

## Request for Proposals

Organization: Adirondack North Country Association  
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Proposal due date: November 30, 2022  
Projected contract term: December 1, 2022- February 28, 2023  
Anticipated budget: ~\$10,000

### North Country Center for Businesses in Transition - Seller Advisor

Notice is hereby given that the Adirondack North Country Association (**ANCA**) is seeking to retain a Technical Service Provider (**TSP**) to serve as **Seller Advisor**, providing support to small business owners (**sellers**) looking to prepare approximately 20-30 businesses for sale at the North Country Center for Businesses in Transition (**CBIT**) *Small Communities. Big Opportunities.* Conference (**SCBO**) in February 2023.

ANCA requests that the TSP: 1) Begin working with sellers beginning December 1, 2022 to ensure that each participant has completed and feels confident with 5 preparatory activities leading up to the event, 2) aids in the valuation process of participating sellers as needed, 3) provides direction and support for the matchmaking event(s) of the SCBO conference, and 4) attends SCBO to serve as key point of contact for sellers.

### Project Overview

**The North Country Center for Businesses in Transition (CBIT)** provides matchmaking services between potential buyers and sellers, plus access to planning tools and connection with existing services.

CBIT is a dynamic partnership between regional organizations and individuals invested in the retention of local businesses and the future of our communities. Our goals include helping owners sell their businesses on the open market, completing intergenerational family transitions, and converting to employee-owned and cooperative models.

The ***Small Communities. Big Opportunities.: Own a North Country Business 2023 Conference (SCBO)*** will take place Sunday, February 12 - Tuesday, February 14, 2023 at the Hotel Saranac in Saranac Lake, NY.

Aspiring entrepreneurs, current small business owners, support professionals, fiscal and legal agencies and North Country leaders will gather for a three-day, hybrid conference. This conference is for anyone who wants to realize a dream of business ownership and who lives, or wants to live, in northern New York State.

## Scope of Work

The Seller Advisor TSP shall work with the project team to:

- A. Prepare sellers for SCBO.** The contractor will ensure that sellers attending the conference have completed and feel confident with 5 preparatory activities, in which sellers will:
  - a. Attend and/or watch a CBIT Sellers Working Group program;
  - b. Meet one-on-one with a CBIT liaison or advisor to develop a back of the envelope valuation for their business;
  - c. Develop a sell sheet;
  - d. Upload the sell sheet and basic information to the Booth Central Platform used for matchmaking opportunities at the conference; and,
  - e. Understand the format and expectations of the conference matchmaking events to ensure they are able to present their business in the best possible light.
- B. Provide Valuation Support:** The Seller Advisor will be called upon to provide additional valuation support to participating sellers if a CBIT liaison is not available in their area or if the liaison or business owner needs additional support for any reason. Additional valuation support will be provided free of charge but is not to exceed three hours per individual Seller unless otherwise approved by ANCA.
- C. Support Matchmaking Event:** The Seller Advisor will participate in the brainstorming process for the conference matchmaking event(s), helping to ensure the process is easily navigable for sellers. The Seller Advisor will be tasked with ensuring that sellers know what to expect, where to be, and how to get the most out of the experience.
- D. Attend SCBO Conference:** The Seller Advisor will be present at the SCBO conference to greet, support and serve as the key point of contact for sellers participating in the SCBO conference virtually and in-person.
- E. Participate in Weekly Planning Meetings:** The contractor will attend a weekly SCBO planning meeting, Thursdays from 10:30-11:00 a.m., to keep abreast of the event developments.

## Proposal Format

- Please provide a proposal that addresses:
  - How you will engage with Sellers to ensure that they are prepared for the conference;
  - Relevant experience providing Valuation support to small (1-5 person) businesses; and,
  - An estimated budget and hours per week that you would be available to carry out this work.
- Please also include:
  - A copy of your resume;
  - The name, phone number, and email address for 3 references familiar with your work (this information is for internal use and will not be shared publicly); and,
  - A written statement acknowledging that the organization understands they will be expected to complete a mutual agreement on core policies such as EOE, Harassment and diversity upon selection.
- In addition, please consider attaching:
  - A portfolio of relevant past projects; and,
  - Any current statements or descriptions of programs that you currently have addressing Diversity, Equity, and Inclusion.

