

File Edit View Navigate Query Tools Help

MBDA

Saved Queries: All Accounts

Account:

Home Accounts Contacts Service Funded Centers Opportunities Deals Pipeline MBDA Relationships Management Reports Semi Annual Report

Accounts Home Accounts List

My Accounts Menu New Delete Query 1 - 1 of 1

| Phoenix Stati | Account Type | Name | Funded Cent | Site | Main Phone # | Status | Entity Struct | Annual Rever | State | Region | Customer Sin | Ethnicity | Industry | Industry Des | Special Progr | CCR | DUNS # | Special I |
|---------------|--------------|------|-------------|------|--------------|--------|---------------|--------------|-------|--------|--------------|-----------|----------|--------------|---------------|-----|--------|-----------|
| | | | | | | Active | | | | | 6/15/2012 | | | | | | | |

1 of 1

Menu New Delete Query

Account Name: * _____ Site: _____ Annual Revenue: _____ # Of Employees: _____

Address: * _____ State: _____ Main Phone #: * _____ Full Time Employee: _____

City: _____ Country: _____ Main Fax #: _____ Part Time Employee: _____

Zip Code: _____ Customer Since: * 6/15/2012 URL: _____ Minority Employees: _____

Ethnicity: * _____ Region: * _____ Industry: * _____ Largest Contract Value: _____

Special Program: _____ Funded Center: * _____ Industry Desc: * _____ Annual Export Sales: _____

CCR: Special Interest: _____ DUNS #: _____ Business Description: _____

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Saved Queries: * All SRs

SR #: **1-5432041**
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Service Requests Home | **Service Requests List**

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SR Information

SR #: 1-5432041 SR Type: * Access to Markets

Last Name: Martin Fee Amount Billed: * 125

First Name: Nory Fee Amount Collected: * 125

Total Attendees: 1 Waived Fee Amount: 0

Status and Ownership

Status: * Open

Sub Status: Unassigned

Priority: 3-Medium

Owner: JIGLESIAS

Related Activities

[Awarded Transactions](#) | **Service Request Sub Type**

Service Request Sub type | Menu ▾ | New Edit Delete Query
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| Sub Type | Referred To | Point of Contr | Hours | Service Start Date | Note |
|-------------------------------|-------------|----------------|-------|--------------------|--|
| Procurement Packaging | Martin | 2 | | 7/12/2011 11:00:00 | 8(a) Certification Assistance / Bonding Request Assistance |
| Construction Related Services | Martin | 2 | | 7/26/2011 12:08:20 | Bonding Financial Assistance |
| Procurement Opportunity Sou | Martin | 2 | | 8/16/2011 12:00:00 | Research Federal Government Organization for Client |
| Procurement Opportunity Sou | Martin | 2 | | 6/10/2011 12:00:00 | Banding Financial Assistance |
| Construction Related Services | Martin | 2 | | 8/16/2011 12:00:00 | |
| Construction Related Services | Martin | 1 | | 8/24/2011 12:00:00 | |
| Construction Related Services | Martin | 1 | | 8/25/2011 12:00:00 | |

| New | Transaction Type | Transaction Sub Ty | Contracting Methk | Amount | Source Company | Award Date | Export/Strategic | Status | Owner | Start | End | Comment | Duration |
|-------------------------------------|-----------------------|----------------------|-------------------|--------|-------------------|------------|------------------|----------|--------|-----------|-----------|---------|----------|
| <input checked="" type="checkbox"/> | Contract/Procurements | Construction, Non Bu | | 76,058 | Case Construction | 5/13/2011 | | Approved | MLESLE | 10/7/2011 | 10/7/2011 | | 0 |
| <input checked="" type="checkbox"/> | Contract/Procurements | Construction, Non Bu | | 60,269 | JC Duke | 5/16/2011 | | Approved | MLESLE | 10/7/2011 | 10/7/2011 | | |

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Saved Queries:

MBDA Deals:

