

PROPOSAL

Cover Letter

Thursday, April 4, 2024

Revby LLC
75 Arlington St., Suite 500
Boston, MA 02116
michael@revby.co

City of La Crosse
400 La Crosse Street
La Crosse, WI 54601
emslej@cityoflacrosse.org

Re: RFP American Rescue Plan Act (ARPA) Funding for Small Business Organizations

Judy Emslie:

Revby LLC is pleased to submit our proposal to the City of La Crosse for small business assistance services. Our team is experienced and qualified to provide small business technical assistance (TA) to diverse small business owners. We provide business planning services to established and start-up small businesses and microenterprises. The small businesses we work with are often minority, women, immigrant, and LGBT -owned and those located in lower-moderate income (LMI) neighborhoods. It is our mission to create and deliver TA designed for diverse audiences, including those with limited financial, technical, and other business acumen. Many of our TA programs are funded by ARPA, CDBG, or other federal sources. We are experienced and have the capacity to comply with federal reporting guidelines. Our reports are designed in collaboration with our municipal partners.

Revby is qualified to provide business consulting services in the following areas:

- Access to Capital
- Accounting / Bookkeeping / QuickBooks
- Business Planning
- Financial Advising
- Human Resources (employee recruitment, engagement, and retention; HR software)
- Marketing and Sales
- Operational Excellence
- Strategic Planning
- Workforce/Talent Development
- Technology Consulting (e.g., CRM, project management, POS system, and eCommerce)
- Graphic Design (e.g., logo design, branding, web and social content, etc.)

Revby LLC is an MBE-certified business with the Commonwealth of Massachusetts's Supplier Diversity Office. We are a certified LGBT-owned business with the NGLCC (National LGBT Chamber of Commerce).



Michael Aparicio, Founder and CEO, Revby LLC

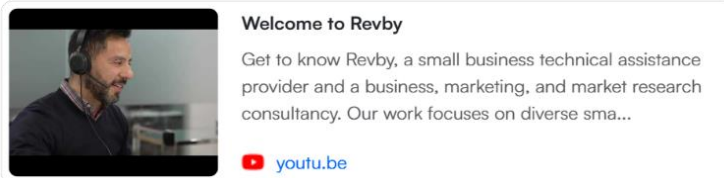
General Information and Proposal Overview

Primary contact:

Michael Aparicio
Founder and CEO
michael@revby.co
617-553-4343

We are registered at Sam.gov.
UEI: JLDTVXGEZTJ7

A video introduction to our company and the work we do may be viewed [here](#).



Brief synopsis of the Project to be supported/Purpose of the Request (1-2 sentences)

Revby's proposal is to provide one-on-one small business technical assistance (business planning, marketing, financial analysis, general business management assistance) to La Crosse small business that fit the eligibility criteria for ARPA funding technical assistance. We will establish an application process to qualify small businesses and microenterprises (less than 25 employees, for example) that have demonstrated a financial hardship due to the Covid-19 pandemic.

Anticipated number of businesses served.

10-25 businesses.

Qualified Census Tracts served and/or other ARPA eligibility requirements being met.

We will create an application with a set of questions for business owner applicants can attest to a financial hardship due to the Covid-19 pandemic. Financial hardship will be defined as having experienced decreased revenue or gross receipts, financial insecurity, increased costs, capacity to weather financial hardship at risk, challenges covering payroll, rent or mortgage, and other operating costs. A Covid-19 hardship attestation with signature and notary can also be implemented for ARPA compliance.

We will request a copy of a business license to confirm business location and identify if the business is located in a qualified census tract for priority.

Project Start and End date

We are prepared to begin work as early as May 1, 2024 and have our project run through December 15, 2024. We can be flexible on end date according to the City of La Crosse's preferences.

Total Project Cost and Amount Requested

We have prepared three project cost amount requests, tiered on number of businesses served.

10 businesses through one-on-one technical assistance: \$33,000

15 businesses through one-on-one technical assistance: \$45,000

25 businesses through one-on-one technical assistance: \$65,625

Our project cost requests to City of La Crosse represent 80% of the total project cost. Expenses that are NOT included in our request and will be covered by Revby's general operating budget, funding by retained earnings, are the following:

- Administrative / Reporting / Back Office Tasks
- Software
- Office overhead
- Travel budget

Detailed figures are provided in the Project Budget section of our proposal.

