



## **Request for Proposals- Small Business Technical Assistance Consultants**

### **ABOUT THE CENTER BY LENDISTRY**

The Center by Lendistry (TCbL) has provided educational and technical assistance to small businesses across the country since 2015. TCbL is the non-profit arm of Lendistry, a Black-led, technology enabled CDFI that provides loans and other financial products to underserved small business owners.

TCbL provides direct consulting and advising services to diverse small businesses to ensure that they can achieve one or more of the following (a) access credit/capital, (b) retain and/or grow jobs, (c) increase revenue. In addition, TCbL has also served as a regional convener of mission- based lenders, business development organizations and other CDFIs to deploy recovery grants and other financial resources since the start of the COVID-19 pandemic. Over it's history, TCbL has assisted nearly 11,000 small businesses including 6,300 women-owned, 8,200 diverse-owned, and 350 veteran-owned businesses.

### **OVERVIEW OF OPPORTUNITIES**

TCbL is seeking experienced technical assistance providers and small business advisors to support the design and delivery of several small business development initiatives in collaboration with the TCbL team. TCbL will contract with several high-quality TA consultants that have demonstrated success leading cohort-based trainings and working one-on-one with BIPOC-owned businesses across the country. Respondents to this RFP are encouraged to submit proposals for one or more of the areas listed below.

### **SCOPE A- DIGITAL LITERACY ACCELERATOR**

#### **Program Goals and Deliverables**

During the height of the pandemic small businesses were asked to pivot and move services and products to a digital space, but there were far too many diverse, limited English speaking and underserved small businesses that didn't have the technical expertise to do so. In this new economic reality, E-commerce and online products/services are no longer just for big retailers and all small businesses regardless of size, product or market need a digital footprint.

As such, TCbL is launching a virtual California state-wide Digital Literacy Accelerator that will serve 50-75 small businesses over 3 cohorts. Each cohort will have 15-25 participants. Two of the cohorts will be facilitated in English and one of the cohorts will be facilitated in Spanish. In all cohorts, businesses will go through a virtual cohort-based learning series and receive one on one assistance to help them operationalize their learnings. All program participants should walk away with a digital growth strategy plan and the tools to implement the strategy.

TCbL will lead the marketing, outreach, and recruitment efforts for the program. TCbL is looking for an experienced consultant(s) to:

- Co-design and outline 6 business education modules that will provide hands on learning and resources to support small business growth via digital marketing and sales. The

outline should include module topics, dates/times, instructors, homework assignments, readings, session activities, and session outcomes as applicable. Program activities should be in line with the program goals, available resources, and timeline;

- Identify instructors and/or facilitate 6 learning sessions per cohort;
- Provide up to 5 hours of one-one advising time to small businesses in each cohort;
- Collaborate with the Project Team and provide insightful advice to shape quality program in line with the small business needs;
- Design a pre- and post-program survey on the impacts and outcomes of the curriculum on small business goals; and
- In collaboration with TCbL, help finalize the application materials and provide input on final cohort selection.

### Budget

|                           | <b>SCOPE A</b>               | <b>SCOPE A.1</b> | <b>SCOPE A.2</b> |
|---------------------------|------------------------------|------------------|------------------|
| <b>BUDGET</b>             | Up to \$150,000              | Up to \$100,000  | Up to \$50,000   |
| <b>LANGUAGE</b>           | English + Spanish            | English          | Spanish          |
| <b>TOTAL # COHORTS</b>    | 3: 2- English and 1- Spanish | 2                | 1                |
| <b>TOTAL # BUSINESSES</b> | 50-75                        | 30-50            | 15-25            |

### Timeline

| <b>Date</b>             |  |
|-------------------------|--|
| November 22, 2022       | RFP Responses Due  |
| November 30, 2022       | Vendor Selection   |
| December 23, 2022       | Contract Execution is expected to be completed no later than December 23. A kick off call to discuss proposal approach, finalize scope of work and timeline will take place in early December. |
| January - February 2023 | Curriculum and program development   |
| March - May 2023        | Cohort 1   |
| June - August 2023      | Cohorts 2 + 3  |
| September 30, 2023      | Program wrap up and evaluations  |

***\*Program end date is fixed, but other timelines can be adjusted as needed \****

**SCOPE B- CONTRACT ACCELERATOR**

**Program Goals and Deliverables**

The Center by Lendistry (TCbL) seeks to accelerate the growth of women and diverse owned businesses with strategic access to cohort-based learning opportunities and one-on-one advisory services to assist them in accessing public sector and/or anchor institution contracts. As such, TCbL's program- Contractor Accelerator- will engage business owners by providing by providing three critical resources (1) Public contract research/pitch/bid/management education (2) One-on-one bid advising 3) Contract capital pre-approval. In 2023, the program will serve up to 25 diverse small businesses. Business industries, revenue size, and other cohort selection criteria are to be determined. Businesses should walk away from the program with updated capabilities statements, certification guidance, and 1 bid submission.

