

Policy on Counseling Sessions

Counseling Session:

You must provide your clients with counseling and information regarding marketing their products and services to DoD, other Federal agencies, and State and local governments. You must provide this one-on-one counseling service free of charge. You must assist, as appropriate, your clients with understanding Federal, State and local government requirements applicable to contracting for services, manufacturing, construction or other markets. The services you must offer include, but are not limited to:

- a. Identifying marketing opportunities for clients consistent with the client's products and services.
- b. Advising and assisting clients in the preparation and proper submission of applications, certifications, registrations, etc. to prepare them for doing business with Federal, State and local government entities.
- c. Advising and assisting clients with the preparation and submission of bids and proposals.
- d. Advising and assisting clients concerning post-award functions.
- e. You must advise and assist clients in pursuing and securing subcontracting opportunities from Federal, State and local government prime contractors and subcontractors at any tier.
- f. As a minimum, the PTAC must make available, advice and assistance on the following topics at no-cost to businesses:
 - i. Federal, State and local government contracting laws, policies and procedures. Emphasis must be placed on requirements and procedures used by DoD and other Federal agencies, including registration in systems such as the System for Award Management.
 - ii. The DoD Mentor-Protégé Program (MPP) and similar Government programs.
 - iii. Accounting system requirements and contract payments.
 - iv. Wide Area Work Flow (WAWF).
 - v. Subcontracting.
 - vi. DLA Internet Bid Board System (DIBBS).
 - vii. Small Business (SB) Innovative Research (SBIR) / SB Technology Transfer (STTR).
 - viii. DoD Cyber Security clause compliance.
 - ix. Obtaining federal contract data from databases such as FPDS-NG or USASpending.
 - x. Finding federal procurement opportunities using FedBizOpps.
 - xi. Business size and type (socioeconomic) certifications
- g. You may charge businesses exhibitor, sponsorship, and advertising fees for specific outreach events to generate program income when that activity does not conflict or interfere with the PTAP's purpose and intent. The focus must remain on maximizing quality service to clients and not on generating income. You must make it clear to clients that optional, fee-based, services are optional and not required to receive other no-cost services. You may charge up to \$50 per month (\$600 per year) for each subscription type service, such as electronic bid match delivery. You may charge for optional customized reports that provide clients with historical contract data. You

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must limit charges to event attendees to the minimum amount anticipated necessary to cover the facilities and food costs of that event. PTACs must collaborate with each other to minimize expenses and maximize value to the program. When charging another PTAC is necessary, you may only charge the actual cost experienced by the hosting recipient (e.g. PTAC 1 hosts an event at their location and charges exhibitor fees of \$100, which includes tables PTAC 1 owns and paid labor services to set up the table; PTAC 1 may only charge PTAC 2 the actual cost of the setup labor). The gross program income generated must be reported, see FMS Article VII for more information.

Initial Counseling Session

The first counseling session held by a PTAC with an individual or business firm. There usually is only one initial counseling session per individual or business firm; subsequent sessions are considered follow-up counseling sessions. The exception would be if you reactivate a client that has been inactive for one year or more, then you can enter another Initial Session. The initial counseling session may determine that the individual or business firm has no likely potential to do business with a federal agency and/or state and local government.

Program Manager Guidelines on Initial Counseling Sessions

An **Initial Counseling Session** should be recorded detailing an initial conversation with a client lasting at least **thirty-minutes**. Often when you talk with someone, it should be considered simply outreach and not be recorded as a counseling session. Initial counseling sessions must be able to be defended because they provided true procurement technical assistance and must be substantive in nature. If you speak with a company at a trade show or other outreach event for five or ten minutes that conversation in all likelihood would not be meaningful enough to be counted as an initial session. An initial session should contain some depth and provide guidance and instruction so that the company is educated about some aspect of government procurement. This is why thirty minutes serves as a good baseline for an initial counseling session. If the company that you met at an outreach event becomes a client, only the second meeting should be recorded as an initial session. Your initial conversation can be added to the time recorded for the initial session. Through the initial counseling session, a company must have gained a significant amount of information with several topics discussed. In entering the session, please indicate that you provided a PTAC overview and list some additional topics. As an example: Educated on PTAP [Program], SAM, DIBBS Board, etc. You should always offer some overview of PTAC services. If a company indicates through your conversation that they intend to complete the on-line application, you should request they note that you spoke with them to give better insight in assigning the company to you.

Another situation is when you receive a phone call from a company in which a specific topic is discussed. Perhaps the company is seeking assistance about a specific issue in government procurement, i.e. the RFID process. In this case, you are proving true

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procurement technical assistance and your conversation should be recorded as an initial counseling session. Since you will have to obtain some basic information about the company, you should be able to provide them a brief overview about CT PTAC. In this situation, valuable information is exchanged and company may call you again. As a procurement specialist, you should get credit for the assistance you provide and an initial counseling session should be recorded. Again, the twenty-minute rule applies.

It is not always possible **or preferable** to have rules for every possible situation; however, it is important to apply the guideline of whether the meeting or conversation with a company was truly substantive procurement technical assistance. Please feel free to call me when a special situation arises. In no case should your record an initial counseling session for a meeting or conversation that was less than twenty-minutes in duration.

Note: Use action words to describe your counseling, show no emotion and list the most important topics. If you don't know the answer to a client's question, advise them you will research the topic and get back to them. Confer with Program Director or another counselor.