

RFP # COUNCIL-TA-02

Small Business Technical Assistance

Nassau County, NY

Request for Proposals

The Nassau Council of Chambers of Commerce received a grant from Nassau County’s American Rescue Plan Act (ARPA) State and Local Fiscal Recovery Fund (SLFRF) allocation to provide technical assistance to Nassau County small business. This Request for Proposal (RFP) is seeking professional services for one-on-one technical assistance to Nassau County small businesses.

This project was supported by ARPA funding administered by the County of Nassau, New York and the U.S. Department of the Treasury. Points of view in this document are those of the author and do not necessarily represent the official position or policies of the County of Nassau, New York or the U.S. Department of the Treasury.

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INTRODUCTION

The Nassau Council of Chambers of Commerce (“the Council”) conducted an online survey of local businesses. They reached out through their network of Chambers of Commerce and got 298 participants. Close to 50% (48.65%) of participants reported being in one of three businesses: Professional Services, Service/Retail, and Health Care.

Table 1: WHAT TYPE OF BUSINESS DO YOU OWN OR MANAGE?

Answer	Sum of Responses
Professional services	76
Service/Retail (salon, laundromat, pharmacy, etc.)	41
Health Care	28

The participants ranked six business categories in order of importance:

- Financial Management
- Marketing & Communications
- Computer Systems/Tech
- General Management
- Personnel Management
- Regulatory/Compliance

After all rankings were tallied the top three scored categories were: Financial Management, Marketing & Communications, and Computer Systems/Tech.

Table 2: RANK THE ABOVE CATEGORIES IN ORDER OF IMPORTANCE (most important on top)

Answer	Score
Financial Management	76
Marketing & Communications	41
Computer Systems/Technology	28

PROPOSED PROJECT

The Council is soliciting proposals for professional services from individuals or firms with expertise and understanding of Financial Management, Marketing & Communications, or Computer Systems. Three (3) zones have been designated as service areas. Each zone will select one (1) proposal per service for a total of nine (9) vendors.

Each selected vendor will participate in one (1) in person meeting prior to the start of services. The Council will hold one (1) meeting per service in each of the three (3) zones for a total of nine (9) meetings. Each meeting is anticipated to have 50-100 businesses in attendance. Zones are outlined in the Service Area Map.

The target start date and term for the proposed services is June 1, 2024, through August 31, 2024, subject to negotiation of a final agreement.

SCOPE OF SERVICES

Each vendor is to select one (1) service type, listed below to provide technical assistance to small businesses. If a vendor wishes to propose on more than one service, they must submit a separate proposal for each. Each vendor must bid on the entire service type – inclusive of all tasks – separately outlining in their proposal how they will deal with each task in the service. Vendors can work collaboratively with other vendors to provide a task in each service. Bids that do not provide information on how they will provide technical assistance for each task in a service will be rejected as incomplete bids.

Technical assistance for each service type is defined as follows:

- Service 1: FINANCIAL MANAGEMENT
 - Task 1: Taxes
 - Task 2: Cash Flow Management
 - Task 3: Fundamentals of Sources of Capital/Access to Capital
 - Task 4: Bookkeeping/Financial Statements

- Service 2: MARKETING & COMMUNICATIONS
 - Task 1: Social Media (Facebook/Instagram/LinkedIn etc.)
 - Task 2: General Marketing Support & Strategies (other than Social Media)
 - Task 3: How To Grow Your Business Through Networking
 - Task 4: E-Commerce/Selling Online/Online Marketing

- Service 3: COMPUTER SYSTEMS
 - Task 1: Website Optimization/Building
 - Task 2: Cybersecurity
 - Task 3: Business Software
 - Task 4: System Backup & Recovery

The Nassau Council of Chambers of Commerce will provide the following and the costs will be paid by the Council:

- The location for each meeting,
- The marketing for each workshop,
- Advertisements, and
- Any equipment necessary for the vendors to provide a workshop for the small businesses.

Each service type in each zone has a budget up to \$15,000 to provide technical assistance to eligible small businesses located in Nassau County (for example you should submit a proposal for Financial Management in Zone 1, and a proposal for Financial Management in Zone 3, etc.), and each proposal has a cap of \$15,000.

