



City of Tacoma, WA

COMMUNITY AND ECONOMIC DEVELOPMENT

REQUEST FOR PROPOSAL

SMALL BUSINESS TECHNICAL ASSISTANCE GRANT

SPECIFICATION NO. ED22-0340F



**City of Tacoma
Community and Economic Development**

**REQUEST FOR PROPOSALS ED22-0340F
Small Business Technical Assistance Grant**

Submittal Deadline: 11:00 a.m., Pacific Time, Tuesday, October 25th, 2022

Submittals must be received by the City's Procurement and Payables Division prior to 11:00 a.m. Pacific Time. For electronic submittals, the City of Tacoma will designate the time of receipt recorded by our email, bids@cityoftacoma.org, as the official time of receipt. This clock will be used as the official time of receipt of all parts of electronic bid submittals.

Submittal Delivery: Sealed submittals will be received as follows:

By Email:

bids@cityoftacoma.org

Maximum file size: 35 MB. Multiple emails may be sent for each submittal.

Bid Opening: Held virtually each Tuesday at 11AM. Attend [via this link](#) or call 1 (253) 215 8782.

Submittals in response to a RFP will be recorded as received. As soon as possible, after 1:00 PM, on the day of submittal deadline, preliminary results will be posted to www.TacomaPurchasing.org.

Solicitation Documents: An electronic copy of the complete solicitation documents may be viewed and obtained by accessing the City of Tacoma Purchasing website at www.TacomaPurchasing.org.

- [Register for the Bid Holders List](#) to receive notices of addenda, questions and answers and related updates.
- Click here to see a [list of vendors registered for this solicitation](#).

Pre-Proposal Meeting: A pre-proposal meeting will not be held.

Project Scope: In alignment with The City of Tacoma's commitment to anti-racist policies and procedures, the Community & Economic Development Department is seeking strategic partners to reach and serve Tacoma-based small and micro-businesses with a particular emphasis on underrepresented and/or disadvantaged businesses

Estimate: \$330,000

Paid Sick Leave: The City of Tacoma requires all employers to provide paid sick leave as set forth in Title 18 of the Tacoma Municipal Code. For more information, visit [our Minimum Employment Standards Paid Sick Leave webpage](#).

Americans with Disabilities Act (ADA Information): The City of Tacoma, in accordance with Section 504 of the Rehabilitation Act (Section 504) and the Americans with Disabilities Act (ADA), commits to nondiscrimination on the basis of disability, in all of its programs and activities. Specification materials can be made available in an alternate format by emailing Gail Himes at ghimes@cityoftacoma.org, or by calling her collect at 253-591-5785.

Title VI Information:

"The City of Tacoma" in accordance with provisions of Title VI of the Civil Rights Act of 1964, (78 Stat. 252, 42 U.S.C. sections 2000d to 2000d-4) and the Regulations, hereby notifies all bidders that it will affirmatively ensure that in any contract entered into pursuant to this advertisement, disadvantaged business enterprises will be afforded full and fair opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, national origin in consideration of award.

Additional Information: Requests for information regarding the specifications may be obtained by contacting Ryan Foster, Senior Buyer by email to rFoster1@cityoftacoma.org

Protest Policy: City of Tacoma [protest policy](#), located at www.tacomapurchasing.org, specifies procedures for protests submitted prior to and after submittal deadline.



Meeting sites are accessible to persons with disabilities. Reasonable accommodations for persons with disabilities can be arranged with 48 hours advance notice by calling 253-502-8468.


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SUBMITTAL CHECK LIST

This checklist identifies items to be included with your submittal. Any submittal received without these required items may be deemed non-responsive and not be considered for award.

Submittals must be received by the City of Tacoma Purchasing Division by the date and time specified in the Request for Proposal page.

The following items make up your submittal package:	
One electronic copy of your complete submittal package in PDF format emailed to bids@cityoftacoma.org	
Signature Page (Appendix A)	
Information in Section 12	
After award, the following documents will be executed and provided:	
Contract	
Certificate of Insurance and related endorsements if required	

1. BACKGROUND

In alignment with The City of Tacoma's commitment to anti-racist policies and procedures, the Community & Economic Development Department is seeking strategic partners to reach and serve Tacoma-based small and micro-businesses with a particular emphasis on underrepresented and/or disadvantaged businesses. Every business is unique, therefore, your partnership with the City of Tacoma will allow businesses to receive culturally competent technical assistance that will help them navigate and recover from the disproportionate economic disparities and challenges of the COVID-19 Pandemic and assist with future growth of their businesses. To learn more about the City of Tacoma, visit www.cityoftacoma.org.

