



City of Tacoma

Questions and Answers

Small Business Innovation Fund RFP Specification No. ED23-0016F

All interested parties had the opportunity to submit questions in writing by email to Ryan Foster, Senior Buyer by date questions were due. The answers to the questions received are provided below and posted to the City's website at www.TacomaPurchasing.org. Navigate to [Current Contracting Opportunities](#) / *Services Solicitations*, and then click *Questions and Answers* for this Specification. This information IS NOT considered an addendum. Respondents should consider this information when submitting their proposals.

Question 1: Is there a page limit for the application? If so, does this limit also include attachments? (such as resumes)

Answer 1: No there is no page limit.

Question 2: Since these are federal funds, can an applicant provide an indirect cost for administrative expenses? If so, what is the allowable rate?

Answer 2: Yes, an applicant can include indirect costs for administrative expenses, we do not have a set specific ratio and/or allowable rate for administrative expenses.

Question 3: The RFP states that Appendix A and Information in Section 12 need to be submitted as a part of the submittal package. Does Appendix B also need to be submitted?

Answer 3: Section 12 is inclusive of Appendix B. Respondents must utilize Appendix B in order to provide an answer for Section 12. It is also required to provide Appendix A as stated in on Page 4.

Question 4: How will this project be paid? Is this a cost reimbursable program, or by deliverables, for example?

Answer 4: This project will be paid by deliverables based upon the executed contract.

Question 5: May we please have a definition of "Funder" for the requested reference?

Answer 5: Funder refers to an organization/entity that has contracted your firm/company/organization to provide services and/or products based on a contract and/or deliverables. For example, if awarded this contract the City of Tacoma would be considered a funder to the contractor.

Question 6: Does "Education" include actually helping someone to build a website, for example, or is it strictly instructional?

Answer 6: Yes, education does and can include helping someone build a website.



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Question 7: Could we provide some funds from the grant to organizations to help with website development or other substantial work?

Answer 7: Yes.

Question 8: Will we need to be registered to do business in the City of Tacoma?

Answer 8: Yes, if selected for award, respondents must have a current and active business license with the City of Tacoma prior to any work being started.

Question 9: This procurement opportunity is very similar to “Small Business Technical Assistance Grant” Specification no. ED22-0340F. We applied to that opportunity and was not awarded it. Are there differences in the criteria for this opportunity? If so, what are they?

Answer 9: No, there is no different required criteria. However, the scope for this RFP is similar although not identical to ED22-0340F and this RFP is from a different and separate funding source.

Question 10: You are awarding 3 contracts totaling \$500,000 for a period of about 90 days. What types of costs do you expect to cover in such a short amount of time?

Answer 10: We expect that we will be covering costs related to direct services provided to businesses, consultant and/or subcontractor costs, some administrative/staff costs, and miscellaneous costs such as travel, venue rental, etc.

Question 11: If we are selected how is the payment submitted? From the RFP it sounds like reimbursement will be done through credit card or PayPal. How will the transaction fee be calculated into the reimbursement?

Answer 11: Contractors will be invoicing us monthly based on deliverables and will follow the City's standard of payment via ACH or check. Please refer to pages 16 & 17 of the [City's Standard Terms and Conditions](https://cms.cityoftacoma.org/purchasing/StandardTermsandConditions.pdf).
<https://cms.cityoftacoma.org/purchasing/StandardTermsandConditions.pdf>

Question 12: In section 12.10 it also discusses reporting capabilities. It asks for us to indicate level I, II, or III. Can you clarify what those levels are? I did not see the description in the RFP.

Answer 12: Please refer to the City's standard terms and conditions section 1.44 for credit card requirements. For reporting capabilities, please see Exhibit A below.



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Question 13: Can you provide the ratings, comments and rankings of the recent previous City of Tacoma RFP Small Business Technical Assistance proposals?

Answer 13: At this time the results of ED22-0340F are preliminary as contracts have not been finalized. Once the contracts have been finalized the bid results will be published on the purchasing website on this [webpage](#). However, this will not include all scoring and rankings, if you'd like to receive this you may submit a formal Public Disclosure Request [here](#).

