



**Request for Proposals (RFP):
Small Business Finance Workshop Services**

This Request for Proposals (RFP) is an official notification for the need of a consultant to present an in-person Small Business Finance Workshop in the City of Goldendale to be completed before May 31, 2023. A submittal of a proposal does not guarantee that the firm will be contracted to perform any services but only serves notice to the Greater Goldendale Area Chamber of Commerce (Goldendale Chamber of Commerce) that the firm desires to be considered.

**Issued Date: January 9, 2023
Response Date/Time: January 26, 2023 @ 3:00PM**

Response Location:
Goldendale Chamber of Commerce, Attn: Nicole Lundin
nicole@goldendalechamber.org
903 E Broadway
Goldendale, WA. 98620

I. Introduction

In partnership with the City of Goldendale, the Goldendale Chamber of Commerce is seeking a consultant to perform a Small Business Finance Workshop in the City of Goldendale. This workshop is necessary because the City of Goldendale received a Small Business Innovation grant to conduct a Business Accelerator project. All elements of the project must be completed by May 31, 2023, no exceptions. The project requires the consultant to perform and manage all aspects of the scope of work deliverables listed below. Prospective firms must not be listed on any list suspending or barring them from an award of this contract.

II. Scope of Work

The selected firm must present an in-person workshop that includes a full range of Small Business Finance instruction and related activities to help business owners manage their finances including, but not limited to the following:

- General business finance tasks and issues
- Financial reporting and bookkeeping
- Tools for business finance and how to use them
- Pricing models for wholesale, retail, and service businesses
- Evaluating and managing costs
- Managing cash flow
- Planning for the future and goal setting
- Lender relationships

III. Deliverables

- Contract complete and workshop scheduled with Goldendale Chamber. **Feb. 6, 2023**
- Marketing and recruiting materials delivered to Goldendale Chamber. **Feb. 10, 2023**
- Workshop coordination for technical and other needs with Goldendale Chamber. **Feb. 13, 2023.**
- In person workshop to be held in the City of Goldendale before **May 15, 2023.**
- Follow up with survey of attendees before **May 31, 2023.**

IV. General submission Instructions and Requirements

A. *Inquiries*

Any questions concerning the Scope of Services of this project or requests for additional information, or any other questions should be directed in writing to Nicole Lundin, Goldendale Chamber of Commerce, by e-mail at: nicole@goldendalechamber.org. Inquiries must be made by **4:00 PM on January 20, 2023**. The Goldendale will send an FAQ in response to inquiries that contains answers to all questions received. Please note that the Goldendale Chamber of Commerce will respond only to technical questions. Under no circumstances will the Goldendale Chamber of Commerce provide interpretive guidance. No oral interpretations shall be made to any respondent as to the meaning of any of the documents.

B. *Proposal Requirements*

The Goldendale Chamber of Commerce, acting through a Selection Committee consisting of representatives from the Chamber staff and board of directors will select a qualified Small Business Finance consultant, firm or team based on firm capabilities, past project experience, key staff assigned to the project, knowledge of the area and workshop approach. Qualifying firms or teams must demonstrate experience with holding successful workshops with small businesses. Prospective firms or teams are asked to submit responses in two parts: Letter of Interest and Technical Response.

1. Letter of Interest

The Letter of Interest must specify the following:

- Name and address of the Firm/Team.
- General information on the firm or team and any proposed sub-consultants
- Name, title, telephone number, and email address of the individuals within the firm authorized to commit the company to this contract.
- Name, title, telephone number, and email address of individual contact regarding questions and clarifications.
- A statement that the Firm or team's offer will remain in effect for ninety (90) days after acceptance of the Consultant's proposal.

2. Technical Response

The Technical Response must contain a description of the consultant's proposed approach with specific reference to:

- **Firm/Team Qualifications and Capabilities:** Describe the qualifications and capabilities of the Firm or Team as they relate to Management and Coordination, Public Outreach, Recruiting and Marketing Materials, Workshop Planning and Curriculum. Firms or Teams should describe how their approach will consider other related planning programs that will maximize the impact of the proposed workshop.
- **Approach:** Describe the Approach that will be used to meet the tight schedule to complete all elements of the project, any recommendations to improve the schedule and any thoughts your firm may have on efficient delivery of the project should also be included.
- **Past Project Experience:** Include descriptions of comparable projects and provide brief summaries and reports of related and relevant work completed. Summarize the scope of work to be performed, why the unique approach to this project was successful and provide client contact information. Please include a description of why and how Goldendale's project will be similar and different regarding potential challenges.
- **Cost & Budget Restrictions:** Provide total cost of project including any travel. Allocation for this project is no more than \$25,000.
- **Key Staff Assigned to the Project:** Identify specific personnel who will be staffing the workshop. Resumes shall not exceed 3 pages in length. staff must meet all local, state, and federal requirements to perform work.
- **References:** Provide 3 references from comparable types of workshops completed over the last 5 years. Include project names, name of primary client contacts and their contact information including e-mail addresses and telephone numbers.

IV Selection Process

Responses to this RFP will be evaluated based on the consultant's responses to all relevant criteria stated in this RFP. Proposals will be evaluated and scored using the following rubric:

Criteria	Percentage of weight
Qualifications and capabilities	25%
Approach to meet schedule	30%
Past project experience	25%
Cost	20%

All RFPs received by the Goldendale Chamber of Commerce will be reviewed and evaluated by a Selection Committee (the "Committee") comprised of representatives from the Goldendale Chamber of Commerce staff and Board of Directors. A recommendation of the preferred firm will be made by the Committee to the Board of Directors for authorization to communicate to the selected firm to prepare a contract.

The firm awarded the contract as a result of this RFP, must meet all municipal, state, federal, and Equal Employment Opportunity practices. This will include compliance with E.O. 11246 "Equal Employment Opportunity", as amended by E.O. 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity", and as supplemented by regulations at 41 CFR Part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor".

In consideration of project timelines, the selected consultant will be required to prepare project documents in a timely manner and any problems could impact the project schedule. To that end, the Consultant will be expected to assign sufficient administrative, planning, and support staff to complete the Scope of Work within the established and agreed to schedule. All elements of the project must be completed by May 31, 2023.

V. Signature Requirements

Proposals must be signed by a representative of the firm or team having legal authority to contract on behalf of the firm or team. Proposals will be treated as bona fide offers and must remain open for a period of ninety (90) days from the closing date for submissions.

VI. Submission of Proposals

Submission of Proposals: Goldendale Chamber of Commerce will accept completed proposals by email, mail, or in person, until 3:00 PM January 26, 2023. Proposals submitted via facsimile will not be accepted. All submissions should be clearly marked "Small Business Finance Workshop Services – Small Business Accelerator. Respondents must submit a signed copy of their proposal to: Goldendale Chamber of Commerce, Attn. Nicole Lundin, nicole@goldendalechamber.org or 903 E Broadway, Goldendale, WA. 98620.