



REQUEST FOR QUALIFICATIONS (RFQ)

WV SBDC CARES Business Recovery Project SMALL BUSINESS CONSULTANTS

GENERAL INFORMATION

The West Virginia Small Business Development Center (SBDC) has been awarded funds from the CARES Act to operate a temporary program from now through September 30, 2021 to offer technical assistance to businesses affected by the COVID-19 pandemic. The WV SBDC CARES Business Recovery Project requests qualifications from individuals or consulting firms (the “Consultant”) to expand statewide consulting capacity, increase training, and expand outreach. Consulting partners will leverage and enhance the SBDC business coaching network to provide additional technical expertise for small businesses who have experienced supply chain disruptions, staffing challenges, a decrease in gross receipts or customers, or a closure as a result of COVID-19.

The SBDC plans to establish an ongoing roster of qualified and approved contracted personnel (consultant) to provide statewide small business expertise. Each approved consultant will remain on the list through September 30, 2021. All consultants hired for the WV SBDC CARES Business Recovery Project are acting as independent contractors working on behalf of the West Virginia SBDC Network. You will be expected to maintain all required client information and documentation, and ensure all communication exchanged with clients is maintained with strict confidentiality. Consultants must sign a conflict of interest and confidentiality agreement as part of any contract.

SCOPE OF SERVICES

Consultants will train and/or advise SBDC clients in the best methods for recovering small businesses affected by the COVID-19 pandemic. The needs of West Virginia’s business owners and entrepreneurs are diverse. The following topics have been identified as priority importance. Additional topics will be considered as future needs become known.

The SBDC contract will be designed to offer small businesses a variety of consultants best positioned to provide consulting services. The contract will be split into the following categories (Lots). Applicants may elect to bid on some or all of the categories. The number of categories an Applicant bids will not have an impact on the award.

Applicants may choose one or more of the areas below to include in their submission.

1. Business Operations and Disaster Planning (including, for example):
 - a. Capital Access
 - b. Workforce Capacity
 - c. Inventory and Supply Chain Shortfalls

- d. Facility Remediation/Clean-up Costs
 - e. Insurance Coverage Issues
 - f. Managing Changing Market Demand
 - g. Continuity of Operations planning
 - h. CDC Guidance for Employers
 - i. OSHA/HHS Guidance for Employers
 - j. Architecture and physical space design
 - k. Reconfiguring manufacturing equipment/processes and incorporating safety measures
2. Accounting (including, for example):
 - a. PPP Loan Forgiveness Application
 - b. Financial Planning and Analysis
 - c. Budget and Forecast Development
 - d. Process Improvement
 - e. Strategic Planning
 - f. Supplier Relationship Management
 3. Marketing (including, for example):
 - a. Website development
 - b. eCommerce
 - c. Increasing website traffic
 - d. Social media engagement
 - e. Brand Awareness
 4. Hospitality Industry Finance and Operations (including, for example):
 - a. Monitoring accounts and managing budgets
 - b. Managing staff
 - c. Innovations for improved business performance
 - d. Dealing with customer complaints and queries
 - e. Interviewing and training new staff
 - f. Health and safety regulation compliance
 5. Human Resources (including, for example):
 - a. Establishing emergency communications plans
 - b. Maintaining a healthy work environment
 - c. Guidance on staffing, benefits, compensation, telework
 - d. Compliance and Risk Management
 - e. Employee Relations
 - f. Organizational Development
 - g. Succession Planning
 6. Retail Finance and Operations (including, for example):
 - a. Financial forecasting
 - b. Retail Analytics to optimize pricing and discount strategies, manage seasonal trends, improve productivity, manage inventory
 - c. Optimize Marketing Channels
 7. Government Contracting (including, for example):
 - a. Regulations and Reporting Requirements
 - b. Contract Bidding and Performance
 - c. SAM Registration
 - d. Identifying Contract Opportunities
 8. Exporting (including, for example):

- a. Market Research and Competitive Analysis
- b. Export Marketing Plan
- c. Export Pricing
- 9. Startup and early stage business consulting (including, for example):
 - a. Business Organization and Registration
 - b. Capital Access
 - c. Business Planning
- 10. Turnaround Management (including, for example):
 - a. Reducing Financial Losses
 - b. Generating New Revenue
 - c. Managing Staffing Levels
 - d. Long-term Strategic Planning
- 11. Child Care/Dependent Care Finance and Operations (including, for example):
 - a. Budgeting and Bookkeeping
 - b. Business Planning
 - c. Hiring and Employee Development
 - d. Capital Access
- 12. Early Stage Technology Finance and Market Research (including, for example):
 - a. Market study/Market analysis for SBIR/STTR proposals
 - b. Technology Evaluation
 - c. Business and Industrial Process Automation
 - d. Creating pitch decks for investor financing
- 13. Healthcare Services Finance and Operations (including, for example):
 - a. Medical insurance billing and coding
 - b. Cash Flow Management
 - c. Strategic Problem Solving
 - d. Finance Operations Management
- 14. Business Succession Planning/Business Valuation/Selling a Business (including, for example):
 - a. Exit Strategies
 - b. Strategies to Optimize Sale Price
 - c. Corporate Structure, Recordkeeping and Documentation
 - d. Assembling a Business Sale Team
 - e. Understanding Taxes and Material Assets, Reviewing Contracts
 - f. Valuing a Business
- 15. Cybersecurity Awareness/Risk Management (including, for example):
 - a. Teleworking Security
 - b. Preventative Security
 - c. Employee Security Training
 - d. Security Risk Assessment