Question 14: I am interested in submitting a proposal. I have not done this before? Can you provide a sample of what a proposal looks like?

Answer 14: Appendix B of the RFP Specification can be used as a proposal template. Respondents will also need to provide information from section 12 which can be drafted through word (as well as Appendix B) and converted to a pdf document and submitted. Appendix A is also required.

Question 15: Do we need to have a City of Tacoma business license?

Answer 15: Yes, if selected for award, respondents must have a current and active business license with the City of Tacoma prior to any work being started.

Question 16: Is this RFP funded upon deliverables?

Answer 16: Yes, contractors will be sending in monthly invoices based upon deliverables as defined by their contract with The City.

Question 17: What is the total amount of dollars to be awarded? Is there a limit on the amount of award per organization?

Answer 17: There is \$500,000 total available, the City may award up to three (3) separate contracts contingent upon submissions. At the least there could be one (1) sole contract and at maximum three (3) separate contracts.

Question 18: Will there be 3 contracts awarded per type of service (financial vs. digital) or 3 contracts awarded total?

Answer 18: No, there is a potential total of three (3) potential contracts overall, not 3 contracts per type of service.

Question 19: For references, what is the difference between a funder and a client?

Answer 19: A funder is an entity or organization that has granted you funds as a contractor, recipient, and/or sub-recipient to complete a contract or services. A client is an individual, organization, and/or entity that has received direct service from you.



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Question 20: If you are a prime contractor on another City of Tacoma project that runs concurrently, can you still put in a bid?

Answer 20: Yes.

Question 21: Can I submit a City of Tacoma reference for funder or would that be a conflict of interest?

Answer 21: Yes respondents can submit a City of Tacoma reference.

Question 22: What is a “qualified” firm?

**Are firms that are not registered with the State OMWBE office precluded?
Are there any governmental “certification” requirements?**

Answer 22: We are seeking strategic partners with a demonstrated history of delivering technical assistance to small and micro-businesses in the areas of financial and/or digital literacy & readiness. Firms do not need to be registered with the state OMWBE office and there are not governmental certification requirements.

IF IN NEED, PLEASE SEE PRE-PROPOSAL PRESENTATION BELOW

Levels of Transaction Data

Exhibit A

	Date	Supplier	Transaction Amount	Sales Tax	Customer-defined Code	Line-Item Detail
Level I Standard Data	X	X	X			
Level II Variable Data	X	X	X	X	X	
Level III Detailed Data	X	X	X	X	X	X

Customer Defined Code =

Purchase ID Field:

- PO
- Invoice
- Contract

Numbers

Level I: Tax and Freight not passed

Transaction Summary

Status	Trans Date	Posting Date	Merchant	City, State/Province	Amount	Detail	Purchase ID	Accounting Code
	02/11	02/16	WOODS LOGGING SUPPLY	360-577-8030, WA	\$64.03			566500

☐ Disputed
 ☒ Extracted
 ☐ Reallocated
 ☐ Reallocation Locked

Summary Allocations

The Summary tab shows high-level transaction information.

To initiate a dispute, click the "Dispute" button.

Transaction
Date: 02/11/2011
Purchase ID:
Total Amount: 64.03
Memo Post: Yes

Sales Tax: 0.00
Freight:

Reference Information
Billing Cycle: 03/15/2011
Posting Date: 02/16/2011
Reference Number: 74798261047207773200022
Authorization Number:

Extract Date(s)
Most Recent Standard Financial Extract: 03/17/2011
General Ledger Extract:
Payment Extract:

Merchant
Name: WOODS LOGGING SUPPLY
City, State/Province: 360-577-8030, WA
Transaction Type: DEBIT TO PURCHASE BALANCE
MCC Code: 5085
MCC Description: WHOLESALE INDUST SUPP

Currency
Billing Currency: U.S. Dollar
Source Currency: U.S. Dollar
Source Currency Amt: 64.03

Level II: Tax and Freight passed along with customer defined code/purchase ID

Transaction Summary

Status	Trans Date	Posting Date	Merchant	City, State/Province	Amount	Detail	Purchase ID	Accounting Code
	03/15	03/17	BUSINESS INTERIORS NORTHW	253-5926000, WA	\$2,178.63		4500276775	5643500 FURNITURE

☐ Disputed
 ☒ Trans Detail Level
 ☐ Reallocated

Summary Allocations

The Summary tab shows high-level transaction information.