Request Details

The following statement and sub-sections addresses our statement of need, proposed work, our impact objectives, partner plan, and organizational fit.

Revby's broad experience working with small and medium sized municipalities across the country makes our firm uniquely prepared to assist businesses with business recovery, resilience, and strategic expansion as intended through this program. Although not based in La Crosse, one of our senior consultants has visited La Crosse and has family connections at UWL and across Wisconsin. La Crosse and its small business community bear striking similarities to medium sized towns across Wisconsin. La Crosse's local economy has been anchored by generations of German Catholic and Scandinavian Lutheran workers, contributing to the city's heritage of industry. However, La Crosse has also faced a historic economic shift as its chief employers have shifted from industrial manufacturing and production (Cargill, Heileman Brewery/LaCroix, agriculture), to healthcare, services, and education (KwikTrip, Mayo Clinic, Gundersen Health, UWL, banking and financial services). These new employers have attracted new and diverse workers to La Crosse, as well as molded the existing residents of the city, as shown by La Crosse's growing young, diverse, and college-educated population. As a similar shift has played out across the US, industry towns from Massachusetts to Kansas have seen a corresponding change in the dynamics of their local residents, consumers, and small business economy. Revby has discovered that it is small and community-centric businesses that struggle the most to adapt to this environment of expensive credit, digital marketing, and changing demographics, and we specialize in guiding these businesses in capturing new customers and reexamining their operations so they may continue to thrive in the future.

When working in a community, we often partner with local entrepreneurial ecosystem organizations, such as SCORE, a local SBDC, and a local non-profit with an overlapping audience, to coordinate collaboration on program marketing outreach and ensuring differentiation in programming. We have experience with this approach in Tacoma, WA and Lynn, MA, for example. This will be part of our plan for this project.

The following represent *examples* of the subject matter we plan to focus on through our proposed technical assistance, which can be delivered virtually through video conference and in person.

Technical Assistance Service Area	Example Methodology & Deliverables (Scopes of Work are tailored to fit the specific needs of the business owner and program budget)
BUSINESS PLANNING & OPERATIONS/TECHNOLOGY:	<ol style="list-style-type: none"> 1. Evaluate which one or more of the following business plan elements: <ul style="list-style-type: none"> • Uncover the company’s mission and values / brand story. • SWOT analysis / Market research / competitor analysis. • Value proposition development. • Customer segments, inbound & outbound marketing plan. • Operations and technology plan; Lean principals. • Staff needs and capabilities / workforce management plan. • Industry-specific knowledge development. 2. Work alongside business owners to develop an understanding of these elements and how they fit in their unique environment. 3. Create a living document with actionable steps and recommendations for informed and focused decisions on their business.
FINANCIAL ANALYSIS, FINANCIAL MANAGEMENT, AND ACCESS TO CAPITAL:	<ol style="list-style-type: none"> 1. Evaluate business financial documents (income statement, cash flow, and balance sheet) and assess their current situation. 2. Evaluate and assist with implementation of financial elements: <ul style="list-style-type: none"> • Review general financial structure, including banking set up. Bookkeeping and accounting software setup. Training on expense categorization. • Provide financial modeling and analysis reports. Discuss sales targets by customer segment and sales execution strategies. • Provide guidance on how to source capital from various sources. • TA on loan application, due diligence, and loan readiness.
MARKETING, ADVERTISING, BRAND/GRAPHIC DESIGN, WEBSITE:	<ol style="list-style-type: none"> 1. Conduct an audit of the business’s current digital presence, website, technology infrastructure, and use of a digital marketing plan. This includes review of Google Business Profile and social media accounts. 2. Provide a report and conduct brainstorming sessions to help the business owner improve digital presence. 3. Assess marketing opportunities that match their business type, stage, and budget. Introduce marketing KPIs / metrics. <ol style="list-style-type: none"> a. Create a marketing plan that includes Inbound Marketing (i.e., social media, landing pages, Google Business Profile, etc.) and Outbound Marketing (i.e., sales outreach, conferences). 4. Introduce SaaS platforms that are relevant to the business type and strategic goals / metrics (CRM, POS system, other software). 5. Training and maintaining on a website or eCommerce platform. Assistance with website improvements.