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MBDA Deals List

All MBDA Deals
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| Deal Name | Deal Size | MOU Req | MOI | Current Deal Sta | Probability % | Company Name | Fiscal Year | Transaction Type | Needs HQ | Next Steps | Team Member | Deal Descripti | Relationship Manager | Service Req | Source | Last Updated |
|---------------------|-----------------|---------|-----|------------------|---------------|--------------------------|-------------|---------------------|----------|--------------------------|-------------|-----------------|----------------------|-------------|----------------|--------------|
| Rainbow Natural | \$50,000.00 | | N/A | Active | 70% | Rainbow Natural | 2011 | Financing | | | CRAMOSDAVID | Jennifer Rivera | Jennifer Rivera | 0 | | 10/3/2011 0: |
| AAA Builds | \$50,000.00 | | N/A | Active | 30% | AAA General Contracto | 2011 | Financing | | | CRAMOSDAVID | Jennifer Rivera | Jennifer Rivera | 0 | | 11/1/2011 0: |
| TIC Logistics | \$1,000,000.00 | | | Active | 10% | TIC Logistics | 2012 | Contracts/Procureme | | | CGUZMAN | Carlos Guzman | Carlos Guzman | 000 | | 1/26/2012 0: |
| Creative/CSA | \$1,000,000.00 | | | Active | 10% | Creative Associates | 2012 | Contracts/Procureme | | | CGUZMAN | Carlos Guzman | Carlos Guzman | 000 | | 1/26/2012 0: |
| APR/IRS | \$1,000,000.00 | | | Active | 10% | APR Consulting, Inc. | 2012 | Contracts/Procureme | | | CGUZMAN | Carlos Guzman | Carlos Guzman | 000 | | 1/26/2012 0: |
| VXI/CENTECH | \$1,000,000.00 | | | Active | 10% | VXI Global Solutions, In | 2012 | Contracts/Procureme | | | CGUZMAN | Carlos Guzman | Carlos Guzman | 000 | | 1/26/2012 0: |
| M Luis Construction | \$1,000,000.00 | | | Active | 10% | M Luis Construction Co | 2012 | Contracts/Procureme | | | CGUZMAN | Carlos Guzman | Carlos Guzman | 000 | | 1/26/2012 0: |
| Creative/SoftPower | \$1,000,000.00 | | | Active | 10% | Creative Associates | 2012 | Contracts/Procureme | | | CGUZMAN | Carlos Guzman | Carlos Guzman | 000 | | 1/26/2012 0: |
| Farrow | \$4,000,000.00 | | | Dead | 90% | Farrow Construction S | 2011 | Contracts/Procureme | | | JTHOMAS | Victor Valdez | Victor Valdez | 1-5038727 | | 5/7/2012 04: |
| Refinancing | \$10,595,000.00 | | | Complete | 100% | KrisDee and Associates, | 2011 | Financing | | Met with Ban SHILLMORGAN | | Hans Bonner | Hans Bonner | 1-5062739 | Private Sector | 10/4/2011 1: |

Rainbow Natural

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New
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Query
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Name: * **Rainbow Natural**

Company Name: * **Rainbow Natural**

Deal Size: * **\$50,000.00**

Currency: * **USD**

Industry: _____

Industry Desc: _____

Primary Contacts: _____

Sales Team: **CRAMOSDAVID**

Transaction Type: * **Financing**

Source: _____

Current Deal Status: * **Active**

Fiscal Year: * **2011**

Source Company: * **Private Investor**

Work #: _____

Home #: _____

Funded Center: * **El Paso, Texas M**

Description: _____

Company Size(\$Rev): **\$120,000.00**

Relationship Manager: **Jennifer Rivera**

Service Request: * **0**

Created Date: * **10/3/2011**

Anticipated Close Date: * **10/3/2011**

Probability: * **70**

Customer Needs/Objectives: _____

MOU Req (Y/N): **I**

MBDA MOU Status: **N/A**

Lead %: _____

https://mbda-crmweb.mbda.gov/callcenter_enu/start.swe?SWECmd=Login&SWEPL=1&_sn=qzpjadTaI1JCOonViG5N8D66OD... 6/15/2012