The City anticipates awarding up to 3 contracts; based on proposals received.

Submittals submitted and/or the selected Consultant(s) may be used for projects of similar type and scope at the sole discretion of the City for up to one year.

2. STANDARD TERMS AND CONDITIONS

City of Tacoma [Standard Terms and Conditions](#) apply.

3. MINIMUM REQUIREMENTS

Vendor must have demonstrated experience and expertise delivering technical assistance to diverse audiences in the focus area(s) of which they are submitting a proposal.

4. SUMMARY OF SCOPE OF SERVICES AND DELIVERABLES

It is the City's intent to select a consultant based on qualifications and abilities of the firm and key project individuals.

We have identified 3 areas of focus:

Focus Area 1: Financial Literacy (\$270,000 total available for Focus Area 1 & 2)

Under this focus area, the institution will help small businesses owners (with a particular emphasis on underrepresented and disadvantaged businesses) gain the skills and knowledge necessary to improve in the following (included but not limited to) areas: preparedness and literacy in financial recordkeeping (profit and loss statements, balance sheets, succession planning, etc.), cashflow management, data interpretation, loan readiness, business tax structure, and business credit.

Focus Area 2: Credit Repair (\$270,000 total available for Focus Area 1 & 2)

Under this focus area, the institution will help small and micro-businesses (with a particular emphasis on underrepresented and disadvantaged businesses) improve their creditworthiness by assessing, analyzing, and addressing unfavorable indicators in their credit report.

Focus Area 3: Digital Literacy/Readiness (Maximum \$60,000)

Under this focus area, the institution will help small and micro-businesses (with a particular emphasis on underrepresented and disadvantaged businesses) gain the skills and knowledge necessary to adapt their business to the current digital landscape. Education provided will

improve best practices related digital business operations in the following (included but not limited to) areas: establishing an online presence (website and social media), online marketing, Search Engine Optimization (SEO), e-commerce, etc.

Maximum contract value: \$330,000

5. ANTICIPATED CONTRACT TERM

The anticipated duration of the contract is for a 8-month period with the City's sole option to renew for additional periods as applicable.

6. CALENDAR OF EVENTS

This is a tentative schedule only and may be altered at the sole discretion of the City.

The anticipated schedule of events concerning this RFP is as follows:

Publish and issue RFP:	10/5/2022
Pre-Submittal Questions:	10/12/2022
Response to Questions:	10/14/2022
Submittal Due Date:	10/25/2022
Submittal Evaluated, on or about:	November 2022
Award Recommendation, on or about:	November 2022

7. PRE-PROPOSAL MEETING

- 7.1** No pre-proposal meeting will be held; however, questions and request for clarifications of the specifications may be submitted as stated in the [inquiries](#) section. .

8. INQUIRIES

- 8.1** Questions should be submitted by October 12, 2022 at 3:00 PM to Ryan Foster via email to rfoster1@cityoftacoma.org subject line to read:

ED22 -0340F – Small Business Technical Assistance Grant – VENDOR NAME

- 8.2** Questions marked confidential will not be answered or included.
- 8.3** The City reserves the discretion to group similar questions to provide a single answer or not to respond when the requested information is confidential.
- 8.4** The answers are not typically considered an addendum.
- 8.5** The City will not be responsible for unsuccessful submittal of questions.
- 8.6** Written answers to questions will be posted in the event approximately one week after the question deadline.

9. DISCLAIMER

The City is not liable for any costs incurred by the Respondent for the preparation of materials or a submittal submitted in response to this RFP, for conducting any presentations to the City, or any other activities related to responding to this RFP, or related to the contract negotiation process.

10. EVALUATION CRITERIA

A Selection Advisory Committee (SAC) will review and evaluate submittals. After the evaluation, the SAC may conduct interviews of the most qualified Respondents before final selection.

10.1 The SAC may select one or more respondent to provide the services required.

10.2 The SAC may use references to clarify information in the submittals and interviews, if conducted, which may affect the rating. The City reserves the right to contact references other than those included in the submittal.

