

Exhibit A – Scope of Work

FAS 2019-001, Technical Assistance Services

The Consultant shall complete the Scope of Work described herein:

Section 1: Background

The Consultant will provide assistance to businesses (hereafter referred to as “client” or “clients” or “firm” or “firms”) seeking to learn and understand the process of doing business with the City of Seattle. The general scope of technical assistance included a combination of consultation, outreach, group sessions, one-on-one sessions, phone inquiries and a technical assistance program that consists of a “tailored” curriculum-based approach as described below.

Section 2: Technical Assistance Services

The Consultant will provide technical assistance to clients, with particular outreach and recruitment attention to women and/or minority owned businesses. Such services shall include but not be limited to the services outlined below:

- How to respond to an RFQ, RFP, etc.,
- How to find City solicitations, i.e., Daily Journal of Commerce, Ebid Exchange, Buy Line, Consultant Connection, etc.,
- How to register with the City Online Business Directory system as a WMBE and or on the appropriate city consultant rosters.
- How to get certified through the State of WA OMWBE,
- How to develop a marketing strategy for the City,
- Understanding terms and conditions in City solicitations,
- Making go/no-go decisions when exploring City work,
- Assisting and advising firms, to match their expertise and capabilities to City opportunities,
- Assisting and advising firms in their preparation of materials, pricing and other aspects for bid submittals or proposal response preparations,
- Assisting firms and preparing them for interviews or contract negotiations,
- Inform City WMBE advisors when WMBEs are seeking bid/propose or opportunities.

Technical assistance may be in the form of phone assistance, one-on-one in person meetings, group training sessions, or other means the Consultant determines necessary.

Section 3: Technical Assistance Program

The Consultant will provide a “tailored” curriculum option for clients who are interested in a more academic and structured approach that will cover one or more areas including but not limited to marketing, bonding, finance, contracting & negotiations, operations, programming development, RFP processes and methodology, sales, pricing, and access to capital. The Consultant will work with its subconsultants, University of Washington, Trio Group, and Craft3 in the delivery of this curriculum.

The following table shows the course curriculum included in the Technical Assistance Program.

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NWMMSDC	Trio Group	University of Washington	Craft3
Outreach – Access to Market	Marketing & Communications	Leadership	Credit Education
Getting through the registration and certification process	Capabilities Statement Development	Marketing	Access to Capital
Contract Vehicle Education		Finance	

NOTE: Detailed curriculum offered by each of the four organizations will be documented in detail in the Learning Manual described in Section 7.

Section 4: Scope Exclusions

Services excluded from the Agreement resulting from this solicitation include the following:

- Direct administrative support services, such as reception services,
- Direct accounting services (for example – actual invoice preparation),
- Direct financial services,
- Direct legal or advocacy services,
- Direct graphic design or other direct marketing services (for example serving as an agent for the client firm in marketing firm’s services).

The City shall not pay for any services performed outside the approved scope of services.

Section 4: Intake Assessment Process and Form/Assessment or Exit Process and Form:

Intake Assessment: All technical assistance support requests will be directed to a Consultant single point of contact who will then determine the best path to follow via an in-person meeting, phone call, or assessment to enroll in the curriculum option. The Consultant will use a unique phone number (e.g., google phone number) and a dedicated email address to receive requests and report number and type of requests for technical services. The Consultant will train in-house staff to adequately track and manage calls and correspondence receive and/or processed in the performance of this Agreement. Within two weeks of the execution of the Agreement, unless otherwise agreed upon by the City, the Consultant will finalize an Intake form to be approved by the City for use in identifying and documenting the topics and classes mutually agreed for technical assistance for the requesting client. The form will also identify metrics to evaluate the success of each technical assistance provided. This form will document all technical assistance provided in person. Technical assistance provided by phone will be tracked separately as described in the Reports and Deliverable section. The Consultant shall provide reports reflecting these service requests as part of the monthly billing process.