TCbL will lead the marketing, outreach, recruitment, and capital access efforts for the program. TCbL is looking for an experienced consultant to:

- Co-design and outline 4-5 business education modules that will provide hands on learning and resources to support small business growth via supply chain contracts. The outline should include module topics, dates/times, instructors, homework assignments, readings, session activities, and session outcomes as applicable. Program activities should be in line with the program goals, available resources, and timeline. Course topics should include:
  - How to Conduct Market Research and identify contract opportunities
  - Capabilities Statement
  - Certifications
  - Bid and Budget Prep
  - Post Award Project Management
- Identify instructors and/or facilitate 4-5 learning sessions;
- Provide up to 5 hours of one-one business advising to up to 25 small businesses;
- Collaborate with the Project Team and provide insightful advice to shape quality program in line with the small business needs; and
- In collaboration with TCbL, help finalize the application materials and provide input on final cohort selection.

**Budget-** Up to \$50,000

**Timeline**

| Date              |   |
|-------------------|---|
| November 22, 2022 | RFP Responses Due   |
| November 30, 2022 | Vendor Selection  |
| December 23, 2022 | Contract Execution is expected to be completed no later than December 23. A kick off call to discuss proposal approach, finalize scope of work and timeline will take place in early December |

|                       |   |
|-----------------------|---|
| January - March 2022  | Program development and cohort recruitment                      |
| March – December 2023 | Cohort-based learning sessions and one on one business advising |

**SCOPE C- BUSINESS ADVISORS- CAPITAL ACCESS**

**Program Goals and Deliverables**

As the technical assistance and educational arm of Lendistry, TCbL strives to help small business owners achieve the technical skills they need to successfully manage their business in each stage of growth. One of our primary focuses is to provide inclusive access to financial education, financial planning, credit repair/ counseling, and loan packaging assistance to small businesses seeking access to [Lendistry’s suite of capital products](#). As such, TCbL is seeking business advisors that have experience providing intensive one-on-one support to diverse entrepreneurs in order to help them access the capital they need to grow. We are looking for Business Advisors with demonstrated expertise in the following areas:

- Accounting (proficient in reading and advising on how to understand financial statements, cash flow projections, etc.)
- Credit Advising
- Financial Planning
- Insurance
- Loan packaging
- Small business investment tools

TCbL will work with Lendistry to identify a pipeline of clients that need additional assistance accessing capital. Business Advisors will be expected to:

- Support up to 30 businesses/year in accessing capital with Lendistry or referred partner;
- Respond to business referrals within 24 hours;
- Create Access to Capital Action Plan with clear milestones for small business to access capital within 6 months;
- Meet with small business one-on-one (up to 30 hours/business) as needed to complete action plan milestones;
- Collect relevant small business growth data as requested;
- Upload action plans and relevant client interaction and points to Salesforce and other TCbL systems on a monthly basis; and
- Meet with TCbL staff on a monthly basis to review client pipeline, progress, challenges etc

**Budget**

Business Advisors will be engaged based on a time-spent basis and are requested to submit hourly rates with a maximum amount of time needed to complete the above scope of work in each category. The price scoping should not exceed \$75 per hour, please delineate between



one-on-one advising hours vs. program administration hours. TCbL intends to award several contracts under this RFP, in accordance with client needs/demand.

### Timeline

| Date                 |   |
|----------------------|---|
| December 2, 2022     | RFP Responses Due   |
| December 12-16, 2022 | Business Advisor Interviews   |
| January 28, 2023     | Contract Execution is expected to be completed no later than 1/31/23. |
| February 1, 2023     | 12-month contract begins  |

### **SUBMISSION REQUIREMENTS**

For Scopes A-C, all interested parties must provide a:

- 1) **Statement of Interest** (not to exceed 5 pages)
  - Name of business, primary contact, email, phone numbers, website, address, company profile, years in business, number of employees, and key staff resumes;
  - Narrative description of relevant experience providing assistance in each area outlined in Project Scopes A-C, the resulting outcomes, and success stories from past assistance interventions;
  - **For Scopes A – B**, please provide curriculum approach, module outlines, and learning outcomes as requested in Scope of Work;
  - **For Scope C**, please provide outline of Access to Capital Action plan and include your approach to client engagement and retention.
- 2) **Proposed Timeline** (in accordance with program requirements)
- 3) **Proposed Budget** (in accordance with program requirements)

Please send all questions and submissions to [contactus@thecenterbylendistry.org](mailto:contactus@thecenterbylendistry.org) by the above stated deadlines. All proposals should be in pdf format.

This RFP can be found on The Center by Lendistry's website at: [www.thecenterbylendistry.org/](http://www.thecenterbylendistry.org/)