11. RESPONSIVENESS

Respondents agree their submittal is valid until a contract(s) has been executed.

All submittals will be reviewed by the City to determine compliance with the requirements and instructions specified in this RFP. The Respondent is specifically notified that failure to comply with any part of this RFP may result in rejection of the submittal as non-responsive. The City reserves the right, in its sole discretion, to waive irregularities deemed immaterial.

The final selection, if any, will be that submittal which, after review of submissions and potential interviews, in the sole judgement of the City, best meets the requirements set forth in this RFP.

12. CONTENT TO BE SUBMITTED – This section represents 100% of the possible scoring criteria.

Respondents are to provide complete and detailed responses to all items below. Submittals that are incomplete or conditioned in any way that contain alternatives or items not called for in this RFP, which materially deviate from the requirements of this RFP or which are not in conformity with law, may be rejected as being non-responsive.

Submittals should present information as requested in Appendix B in a straightforward and concise manner, while ensuring complete and detailed descriptions of the Respondent's abilities to meet the requirement of this RFP. Emphasis will be on completeness of content. The written submittals should be prepared in the sequential order as outlined below.

The City reserves the right to request clarification of any aspect of a submittal, or request additional information that might be required to properly evaluate the submittal. Failure to respond to such a request may result in rejection of the firm's submittal. Respondents are required to provide responses to any request clarification within two (2) business days.

Requests for clarification or additional information shall be made at the sole discretion of the City. The City's retention of this right shall no way diminish a Respondent's responsibility to submit a submittal that is current, clear, complete and accurate.

The relative weight of each scoring criteria is indicated in the table below.

Criteria	Max Points
Qualifications/Experience of Respondent	25
Examples of Projects	20
Reporting Capabilities	5
Client References	10
Fees and Charges / Method of Billing / Hourly Rates	10
Qualifications / Experience of Key Personnel	25
Equity in Contracting	5
Credit Card Acceptance	0
Contract Exceptions	0
Total	100

12.1 Qualifications/Experience of Respondent – 25 points

1. Describe Respondent's ability to provide the project, services or deliverables described in this RFP.

12.2 Examples of Projects – 20 points

In the fields below, describe three projects similar in scope and complexity to this project's scope of work.

1. Project 1
2. Project 2
3. Project 3

12.3 Reporting Capabilities – 5 points

1. Describe reporting capabilities.

12.4 Client References – 10 points

Provide three client references able to verify the firm's overall expertise for this type of work. The references must have worked with the firm within the last year. Provide complete information such as name of company, contact person, address, phone number, and email address.

1. Reference 1
2. Reference 2
3. Reference 3

12.5 Fees and Charges / Method of Billing / Hourly Rates – 10 points

Provide the method of billing and hourly rates.

12.6 Qualifications / Experience of Key Personnel – 25 points

List key personnel that will handle the project. The personnel listed must be committed to this project for the expected term of the contract. Include a brief bio or resume outlining the experience of the key personnel that will be involved.

12.7 Equity in Contracting – 5 points

Is Respondent, or the any entity Respondent is partnering with, certified with Washington State for any of the below categories (select all that apply)? Selecting any item below will award all points for this category.

- ☐ Combination Business Enterprise (CBE)
- ☐ Disadvantaged Business Enterprise (DBE)
- ☐ Minority Business Enterprise (MBE)
- ☐ Minority/Women Business Enterprise (MWBE)
- ☐ Small Business Enterprise (SBE)
- ☐ Socially and Economically Disadvantaged Business Enterprise (SEDBE)
- ☐ Women Business Enterprise (WBE)

12.8 Credit Card Acceptance – 0 points

Provide a statement regarding your ability to meet the City's credit card requirements(state below) as well as identifying your reporting capabilities (Level I, II, or III). This information is not a consideration in the evaluation process.

12.9 Exceptions – 0 points

If Respondent takes exception to any of the City of Tacoma's Standard Terms and Conditions stated herein or to any other part of this specifications, including the stated Insurance Requirements, they must identify the section and page that is the subject of the exception, specify the nature of the exception and, if applicable, provide proposed replacement language or proposed replacement form of Contract. Acceptance of any proposed changes are at the sole discretion of the City.

