
- xxviii. (b)(2)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - c. 6 January 2010 – Advised CCR expires in January
 - d. 11 January 2010 – Advised CCR profile expired and how to renew
- xxix. (b)(4)
 - a. 6 January 2010 – Advised CCR expires in January
 - b. 19 January 2010 – Advised CCR expired and how to renew

- xxx. (b)(4)
 - a. 19 November 2009 – Sent link to the SBA's "Winning Federal Contracts: A Guide for Women Entrepreneurs"
 - b. 15 December 2009 – Confirmed address is in a HUBZone but not certified
- xxxi. (b)(4)
 - a. 27 November 2009 – Sent portal log in information
- xxxii. (b)(4)
 - a. 19 November 2009 – Sent carrier profile to be completed and submitted to Procurement
- xxxiii. (b)(4)
 - ii. 23 December 2009 – Advised POC their CCR profile was missing mandatory information and how to update
- xxv. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 6 January 2010 – Advised CCR expires in January
 - c. 21 January 2010 – Advised CCR expired and how to renew
- xxvi. (b)(4)
 - a. 6 January 2010 – Advised CCR expires in January
- xxvii.
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 6 January 2010 – Advised CCR expires in January
 - c. 19 January 2010 – Advised CCR expired and how to renew
 - i. Gave POC CCR's Help Desk number

Small Business – No Subcategory assistance

- i. (b)(4)
 - orwarded carrier profile to completed and submit to Procurement for review
 - i. Informed POC of contracting process
 - ii. Sent HUBZone criteria information
 - b. 20 November 2009 – Received faxed version of carrier profile
 - i. Advised POC this must be submitted in Excel format
 - ii. Received operating authority and W9
- ii. (b)(4)
 - a. 6 January 2010 – Advised CCR expires in January
 - b. 11 January 2010 – Advised CCR expired and how to renew
- iii. (b)(4)
 - a. 6 January 2010 – Advised CCR expires in January
 - b. 19 January 2010 – Advised CCR expired and how to renew
- iv. (b)(4)

- a. 2 November 2009 – Advised CCR expires in November
 - b. 6 January 2010 – Advised CCR expires in January
 - c. 21 January 2010 – Advised CCR expired and how to renew
- v. (b)(4)
 - a. 12 November 2009 – Followed up with POC to confirm still interested in finishing contract; emailed for rates
 - i. Re-sent Phase 1-5 rates worksheets
 - ii. Received, saved, and forwarded rate worksheets to Procurement
- vi. (b)(4)
 - a. 6 January 2010 – Advised CCR expires in January
 - b. 19 January 2010 – Advised CCR expired and how to renew
- vii. (b)(4)
 - a. 19 January 2010 – Master Motor Carrier Agreement sent
 - b. 21 January 2010 – New POC information received and updated
- viii. (b)(4)
 - Advised CCR expires in November
- ix. (b)(4)
 - a. 20 January 2010 – Master Co Broker Agreement sent
 - i. Followed up with Procurement regarding contract questions on their behalf
- x. (b)(4)
 - a. 19 January 2010 – Advised CCR expired and how to renew
- xi. (b)(4)
 - a. 7 January 2010 – Master Motor Carrier Agreement and Phase 3-5 rate worksheets sent
 - b. 18 January 2010 – Received partial contract documents
 - i. Advised POC of missing documents
- xii. (b)(4)
 - a. 27 November 2009 – Updated contact information
 - i. Reached out to POC to fax new signed accessorial odes document
- xiii. (b)(4)
 - a. 17 November 2009 – Master Motor Carrier Agreement and rate worksheets sent
 - b. 24 November 2009 – Corresponded with POC regarding the contracting process
 - c. 4 December 2009 – Temporary SBC forwarded contract to Aurora to complete
- xiv. (b)(4)
 - a. 6 January 2010 – Advised CCR expired and how to renew
- xv. (b)(4)
 - a. 6 January 2010 – Advised CCR expires in January
 - b. 20 January 2010 – Advised CCR expired and how to renew

- xvi. (b)(4)
 - a. 6 January 2010 – Advised CCR expires in January
 - b. 21 January 2010 – Advised CCR expired and how to renew
- xvii. (b)(4)
 - a. 6 January 2010 – Advised CCR expires in January
 - b. 19 January 2010 – Advised CCR expired and how to renew
- xviii. (b)(4)
 - a. 6 January 2010 – Advised CCR expires in January
 - b. 11 January 2010 – Advised CCR expired and how to renew
- xix. (b)(4)
 - a. 7 December 2009 – Temporary SBC followed up with Procurement on behalf of POC regarding them submitting rates without any results
 - b. 5 January 2010 – Procurement working on rate addenda
 - c. 14 January 2010 – Returned voicemail and advised POC of rate addenda being worked on the 5th
- xx. (b)(4)
 - a. 9 November 2009 – Received SCAC code
 - i. Forwarded SCAC to Aurora to be updated in the list
- xxi. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 12 November 2009 – Followed up with POC to confirm still interested in contract
 - i. Spoke to POC – he thought he had sent package, but confirmed it was never mailed
 - c. 6 January 2010 – Advised CCR expires in January
 - d. 19 January 2010 – Advised CCR expired and how to renew
- xxii. (b)(4)
 - a. 1 December 2009 – Temporary SBC worked with Procurement to ensure welcome email was sent to this company
 - b. 7 December 2009 – Temporary SBC advised the POC the carrier profile is the next step
 - c. 15 December 2009 – Temporary SBC followed up with the ng outstanding issues
- xxiii. (b)(4)
 - a. 11 January 2010 – Sent CCR registration help documents
 - b. 12 January 2010 – Advised POC the carrier profile is the next step and needs to be completed and submitted to Procurement for review
 - i. Verified their profile was saved appropriately
 - c. 14 January 2010 – Master Motor Carrier Agreement sent
 - d. 15 January 2010 – Spoke to POC about the Schedule of Government Services contract document

