

May 25, 2021

Miguel Beltran,
Contracting Compliance Manager
City of Seattle
Department of Finance and Administrative Service
PPO Box 98124

Subject: Technical Assistance Services Extension 2nd Quarterly Report 2021

Miguel,

It is a pleasure to submit to you our 2nd Quarterly Report in extension of Technical Assistance Services Agreement No. FAS 2019-001, Amendment No. 001. This report communicates all efforts toward recruitment and subsequent activities performed on behalf of served firms during the month of November.

The Technical Assistance Services (TAS) program extension continues to help firms seeking to learn and understand the process of doing business with the City of Seattle. The general scope of TAS amendment is to enroll and provide support to an additional 26 SWMBE firms wanting to conduct business with the City of Seattle and, will provide an additional 520 hours of consultation and support. This support comes in the form of consultation, outreach, group sessions, one-on-one sessions, phone inquiries and other services that create a tailored curriculum-based approach to equip firms with information necessary to engage in business with the City of Seattle. NWMMSDC has partnered with the University of Washington's Foster School of Business, Craft3 and Trio Group, in order to accomplish this task.

Table 1 is a tracking of actual activities conducted in the 2nd Quarter to support the recruitment and instruction of small, minority and women owned business enterprises into the City of Seattle Technical Assistance Services program. The last row highlighted denotes 536.5 hours of TAS instruction of 29 firms and introduction to 195 individuals and firms. Currently, the TAS program has reached 108% of its 520 hours of consultation and support goal.

Table 1: Calendar of Activities.

	Council Action	Council Activities	Council Purpose	Committed Hours	Date
1.	Introduction to TAS	Meeting with Txley	Introduce Txley to Technical Assistance Services	1 Hour Council Participation	February 1, 2021
2.	City contracting and Responsibilities	Host City contracting and responsibilities webinar. 11 Registrants.	Help Firms to understand terms, conditions & contractual responsibilities. 3 firms in attendance	2 Hour Council Participation	February 2, 2021
3.	One-on-one Training	Meeting with Destiny's Designs	Discuss and implement Next Steps for Destiny's Designs	1 Hour Council Participation	February 3, 2021
4.	Opportunity Search Session	Host Opportunity Search Session	Increase firms' ability to find Opportunities. 1 firm in attendance.	2 Hours Council Participation	February 3, 2021
5.	First Friday	Attend First Friday	Introduce Businesses to Technical Assistance Services. 6 business in attendance.	1 hour Council participation	February 5, 2021

	Council Action	Council Activities	Council Purpose	Committed Hours	Date
6.	Introduction to TAS	Meeting with Pivitol	Introduce Pivitol to Technical Assistance Services	1 Hours Council Participation	February 8, 2021
7.	Financing your business for growth	Host Financing your business for growth webinar. 7 registrants.	Educate businesses the utilization of financial tools and lenders to grow businesses. 4 firms in attendance.	2 hours Council participation	February 9, 2021
8.	Certification Workshop	Host Certification workshop. 18 registrants.	Introduce firms to the various types of certifications and their benefits. 9 firms in Attendance.	1 hour Council participation	February 16, 2021
9.	Opportunity Search Session	Host Opportunity Search Session webinar	Increase firms' ability to find Opportunities. 2 firm in attendance.	1 hour Council participation	February 17, 2021
10.	Introduction To TAS	Call with Angelica Partida	Share business development information for potential collaboration.	1 Hour Council Participation	February 19, 2021
11.	One-on-one Training	Meeting with American Bio Services	Discuss and implement Next Steps for American Bio Services	Add a little bit of body text	Add a little bit of body text

