

ARIZONA
COMMERCE AUTHORITY
QUESTIONS & ANSWERS LIST (Amended 9/19/2023)

Solicitation Number: RFQ 2024-15: SSBCI Technical Assistance Financial Advisory Services (STAFSA)
 Solicitation Release Date: August 24, 2023
 Questions Due Date: September 12, 2023
 Answers Release Date: September 18, 2023; **amended answers released September 19, 2023 (reference note on last page)**
 Submission Due Date: September 22, 2023
 Solicitation Point of Contact: Teri Orman, Procurement/Grants Manager, procurement@azcommerce.com

#	Question	Answer
1	Can we submit multiple proposals, and be awarded contracts under multiple programs with the ACA? Specifically, RFP #2024-15 and RFQ #2024-11?	Yes, interested parties may submit applications to both solicitations. RFP #2024-15 and RFQ #2024-11 will be evaluated independently. For more information regarding ACA Solicitation 2024-11: RFQ for SSBCI General Technical Assistance, email procurement@azcommerce.com .
2	Can an application be submitted for both Scope 1 and Scope 2? (Reference RFP Sections 1.4 and 1.5)	Yes, applicants can apply for more than one scope. In the General Information Form, Part 1: Organization Information under "Scope(s) Applying For", the Offeror should indicate which scope(s) it is applying for. (Reference RFP Section 4)
3	Does a single contractor need to service the entire state, or will multiple contractors be considered to serve different regions?	In accordance with RFP Section 3.3 – Contract Award, the ACA reserves the right to make multiple awards if, after considering the additional administrative costs, it is in the ACA's best interest to do so. If multiple awards are made, the ACA SSBCI TA team will designate what region(s) are covered by each awarded Contractor. If a single Offeror can facilitate the entire state or would prefer to only service a specific region, they must provide this information within their proposal. If Offerors seek to work in partnership with another company for one or more scopes, the proposal must outline how they will work to cover the different counties of the state, fulfilling the workshop/webinar requirements.
4	Are partnerships allowed to carry out the scope of work? There is mention of subcontractors in the insurance requirements, however, it is unclear if we can submit a proposal that names partners.	Yes, partners may be included in your proposal. Generally, the ACA requires partners to be considered as subcontractors with one primary applicant identified for contractual purposes. If submitting a proposal with a partner – a General Information Form must be submitted for each company, with a primary applicant identified on the form itself. (Reference RFP Section 4.)
5	Are there any additional guidelines for submitting a consortium/partnership application?	A General Information Form (reference RFP Section 4) should be submitted for each partner. A primary applicant must be identified for contractual purposes (add text to applicable Form). (Reference RFP Section 4)
6	What is the timeline for completion of program?	The SSBCI Technical Assistance program has been allocated for 5 years in 3 separate tranches.