Similar Program Experience

1. **City of Boston, Office of Economic Opportunity and Inclusion, Boston, MA**
Scope: Provide small business technical assistance in the areas of business planning, financial analysis and modeling, marketing, operations, technology, website development, and general management to business owners based in lower-moderate income

neighborhoods of Boston.

Work Experience Examples:

- Revby provided TA in Spanish to help a business owner with a strategy and customer acquisition plan. Revby assisted in website revision, brand development, and bookkeeping. **The work resulted in new revenue that exceeded expectations for the year.**
- Revby provided TA in Spanish for a business owner who needed help to develop a business strategy and customer acquisition plan. Revby managed a transition from one eCommerce site to a Shopify account. **The work resulted in an increase in eCommerce revenue.**
- Revby curated and led a 12-week Entrepreneurship Training Program for at-risk / court-involved young adults. The workshop training provided education, mentorship, and skills applicable for each of the participants' business ventures. **The work resulted in several new business entities created with early revenue.**

2. **Arlington Economic Development, BizLaunch's ReLaunch Program, Arlington, VA**

Scope: We provide general business advisory services and specialist services in business planning, marketing, digital marketing, digital enablement, operations, financial analysis, access to capital assistance, website development, and human resources.

Work Experience Examples:

- Affected by covid-19 business disruption, a business owner needed help securing working capital and finding alternate revenue streams. Guidance was provided on funding options and applications. A strategic plan was created to help the business owner increase delivery revenue and organizational contracts. **The work resulted in the business accessing capital.**
- Economic resilience and business model pivot planning was provided to a business that relied on tourism traffic in-store. Assistance was provided to the business so they could establish a new eCommerce operation to augment their in-store revenue stream and use that revenue to expand/hire. **The work resulted in new eCommerce revenue.**

Other small business technical assistance engagements include:

1. **Lake Champlain Lake George Regional Planning Board (LCLGRP), Lake George, NY**

Our multi-year contract with LCLGRP represents Revby's most recent rural small business technical assistance engagement. We serve small businesses located in a five-county region in New York's Adirondack area, providing TA in business planning, financial analysis, and marketing planning.

2. **The Alliance for Economic Development of Oklahoma City, Inc., Oklahoma City, OK**

We provide general business advisory services and specialist services in business planning, marketing, digital marketing, digital enablement, operations, financial analysis, access to capital assistance, website development, and human resources.

3. City of Detroit Motor City Match Small Business Technical Assistance Program, Detroit, MI

We provide general business advisory services and specialist services in business planning, marketing, digital marketing, digital enablement, operations, financial analysis, access to capital assistance, website development, and human resources.

4. City of Tacoma, Department of Community and Economic Development, Tacoma, WA

We provide one-on-one small business technical assistance in the areas of digital literacy building and digital capacity building projects. Our scopes of work often begin with business strategy work which then leads to digital marketing and online presence tangible deliverables such as website development.

5. County of Barnstable, Cape Cod, MA

We prepared small business and retail business recovery and resiliency toolkits to help Cape Cod small businesses recover from the Covid-19 pandemic. Toolkit components included digital presence, financial literacy, and general business and marketing resiliency.

Project Evaluation

Our project will have the high-level objectives of increasing a business owner's state of recovery and resilience through digital capacity and financial capacity building. Our business planning technical assistance is designed to achieve these objectives in a way that is practical and relevant for their business, their customers, and their own business goals.

Revby LLC utilizes cloud-based project management and customer relationship management (CRM) software to organize project data and reporting. We report on business type, a project's primary scope, intake summary, project milestones, quantitative outcomes, qualitative outcomes.

Outcomes include increased digital capacity in the form of online presence (website) and systems (POS system). Increased financial capacity in the form of increased revenue, new customers, new customer contacts, and other metrics defined by the business owner. Other metrics include new jobs created and improved compliance with financial or labor requirements.