13. CITY'S RESERVED RIGHTS

Respondents are advised that the City reserves the right to cancel any award at any time prior to mutual execution of a Contract if cancellation is deemed to be in the City's best interest. City is not liable to Respondent for any costs or damages for the cancellation of an award. The Respondent assumes the sole risk and responsibility for all expenses connected with the preparation of this submittal.

In addition to any reserved rights contained in the City of Tacoma Standard Terms and Conditions, City specifically reserves the following rights:

- To waive any or all informalities or irregularities in any submittal which, in City's sole judgement, are deemed minor or immaterial
- To award one or more contracts

- To not award a contract
- To issue subsequent solicitation

14. CONTRACT OBLIGATION

The selected Respondent(s) will be expected to execute a Contract with the City. At a minimum, any contract will incorporate the contents of this specification, including all stated services or deliverables and other requirements and the City of Tacoma Standard Terms and Conditions, together with the contents of Respondent's submittal. The submittal contents of the successful Respondent will become contractual obligations

15. FORM OF CONTRACT

In event the City's Services Contract or other City Contract template is attached to this RFP as a sample form of Contract, the City expects to utilize the Terms and Conditions contained in the sample form of Contract. Post award negotiation may occur at the discretion of the City. Respondents should clearly state exceptions to City's Standard Terms and Conditions as well as to the Terms and Conditions contained in any attached sample form of Contract and to any other portions of this RFP, including the stated Insurance Requirements. Respondents may also propose to utilize their own form of Contract and in such instances, Respondent must provide its form of Contract as part of its submittal. City, at its sole option, will decide whether engage in negotiation on any or all proposed exceptions. City reserves sole discretion to determine the final form of Contract that will be used.

16. INSURANCE REQUIREMENTS

Successful proposer will provide proof of and maintain the insurance coverage in the amounts and in the manner specified in the City of Tacoma Insurance Requirements contained in this solicitation.

17. PREVAILING WAGE INFORMATION (IF APPLICABLE)

If this project requires prevailing wages under 39.12 RCW, any worker, laborer, or mechanic employed in the performance of any part of the work shall be paid not less than the applicable prevailing rate of wage.

The project site is located in Pierce County/Counties.

The effective date for prevailing wages on this project will be the submittal deadline with these exceptions:

1. If the project is not awarded within six months of the submittal deadline, the award date is the effective date.
2. If the project is not awarded pursuant to a competitive solicitation, the date the contract is executed is the effective date.
3. Janitorial contracts follow WAC 296-127-023.

Except for janitorial contracts, these rates shall apply for the duration of the contract unless otherwise noted in the solicitation.

Look up prevailing rates of pay, benefits, and overtime codes from this link:

<https://secure.lni.wa.gov/wagelookup/>

REQUIRED FILINGS

The contractor and all subcontractors covered under 39.12 RCW shall submit to the Department of Labor and Industries (L&I) for work provided under this contract:

1. A Statement of Intent to Pay Prevailing Wages must be filed with and approved by L&I upon award of contract.
2. An Affidavit of Wages Paid must be filed with and approved by L&I upon job completion.

Payments cannot be released by the City until verification of these filings are received by the engineer. Additional information regarding these filings can be obtained by calling the Department of Labor & Industries, Prevailing Wage at 360-902-5335, <https://secure.lni.wa.gov/> or by visiting their MY L&I account.

18. PAID LEAVE

Effective February 1, 2016, the City of Tacoma requires all employers to provide Paid Leave and Minimum Wage, as set forth in Title 18 of the Tacoma Municipal Code. For more information visit <http://www.cityoftacoma.org/employmentstandards>.

19. PAYMENT AND PERFORMANCE BOND (IF APPLICABLE)

If a payment and performance bond is stated herein, the required bonds must include a power of attorney, will be in 100 percent of the Contract total and is subject to the following requirements.

1. The City's payment and performance bond forms must be used.
2. The payment and performance bonds must be executed by a surety company licensed to do business in the state of Washington.
3. The cost of a payment and performance bonds must be included in submittal prices. Bonds will not be paid as a separate line item.
4. For a supply-type contract, a certified cashier's check or cash may be substituted for the bonds; however, this cash or check must remain with the City through the guarantee period and any interest on said amount shall accrue to the City.

