

Work Program

A1. Delegate Agency: **NON-EXCEL SAMPLE FOR RFP USE ONLY**
 A2. Program Name: **Neighborhood Business Development Centers (NBDC)**

B1. Department: **Business Affairs and Consumer Protection (BACP)**
 B2. Program: **Capital Specialist**

C. Work Program Year: **2022**

C1. Program or Subprogram Activities	C2. Deliverables	C3. Planned Output by Quarter & Year Total					C4. Performance Measures	
		1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Total		
BUSINESS CONSULTATIONS Provide support, counseling and coaching assistance to entrepreneurs and business owners requiring access to capital; especially start-up businesses looking to scale, and businesses owned by women and people of color with limited access to funding networks. Provide assistance with navigating supports during COVID, and consultation for businesses needing assistance with reopening guidelines; Maintain relationships with institutions and programs that provide debt and non-debt financing.	Report business consultation data through ECM directly, or by utilizing an approved Capital Specialist ECM upload Excel template; Monthly reporting recommended; Quarterly at minimum.	Clients / Units	#	#	#	#	0	100% Quality business consultations; Planned output is cumulative (i.e. Total output should be met or exceeded by the end of the fourth quarter), however, not meeting quarterly goals will need an explanation.
		Unduplicated					0	
BUSINESS ADVISORY For entrepreneurs / business owners who are NOT ready to apply for funding (i.e. debt or non-debt), provide them with mentorship, credit building coaching, technical assistance and/or credit counseling opportunities and providers; If not offered in-house, recommend capacity building resources (e.g. entrepreneurial training program, business incubator); maintain data on advisory meetings. Provide assistance with navigating supports during COVID, and consultation for businesses needing	Report business advisory data through ECM directly, or by utilizing an approved Capital Specialist ECM upload Excel template; Monthly reporting recommended; Quarterly at minimum.	Clients / Units	#	#	#	#	0	100% Quality business advisories; Planned output is cumulative (i.e. Total output should be met or exceeded by the end of the fourth quarter), however, not meeting quarterly goals will need an explanation.
		Unduplicated					0	
REFERRALS Provide clients / members, with a business consultation assistance request that is not supported by your organization's standard suite of business services, a referral to a BACP Chicago Business Center, NBDCs, and/or qualified non-NBDC BSO referral partners: Follow	Report business referral data through ECM directly, or by utilizing an approved Capital Specialist ECM upload Excel template; Monthly reporting recommended; Quarterly at minimum.	Clients / Units	#	#	#	#	0	100% Quality business referrals; Planned output is cumulative (i.e. Total output should be met or exceeded by the end of the fourth quarter), however, not meeting quarterly goals will need an explanation.
		Unduplicated					0	

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up and document results of referrals.		Unduplicated					0	
COLLABORATION Think of new ways to engage fellow NBDCs in a sustained manner; Form a coalition with at least 2-3 NBDC partners to develop a regional strategy or initiative that supports the small business ecosystem and the communities your organizations serve; If unable to partner with a fellow NBDC, you may coordinate with other QUALIFIED nonprofit business service organizations in Chicago that are not in the NBDC program; Maintain data on results of collaboration activities.	Report collaboration data through ECM directly, or by utilizing an approved Capital Specialistt ECM upload Excel template; Monthly reporting recommended; Quarterly at minimum.	Clients / Units	#	#	#	#	0	100% Quality collaborations; Planned output is cumulative (i.e. Total output should be met or exceeded by the end of the fourth quarter), however, not meeting quarterly goals will need an explanation.
		Unduplicated					0	
LENDER RESOURCES LISTING & LENDING ACTIVITIES REPORTING Maintain relationships with financial institutions and programs that provide access to capital; Maintain a list of funding resources; Provide quarterly reporting to include: Number of funding applications, amount of debt and non-debt funding, number of jobs created, and number of jobs retained.	Report lender resources listing & lending activities data through ECM directly, or by utilizing an approved Capital Specialistt ECM upload Excel template; Monthly reporting recommended; Quarterly at minimum.	Clients / Units	1	1	1	1	4	Maintain quality lender resources listing & lending activities data.
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NEW BUSINESS OUTREACH & ATTRACTION Provide welcome letter / kit / email, and ongoing support, to all newly licensed businesses within the service area as identified from the City Data Portal (i.e. pull report once a month and contact all in the report by end of month); Engage with prospective entrepreneurs, and instruct business owners without business license(s) and / or public way use permit(s), to come into compliance; Provide economic development activities (i.e. business attraction and retention, promotion of commercial corridors, etc.) in communities served.	Generate "Newly Licensed Business" Data Portal Report once a month (3 per quarter; 12 per year) to perform outreach; Report business outreach and attraction data through ECM directly, or by utilizing an approved Capital Specialist ECM upload Excel template; Submit proof of outreach (i.e. Copy of welcome letter / kit / email) in ECM as well; Monthly reporting recommended; Quarterly at minimum.	Clients / Units	3	3	3	3	12	100% Contact with newly licensed businesses per month; Planned output is cumulative (i.e. Total output should be met or exceeded by the end of the fourth quarter), however, not meeting quarterly goals will need an explanation.
		Unduplicated					0	
SUCCESS STORIES Provide stories / photos about helping your clients / members to start and/or grow; Profile successful implementation of an engagement project, and document any media coverage received.	Report success stories into ECM directly or by uploading the Success Stories Word template in the appropriate Supplemental Documents tab; Monthly reporting recommended; Quarterly at minimum.	Clients / Units	3	3	3	3	12	100% Quality success stories; At least one story per month with clear demonstration of agency relationship/impact with businesses and/or community served; Planned output is cumulative (i.e. Total output should be met or exceeded by the end of the fourth quarter), however, not meeting quarterly goals will need an explanation.
		Unduplicated					0	
MARKETING Implement marketing campaigns that promote your NBDC Capital Specialist Program and your organization; Must have a functional website denoting your participation in the NBDC Program, and with content relevant to clients / members as it relates to your NBDC	Report marketing data through ECM directly, or by utilizing an approved Capital Specialist ECM upload Excel template; Two of the required output numbers (1 in Q2 and 1 in Q4) is a BACP audit of the NBDC website; Monthly reporting recommended; Quarterly at minimum.	Clients / Units	1	2	1	2	6	100% Quality marketing campaigns; Planned output is cumulative (i.e. Total output should be met or exceeded by the end of the fourth quarter), however, not meeting quarterly goals will need an explanation.

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Program, contact email, phone and social media outlets; website must include, at minimum, City and local resources for businesses; link to the City of Chicago Small Business Center web page; link(s) to NBDC service area Alderman/men		Unduplicated					0	
BACP EVENTS Attend all mandatory NBDC Quarterly Meetings; At least one NBDC staff member is required to attend the duration of said meeting; Participate in one (1) Small Business Center on the Road Expo; Participate in BACP led trainings and/or BACP meetings.	Event attendance will be automatically recorded upon attendance of qualified BACP Event.	Clients / Units	1	1	1	1	4	100% Attendance, and participation, of mandatory BACP events.
		Unduplicated					0	