	Council Action	Council Activities	Council Purpose	Committed Hours	Date
12.	Marketing to the City	Host Marketing to the City webinar. 20 registrants.	Increase firms' ability to effectively market to the city. 9 firms in attendance.	2 Hours Council Participation	February 23, 2021
13.	Small Business Plan Builder course review	Host meeting with partners	Review BPB module content and delivery	1 hour Council participation	February 26, 2021
14.	Introduction to TAS	Meeting Mila Dorosh	Introduce Boss Makes You Go to Technical Assistance Services	1 Hour Council Participation	March 1, 2021
15.	Opportunity Search Session	Host Opportunity Search Session	Teach attendees to find City opportunities	2 Hour Council Participation	March 3, 2021
16.	First Friday	Attend First Friday	Introduce TAS to Participants. 14 businesses in attendance	1 hour Council participation	March 5, 2021
17.	Introduction to TAS	Meeting Sarat Kumar Rachulapalli	Introduce Sarat Kumar Rachulapalli to Technical Assistance Services	1 hour Council participation	March 5, 2021
18.	Ascend Seattle Program	Foster School of Business to host session	Instruct businesses in commercial construction and affordable housing, 6	8-hour Partner participation	March 5, 2021

	Council Action	Council Activities	Council Purpose	Committed Hours	Date
			businesses in program		
19.	Introduction to Business plan business Plan Builder	Host Introduction to BPB	Introduce attendees to Technical Assistance Services, 10 businesses in attendance	1 Hours Council Participation	March 11, 2021
20.	Introduction To TAS	Meet with Eco Innova Inro	Introduce Eco Innova Inro to Technical Assistance Services	1 hour Council participation	March 16, 2021
21.	One on One Training	Meet with Darrell Bryant	Discuss and implement Next Steps for AA/D and Sons Transportation Group Next Steps for Demarche Consulting Group	1 hour Council participation	March 17, 2021
22.	One on One Training	Meet with Pedro Garza	Discuss and implement Next Steps for Dyna Glide	1 Council Participation	March 17, 2021
23.	Opportunity Search Session	Host Opportunity Search Session	Teach attendees to find City opportunities	2 Hour Council Participation	March 17, 2021
24.	Introduction To TAS	Introduce Simon Kennedy to Technical Assistance Services	Introduce Dynabuild to Technical Assistance Services	1 Hour Council Participation	March 18, 2021

	Council Action	Council Activities	Council Purpose	Committed Hours	Date
25.	Basic Business Plan Builder and Marketing	Trio Group to host BPB session	Instruct attendees on the Basics of business plan development, 4 firms in program.	3 Hour Partner Participation	March 18, 2021
26.	One on One Training	Meet with Simon Kennedy	Discuss and implement Next Steps Dynabuild	1 Hour Council Participation	March 19, 2021
27.	Ascend Seattle Program	Foster School of Business to host session	Instruct businesses in commercial construction and affordable housing. 6 businesses in program	8-hour Partner participation	March 19, 2021
28.	Next Steps	Meet with Mila Dorosh	Discuss and implement Next Steps for Boss Makes You Go Training	1 hour Council participation	March 23, 2021
29.	Next Steps	Meet with Vance Ashworth	Discuss and implement Next Steps for The Maximizer	1 hour Council participation	March 23, 2021
30.	March Mixer	Attend Seattle Southside Chamber of Commerce March Mixer	Introduce Chamber members to Technical Assistance Services Program, 16 businesses in attendance	1 hour Council participation	March 24, 2021

	Council Action	Council Activities	Council Purpose	Committed Hours	Date
31.	Kinect at Burien Subcontract or Outreach	Attend Kinect at Burien	Introduce attendees to Technical Assistance Services program, 23 businesses in attendance	1 hour Council participation	March 25, 2021
32.	Basic Business Plan Builder and Marketing	Trio Group to host BPB session	Instruct attendees on the Basics of business plan development, 4 firms in program.	3-hour Partner participation	March 25, 2021
33.	Introduction To TAS	Meet with Precious Williams	Introduce Perfect Pitches by Precious Williams to Technical Assistance Services	1 hour Council participation	March 30, 2021
34.	Basic Business Plan Builder with Trio Group	Trio Group to host BPB session	Instruct attendees on the Basics of business plan development, 4 firms in program.	3 hours Council participation	April 1, 2021
35.	First Friday	Attend First Friday	Introduce TAS to Participants. 13 businesses in attendance	2-hour Council participation	April 2, 2021
36.	Ascend Seattle Program	Partner provided training through University of Washington	Loan Readiness and Decision Making. 6 attendees	8-hour Council participation	April 2, 2021