Assessment or Exit Form: Once a client has completed the curriculum agreed in the intake form, the Consultant will conduct an exit assessment, using an Exit Form approved by the City or a survey to be designed as part of this Agreement. The City understands that some clients may only provide verbal feedback, in which case, the Consultant shall provide the written narrative. The Consultant will report results of all exits and include in monthly, quarterly, and final reports.

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Section 5: Outreach and Events

Provide outreach and coordinate, host or attend relevant events, focused primarily on WMBE clients who are interested in doing business with the City of Seattle. The events may be any combination of those listed below, such that they will serve to recruit the expected number of WMBE firms described in Section 8.

- (a) Provide outreach through any combination of methods, such as e-mail newsletters, direct emails to firms that have registered in the City of Seattle online business directory, OMWBE directory and/or the King County small business directory and provide and/or receive referrals to/from City staff and other resource partners.
- (b) The Consultant will introduce its primary contact person at a City WMBE Inter-departmental team meeting and to present on the technical assistance services to be provided under this Agreement. Attend additional sessions to provide information, updates and/or learn of barriers and solutions particularly focused upon WMBE firms from this group.
- (c) Coordinate with City staff on events organized by city departments or other public agencies, including SPU Annual A&E forum, Alliance Northwest, LGBT Matchmaker, Regional Contracting Forum, City of Seattle/King County Joint Information Technology Vendor Forum, Working with SDOT Series Events, Reverse Vendor Tradeshow, City of Seattle Construction CIP Expo, and North Puget Sound Small Business Summit, Etc.
- (d) Conduct a combination of twenty to twenty-five (20 – 25) events supporting City of Seattle Technical Assistance Services to recruit and prepare appropriate WMBE firms to present their qualification or products for City staff who make buying decisions.
- (e) Provide a series of stand-alone trainings about selling to the City to fill any gaps in understanding or skills firms have in marketing their firms, and to further enhance the awareness of the services the Consultants’ clients provide.
- (f) Conduct two (2) Go-to-Meeting (or equivalent) online events for WMBE firms on “How to do Business with the City.”
- (g) Leverage online networking to engage target audience. This will include the use of Facebook, Twitter, LinkedIn, Website, and email. The Consultant will create a webpage within their existing domain for the City’s Technical Assistance program.
- (h) Conduct a survey to WMBE firms to be pre-approved by CPCS, to identify the most valuable topics for such trainings, the preferred location, and similar information to help fine-tune the trainings to meet the needs of WMBE firms interested in doing business with the City. The Consultant is to deliver a plan to the City for conducting a survey within the first two months of the Agreement.
- (i) Present technical assistance contract overview to ethnic chambers, non-profits or other public agencies, including Tabor100, NAMC, and others by mutual agreement between the City and the Consultant.

Section 6: Technical Assistance Program Launch Schedule

Unless the City and the Consultant agree to alternate timeframes through written notice the Consultant shall initiate the complete activities listed in the chart below within the time specified following execution of the Agreement. All development activities will occur in tandem. Execution in accordance with table below:

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Schedule Launch Chart	
Week	Activities
2	Conduct kick-off meeting and schedule meetings with City Staff, including WMBE advisors.
2	Conduct onboarding meetings with CPCS to review City policies and processes.
2	Begin developing communications plan to define outreach.
4	Conduct meeting with WMBE advisors and other City staff to discuss anticipated events and timelines and staff participation. Anticipated staff efforts. Finalize forms and mechanisms to satisfy reporting requirements by the City including finalizing Intake form and Exit form.
2 – 3	Coordinate with the City on any public announcement or communication announcing the launch of the Program and Consultant location.
5	Start basic technical assistance services and outreach activities, with a focus on WMBE firms.
5 – 6	Identify and select first cohort of WMBE firms for curriculum-based programs. Finalize communications plan.