20. PARTNERSHIPS

The City will allow Respondents to partner in order to respond to this RFP. Respondents may team under a Prime Respondent's submittal in order to provide responses to all sections in a single submission; however, each Respondent's participation must be clearly delineated by section. The Prime Respondent will be considered the responding vendor and the responsible party at contract award. Any contract negotiations will be conducted only with the Prime Respondent. All contract payments will be made only to the Prime Respondent. Any agreements between the Prime Respondent and other companies will not be a part of the agreement between the City and the Prime Respondent. The City reserves the right to select more than one Prime Respondent.

21. COMMITMENT OF FIRM KEY PERSONNEL

The Respondent agrees that key personnel identified in its submittal or during contract negotiations as committed to this project will, in fact, be the key personnel to perform during the life of this contract. Should key personnel become unavailable for any reason, the selected Respondent shall provide suitable replacement personnel, subject to the approval of the City. Substantial organizational or personnel changes within the agency are expected to be communicated immediately. Failure to do so could result in cancellation of the Contract. Specific language pertaining to personnel substitution is contained within the sample contract in Appendix A.

22. AWARD

After the Respondent(s) is selected by the SAC and prior to award, all other Respondents will be notified via the Purchasing Division using the email address for communications provided on the signature page.

Once a Respondent(s) has been selected for award by the SAC, contract negotiations will begin. If the a contract with the selected Respondent(s) is not successfully negotiated in that the City's final offer is not accepted, the City may, in its sole discretion discontinue contract negotiations and commence negotiations with another Respondent. When a contract is successfully negotiated, the Contract will, if required, be submitted for final approval by the Public Utility Board and/or City Council.

23. ENVIRONMENTALLY PREFERABLE PROCUREMENT

In accordance with the City's Sustainable Procurement Policy, it is the policy of the City of Tacoma to encourage the use of products or services that help to minimize the environmental and human health impacts of City Operations. Respondents are encouraged to incorporate environmentally preferable products or services that have a lesser or reduced effect on human health and the environment when compared with competing products or services that serve the same purpose. This comparison may consider raw materials acquisition, products, manufacturing, packaging, distribution reuse, operation, maintenance or disposal of the product or service.

The City of Tacoma encourages the use of sustainability practices and desires any awarded contractor(s) to assist in efforts to address such factors when feasible for:

- Reduction of pollutant releases
- Toxicity of materials used
- Waste generation
- Greenhouse gas emissions, including transportation of materials and services
- Recycle content
- Comprehensive energy conservation measures
- Waste manage reduction plans
- Potential impact on human health and the environment

24. EQUITY IN CONTRACTING

The City of Tacoma is committed to encouraging firms certified through the [Washington State Office of Minority and Women's Business Enterprise](#) to participate in City contracting opportunities. See the **TMC 1.07 Equity in Contracting Policy** at the City's [Equity in Contracting Program website](#).

25. PROPRIETARY OR CONFIDENTIAL INFORMATION

The Washington State Public Disclosure Act ([RCW 42.56 et seq.](#)) requires public agencies in Washington make public records available for inspection and copying unless they fall within the specified exemptions contained in the Act, or are otherwise privileged. Documents submitted under this RFP shall be considered public records and, with limited exceptions, will be made available for inspection and copying by the public.

For complete detail on Respondent's responsibility to identify and mark confidential information, and the applicability of the Public Disclosure Act, see the [Standard Terms and Conditions](#).

26. ADDENDUMS

In the event it becomes necessary to revise any part of this RFP, an addendum will be posted along with this specification on <http://www.tacomapurchasing.org>. Failure to acknowledge addendum(s) on the required Signature Page may result in a submittal being deemed non-responsive by the City.

APPENDIX A – SIGNATURE PAGE

CITY OF TACOMA Community & Economic Development

All submittals must be executed by a duly authorized officer or representative of the bidding/proposing entity, and received and time stamped as directed in the **Request For PROPOSALS page near the beginning of the specification**. If the bidder/proposer is a subsidiary or doing business on behalf of another entity, so state, and provide the firm name under which business is hereby transacted.

REQUEST FOR PROPOSALS - SPECIFICATION NO. ED22-0340F Small Business Technical Assistance Grant

The undersigned bidder/proposer hereby agrees to execute the proposed contract and furnish all materials, labor, tools, equipment and all other facilities and services in accordance with these specifications.