	Council Action	Council Activities	Council Purpose	Committed Hours	Date
37.	Working Washington Round 4 Grants Info	Attend Working Washington Round 4 Grants Info	Acquire information about WA grants and increase TAS ability to be a resource	3 hours Council participation	April 2, 2021
38.	Introduction to TAS	Meeting with City of Seattle IT	Share TAS program and understand IT needs	.5-hour Council participation	April 5, 2021
39.	Introduction to TAS	Virginia Fullwood	Introduce TAS to Resourcing Growing Consulting Firm	1 hour Council participation	April 5, 2021
40.	Introduction to TAS	Meeting with Joy Egbejimba	Introduce Nuciano to the TAS program	1 hour Council participation	April 5, 2021
41.	Contracting with the City of Seattle Review	Meet with event presenters	Prepare presenters for Contracting with the City of Seattle event	1 hour Council participation	April 6, 2021
42.	Business Plan Builder with Trio Group	Trio Group to host BPB session	Instruct attendees on the Basics of business plan development, 4 firms in program.	3-hour Partner participation	April 8, 2021
43.	Opportunity Search Session	Host Opportunity Search Session	Teach attendees to find City opportunities	2 Hour Council Participation	April 14, 2021
44.	Ascend Seattle Program	Host Contracting with the City of Seattle	Strategic Planning. 6 attendees	8 Hour Council Participation	April 16, 2021

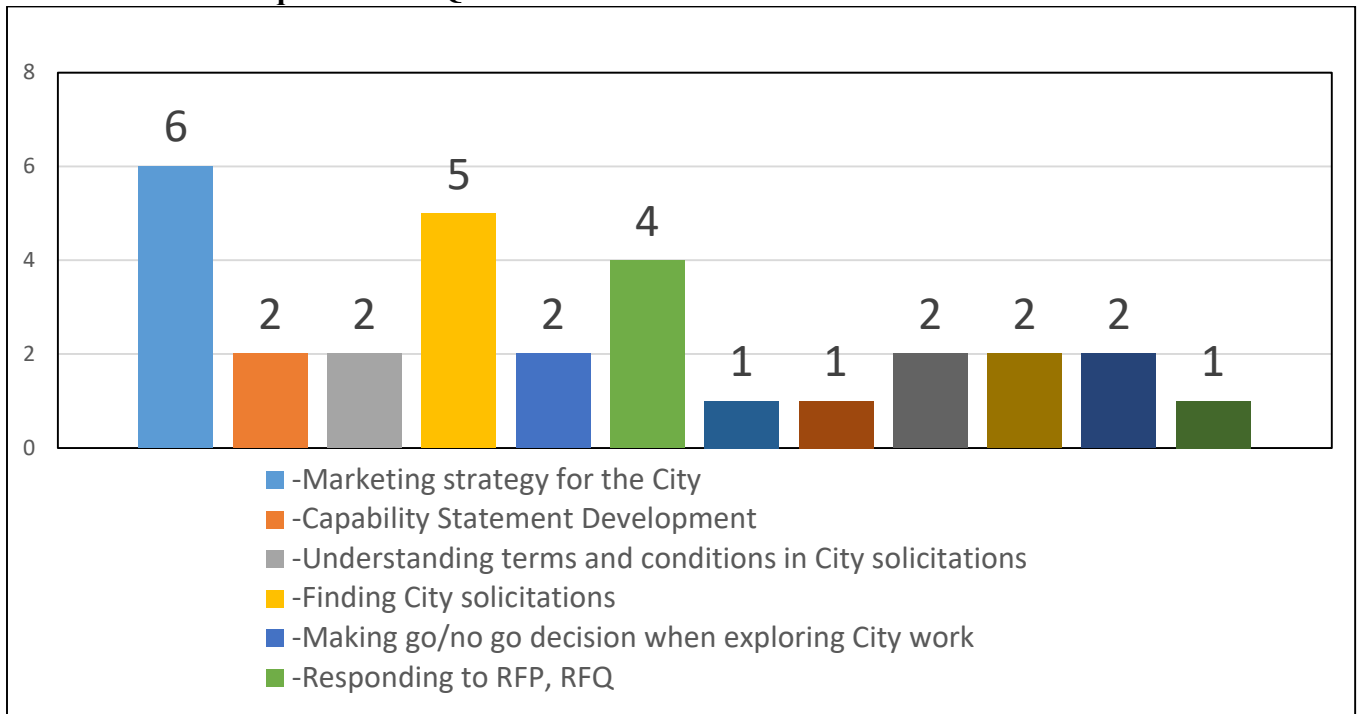
	Council Action	Council Activities	Council Purpose	Committed Hours	Date
45.	Introduction to TAS	Meeting Breanna	Introduce High Level to Technical Assistance Services	1 Hour Council Participation	April 19, 2021
46.	Business Plan Builder with Trio Group	Trio Group to host BPB session	Instruct attendees on the Basics of business plan development, 4 firms in program.	3-hour Partner participation	April 22, 2021
47.	Contracting with the City of Seattle	Host Contracting with the City of Seattle	Provide understanding around terms, conditions and clause found in City contracting. 8 businesses in attendance.	2 Hour Council Participation	April 29, 2021
48.	Business Plan Builder with Trio Group	Trio Group to host BPB session	Instruct attendees on the Basics of business plan development, 4 firms in program.	3-hour Partner participation	April 29, 2021
49.	Ascend Seattle Program	Partner provided training through University of Washington	Capacity collaboration and scaling. 6 attendees	8-hour Council participation	April 30, 2021
50.	Introduction to TAS	Meeting with Tiffany Scroggs and Team	Introduce PTAC team to TAS services find areas of collaboration	1 hour Council participation	April 30, 2021