2011 Semi-Annual Report

for the MBDA Business Center – Albuquerque, New Mexico MBC

Date of Submission: 11/14/2011

This confirms that I have completed, reviewed and submitted the information contained in this Semi-Annual Report. I certify the information therein as accurate, and complied under the program requirements as originally competed under the applicable Federal Funding Opportunity Announcement for the MBDA Business Center (MBC) program.

| | | | |
|----------------------------|----------|------------------------|----------|
| Anna Muller | 11/14/11 | Anna Muller | 11/14/11 |
| [Operator/Award Recipient] | [Date] | [MBC Project Director] | [Date] |

Semi-Annual Cumulative Performance:

| Goal | Assigned Points | Q1+Q2 Goal | Q1+Q2 Actual | Q1+Q2 % Goal | Q1+Q2 Points Earned | % Annual Goal |
|--------------------------------|-----------------|-----------------|-----------------|--------------|---------------------|---------------|
| \$ Contracts and Procurements | 20 | \$28,500,000.00 | \$22,224,300.00 | 77.98% | 15.60 | 38.99% |
| # Contracts and Procurements | 5 | 10.00 | 12.00 | 120.00% | 6.00 | 60.00% |
| \$ Financial Transactions | 15 | \$12,228,500.00 | \$43,224,732.00 | 353.48% | 22.50 | 176.74% |
| # Financial Transactions | 5 | 10.00 | 16.00 | 160.00% | 7.50 | 80.00% |
| Number of Jobs Created | 20 | 35.00 | 165.00 | 471.43% | 30.00 | 235.71% |
| Number of Jobs Retained | 5 | 24.00 | 53.00 | 220.83% | 7.50 | 110.42% |
| Number of Clients Served | 5 | 30.00 | 110.00 | 366.67% | 7.50 | 183.33% |
| Export Transaction Facilitated | 5 | 1.00 | 0.00 | 0.00% | 0.00 | 0.00% |
| Strategic Facilitated | 5 | 1.00 | 0.00 | 0.00% | 0.00 | 0.00% |
| MBE Referrals | 5 | 29.00 | 1.00 | 3.45% | 0.17 | 1.72% |

The table above represents an overall **COMMENDABLE** rating for the performance period beginning **01-APR-11** through **30-SEP-11**, with a cumulative score of **96.77**.

This level of performance attainment does not include points assigned by the Project Monitor in the following areas: (a) Management Assessment; (b) Promotion of MBDA; and (c) Bonus Points.

| Goal | Assigned Points | Q1+Q2 Goal | Q1+Q2 Actual | Q1+Q2 % Goal | Q1+Q2 Points Earned | % Annual Goal |
|-------------------------------|-----------------|-----------------|-----------------|--------------|---------------------|---------------|
| \$ Contracts and Procurements | 20 | \$28,500,000.00 | \$22,224,300.00 | 77.98% | 15.60 | 38.99% |

1.) Describe the difficulties encountered by the center in attaining the "Dollar Value of Awarded Contracts & Procurements" goal.

The HUBZone minority businesses were not awarded year end contracts because of changes in the census tracts and HUBZones were redesignated. In addition the majority of federal contracts were delayed due to the federal budget being delayed.

2.) Describe the steps taken and efforts planned by the center to overcome the above difficulties and increase performance attainment on the "Dollar Value of Awarded Contracts & Procurements" goal.

The New Mexico MBDA Minority Business Center assisted with 8(a), HUBZone, Women Owned and Disabled Veteran certifications. The center specializes in struction teaming arrangement to target larger contracts. We anticipate a large number of contracts awards the next quarter.

| Goal | Assigned Points | Q1+Q2 Goal | Q1+Q2 Actual | Q1+Q2 % Goal | Q1+Q2 Points Earned | % Annual Goal |
|------------------------------|-----------------|------------|--------------|--------------|---------------------|---------------|
| # Contracts and Procurements | 5 | 10.00 | 12.00 | 120.00% | 6.00 | 60.00% |