## Proposal Evaluation

A committee of ANCA staff and strategic partners will review and score proposals based on the following criteria:

Criteria	Maximum Points
<b>Project Plan and Approach to Work:</b> Proposal responds to all aspects of the scope of work requested, demonstrating an understanding of our project needs/requirements, and includes a project timeline and your approach to work, including client communication, project management, and mechanisms used to ensure the project stays on track and on budget.	35
<b>Past Experience, Expertise, and Team:</b> Proposal articulates the qualifications and technical expertise of the organization and key staff members to complete a successful project, including examples of relevant past projects.	30
<b>Budget:</b> Proposal includes an accurate, allocable, and cost-effective project budget with as much detail as possible.	25
<b>Project Area:</b> Proposal demonstrates familiarity with and/or understanding of ANCA and project's service area and has capacity to deploy a successful project that is able to serve the unique needs of our organization and region.	10
<b>Total</b>	<b>100</b>
<b>Bonus:</b> Respondents who submit additional materials identifying commitment and action towards building Diversity, Equity and Inclusion into their organization's programming are eligible to receive bonus points at the discretion of the review committee.	5
<b>Compliance:</b> Meets all legal requirements listed below and is compliant and familiar with all necessary local, state, and federal requirements.	True/False
<b>Completeness:</b> Proposal includes all required materials.	True/False

## Eligible Applicants

Any non-governmental, not-for-profit, local agency, educational institution, sole proprietorship, limited liability company, corporation or joint venture focused properly operating in accordance with federal, state and local law, may submit a proposal for consideration. Respondents must indicate the full address for their administrative offices in their response. Respondents may submit proposals that include subcontractors; subcontracting relationships must be specified in the response. Any later subcontracting will be subject to prior written approval from ANCA. Entities are ineligible if they: 1) are currently barred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in this transaction by a Federal, State or Local department/agency; 2) have existing grants with any State or Local agency that are suspended or otherwise not in good standing; or 3) are not in compliance with the NYS Department of Revenue or the Federal Internal Revenue Service requirements. In addition, organizations must have and enforce employment policies in alignment with those in place at the Adirondack North Country Association such as those related to Equal Opportunity and Harassment.

Proposed contractors must have experience centering community voices and the lived experiences of Black, Indigenous, people of color and other marginalized groups in their strategies and campaign development. Proposals should include a supplemental document expounding upon this aspect of their work and their commitment to racial equity.

### **Title VI Compliance**

In accordance with Title VI of the Civil Rights Act of 1964, 78 Stat. 252, 42 U.S.C. 2000d to 2000d-4 and Title 49, Code of Federal Regulations, U.S. Department of Transportation, Subtitle A, Office of the Secretary, Part 21, Nondiscrimination in federally-assisted programs of the U.S. Department of Transportation and Title 23 Code of Federal Regulations, Part 200, Title VI Program and Related Statutes, as amended, issued pursuant to such Act, ANCA hereby notifies all who respond to this solicitation, invitation, and request for proposals that it will affirmatively ensure that in any contract entered into pursuant to this advertisement, disadvantaged business enterprises will be afforded full opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, national origin, sex, age, disability or income status in consideration for an award.

### **Disadvantaged Business Enterprise (DBEs)**

DBEs are encouraged to submit proposals in response to this RFP. Other proposers are encouraged to submit DBE subconsultants where appropriate.

### **Equal Opportunity Employer**

ANCA is an Equal Opportunity Employer

### **Project Payment Method/Schedule**

Payment will be made to the awarded contractor by check after submitting proof of completion of agreed upon project milestones.

**All respondents will be notified with the selection results.**