	Council Action	Council Activities	Council Purpose	Committed Hours	Date
2 nd Quarter	50 Total Actions	50 Activities	Activities contributed to introduction to 69 individuals and firms	447 hours of TAS instruction of 7 firms	
1 st Quarter	45 Total Actions	45 Total Activities	Activities contributed to introduction to 126 individuals and firms	89.5 hours of TTAS instruction of 22 firms	
Aggregate	95 Total Actions	95 Total Activities	Activities contributed to introduction to 195 individuals and firms	536.5 hours of TAS instruction of 29 firms	

Numbers in final highlighted row are adjusted to disallow the count of City staff and other individuals/firms that do not meet TAS eligibility.

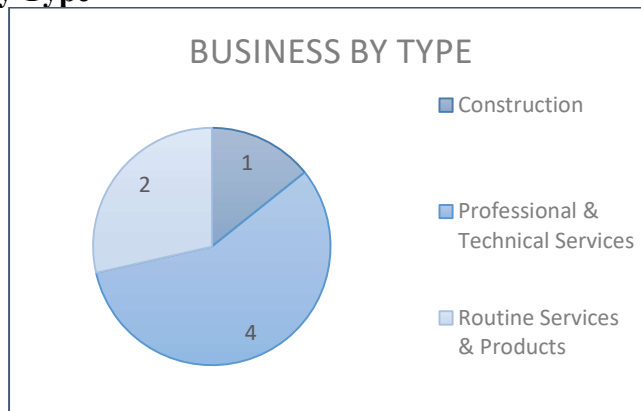
Metric Summary

Table 2: Services Requested this Quarter.



