



## **Request for Proposals For Trucking, Transportation, and Logistics Business Consulting**

### **COMPANY BACKGROUND**

CommunityWorks is a non-profit financial organization, certified by the US Treasury as a Community Development Financial Institution or CDFI, committed to building a brighter future for underserved families and communities through financial education, lending, and investing. We envision robust and vibrant communities that offer the opportunity for financial equity and economic achievement for everyone.

CommunityWorks achieves this mission by providing capital to small and microbusiness owners, financing to affordable housing developers, down payment assistance to aspiring homeowners, personal and business coaching services, and entrepreneurial training through the Women's Business Center.

One of the key elements of our Small Business Loan program is robust business coaching and technical assistance services. Our offerings range from general entrepreneurial training, pre-loan coaching to assess capital readiness, post-loan coaching, and more specific consulting services based on the unique needs of the entrepreneurs we serve.

In an effort to provide more specialized coaching and consulting services to specific industry areas, CommunityWorks is inviting interested and qualified consulting firms or individuals to submit a formal proposal to support our small business clients with Trucking, Transportation, and Logistics Business Consulting.

### **NEED FOR SERVICES**

Over the last 5 years, CommunityWorks has seen an increased demand for specialized coaching and training services to entrepreneurs that are seeking to either start, maintain, or expand a business in the trucking, transportation, and/or logistics industry. With this growth, we are looking for one or more providers that can provide specialized technical assistance, coaching, and training support to entrepreneurs in this unique industry area. CommunityWorks provides these services to a diverse group of entrepreneurs and it is expected that the experience level of these entrepreneurs will range from more extensive technical assistance to limited support on targeted questions. CommunityWorks anticipates that the specialized support could include: understanding DOT, licenses, contracts, supply chain training, evaluating types of trucks/trailers/equipment, operating authorities, brokering, factoring, pricing, and insurance.

CommunityWorks expects this engagement to be no less than one year. The technical assistance and coaching services will be on an as needed basis as dictated by volume of clients. It is also expected that the consultant will provide at least two group trainings and/or workshops to cover the basics on running a trucking business and other common areas based on what the consultant has identified in working with their clients.

Respondents are requested to outline their all-inclusive hourly rate for providing the scope of services, as outlined below.

## SCOPE OF SERVICES

- Conduct an assessment of all assigned clients to determine their technical assistance and coaching needs around trucking, transportation, and logistics.
- Provide direct advice and support through online, phone, and in-person (when appropriate) coaching sessions
- Develop an action plan for each client that defines needs, outline goals, document all resources connected to the client, and report on progress toward items identified in the action plan. The overall goal of the action plan should be that the client can operate their business successfully without the need for intensive outside technical support.
- Provide recommendations to the CommunityWorks of specific needs common to the client base
- Provide group training sessions and workshops to address common areas of need for the client base
- The contracted individual or firm agrees to keep all borrower information as well as that of the CommunityWorks

## **HOW TO SUBMIT A PROPOSAL**

Submit the following documents to Katy Davenport, Chief Program Officer – [kdavenport@cwcarolina.org](mailto:kdavenport@cwcarolina.org) by June 30, 2022 at 4pm

Title page (Define subject firm, local address, phone number, contact person, and date)

1. Summary to include the following:
  - a. Statement of services to be performed
  - b. Fee (all-inclusive rate on a per hour basis)
  - c. Names of persons authorized to make representations for the proposer, titles, addresses, and phone numbers
  - d. Knowledge of and experience in working with small businesses
  - e. Knowledge of and/or experience in the trucking, transportation, and logistics industry
2. Description of the proposed approach to providing coaching, technical assistance, and business training services to a diverse audience of trucking and transportation entrepreneurs
3. Qualifications and credentials of staff to be assigned to the project
4. Additional data the firm wishes to present
5. Three (3) business references who can attest to the qualifications of the proposer
6. Completed CommunityWorks' [Vendor Registration Form](#)

Proposals will be evaluated based on experience in the trucking, transportation, and logistics industry, the scope of services, and availability to provide services on an on-demand basis. All submitted proposals become part of the files of CommunityWorks and receipt of the proposals implies no obligation on the part of the requestor.

CommunityWorks is an Equal Opportunity Employer.