7	SSBCI TA guidelines mention a 5-year timeframe; what timeframe should our proposal cover?	The SSBCI Technical Assistance program has been allocated for 5 years in 3 separate tranches. The proposal can cover up to 5 years. SSBCI Technical Assistance Guidelines: https://home.treasury.gov/system/files/136/SSBCI-Technical-Assistance-Guidelines-April-2022.pdf
8	Does ACA have goals for how many beneficiaries should be attending workshops? (Reference RFP Sections 1.4.A and 1.5.A)	Yes, the ACA does have goals for how many workshops and attendees should be attending workshops. Along with the 24-workshops (in-person and statewide) goal stated in RFP, the ACA’s goal for attendance is 440 attendees per year, which is approximately 18 participants per webinar/workshop.
9	Should proposals include marketing to attract participants, or will the ACA select participants for the program?	A marketing budget and outline are highly encouraged to be included in the proposal. The SSBCI TA team along with the Contractor will work in unison to identify those qualified beneficiaries after they request TA assistance and reporting documentation will follow.
10	Does Scope 2: Financial Advisory Services with Financial Literacy Workshops include all points mentioned in Scope 1: Financial Advisory Services? (Reference RFP Sections 1.4 and 1.5)	Both scopes are very similar in Services and Technical Experience/Knowledge. The only difference is that for Scope 2, Contractors are required to generate financial literacy workshops throughout the state both virtually and in person. In contrast, Scope 1 requires one on one or small group setting with specific financial literacy tasks in helping beneficiaries secure the necessary documentation for funding. Scope 1 will be more personalized and to where Scope 2 will be “top of the funnel”, financial literacy introduction.
11	If a cross-scope application is permitted, should those submissions be combined into a single submission? And are there any additional guidelines for those submissions? (Reference RFP Sections 1.4, 1.5, and 2.1)	If applying for both Scope 1: Financial Advisory Services and Scope 2: Financial Advisory Services with Financial Literacy Workshops, an Offeror must submit a single proposal and indicate the applicable Scopes on the General Information Form. The page limit for Approach and Methodology may be increased to five (5) pages (reference RFP Sections 2.1.D and 4).
12	Scope 1 mentions "General banking and loan preparation documents" – would this also apply for equity documents? (Reference RFP Section 1.4)	All the services listed are applicable to debt <u>and</u> equity funding and their constituent documents.
13	Scope 1 mentions "Pre- and Post-loan continuing education and support" - would this also apply for equity investees? (Reference RFP Section 1.4)	Pre- and Post-loan support covers beneficiaries that have entered into debt or equity capital. All beneficiaries who are applying for, preparing to apply for, or have applied for capital from an SSBCI-supported capital program or other eligible federal programs. This would apply to those beneficiaries, not the investors or lenders providing that funding.
14	How many participants should be expected per year?	<u>For Scope 1:</u> The goal would coincide with the “secure capital” number for short, medium, and long quantitative goals listed in question 15 . This would be for either debt or equity capital. <ul style="list-style-type: none"> • Short (<2 Years) – Assist 50+ SEDI and VSBs secure capital (44 SEDI & 6 VSBs for a total of ~50). • Medium (2-4 years) – Assist 100+ SEDI and VSBs secure capital (88 SEDI & 12 VSBs for a total of ~100). • Long (4+ years) – Assist 125+ SEDI businesses secure capital (110 SEDI & 15 VSBs for a total of ~125). <u>For Scope 2:</u> The goal would coincide with the “Financial literacy programming” number of attendees for short, medium, and long quantitative goals listed in question 15 . <ul style="list-style-type: none"> • Short (<2 Years) – Serve 880+ attendees with financial literacy programming. • Medium (2-4 years) – Serve 1800+ attendees with financial literacy programming. • Long (4+ years) – Serve 2000+ attendees with financial literacy programming. *Goals may change after Treasury’s approval and year 1 data

15	<p>What are the expected outcomes/success metrics for individuals served by this program (# attendees, # applications for funding, funding received, etc.)?</p>	<p><u>Qualitative program outcomes</u></p> <ol style="list-style-type: none"> 1) Results in successful acquirement of capital by SEDI-owned and VSBs. 2) Increase awareness of Arizona’s SSBCI Capital programs and other eligible programs among SEDI- owned and VSBs. 3) Provide support throughout the length of the loan (capped at program conclusion) for SEDI-owned and VSBs borrowers. 4) Align outcomes relative to Arizona’s Economic Benefit Ration (EBR) or 8 SEDI-Owned for every 1 VSB. 5) Foster relationships in the ecosystem that support small businesses. 6) Deliver TA services to beneficiaries aligned with the current ACA TA yearly goals. <p><u>Quantitative program outcomes</u></p> <ol style="list-style-type: none"> 1) Short (<2 Years) <ol style="list-style-type: none"> a. Deliver TA services to beneficiaries, aligned with the current TA yearly goals. b. Serve 880+ attendees with financial literacy programming. c. Assist 50+ SEDI and VSBs secure capital (44 SEDI & 6 VSBs for a total of ~50). d. Deliver 48+ webinars/workshops. 2) Medium (2-4 years) <ol style="list-style-type: none"> a. Serve 1800+ attendees with financial literacy programming. b. Assist 100+ SEDI and VSBs secure capital (88 SEDI & 12 VSBs for a total of ~100). c. Deliver 96+ webinars/workshops. 3) Long (4+ years) <ol style="list-style-type: none"> a. Serve 2000+ attendees with financial literacy programming. b. Assist 125+ SEDI businesses secure capital (110 SEDI & 15 VSBs for a total of ~125). c. Deliver 120+ webinars/workshops. <p><i>*Qualitative and Quantitative goals are metrics that all Contractors will work towards collectively, not just on their own. Goals may change after Treasury’s approval and year 1 data.</i></p>
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NOTE: Q&A List was amended to correct cross-reference to another question as highlighted above.