PROPOSAL REQUIREMENT

These are the general requirements of each that each vendor should address:

1. Provide a workshop to an anticipated 100 plus small businesses on how your service will assist them. The workshops should be designed to let the businessowners become familiar with your services and how those services will aid their business.
2. As part of the bid please describe the time needed for your workshop including:
 - a. Audio Visual equipment (if any) needed for a successful workshop,
 - b. Wi-Fi with its anticipated capacity.
3. The Council has divided the county into 3 zones (see map on page 7). Each zone will have a meeting for each technical service offered. There will be a total of three (3) group meetings per zone: one group meeting on financial management, one on marketing & communications, and one on computer systems for a total of 9 group meetings for the county. These meetings will be organized by the Council. The vendor should, at a minimum, provide handouts based on your presentation and contact info to the participants.
4. Provide details on how you will help eligible small businesses. Which should include how a successful outcome is measured. Each service item will have more specific RFP requirements which are detailed later in this RFP.
5. Prepare an outline on how you will handle the individual technical assistance meetings with each eligible small business. Outline should include:
 - a. Cost, number of meetings,
 - b. Length of meetings,
 - c. Location of meeting, and
 - d. What are the expected outcomes for a business using your services
6. Based on the \$15,000 budget, how many businesses will you be able to assist in the proposed zone.

ELIGIBLE BUSINESSES

- The business is located in Nassau County and has a valid license or authorization to operate in New York State.
- The business is either:
 - A small business concern as defined in section 3 of the Small Business Act (15 U.S.C. 632); or
 - A small business that has no more than 500 payroll employees as of date of service.
 - Eligible businesses are business that have been in business for at least one year and are registered with New York State.

SCHEDULE

RFP Available	April 1, 2024
Questions due	April 16, 2024
Pre-bid conference (via Zoom)	April 18, 2024
Questions Addendum	April 22, 2024
Proposal Submittal	May 3, 2024

Responses are due on May 3, 2024, by 11:59 PM EDT to NCTechAssist@ncchambers.org. A pre-bid conference will be held on April 18, 2024, at 7:00 PM EDT via Zoom.

The following pages outline the questions and provide space to respond. If additional space is needed, then please attach additional sheets. A sample proposal is provided at on page 13.

The proposal should be no more than 25 pages and the proposal should be double space.

Questions are due by April 16, 2024, by 11:59 PM EDT. All questions are to be submitted to NCTechAssist@ncchambers.org. Answers will be compiled into addenda and posted publicly.

REIMBURSEMENT

Proposers will submit and invoice with required backup documentation that must be approved by the Council to be paid for the services provided to small businesses.

Each service area has a budget of \$15,000 which can be used to pay for vendor expenses to provide technical assistance and/or direct technical assistance to the eligible small businesses. To receive payment once a vendor has engaged a small business, an outline must be provided to the Council of the deliverables that have been delivered or will be delivered to the eligible small business. This paperwork needs to be signed by the eligible small business’s owner or authorized representative and submitted to the Council prior to work beginning for approval.

DEFINITIONS

FINANCIAL MANAGEMENT

Taxes

Tax Planning to develop smart tax strategies to save money.

Cash Flow Management

Staying up to date on business cash flows through collecting data, relationship management, borrowing strategies, etc.

Sources of Capital/Access to Capital

Type of lending businesses require and can access as well as understanding and knowing the lenders that provide them.

Bookkeeping/Financial Statements

Bookkeeping is the process of keeping track of a business's financial transactions. These transactions will roll up into the four main financial statements of a business: Balance Sheet, Income Statement, Cash Flow Statement, and Statement of Stockholders' Equity. Accounting Software (QuickBooks etc.) installation on standalone computer or in a network environment.

MARKETING AND COMMUNICATIONS

Social Media (Facebook/Instagram/LinkedIn etc.)

Content strategy, content development & execution, monitoring & community engagement, and performance evaluation reporting that have a meaningful impact on business.

General Marketing Support & Strategies (other than online)

Reaching customers who might not otherwise know about a business's products and services. Defining a brand, identifying target customers, and choosing the right form of advertising: Direct mail, print, broadcast, open houses, promotional merchandise, flash sales, giveaways, flyers, business cards, etc.

Networking

Identifying activities depending on the business's goals and connecting them to local business communities to network with other entrepreneurs, attend trade shows, fairs, markets and other events.

E-Commerce/Selling Online/Online Marketing

Integration of digital platforms, the software an online store deploys, to handle all their merchant buying needs and their own seller needs. These needs include product pages, reviews, transactions, order fulfillment, and returns suited to the unique business model and growth plan.

COMPUTER SYSTEMS

Website Optimization/Building

Search Engine Optimization (SEO), custom web design, and website hosting to ensure business's target customers can find and navigate your website with ease. Remedy website not being found online, diminished traffic, decrease in leads and calls or launch a site to ramp up new business.