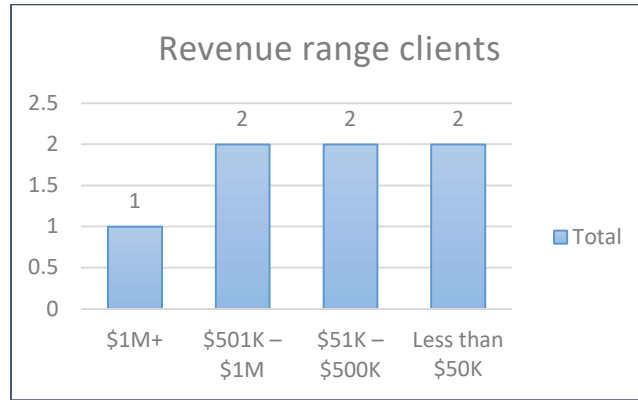
Throughout the duration of the second quarter, we notice an increase of part time employee utilization from 28% to 58%. This was an anticipated reaction by small businesses to reduce overhead while retaining staff.

Table 3: Businesses by Type



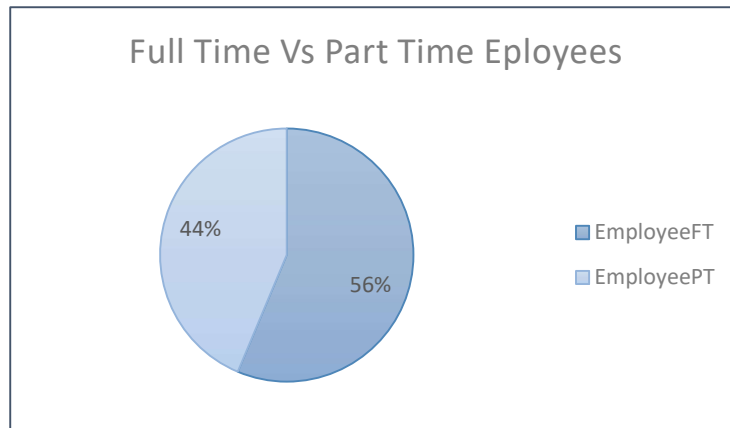
Consulting firms make up 63% of all firms enrolled into the TAS program. Construction firms make up the smallest business type enrolled into the TAS program.

Table 4: Businesses by Annual Revenue



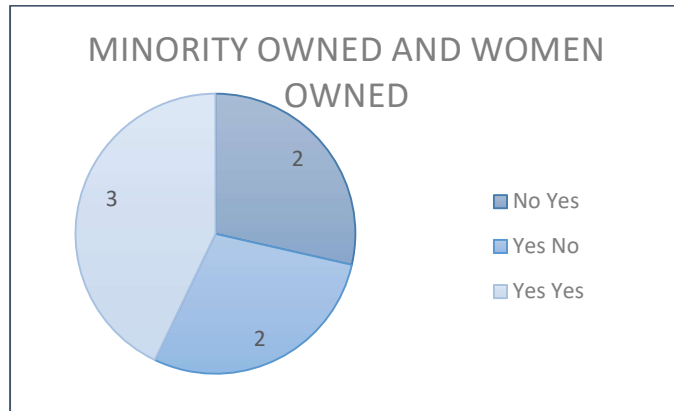
Throughout the second quarter we noticed that businesses enrolled into the TAS program are typically split between two revenue tiers, firms that earn below 500k and those that earn above 500k. This quarters enrollee is a perfect example of this 50/50 split.