Project Budget

Item	Hourly Rate	Hours per Client	# of Businesses served	Total Amount Requested
Small Business Technical Assistance (One-on-One Consulting). Inclusive of materials/deviverables to the small business / microenterprise owner client	220	15	10	33,000.00
Item	Hourly Rate	Hours per Client	# of Businesses served	Total Amount Requested
Small Business Technical Assistance (One-on-One Consulting). Inclusive of materials/deviverables to the small business / microenterprise owner client	200	15	15	45,000.00
Item	Hourly Rate	Hours per Client	# of Businesses served	Total Amount Requested
Small Business Technical Assistance (One-on-One Consulting). Inclusive of materials/deviverables to the small business / microenterprise owner client	175	15	25	65,625.00

Other costs (not included in our funding request)	Cost
Administrative / Reporting / Back Office Tasks	2500
Travel budget	3000
Software	850
Office overhead	950
	\$7,300

All our projects include "living document" deliverables so all our work can be leveraged for continued guidance and for sustainable value. We also provide additional recommendations for further learning and support.

Supporting Documents

See attached municipal client evaluations as our letters of support.

Small Business Owner Client Reviews

The following represent our 5 most recent reviews provided by small business owner clients following the completion of a technical assistance project. Please note that the reviews are unedited. Some spelling or grammar errors may be present.

1. I cannot speak highly enough of my experience with Revby. I had the pleasure of working with Shaashwat and Kristen, and from the moment I engaged with them, their down-to-earth demeanor and relatable approach immediately put me at ease. They fostered an environment where I felt comfortable being open and honest about the areas where I needed assistance. Overall, this was not just a consulting experience, it was a partnership that drove me towards my goals with clarity and confidence. I wholeheartedly recommend Revby to any entrepreneur seeking knowledgeable, personalized guidance for their business endeavors.
2. Everything was valuable. I appreciated Gergana's knowledge and experience. The plan she put together was phenomenal. She reviewed and explained the plan very well. I feel confident that I can put her ideas into action.
3. Alex was very easy to work with. He listened to my ideas and helped me to articulate them in a way that benefitted the business. I also appreciated the questions that he asked. Alex was consistent, kind, and genuinely a major help in preparing a roadmap for my business to be successful. I am so grateful for the time and opportunity to work with the incredible team at Revby!
4. It was a good experience working with Revby. I worked with a team of experts and they helped with marketing strategic plan. They did a digital audit of my website, social media platforms and gave useful feedback on wording, photos and SEO. They gave some good suggestions for ads and what to focus on for social media. They helped with branding, logo, colors and font. I even got a sample blog post for my business. They reviewed sales data and provided financial projections and operational model so I can see how to achieve sales goals. Everyone on the team was knowledgeable and the resources provided are very helpful. Overall I will highly recommend Revby.
5. Initially, I harbored skepticism about the assistance Revby could provide. I worried that the meetings and details might not result in actionable insights for my business. However, as we concluded and reviewed months of work bundled into one comprehensive package – I was blown away! The revelation that aligning my business with specific colors, fonts, and communication rules could be transformative was unexpected. Empowered with newfound motivation, I received the guidance needed to update my website, eliminate underperforming ancillary services, and optimize my Google Ads using the customer journey. The experience instilled the confidence to properly value my services and products. In essence, Revby not only may have saved my business but also revitalized my entrepreneurial spirit.

RFP REFERENCE QUESTIONNAIRE

REFERENCE SUBJECT: Revby LLC

- (1) **What is the name of the, company, organization, or entity responding to this reference questionnaire?**

City of Boston

- (2) **Please provide the following information about the individual completing this reference questionnaire on behalf of the above-named individual, company, organization, or entity.**