1.) Discuss key operational activities that led to the center's success in attainment of the "Number of Awarded Contracts & Procurements" goal:

The New Mexico MBDA Minority Business Center operational activities for the purpose of identifying larger awarded contracts and Procurements.

| Goal | Assigned Points | Q1+Q2 Goal | Q1+Q2 Actual | Q1+Q2 % Goal | Q1+Q2 Points Earned | % Annual Goal |
|---------------------------|-----------------|-----------------|-----------------|--------------|---------------------|---------------|
| \$ Financial Transactions | 15 | \$12,228,500.00 | \$43,224,732.00 | 353.48% | 22.50 | 176.74% |

1.) Discuss key operational activities that led to the center's success in attainment of the "Dollar Value of Awarded Financial Transactions" goal:

The MBDA Business Center assists minority business in securing financing and bonding to target large Federal and Prime contract opportunities.

2.) Provide a "Success Story" that demonstrates how the efforts of the center assisted a client in obtaining a financial transaction (please ensure that this is a new success story that has not been previously reported to MBDA):

| | |
|--|---|
| Client Name: | David Montoya |
| Source Name: | Sandia National Laboratories |
| Transaction Description and Client Service Need: | Contract Award/Toner Supply |
| Description of the MBC's contribution in facilitating the client contract award: | We identified the Sandia requirement and matched the requirement as a set-aside for Manzano Strategies. |

| Goal | Assigned Points | Q1+Q2 Goal | Q1+Q2 Actual | Q1+Q2 % Goal | Q1+Q2 Points Earned | % Annual Goal |
|--------------------------|-----------------|------------|--------------|--------------|---------------------|---------------|
| # Financial Transactions | 5 | 10.00 | 16.00 | 160.00% | 7.50 | 80.00% |

1.) Discuss key operational activities that led to the center's success in attainment of the "Number of Awarded Financial Transactions" goal:

16 Awarded Financial Transactions. Facilitated relationships with lenders and surety firms to build financial capacity for minority businesses.

| Goal | Assigned Points | Q1+Q2 Goal | Q1+Q2 Actual | Q1+Q2 % Goal | Q1+Q2 Points Earned | % Annual Goal |
|------------------------|-----------------|------------|--------------|--------------|---------------------|---------------|
| Number of Jobs Created | 20 | 35.00 | 165.00 | 471.43% | 30.00 | 235.71% |

1.) Discuss key operational activities that led to the center's success in attainment of the "Number of Jobs Created" goal:

165 number of jobs were created successfully by targeting larger contracts which enabled our clients to grow and hire additional staff.

2.) Provide a "Success Story" that demonstrates how the efforts of the center assisted a client in job creation (please ensure that this is a new success story that has not been previously reported to MBDA):

| | |
|--|--|
| Client Name: | David Montoya |
| Source Name: | Sandia National Laboratories |
| Transaction Description and Client Service Need: | Toner Supply Manzano Strategies, LLC is an 8(a) |

Description of the MBC's contribution in facilitating the client contract award:

Service Disabled Veteran owns small business. The Company had a significant net loss and could not service a bank line of credit. The MBDA Business Center resturctured the debt and assisted the firm with teaming arrangements to secure government contracts.

| Goal | Assigned Points | Q1+Q2 Goal | Q1+Q2 Actual | Q1+Q2 % Goal | Q1+Q2 Points Earned | % Annual Goal |
|--------------------------------|-----------------|------------|--------------|--------------|---------------------|---------------|
| Number of Jobs Retained | 5 | 24.00 | 53.00 | 220.83% | 7.50 | 110.42% |

1.) Discuss key operational activities that led to the center's success in attainment of the "Number of Jobs Retained" goal:

The MBDA Business Center structure teaming arrangements in order for minority business to target larger contracts. The larger contracts assists the firms in job retention.