Table 5: Employees: Full time vs Part Time



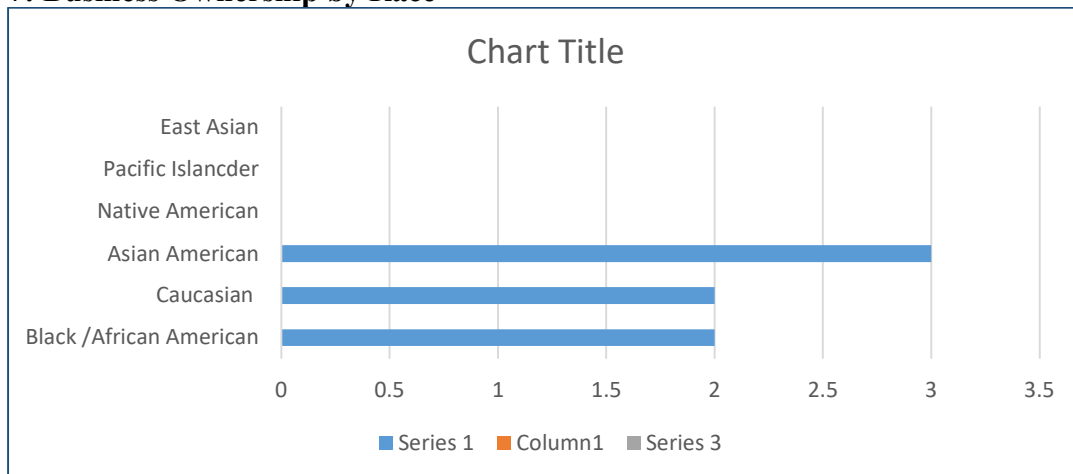
Throughout the duration of the second quarter, we noticed an increase of part time employee utilization from 28% to 58%. This was an anticipated reaction by small businesses to reduce overhead while retaining staff.

Table 6: Minority and Women owned Firms.



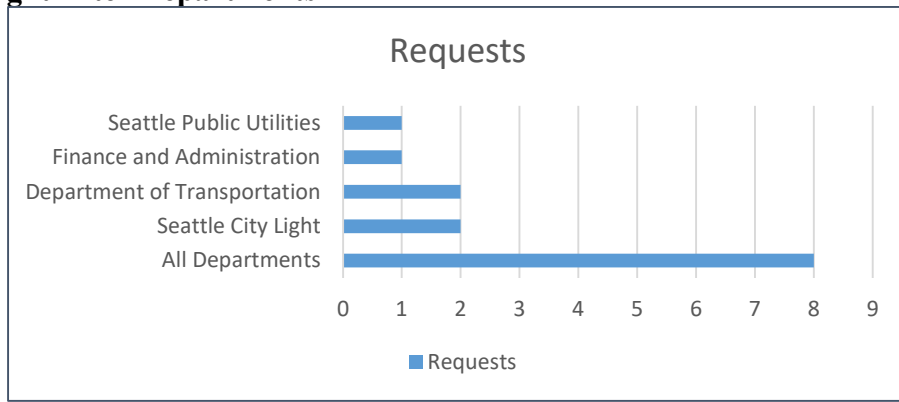
In the month of February and March there were four nonminority women enrolled into the TAS program. April saw one minority male owned firm and three minority women owned firms enrolled in April.

Table 7: Business Ownership by Race



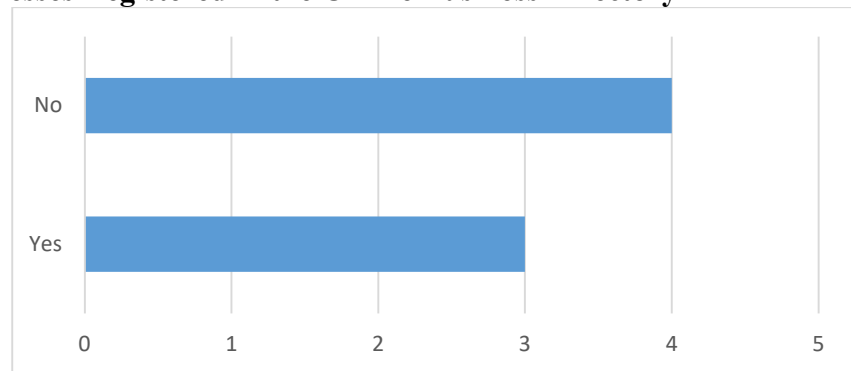
TAS continues to recruit SWMBE firms to the program. Attention is focused in the area of recruiting Native and East Asian owned firms.