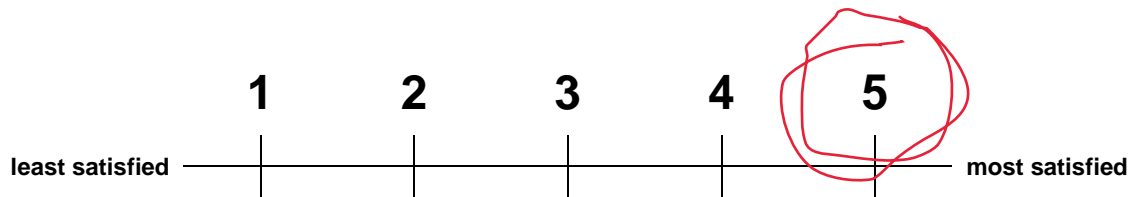
NAME:	Emily Patrick
TITLE:	Senior Neighborhood Business Manager
TELEPHONE #	617-869-1622
E-MAIL ADDRESS:	emily.patrick@boston.gov

- (3) **What goods or services does/did the reference subject provide to your company or organization?**

Revby has worked as a consultant with us for about five years, providing a variety of services to our constituents of small business owners, chiefly business strategy and business planning

- (4) **What is the level of your overall satisfaction with the reference subject as a vendor of the goods or services described above?**

Please respond by circling the appropriate number on the scale below.



RFP REFERENCE QUESTIONNAIRE — PAGE 2

If you circled 3 or less above, what could the reference subject have done to improve that rating?

- (5) If the goods or services that the reference subject provided to your company or organization are completed, were the goods or services provided in compliance with the terms of the contract, on time, and within budget? If not, please explain.**

They were yes. If there was ever a situation where the scope of work needed to be revisited or hours needed to be lengthened, there was always a conversation beforehand to make sure it was done with the City's approval.

- (6) If the reference subject is still providing goods or services to your company or organization, are these goods or services being provided in compliance with the terms of the contract, on time, and within budget? If not, please explain.**

Yes they are.

- (7) How satisfied are you with the reference subject's ability to perform based on your expectations and according to the contractual arrangements?**

Very satisfied. Revby has routinely provided exemplary service to our constituents.

- (8) In what areas of goods or service delivery does/did the reference subject excel?**

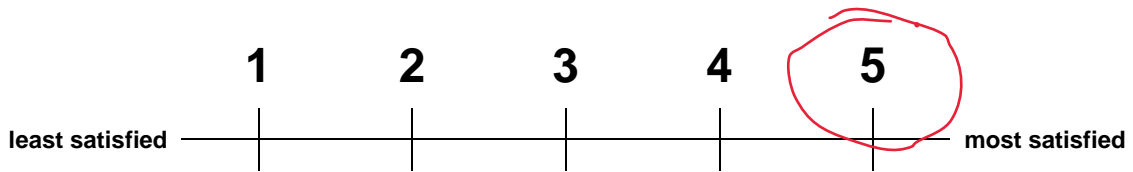
Business planning and strategy. They've also done work when it comes to coaching, financing, website building, and others.

- (9) In what areas of goods or service delivery does/did the reference subject fall short?**

NA

- (10) What is the level of your satisfaction with the reference subject's project management structures, processes, and personnel?**

Please respond by circling the appropriate number on the scale below.

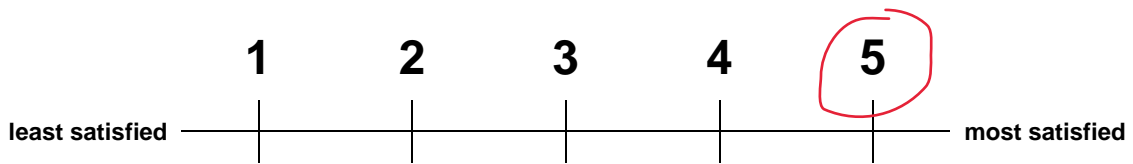


What, if any, comments do you have regarding the score selected above?

RFP REFERENCE QUESTIONNAIRE — PAGE 3

- (11) Considering the staff assigned by the reference subject to deliver the goods or services described in response to question 3 above, how satisfied are you with the technical abilities, professionalism, and interpersonal skills of the individuals assigned?