To initiate a dispute, click the "Dispute" button.

Transaction
Date: 03/15/2011
Purchase ID: 4500276775
Total Amount: 2,178.63
Memo Post: Yes

Sales Tax: 188.83
Freight:

Reference Information
Billing Cycle: Open
Posting Date: 03/17/2011
Reference Number: 24121031075900010983294
Authorization Number: 072633

Extract Date(s)
Most Recent Standard Financial Extract:
General Ledger Extract:
Payment Extract:

Merchant
Name: BUSINESS INTERIORS NORTHW
City, State/Province: 253-5926000, WA
Transaction Type: SALES DRAFT
MCC Code: 5021
MCC Description: WHOLESALE OFFICE FUR

Currency
Billing Currency: U.S. Dollar
Source Currency: U.S. Dollar
Source Currency Amt: 2,178.63

Level III: Complete line item detail pass through, including tax, freight and customer defined data

Transaction Summary

Status	Trans Date	Posting Date	Merchant	City, State/Province	Amount	Detail	Purchase ID	Accounting Code
	03/07	03/09	THE HOME DEPOT #4740	CHEHALIS, WA	\$278.69	III	NONE	566500

Disputed Trans Detail Level Extracted Reallocated Reallocation Locked

Summary Allocations Transaction Line Items

The Summary tab shows high-level transaction information.

To initiate a dispute, click the "Dispute" button.

Transaction

Date: 03/07/2011
Purchase ID: NONE
Total Amount: 278.69
Memo Post: Yes

Sales Tax: 20.40
Freight: 0.00

Merchant

Name: THE HOME DEPOT #4740
City, State/Province: CHEHALIS, WA
Transaction Type: SALES DRAFT
MCC Code: 5200
MCC Description: HOME SUPPLY WAREHOUSE STORES

Reference Information

Billing Cycle: 03/15/2011
Posting Date: 03/09/2011
Reference Number: 24610431067010179851488
Authorization Number: 047311

Extract Date(s)

Most Recent Standard
Financial Extract: 03/17/2011
General Ledger Extract:
Payment Extract:

Currency

Billing Currency: U.S. Dollar
Source Currency: U.S. Dollar
Source Currency Amt: 278.69

Transaction Summary

Status	Trans Date	Posting Date	Merchant	City, State/Province	Amount	Detail	Purchase ID	Accounting Code
	03/07	03/09	THE HOME DEPOT #4740	CHEHALIS, WA	\$278.69	III	NONE	566500

Disputed Trans Detail Level Extracted Reallocated Reallocation Locked

Summary Allocations Transaction Line Items

The Transaction Line Items tab shows the details provided by the merchant of all line items with the transaction. This tab will only appear if the merchant has passed the level 3 data about the transaction.

Records 1 - 6 of 6

Product Code	Item Description	Qty	Unit of Measure	Unit Cost	Line Item Tax Amount	Line Item Total	% of Trans Amount	Item Commodity Code
315026	2090 2"	12.0000	EA	6.93	\$0.00	83.16	29.84%	315026
329152	QT REMOVER	5.0000	EA	11.47	\$0.00	57.35	20.58%	329152
329216	REMOVER	4.0000	EA	19.97	\$0.00	79.88	28.66%	329216
520312	#16 CUT-END	1.0000	EA	9.97	\$0.00	9.97	3.58%	520312
520312	#16 CUT-END	1.0000	EA	9.97	\$0.00	9.97	3.58%	520312
941795	SQUEEGEE	1.0000	EA	17.96	\$0.00	17.96	6.44%	941795

Records 1 - 6 of 6

CITY OF TACOMA



COMMUNITY & ECONOMIC DEVELOPMENT

SMALL BUSINESS INNOVATION FUND PRE-PROSAL MEETING

RFP OVERVIEW AND GENERAL REQUIREMENTS



WHAT IS THE SMALL BUSINESS INNOVATION FUND?