Table 8: Sought After Departments



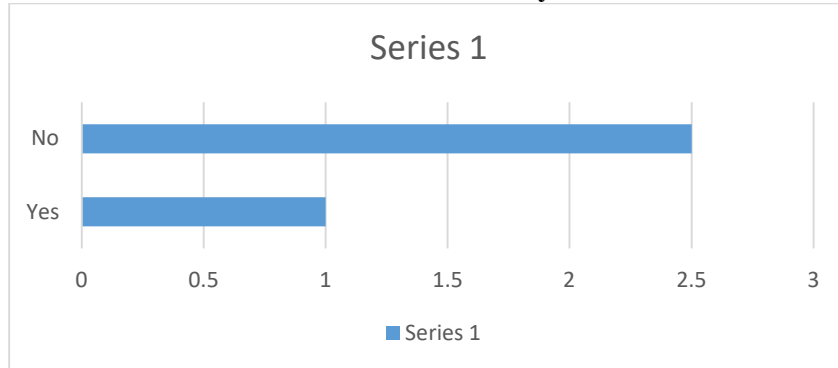
All departments seem to be the primary pursuit, followed by others Seattle City light and Seattle department of Transportation are both well sought-after departments having two requests each, Followed by Seattle public utilities and Finance & administration.

Table 9: Businesses Registered in the Online Business Directory



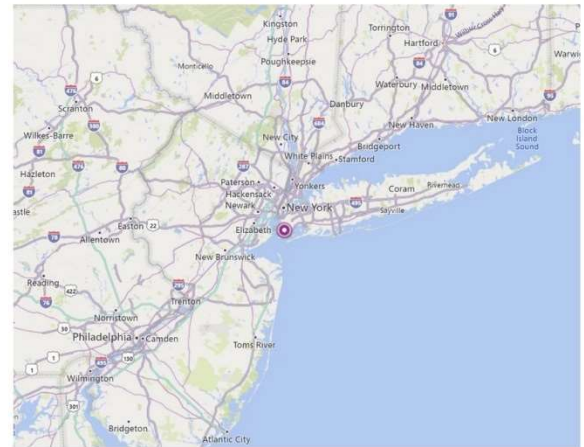
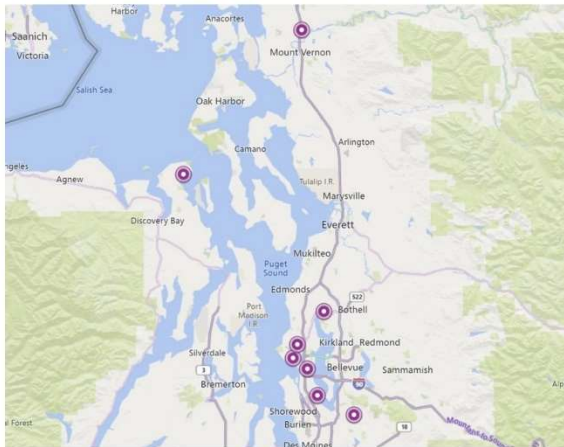
Those companies registered in the online business directory represent half of all businesses enrolled.

Table 10: Businesses that have Contracted with the City of Seattle



Only one firm, Pivotal Consulting, has experience working with the city of Seattle through sole source contract.

Map 1: Serving Businesses Locally and Nationally.



TAS are provided to all businesses that would like to Contract with the City of Seattle. We are currently serving businesses from as far east as Brooklyn, NY and as far west as Port Townsend, WA.

Training

Opportunity Search Sessions

Biweekly search sessions instruct small businesses how to find solicitations that fit the business' expertise. Additionally, the session instructs the businesses how to find past and current contracts to support developing a more accurate approach to bidding. Firms learn how to use Seattle.gov tools, including, but not limited to, contract search, Procureware and Consultant Connection. This training is provided as a direct response to TAS enrollee requests.

One-on-One Training

Outside prescheduled training events giving TAS participants that are unable One-on-one sessions allow for curriculum-based and non-curriculum-based training to be shared outside of prescheduled training events. This gives those individuals that are unable to attend group sessions, the ability to receive the same training as would be provided in group sessions. The flexibility in delivery ensures that our firms have multiple training options.