Cybersecurity

Password & Access Management, Email & Communications Security, Attack Mitigation, Penetration Testing, Security Awareness, Secure Remote Access, Cloud Security, Advanced Endpoint Security, Securing IT Infrastructure, Security Monitoring, Vulnerability management, Firewall and Web Security, etc. targeted toward small businesses.

Business Software

Installation on standalone computer or in a network environment, setup, operation assistance, or personal training. Software applications such as office suites (LibreOffice, Microsoft Office, Google Workspace, etc.), groupware, customer relationship management, human resource management systems, outsourcing relationship management, loan origination software, shopping cart software, field service software, reporting software, and other productivity-enhancing applications.

System Backup & Recovery

Reliable data backup and recovery services: cloud disaster recovery, data backup, and prevention. Business data backup solutions, business continuity consulting, data recovery services, redundant server components management, and uninterruptible power supply (UPS).

15 U.S.C. §632. SMALL-BUSINESS CONCERN

(a) Criteria

(1) For the purposes of this chapter, a small-business concern, including but not limited to enterprises that are engaged in the business of production of food and fiber, ranching and raising of livestock, agriculture, and all other farming and agricultural related industries, shall be deemed to be one which is independently owned and operated and which is not dominant in its field of operation: *Provided*, That notwithstanding any other provision of law, an agricultural enterprise shall be deemed to be a small business concern if it (including its affiliates) has annual receipts not in excess of \$750,000.

(2) Establishment of size standards.—

(A) In general.—In addition to the criteria specified in paragraph (1), the Administrator may specify detailed definitions or standards by which a business concern may be determined to be a small business concern for the purposes of this chapter or any other Act.

(B) Additional criteria.—The standards described in paragraph (1) may utilize number of employees, dollar volume of business, net worth, net income, a combination thereof, or other appropriate factors.

(C) Requirements.—Unless specifically authorized by statute, no Federal department or agency may prescribe a size standard for categorizing a business concern as a small business concern, unless such proposed size standard—

(i) is proposed after an opportunity for public notice and comment;

(ii) provides for determining—

(I) the size of a manufacturing concern as measured by the manufacturing concern's average employment based upon employment during each of the manufacturing concern's pay periods for the preceding 12 months;

(II) the size of a business concern providing services on the basis of the annual average gross receipts of the business concern over a period of not less than 3 years;

(III) the size of other business concerns on the basis of data over a period of not less than 3 years; or

(IV) other appropriate factors; and

(iii) is approved by the Administrator.

(3) When establishing or approving any size standard pursuant to paragraph (2), the Administrator shall ensure that the size standard varies from industry to industry to the extent necessary to reflect the differing characteristics of the various industries and consider other factors deemed to be relevant by the Administrator.

SERVICE AREA MAP



Exhibit A

PROJECT PROPOSAL

Proposers are to pick one (1) service to provide and one (1) service area. Each vendor’s proposal will be evaluated on a scale from 0 to 5 by a panel of five (5) Council members. An average of the scoring will be used to develop a Technical Score. The proposals with the highest Technical Score will be selected for award.

Each service type in each zone has a \$15,000 budget to provide technical assistance to eligible small businesses located in Nassau County. Costs will be incurred by the vendor and submitted to the Council for reimbursement on an invoice request form with the required backup documentation.

Requirements of each proposal that the vendor should address:

- A. Provide a workshop for 100 plus small businesses per zone of your service. This will be done at the zone meeting organized by the Council. The vendor should provide handouts based on your presentation and contact info to the participants at a minimum.
- B. Provide details on how you will help eligible small businesses.
- C. Prepare an outline on how you will handle the individual technical assistance meetings with each eligible small business.
- D. Compensation. Each service has a budget of \$15,000 which can be used to pay for vendor expenses to provide technical assistance in a group setting and/or direct technical assistance to the eligible small businesses. To receive payment once a vendor has engaged a small business an outline must be provided to the Council of the deliverables that have been delivered or will be delivered to the eligible small business. This paperwork needs to be signed by the eligible small business’s owner or authorized representative. In the case of a workshop, a Council representative will be in attendance and sign off on the expense.

For each requirement above (A – D) the proposer will summarize (500 words max. per requirement. 2,000 words total) the vendor’s approach.