- a. 21 January 2010 - Urged HUBZone certification if all criteria were able to be met
- xxiv. (b)(4)
- a. 2 November 2009- Advised CCR expires in November
- xxv. (b)(4)
- a. 6 January 2010 – Advised CCR expired and how to renew
- xxvi. (b)(4)
- a. 6 January 2010 – Advised CCR expires in January
 - b. 11 January 2010 – Advised CCR expired and how to renew
- xxvii. (b)(4)
- a. 10 November 2009 – Advised POC their CCR profile states large business
 - i. Forwarded carrier profile to Procurement for review
 - b. 20 November 2009 – Followed up with Procurement about profile review
 - c. 7 January 2010 – Gave POC Procurement's contact information
- xxviii. (b)(4)
- a. 2 November 2009 – Advised CCR expires in November
- xxix. (b)(4)
- a. 2 November 2009 – Advised CCR expires in November
 - b. 19 January 2010 – Advised CCR expired and how to renew
- xxx. (b)(4)
- a. 2 November 2009 – Advised CCR expires in November
 - b. 6 January 2010 – Advised CCR expires in January
 - c. 22 January 2010 – Advised CCR expired and how to renew
- xxxi. (b)(4)
- a. 3 December 2009 – Spoke to POC; they are updating their carrier profile and want to re-submit
- xxxii. (b)(4)
- a. 6 January 2010 – Advised CCR expires in January
 - b. 19 January 2010 – Advised CCR expired and how to renew
 - i. Spoke to POC regarding new DUNS number
 - ii. Sent new DUNS to Aurora to update master carrier list
 - iii. Sent Vetbiz information
 - iv. Sent Schedule of Government Services to update with VOSB
 - c. 20 January 2010 – Spoke to POC; no longer VOSB
 - i. Advised POC to update CCR
- xxxiii. (b)(4)
- a. 2 November 2009 – Advised CCR expires in November
 - b. 6 January 2010 – Advised CCR expires in January
 - c. 11 January 2010 – Advised CCR expired and how to renew

- xxxiv. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 6 January 2010 – Advised CCR expires in January
 - c. 19 January 2010 – Advised CCR expired and how to renew
- xxxv. (b)(4)
 - a. 12 November 2009 – Followed up with POC to confirm still interested in finishing contract
 - i. POC responded still interested
 - ii. Phase 1-5 rate worksheets sent
 - b. 6 January 2010 – POC advised they are still working on the rate worksheets
- xxxvi. (b)(4)
 - a. 9 – Advised CCR expires in November
 - b. 6 January 2010 – Advised CCR expires in January
 - c. 19 January 2010 – Advised CCR expired and how to renew
- xxxvii. (b)(4)
 - a. 30 December 2009 – Master Co Broker Agreement and Phase 3-5 rate worksheets sent
- xxxviii. (b)(4)
 - a. 21 January 2010 – Advised CCR expired and how to renew
- xxxix. (b)(4)
 - a. 3 November 2009 – Followed up with POC regarding their One Network training invitation
 - b. 9 November 2009 – Forwarded information from Aurora regarding what else is needed before they can get One Training
 - i. POC confirmed everything was sent to One
 - c. 5 January 2010 – Procurement working on rate addenda
- xl. (b)(4)
 - a. 2 November 2009 – Received, saved, and forwarded rates to Procurement
 - b. 4 November 2009 – Emailed POC for insurance requirements of contract
 - c. 8 January 2010 – Corresponded with POC regarding their Sample Certificate of Insurance
 - d. 12 January 2010 – Confirmed with Risk Management the Sample Certificate of Insurance would meet the contract requirements
- xli. (b)(4)
 - a. 6 November 2009 – Advised POC to send revised rates to different Procurement contact
- xl.ii. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 19 January 2010 – Advised CCR expired and how to renew
- xl.iii. (b)(4)



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- c. 22 January 2010 – Advised CCR expired and how to renew
 - liii. (b)(4)
 - a. 16 November 2009 – Corresponded with POC regarding rates already being submitted
 - i. They would like to finish their CCR before sending other rates
 - liv. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 6 January 2010 – Advised CCR expires in January
 - c. 19 January 2010 – Advised CCR expired and how to renew
 - lv. (b)(4)
 - a. 2 November 2009 – Advised CCR expires in November
 - b. 6 January 2010 – Advised CCR expires in January
 - c. 11 January 2010 – Advised CCR expired and how to renew
 - lvi. (b)(4)
 - a. 20 November 2009 – Master Motor Carrier Agreement and Phase 3-5 Rate Worksheets sent
 - b. 8 December 2009 – Temporary SBC forwarded contract to Aurora to complete
 - lvii. (b)(4)
 - a. 6 January 2010 – Advised CCR expires in January

Please direct related questions or comments regarding the content of this deliverable to me at (703) 626 (b)(6)

Respectfully,

// Signed//

(b)(6)