City Contracting and Responsibilities

TAS participants begin to understand contracting vehicles used by the City of Seattle to administer Consulting, Contracting, and Product and Services contracts. Firms also become familiar with terms and conditions Firms learn about the various types of contracting vehicles used across the three business types which typically serve the city, consulting, construction and routine products and services. Firms will also gain familiarization with the terms and conditions commonly found in city contracts and the firms responsibility. This training is designed to help business owners understand contractual agreements with the City of Seattle.

Financing your business for growth

Led by a panel of financial professionals TAS participants are introduced the subject of "Financing your Business for Growth." This forum covers three main areas of finance: personal/business credit; choosing the right banker; and understanding lending tools

available that best meets their business needs. This training session is intended to increase SWMBE financing awareness.

Certification Workshop

Firms are introduced to the Office of Minority and Women Business Enterprise, Northwest Mountain Minority Supplier Development Council, and the City of Seattle self-certification process. Attendees learn the similarities and differences as well as the intended utilization of each certification. The training helps businesses to use certifications to the advantage of the business.

Marketing to the City

TAS participants are introduced effective marketing concepts, methodologies, and available tools. Businesses learn about the various types of marketing/collateral materials that most effectively attract their target audience. This training is specifically designed to help SWMBEs improve their City of Seattle marketing strategy.

Contracting with the City of Seattle

New to the City of Seattle contracting, this training helps SWMBEs understand the beginning stage of engagement. SWMBEs learn how to: register on the Online Business Directory; locate City of Seattle contracting opportunities; and begin to familiarize themselves with contracting terms and conditions.

Firm Survey Responses

Technical Assistance Services program has led to many (how many?) SWMBES firms contract with the City of Seattle. Through the SWMBEs training journey, several have received certificates of completion. In partnership with the Univ. of WA Foster School of Business Consulting and Business Development Center 8 participants have received certificates of completion. In partnership our Marketing Partner the Trio Group, we have designed the Small

and Minority Business Plan Builder. Three participants have completed the program and received a certificate of completion.

Elite Performance and Learning Center, PS.

Revenue: No increase in Revenue

Workforce: Onboarded engineer

Barriers: Financing continues to be a hurdle for this organization. A capital investment of \$3-5M would help. when meeting new client's owner experiences discrimination due to appearance/religion.

Success: Onboarding new engineer fulfilled two needed technical positions, costs of units have reduced by half

First Metals

Revenue: Revenue increase 300k 2015, 1.5M 2020 tracking 2.5 2021

Workforce: Onboarded engineer

Barriers: As a supplier, unable to compete with low bids. Unable to leverage SWMBES status.

Success: Currently contracted to provide custom metal fabrication for 3 large construction Firms. (company names not disclosed)

DLB Enterprises

Revenue: No increase in revenue

Workforce: No increase in Staff

Barriers: When looking for contracts it was observe that there are a handful of suppliers that are contractually utilized for 5-10 years.

Success: Currently fulfilling a Seattle City light contract.

USArchive & Imaging

Revenue: Revenue increased (amount not disclosed)

Workforce: No increase in Staff

Barriers: Locating past project managers was an issue prior to TAS program. Marketing Continues to be a hurdle.

Success: Currently Servicing Contract with Seattle Police Department

Jones and Associates

Revenue: Revenue increased (amount not disclosed)

Workforce: No increase in Staff

Barriers: Greatest barrier was getting to the desired decision maker, building a rapport

Success: Currently Servicing Contract with City of Seattle

Certifications

The Technical assistance Services program has assisted many small businesses in contracting with the city of Seattle. Some of the training provided leads to certification. Thus far the TAS program has helped to certify 8 Businesses through the University of Washington Foster School of business Ascend Seattle program. TAS has Also helped 3 small businesses to receive certification through the Trio Groups Small and Minority Business plan Builder program.



Zavere Weeks
Technical Assistance Services Consultant

Sincerely,

Zavere Weeks
Technical Assistance Services Consultant
Northwest Mountain MSDC