PROPOSER INFORMATION

BUSINESS TYPE (Corporation or Individual)	
BUSINESS NAME	
BUSINESS ADDRESS	

SELECT ONE SERVICE AREA:	SELECT ONE SERVICE PROVIDED:
<input type="checkbox"/> Area 1 = North of Route 25	<input type="checkbox"/> Service 1: FINANCIAL MANAGEMENT
<input type="checkbox"/> Area 2 = South of Route 25 and West of the Meadowbrook Parkway	<input type="checkbox"/> Service 2: MARKETING & COMMUNICATIONS
<input type="checkbox"/> Area 3 = South of Route 25 and East of the Meadowbrook Parkway	<input type="checkbox"/> Service 3: COMPUTER SYSTEMS

REQUIREMENTS FOR RFP FOR SERVICE AREA: FINANCIAL MANAGEMENT

1. Describe your workshop presentation, and equipment and time needed.
2. Describe the assistance you will provide to the small businesses in each of the four (4) tasks of financial management.
3. If a small businessowner engages your service for financial management what is the anticipated outcome per task.
4. What is your cost per task. the cost can be broken down per hour or per task.
5. Provide bio of your company. It must include years in business, location of your business in Nassau County, services you provide and credentials of the individuals who will be assisting small businesses in Nassau County. Documentation must be provided to support your assertions.

FORM TO BE PAID MUST INCLUDED:

- A. The invoice must be on your company letterhead, which shall include your office address in Nassau County, your email address, your preferred telephone number (and what type it is).
- B. The invoice must list all four (4) tasks for financial management, with a checkmark next to the task service that was provided, with a brief explanation of the service provided, and the amount of the fee.
- C. The form must be signed by the eligible small business owner or authorized representative and the owner of your business. All invoices must be preapproved by the council prior to work starting.

REQUIREMENTS FOR RFP FOR SERVICE AREA: MARKETING & COMMUNICATIONS

1. At the group workshop we are asking each businessowner to come with their laptop or tablet so you can assist them in creating a business Facebook, LinkedIn and Instagram page, as well as a GettinLocal account, and how to create events on each platform. Describe your workshop presentation, equipment, and time needed. The Council will supply Wi-Fi as required.
2. Please provide your fee for the group workshop because you will be assisting the businesses that attend to set up the aforementioned services, their accounts with Facebook, GettinLocal and other social media companies. Your fee should be based on the number of businesses assisted and time needed to achieve this task. This fee is in addition to the individual engagements of eligible Nassau County businesses.
3. Describe the assistance you will provide to the small businesses in each of the four (4) tasks of marketing and communications.
4. If a small businessowner engages your service for marketing & communication what is the anticipated outcome per task.
5. What is your cost per task. The cost can be broken down per hour or per task.
6. Provide bio of your company. It must include years in business, location of your business in Nassau County, services you provide and credentials of the individuals who will be assisting small businesses in Nassau County. Documentation must be provided to support your assertions.

FORM TO BE PAID MUST INCLUDED:

- A. The invoice must be on your company letterhead, which shall include your office address in Nassau County, your email address, your preferred telephone number (and what type it is). The invoice must be on your company letterhead, which must include your office address, your email address, and your preferred telephone number.
- B. The invoice must list all four (4) tasks for marketing and communication, with a checkmark next to the task service that was provided, with a brief explanation of the service provided, and the amount of the fee.
- C. The form must be signed by the eligible small business owner or authorized representative and the owner of your business. All invoices must be preapproved by the Council prior to work starting.

REQUIREMENTS FOR RFP FOR SERVICE AREA: COMPUTER SYSTEMS

1. Describe your workshop presentation, equipment, and time needed.
2. Describe the assistance you will provide to the small business in each of the four (4) tasks of computer systems.
3. If a small businessowner engages your service for computer systems what is the anticipated outcome per task
4. What is your cost per task. The cost can be broken down per hour or per task.
5. Provide bio of your company. It must include years in business, location of your business in Nassau County, services you provide and credentials of the individuals who will be assisting small businesses in Nassau County. Documentation must be provided to support your assertions.

FORM TO BE PAID MUST INCLUDED:

- A. The invoice must be on your company letterhead, which shall include your office address in Nassau County, your email address, your preferred telephone number (and what type it is). The invoice must be on your company letterhead, which must include your office address, your email address, and your preferred telephone number.
- B. The invoice must list all four (4) tasks for computer systems, with a checkmark next to the task service that was provided, with a brief explanation of the service provided, and the amount of the fee.
- C. The form must be signed by the eligible small business owner or authorized representative and the owner of your business. All invoices must be preapproved by the Council prior to work starting.