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 provide direct technical assistance to small and micro-businesses with an emphasis on the needs of BIPOC entrepreneurs, woman-owned companies, and small businesses located in Tacoma's underserved, low-income areas as defined by the City of Tacoma's Equity Index.

Efforts will focus on assistance that helps businesses become sustainable through providing culturally relevant intermediate to expert-level training and technical assistance in the areas of financial literacy and digital literacy/readiness.

The City anticipates awarding \$500,000 for up to three separate contracts.



KEY OUTCOMES

01. Financial Literacy

Businesses will receive advanced (intermediate to expert level) hands-on training that will build upon current existing knowledge, experience, and training. Businesses should be able to better understand their financials (profit & loss statements, balance sheets, etc.), learn the skills necessary to use relevant accounting/bookkeeping software and/or POS systems, properly prepare for succession, build business credit, improved capital access/readiness, etc.

02. Digital Literacy & Readiness

Businesses will receive advanced (intermediate to expert level) hands-on training to make their businesses more competitive in the digital space. Once training is complete businesses should be able to or have already: established or improved an existing website, integrate e-commerce and digital marketing, improve social media presence and appearance, etc.

SBIF TIMELINE

01

January 2023

January 11: Request for Proposals (RFP) release
January 17: Pre-submittal questions are
January 18: Response to questions published
January 24: RFP closes
January 24th - 28: RFP's evaluated
January 31: Notification

02

February 2023

TBD: Contract negotiations and finalization
February 24th*: Contract fully executed

03

March - May 2023

March - Early April: Begin contracted work
Mid April: Complete contracted work
May 1st: All invoices and final reports submitted

RFP SCORING

Qualifications/Experience of Respondent - 20 Points	Examples of Projects - 10 Points
Qualifications/Experience of Key Personnel - 25 Points	Client References - 10 Points*
Fees & Charges/Method of Billing/Hourly Rates - 15 Points	Reporting Capabilities - 5 Points
	Ability to Provide Services in Person - 5 Points
	Ability to Provide Services within short timeframe - 5 Points
	Equity in Contracting - 5 Points



REFERENCES

We requesting three written references, each RFP submission should include one (1) written reference for each of the following categories:

- Funder: an entity or organization that has contracted your organization in the past and/or present.
- Partner or Peer Organization/Firm : an entity, organization, or firm within your community/field that you have worked with and/or alongside.
- Client : A business that you have provided direct service to.



RFP SUBMISSION

Your RFP submission should contain the following components (refer to Appendix B- Project Requirements):