2.) Provide a "Success Story" that demonstrates how the efforts of the center assisted a client in job retention (please ensure that this is a new success story that has not been previously reported to MBDA):

| | |
|--|---|
| Client Name: | Elvina Emerson |
| Source Name: | Nellis Air Force Base 8 (a) |
| Transaction Description and Client Service Need: | The MBDA Business Center has structured teaming arrangements with larger firms in order to bid and be awarded larger contracts. |
| Description of the MBC's contribution in facilitating the client contract award: | The MBDA Business Center identifies contract opportunities and assists minority businesses in securing the contracts. |

| Goal | Assigned Points | Q1+Q2 Goal | Q1+Q2 Actual | Q1+Q2 % Goal | Q1+Q2 Points Earned | % Annual Goal |
|---------------------------------|-----------------|------------|--------------|--------------|---------------------|---------------|
| Number of Clients Served | 5 | 30.00 | 110.00 | 366.67% | 7.50 | 183.33% |

1.) Discuss key operational activities that led to the center's success in attainment of the "Number of Clients Served" goal:

The MBDA Business Center Co-Sponsors small business workshops targeting minority businesses. The Center has assisted 110 minority businesses for the Semi Annual Performances.

| Goal | Assigned Points | Q1+Q2 Goal | Q1+Q2 Actual | Q1+Q2 % Goal | Q1+Q2 Points Earned | % Annual Goal |
|---------------------------------------|-----------------|------------|--------------|--------------|---------------------|---------------|
| Export Transaction Facilitated | 5 | 1.00 | 0.00 | 0.00% | 0.00 | 0.00% |

1). Describe the difficulties encountered by the center in attaining the "Number of Export Transaction Facilitated" goal.

We plan to assist the firms that are interested in Export Transactions.

2.) Describe the steps taken and efforts planned by the center to overcome the above difficulties and increase performance attainment on the "Number of Export Transaction Facilitated" goal.

New Mexico MBES are qualified and available to participate in rebuilding the carribbean and northern Mexico. The center will attend export conferences to identify minority owned businesses interested in export transactions.

| Goal | Assigned Points | Q1+Q2 Goal | Q1+Q2 Actual | Q1+Q2 % Goal | Q1+Q2 Points Earned | % Annual Goal |
|-----------------------|-----------------|------------|--------------|--------------|---------------------|---------------|
| Strategic Facilitated | 5 | 1.00 | 0.00 | 0.00% | 0.00 | 0.00% |

1.) Describe the difficulties encountered by the center in attaining the "Number of Strategic Transaction Facilitated" goal.

The MBC co-sponsor events with the strategic partners to target and assist minority businesses.

2.) Describe the steps taken and efforts planned by the center to overcome the above difficulties and increase performance attainment on the "Number of Strategic Transaction Facilitated" goal.

We will continue to provide strategic business consulting services to new and existing clients that will result in increased financing, contracting opportunities and job growth and retention. The services provided that will accomplish this goal include business incorporation, licensing and CCR/SBA registrations, negotiating leases and contracts, financial loan packaging, certifying businesses in the minority preference programs, identifying and matching procurements.

| Goal | Assigned Points | Q1+Q2 Goal | Q1+Q2 Actual | Q1+Q2 % Goal | Q1+Q2 Points Earned | % Annual Goal |
|---------------|-----------------|------------|--------------|--------------|---------------------|---------------|
| MBE Referrals | 5 | 29.00 | 1.00 | 3.45% | 0.17 | 1.72% |

1.) Describe the difficulties encountered by the center in attaining the "Number of MBE Referrals" goal.

The center is recognized as the only entity that specializes in assisting minority businesses in the areas of Government and Prime contractor certifications therefore we do not refer clients to any other entities.

2.) Describe the steps taken and efforts planned by the center to overcome the above difficulties and increase performance attainment on the "Number of MBE Referrals" goal.

By coordinating advocacy meetings with procurement buyers, organizing and sponsoring training and networking events and referring minority businesses to the center for strategic business consulting.

