

### **Engagement Volume & Time Requirements**

Approximately how many small-business clients will the consultant be expected to support during the 6-month period? - **15**

What is the anticipated weekly or monthly time commitment for this engagement? -

**Approximately 5 hours per week direct one-on-one sessions with clients.**

How frequently do you expect training or coaching sessions to occur (e.g., weekly, biweekly)? - **weekly one-on-one sessions**

### **Delivery Expectations**

The RFQ notes that sessions may be virtual or in-person. Does ULBC have a preferred format, or are there any minimum in-person requirements? **They are conducted via Teams or Zoom**

If in-person sessions are required, how often would they occur and at what location(s)? **If any, at our office, 560 NW 27<sup>th</sup> Ave. Ft. Lauderdale, FL 33311**

### **Curriculum & Scope Details**

Will ULBC provide an existing curriculum or training framework, or is the consultant expected to develop their own program content and materials? **Consultant would develop their own.**

Beyond budgeting, revenue forecasting, and funding preparation, are there any specific tools or topics you would like emphasized (for example, QuickBooks, cash-flow management, or loan package preparation)? **This would be based on an assessment with the individual business owners.**

### **Performance Outcomes & Reporting**

How will ULBC evaluate consultant performance and measure outcomes such as revenue growth, increased cash on hand, or loan readiness? **Via direct discussions with the business owner.**

Are consultants expected to submit session reports, progress notes, or KPI tracking for each participant? **Yes, progress notes on a template we provide.**

Will the consultant be required to use ULBC's CRM or internal systems for documenting activities and outcomes? **No, a ULBC staff will enter into our CRM.**

### **Administrative & Operational Logistics**

Will ULBC assign participating businesses to the consultant, or will the consultant be responsible for outreach and scheduling with individual clients? **Participants are prescreened and selected. They will be assigned to the consultants.**

Are there any required standing meetings or check-ins with ULBC staff (for example, weekly or monthly status meetings)? **Yes**

### **Compensation**

Is there a budgeted compensation range for this project or a preferred payment structure (hourly, per session, or retainer-based)? **Hourly rate**

For any required in-person sessions, are travel costs within Broward County reimbursable? **No**

**Budget/Rate Ceiling:** Is there a preferred budget range or hourly rate ceiling for this engagement? **As a nonprofit organization, we are mindful of our budget and appreciate competitive pricing. However, we respect your expertise and cannot dictate your rates. Please provide what you believe is fair and reflective of the scope and quality of your services.**

**Participant Load:** How many businesses are expected to receive operations consulting during the contract period (individual and group)? **Approximately 15 over 6 months.**

**Session Cadence & Format:** What is the anticipated schedule for sessions, and what mix of virtual versus in-person delivery do you foresee? **Weekly, virtual one-on-one sessions, approximately 5 hours per week.**

**Depth of Deliverables:** Should consultants create full SOPs and workflows for each business, or guide participants in creating their own? **Consultants should assist and guide the business owners.**

**Reporting Requirements:** What reports or documentation will be required throughout the contract (attendance, progress notes, outcomes, etc.)? **Progress notes for each session on a template we provide.**

What is the minimum or maximum times or amounts of meetings with the individuals or groups? **Approximately 5 hours per week (one-on-one with each business owner)**

RFQ Questions Received (as of 11/20/25)

The RFQ states beginning of 2026, will tax season be considered? (as that's usually our bust season) **The consultant must be available for the weekly sessions but are free to schedule them for whatever they and the business owner agree upon.**

Is there a tangible rubric or criteria that needs to be met to satisfy certain requirements? ie) client secures loan, ie) client increased margins Clients should be loan ready at the end of 6 months, meaning they have all documents needed to apply for a loan. **They should have an average 10% revenue increase after they complete the 6-month program and go through all consultant rotations.**