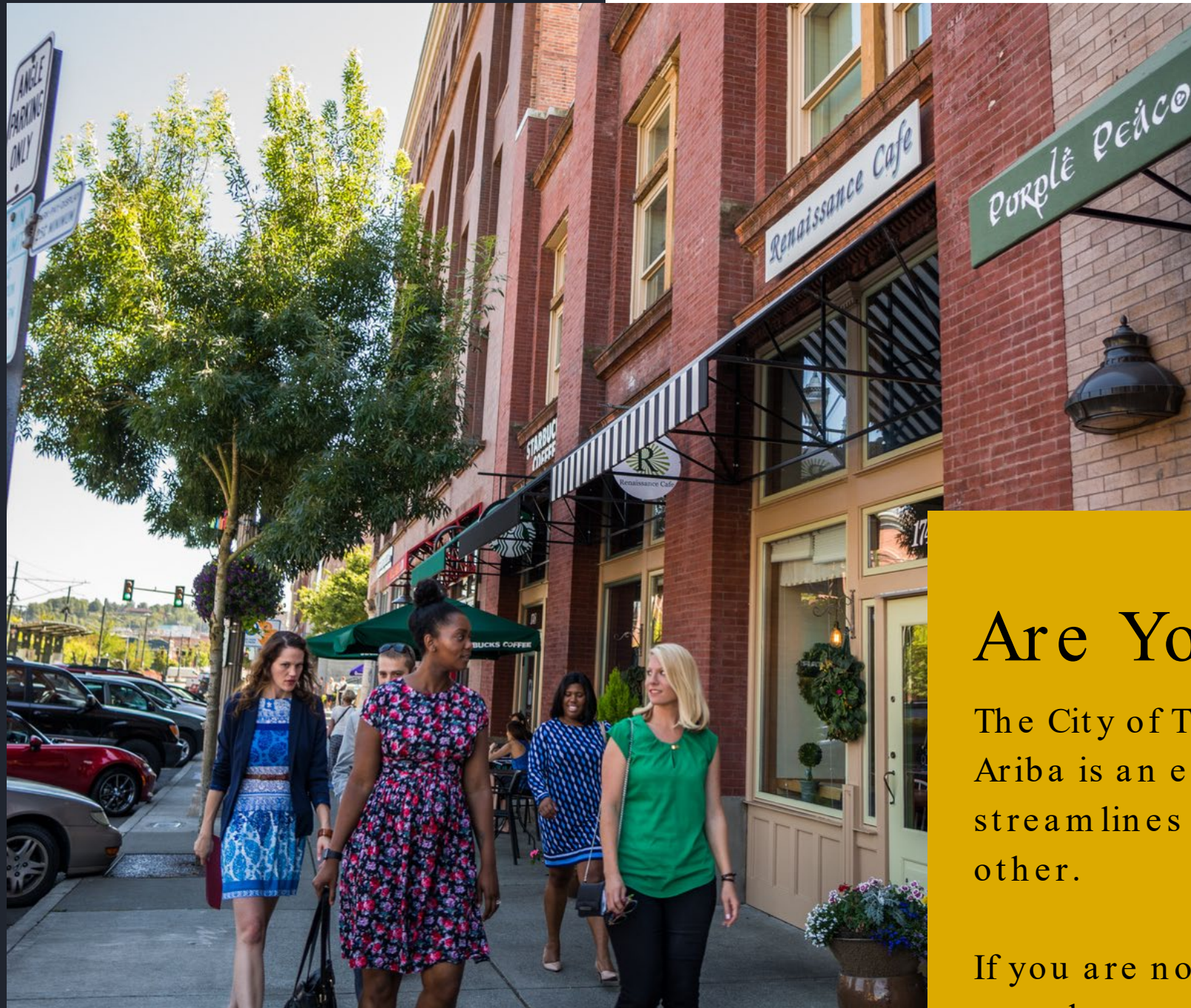
- Organization and Project Contacts
- Proposal Information (project title and amount requested)
- Proposal details:
 - A) Experience
 - B) Works Scope and Description
 - C) Success Measures
- Targets
- Collaborating Organizations and/or Consultants
- Grant Budget & Narrative
- Areas of Service Delivery



CONTRACT REQUIREMENTS

INSURANCE

- Commercial General Liability Insurance (with limits no less than \$1 million and \$2 million annual aggregate)
- Commercial (Business) Automobile Liability Insurance (with limits no less than \$1 million)
- Workers' Compensation (in compliance with state regulations)
- Employers' Liability Insurance (with limits no less than \$1 million)
- Professional Liability Insurance or Errors and Omissions (with limits of \$1 million and \$2 million aggregate)
- Other*



CONTRACT REQUIREMENTS

Are You a Tacoma Supplier?

The City of Tacoma (City) uses Ariba for its procurement processes. Ariba is an eCommerce website that facilitates procurement. It streamlines buyers' and sellers' ability to connect and find each other.

If you are not already registered as a City of Tacoma Supplier you may do so online. Once received city staff will review your registration and notify you of your approval status.