Management Assessment:

1.) Identify all personnel positions included in the program budget. If a position is vacant, indicate "Vacant" under "Employee Name" and fill in the date the position was last occupied:

| Position Title | Employee Name | Percent FTE | Salary | Effective Start Date | Date Last Occupied |
|------------------------------|----------------|-------------|--------|----------------------|--------------------|
| President & Project Director | Anna Muller | 100 | 93,600 | 4/1/2011 | |
| Controller | Christine Kamm | 25 | 23,400 | 4/1/2011 | |
| Business Consultant | Paul Vosburgh | 70 | 53,872 | 4/1/2011 | |
| Business Consultant | Janie Johns | 15 | 10,296 | 4/1/2011 | |
| Admin Asst/Receptionist | Pauline Torres | 100 | 36,050 | 4/1/2011 | |

2.) For any positions that are currently vacant, identify the actions being taken to fill the position and the anticipated fill date.

No vacant positions.

3.) Describe how program income was earned during the report period, and how it was used to further program objectives. Identify any problems encountered in generating program income and steps proposed by the center to address the identified issues.

Program Income Chart

| Annual Proposed | Collected to Date | % Collected | Waived | % Waived | Uncollected | % Uncollected |
|-----------------|-------------------|-------------|----------|----------|-------------|---------------|
| 92,200 | 36,422.86 | 39.5 | 1,502.90 | 4.1 | 18,180.71 | 19.7 |

4.) Describe how each of the center’s Strategic Partners contributed to the center’s overall performance during the report period.

| Name of Strategic Partner | Contribution to center |
|--|---|
| ACCION | ACCION is a micro lender and provides financing to our clients. |
| Albuquerque Hispano Chamber of Commerce | Albuquerque Hispano Chamber of Commerce co-sponsors workshops with the center and refers minority businesses to the center. |
| The New Mexico 8 (a) Minority Business Association | New Mexico 8(a) & Minority Business Association co-sponsors all minority businesses events with the center. |
| Enchantment Land Certified Development Co | Enchantment Land Certified Development provides real estate and fixed asset financing to small minority award businesses. |
| The Loan Fund | The Loan Fund is a micro lender that provides financing to our clients. |

Promotion of MBDA:

Describe efforts undertaken during the report period to communicate the mission and objectives of MBDA within the business and government communities. Please attach supporting documentation for each instance being reported. Limit of five.

The center directly solicit assistance from our contacts in the banking and financial communities, bonding and insurance companies, federal, state and local government entities and other organizations serving the minority business community.

MED Week is the largest event that all of our strategic partners co-sponsor. MBDA is the main co-sponsor of the event. MED Week program is the supporting documentation

Bonus Points:

MBDA Special Initiatives: Provide a brief narrative description of participation in and successful execution of MBDA special initiatives (in response to MBDA request) during the report period. Please attach supporting documentation for each instance being reported. Limit of five.

Collaboration with MBDA: Provide a brief narrative description of how the center successfully collaborated with MBDA staff to assist a client in securing a transaction during the report period. Please attach supporting documentation for each instance being reported. Limit of five.

Business to Business (B2B) Events Completed: Provide a brief narrative description of how the center successfully executed a B2B event. Please attach supporting documentation for each instance being reported. Limit of five.

The Center is a co-sponsor of every B2B event in New Mexico. PTAP Workshops First Wednesday Afternoon of Each Month

MED Week October 21, 2011 11:00 am at the Hotel Albuquerque celebration recognizing and honoring the accomplished minority business and advocates for their personal achievements and contributions 35 - organizations. All federal agencies local and state government officials in attendance.

August 9, 2011, 9am at the Hotel Albuquerque at Old Town purpose is to Advance Teaming Strategies for Winning Federal and Prime Contracts, NMSBDC/Procurement. Technical Assistance Program Workshop. Instructor Anna Muller

August 10, 2011 11:30am at the Albuquerque Hispano Chamber of Commerce - Roundtable discussion, Jobs and the Latino Workforce. In attendance United States Secretary Labor

NEDA Business Consultants regularly participating in Veterans events through out the year sponsored by New Mexico Department of Veterans Services, the New Mexico Veterans Business Outreach Center and the G.I. Forum. Veterans Job Fair