The bidder/proposer agrees, by submitting a bid/proposal under these specifications, that in the event any litigation should arise concerning the submission of bids/proposals or the award of contract under this specification, Request for Bids, Request for Proposals or Request for Qualifications, the venue of such action or litigation shall be in the Superior Court of the State of Washington, in and for the County of Pierce.

Non-Collusion Declaration

The undersigned bidder/proposer hereby certifies under penalty of perjury that this bid/proposal is genuine and not a sham or collusive bid/proposal, or made in the interests or on behalf of any person or entity not herein named; and that said bidder/proposer has not directly or indirectly induced or solicited any contractor or supplier on the above work to put in a sham bid/proposal or any person or entity to refrain from submitting a bid/proposal; and that said bidder/proposer has not, in any manner, sought by collusion to secure to itself an advantage over any other contractor(s) or person(s).

Bidder/Proposer's Registered Name

Signature of Person Authorized Date
to Enter into Contracts for Bidder/Proposer

Address

Printed Name and Title

City, State, Zip

(Area Code) Telephone Number / Fax Number

Authorized Signatory E-Mail Address

State Business License Number
in WA, also known as UBI (Unified Business Identifier) Number

E.I.No. / Federal Social Security Number Used on Quarterly
Federal Tax Return, U.S. Treasury Dept. Form 941

State Contractor's License Number
(See Ch. 18.27, R.C.W.)

E-Mail Address for Communications

Addendum acknowledgement #1_____ #2_____ #3_____ #4_____ #5_____

THIS PAGE MUST BE SIGNED AND RETURNED WITH SUBMITTAL

APPENDIX B – PROJECT REQUIREMENTS

Areas of Service Delivery

FOCUS AREA 1: FINANCIAL LITERACY (\$270,000 total available for Focus Area 1 and Focus Area 2)

Under this focus area, the institution will help small businesses owners (with a particular emphasis on underrepresented and disadvantaged businesses) gain the skills and knowledge to necessary to improve in the following (included but not limited to) areas: preparedness and literacy in financial recordkeeping (profit and loss statements, balance sheets, succession planning, etc.), cashflow management, data interpretation, loan readiness, business tax structure, and business credit.

The following services will address market changes and small business needs (Select all that apply):

- ☐ Workshops and advisory services on how to prepare for and access financial products
- ☐ Managing debt and cash flow
- ☐ Assessing your current business model and tax structure
- ☐ Workshop(s) on how to understand and maintain sufficient financial records (ie profit and loss statements, balance sheets, etc.)
- ☐ Loan readiness and best practices
- ☐ Other (Please describe): _____

FOCUS AREA 2: CREDIT REPAIR (\$270,000 total available for Focus Area 1 and Focus Area 2)

Under this focus area, the institution will help small and micro-businesses (with a particular emphasis on underrepresented and disadvantaged businesses) improve their creditworthiness by assessing, analyzing, and addressing unfavorable indicators in their credit report to reduce barriers to capital.

The following services will address market changes and small business needs (Select all that apply):

- ☐ Workshops and advisory services on personal vs business credit
- ☐ Personal credit analysis and assessment for short-term and long-term credit repair

- ☐ Workshops and advisory services on understanding credit report and disputing inaccuracies
- ☐ Education on debt management and consolidation plans
- ☐ Other (Please describe): _____

FOCUS AREA 3: DIGITAL LITERACY/READINESS (Maximum \$60,000)

Under this focus area, the institution will help small and micro-businesses (with a particular emphasis on underrepresented and disadvantaged businesses) gain the skills and knowledge necessary to adapt their business to the current digital landscape. Education provided will improve best practices related digital business operations in the following (included but not limited to) areas: establishing an online presence (website and social media), online marketing, Search Engine Optimization (SEO), e-commerce, etc.

The following services will address market changes and small business needs (Select all that apply):

- ☐ Workshops and advisory services on establishing an online presence
- ☐ Trainings and/or bootcamp on setting up/maintaining a website (low-cost click and build platforms)
- ☐ Education on improved digital marketing (social media, e-mail marketing, search engine optimization) and branding
- ☐ Workshops on improved digital cellphone photography (hands-on training including how to do effective product shots and photography for social media and online marketing)
- ☐ Education on e-commerce/revenue-generating solutions to deliver products and/or services direct to consumer
- ☐ Other (Please describe): _____

SCOPE OF WORK AND DELIVERABLES

Submission guidelines and requirements

(1) Organization and Project Contacts

The proposal will detail the legal name and enter the key organizational contacts for the proposed grant.