SUBMISSION REQUIREMENTS

- 1. One electronic copy of respondent's qualifications to include:
 - a. Experience
 - i. Briefly describe similar consulting work you or your firm has completed and why you are qualified to provide any of the scope of services discussed above.
 - ii. Resumes of Consultant(s) to provide the service

- iii. An applicant must provide an hourly rate for the technical assistance services that it provides. Bids that require any minimum order quantity or minimum dollar amount may be disqualified.
- iv. References - Provide three (3) references from other entities or business clients who have worked with you or your firm on similar projects. Include the reference's name, title, address, direct telephone number, and email address.
- v. Completed Bidder Response Sheet – Attachment A
- vi. Completed Itemized Price Sheet – Attachment B

SUBMISSIONS

Inquiries related to this RFQ and the applicant's submissions are to be directed to Emily.W.Harrell@wv.gov. Submissions of qualifications must be received by COB on Friday, December 11, and should be sent to Emily.W.Harrell@wv.gov.

REVIEW OF QUALIFICATIONS

- The qualifications review committee will consist of relevant staff from the SBDC.
- The qualifications review committee will check responses against mandatory criteria.
- Formal interviews with respondents may be scheduled at the discretion of the qualifications review committee.
- A qualification review committee will review each response submitted and shall recommend approval to roster of qualified consultants.

CONTRACT AWARD

- The contract award is intended to provide the SBDC with a purchase price for the consulting services. The contract shall be awarded to multiple Consultants on the basis of the lowest price, responsiveness, and applicant qualifications.
- The SBDC intends to award contracts to multiple applicants within each lot, depending on the level of demand for those services.
- Consultant shall be responsible for all mileage and travel costs, including travel time, associated with performance of this contract. Any anticipated mileage or travel costs may be included in the hourly rate listed on applicant's bid, but such costs will not be paid by the agency separately.

Project Management

- A Scope of Work (SOW) shall be created at the commencement of each client engagement. The SOW shall be agreed to by all parties prior to commencement of work. At a minimum, the SOW shall contain:
 - Work to be performed
 - Timeline for performing work
 - Appropriate documentation describing work performed
 - Not to exceed amount for completion of work
- Invoices shall be submitted on a monthly basis for all work performed during the previous month. Consultant should be able to report on a monthly basis all items/services purchased against this contract during the designated report period, including but not limited to:
 - date of service delivery
 - client receiving service
 - complete description of services delivered congruent with those stated in proposal

- prices per the Contract
- Consultant agrees that they will not use any promotional or marketing material which states expressly or implies that the SBDC endorses either the Consultant or any party related to the Consultant or this Contract.
- Confidentiality: All nonpublic data and information submitted or made available to Consultant or work developed as a result of this agreement must be utilized by Consultant in connection with this Agreement only and must not be made available to any other sources.

ATTACHMENT A – BIDDER RESPONSE SHEET

NOTE: This form **must be returned** with your bid response. Numbers for each question below refer to the corresponding section of this document that explains the requirement. Bidder may attach additional relevant information to their bid response; identify sections to which information applies.

1. Have you completed and returned all documents required? **YES** **NO**
 - a. I have provided, in narrative form, qualifications and background for key staff and their responsibilities as they relate to this bid. **YES** **NO**
 - b. I have provided, in narrative form, experience in providing consulting services to early stage and/or established small businesses. **YES** **NO**
2. Are you in the business of providing consulting services to small businesses for the Lots you are submitting a bid? **YES** **NO**
 - a. Identify which areas you have provided consulting services during the past three (3) years:
 - Lot 1 - Business Operations and Disaster Planning
 - Lot 2 - Accounting
 - Lot 3 - Marketing (Online, digital, traditional)
 - Lot 4 - Hospitality Industry Finance and Operations
 - Lot 5 - Human Resources
 - Lot 6 – Retail Finance and Operations
 - Lot 7 - Government Contracting
 - Lot 8 - Exporting
 - Lot 9 - Startup and early stage business consulting
 - Lot 10 - Turnaround Management
 - Lot 11 - Child Care/Dependent Care Finance and Operations
 - Lot 12 - Early Stage Technology Finance and Market Research
 - Lot 13 – Healthcare Services Finance and Operations
 - Lot 14 – Business Succession Planning/Valuation/Selling a Business
 - Lot 15 – Cybersecurity Awareness/Risk Management
3. What type of documentation (i.e. published price list, list of previous buyers, etc.) can you provide to assist the Agency if it requests information to perform a fair price analysis?

4. Do you agree to no minimum order quantity or minimum dollar amount? **YES** **NO**
5. Do you certify that neither your organization nor your principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency? **YES** **NO**

ATTACHMENT B – ITEMIZED PRICE SHEET

Costs which are not specifically identified below will not be compensated under any Contract awarded pursuant to this bid. Applicant shall enter their hourly rate for each Lot they wish to bid. Applicant will not be considered eligible for award against any Lot that does not contain an Hourly Rate.

Lot	Description	Hourly Rate
Lot 1	Business Operations and Disaster Planning	
Lot 2	Accounting	
Lot 3	Marketing (Online, digital, traditional)	
Lot 4	Hospitality Industry Finance and Operations	
Lot 5	Human Resources	
Lot 6	Retail Finance and Operations	
Lot 7	Government Contracting	
Lot 8	Exporting	
Lot 9	Startup and early stage business consulting	
Lot 10	Turnaround Management	
Lot 11	Child Care Business Finance and Operations	
Lot 12	Early Stage Technology Financials and Market Research	
Lot 13	Healthcare Services Finance and Operations	
Lot 14	Business Succession/Valuation/Selling a Business	
Lot 15	Cybersecurity Awareness/Risk Management	