Section 7: Reporting

All deliverables to be submitted to City for final approval before distribution or commencement of services. The Consultant will provide the following deliverables:

- **Learning Manual:** This document will include all materials used and developed under this Agreement, from the communications plan, Consultant’s staff training, calendars, power point presentations, special topics (how to prepare their responses to solicitations). The first version of the learning manual will be delivered once the communications plan is completed and will be updated quarterly and submitted to the City of Seattle for review and approval.
- **Monthly Reports:** This includes an in-person or phone meeting between City staff and Consultant, as agreed by both parties, to review progress to-date and a narrative report that includes:
 - Status of each firm served, i.e., new firm or existing firm. For reporting purposes, “served” shall be defined as any firm that has completed and submitted an “Intake Form”
 - Client Metrics: Collect basic information about each client, not limited to:
 - Have worked with City/new to the City,
 - Worked as a prime or subcontractor on city contract/project,
 - Worked as a subcontractor on any city project,
 - Is the business registered in the City’s Online Business Directory?
 - Is the business registered with the State OMWBE?
 - Is the business registered in Seattle’s Ebid Exchange?
 - WMBE Designation awareness, certified/self-identified,
 - Total city projects pursued/total awarded?
 - Number of workers – at entry/at exit (brackets?/categories?)
 - Average revenue – at entry/at exit (brackets?/categories?)
 - The Consultant will log all calls and service provided in the month by business size, WMBE status, and service provided.

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- Type of procurement consulted on, i.e., purchase, consultant, or construction.
- The specific department, as applicable, the firm seeking/doing business with
- Number of City of Seattle contract opportunities attempted by each firm served and noting whether the firm was seeking the opportunity as prime or as a subcontractor.
- Number of City of Seattle contract opportunities awarded to firms served.
- Submit summaries of all items in the metrics section, including but not limited to:
 - Training developed (type of training, intended audience, and intended medium),
 - Number of Trainings Conducted (including number of attendees at each training and survey feedback from firms attending training containing information on usefulness of training),
 - Exit form results,
 - Lessons learned.
- **Quarterly Reports (Program Impact Reports):** This includes an in-person or phone meeting, as agreed by both parties, to review progress to-date and a narrative report and include summary of key/thematic barriers firms encounter when trying to compete for City services (prime or su). At a minimum the quarterly report will include the following detail:
 - For each firm served during the quarter, identify whether the firm reported that following concerning its revenue --- a) increase, b) decrease, c) no impact,
 - For each firm served during the quarter, identify whether the firm reported the following concerning its workforce --- a) increase, b) decrease, c) no impact,
 - Summary of key/thematic barriers or challenges that firms are encountering when trying to compete for City services, whether as a prime or as a subcontractor.
 - Key metrics assessed at Program Intake/Program Exit.
- **Annual Report:** The Consultant will provide an annual report in the last two weeks of the Agreement term. This report will summarize the information provided on a monthly and quarterly basis and include such other metrics as discussed and agreed upon by both parties.

Section 8: Service Location, Service Hours, Service Level Commitment

Service Location: The Consultant will provide any and all staffing, facilities, equipment, supplies, or other resources required to provide the technical assistance services scope of services to its clients. The City will provide the Consultant with access to City staff for the purposes of supporting the Consultant in the performance of the scope of work required by this agreement.

Service Hours: Unless otherwise agreed to by the City, the Consultant will be available to provide technical assistance services to clients during regular City business hours, 8:00 a.m. to 5:00 p.m., Monday through Friday, excluding City holidays. The holiday schedule may be obtained on the City's website at <http://www.seattle.gov/personnel/services/holidays> Allowances for deviations from this schedule may be considered by the City with at least one week's written notice to the Project Manager.

Service Level Commitments: The Consultant anticipates providing an average of 20 hours of technical assistance to each firm engaged in the program. The Consultant is committed to placing approximately 52 WMBE firms in the technical assistance program providing them with 1,040 hours of consulting services. Based on the specific needs of the enrolled WMBEs, there is flexibility in the delivery of 1,040 hours of consulting services spread across the services described in Section 2: Technical Assistance

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Services and Section 3: Technical Assistance Program. The Consultant will not perform more than 1,040 hours of consulting without written agreement between the City of Seattle and the Consultant. The City of Seattle will be updated monthly during monthly review sessions.