(2) Proposal Information

Please enter scope of work and proposed activities including a project title and the amount requested in US dollars. **The proposed scope of work begins [insert date] and must be completed by [insert date] and must be no more than 5 pages.**

(3) Proposal Details

a. Experience

Outline in your proposal a description of your organizations experience providing direct technical assistance to businesses owned by diverse and/or disadvantaged persons. If your organization has no experience providing direct technical assistance to small and micro-businesses, please describe any other relevant experience. Additionally, detail capability to perform work and reporting within a short timeframe.

b. Works scope and description

Outline in your proposal, a description of training, advisory services and resources that the institution would like to provide to meet the needs of targeted businesses and how you intend to market, promote, and identify participants.

c. Success measures

Outline in your proposal, a detailed description of what success with this project looks like for your organization.

(4) Targets

1 Total number of Tacoma small businesses served	<insert the # of small businesses you plan to serve>
2 Total number of training participants	<insert the # of training participants you plan to serve>
3 Total number of participants attending financial literacy trainings	<insert the # of number of participants you plan to serve>
4 Total number of participants attending credit repair trainings	<insert the # of number of participants you plan to serve>

5 Total number of participants attending digital literacy trainings	<insert the # of number of participants you plan to serve>
6 Total number of credit repair plans	<insert the # of number of participants you plan to serve>

(5) Collaborating Organizations and/or consultants– List all organizations, current/existing programs and/or consultants collaborating with the applicant organization that would be significantly involved in the conception, development and/or execution of the proposed activities, if any.

(6) Grant Budget & narrative

The funds requested should include:

- A. All grant expenses (based on hourly rate), including amounts designated for collaborators and consultants.
- B. Monthly Budget schedule
- C. Reimbursement Methodology: E-Payment (i.e. square, PayPal. We will not be issuing checks and will not use direct bank transfers).

APPENDIX C – SAMPLE DOCUMENTS

RFP Proposal FORM (Not to exceed 5 pages)

(1) Organization and Project Contacts

The proposal will detail the legal name and enter the key organizational contacts for the proposed grant.

Legal Name:

Key Organizational Contacts:

(2) Proposal Information

Please enter scope of work and proposed activities including a project title and the amount requested in US dollars. **The proposed scope of work begins November 1st, 2022 and must be completed by March 30th, 2023.**

(3) Proposal Details

a. Experience

Outline in your proposal a description of your organizations experience providing direct technical assistance to businesses owned by diverse and/or disadvantaged persons. If your organization has no experience providing direct technical assistance to small and micro-businesses, please describe any other relevant experience. Additionally, detail capability to perform work and reporting within a short timeframe.

b. Works scope and description

Outline in your proposal, a description of training, advisory services and resources that the institution would like to provide to meet the needs of targeted businesses and how you intend to market, promote, and identify participants.

c. Success measures

Outline in your proposal, a detailed description of what success with this project looks like for your organization.

(4) Targets

1 Total number of Tacoma small businesses served (if applicable)	<insert the # of small businesses you plan to serve>
2 Total number of training participants (if applicable)	<insert the # of training participants you plan to serve>
3 Total number of participants attending financial literacy trainings (if applicable)	<insert the # of number of participants you plan to serve>
4 Total number of participants attending credit repair trainings (if applicable)	<insert the # of number of participants you plan to serve>
5 Total number of participants attending digital literacy trainings (if applicable)	<insert the # of number of participants you plan to serve>
6 Total number of credit repair plans (if applicable)	<insert the # of number of participants you plan to serve>

(5) Collaborating Organizations and/or consultants– List all organizations, current/existing programs and/or consultants collaborating with the applicant organization that would be significantly involved in the conception, development and/or execution of the proposed activities, if any.

(6) Grant Budget & narrative

The funds requested should include:

- A. All grant expenses (based on hourly rate), including amounts designated for collaborators and consultants.
- B. Monthly Budget schedule
- C. Reimbursement Methodology: E-Payment (i.e. square, PayPal. We will not be issuing checks and will not use direct bank transfers).