



SSBCI TA Accounting and Financial Services Hotline RFP

Introduction and Overview:

The SSBCI TA Program's primary purpose is to help Socially and Economically Disadvantaged Individual (SEDI)-owned businesses and Very Small Businesses (VSB) access and apply for capital funding.

The SSBCI TA Program's goal is to strengthen current business technical assistance providers, and the hotline's goal is to increase technical assistance providers' capacity to prepare SEDI entrepreneurs, VSBs, and small businesses to apply for capital.

This hotline provides subject matter expertise to a network of business service providers, (the Mesh Network) through a platform-based hotline. The Mesh Network includes business consultants, mission driven lenders, and other professionals providing capital readiness business services with a focus on SEDI business owners and VSBs. (Note you will not be providing services directly to small business owners.)

The hotline will answer questions about accounting and financial services topics such as:

- Preparing audits, financial statements, and/or business records
- Digitizing financial records
- Best practices for accounting processes, recordkeeping, and/or accounting software
- Other accounting topics related to small business readiness to access and apply for capital
- Establishing banking relationships or other financial services
- Applications for government small business programs, including preparing financial analyses
- Identifying sources of credit, capital, grants, and other financing
- Factors that may impede access to financing for the business
- Financial management

- Best practices for presentations to potential investors, financial models, and business plans

Description & Requirements:

By applying to staff the SSBCI TA Accounting and Financial Services Hotline, you commit to the following activities:

- Use the CAMEO-designated platform for all Hotline related activities.
- Respond within 24 hours of a hotline's initial request (e.g., question ticket).
- Respond to a follow-up question from an initial request within 48 hours.
- If additional help is needed beyond what's appropriate through the hotline, then make an appropriate referral.
- Create frequently asked questions (FAQs) on topics.
- Identify training needs.
- Develop and deliver at least 6 train-the-trainers based on need per year.

Compensation: \$40,000-\$60,000 for one year with the possibility of renewal based on performance and demand.

Questions:

1. Primary Contact Name
2. Primary Contact Email
3. Organization
4. Project Lead and Support Staff – short bios (and attach CVs)
5. Are you a SEDI owned business? (Link)
6. A short narrative of 3-5 pages introducing yourself or your organization that should include:
 - a. Describe your accounting and financial services experience, especially related to services that enable small businesses to prepare to access capital.
 - b. Describe your accounting and financial services experience specifically with the topics listed above.
 - c. Describe your experience with training professionals.
 - d. Describe how you would meet the needs of the hotline.
 - e. Describe other languages besides English that your organization can accommodate if necessary.
7. Budget and narrative on how you would use the funds allocated.

Please submit to Elena Franco efranco@CAMEOnetwork.org by July 3, 2024.