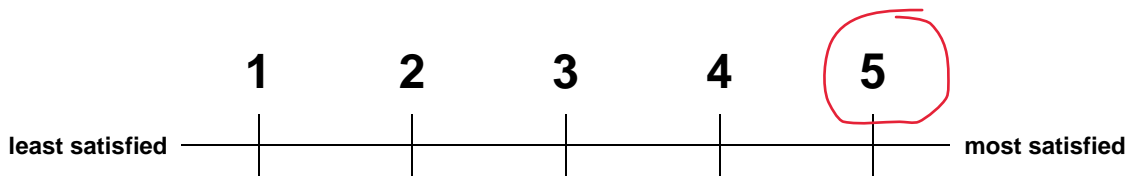
Please respond by circling the appropriate number on the scale below.



What, if any, comments do you have regarding the score selected above?

- (12) Would you contract again with the reference subject for the same or similar goods or services?

Please respond by circling the appropriate number on the scale below.



What, if any, comments do you have regarding the score selected above?

REFERENCE SIGNATURE:

(by the individual completing this
request for reference information)

A handwritten signature in black ink, appearing to read "Emily F. [unclear]". The signature is written in a cursive style with a large initial letter. Below the signature is a solid horizontal line.

DATE:

January 19, 2024

RFP REFERENCE QUESTIONNAIRE

REFERENCE SUBJECT: Revby LLC

(1) **What is the name of the, company, organization, or entity responding to this reference questionnaire?** Arlington County Government, Office of Economic Development

(2) **Please provide the following information about the individual completing this reference questionnaire on behalf of the above-named individual, company, organization, or entity.**

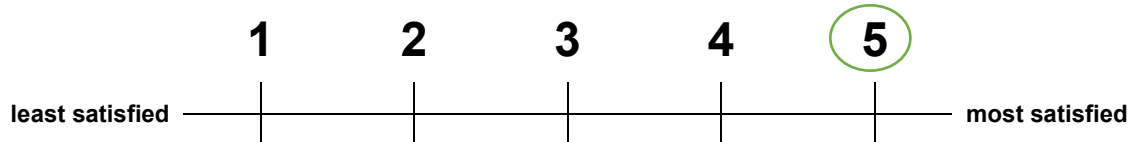
NAME:	Tara Palacios
TITLE:	Director, BizLaunch (Small Business)
TELEPHONE #	703-228-0853
E-MAIL ADDRESS:	tpalacios@arlingtonva.us

(3) **What goods or services does/did the reference subject provide to your company or organization?** Revby provides technical assistance to up to 15 small businesses throughout Arlington County as part of [BizLaunch's ReLaunch](#) program. Specifically, Revby addresses the following areas as part of the County initiative:

- **Financial Management and Sourcing Capital** — How to create a budget, ensure profitability, how and where to access capital
- **Strategic Planning** — How to build a plan for your business: product, pricing, target audiences
- **Marketing and Branding** — How to create a brand and use marketing to connect your business to your best prospects
- **Digital Presence** — Development of website or e-commerce solutions and how to use social media to grow your business
- **Basic Legal Structure, Documentation and Policy Requirements** — Ensure your business has a sound legal foundation and maintains proper records

- (4) **What is the level of your overall satisfaction with the reference subject as a vendor of the goods or services described above?**

Please respond by circling the appropriate number on the scale below.



RFP REFERENCE QUESTIONNAIRE — PAGE 2

If you circled 3 or less above, what could the reference subject have done to improve that rating?

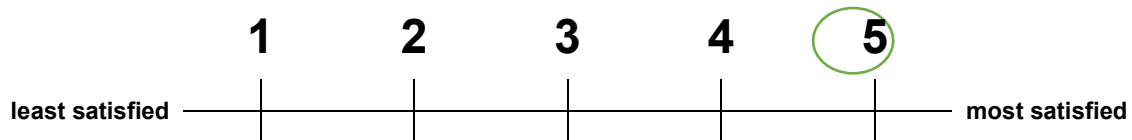
- (5) **If the goods or services that the reference subject provided to your company or organization are completed, were the goods or services provided in compliance with the terms of the contract, on time, and within budget? If not, please explain.** The ReLaunch program has been in existence since 2021. We have worked with Revby for 3 fiscal years, and they have been in compliance throughout the project. They've delivered services on time and within budget.
- (6) **If the reference subject is still providing goods or services to your company or organization, are these goods or services being provided in compliance with the terms of the contract, on time, and within budget? If not, please explain.** Yes. Revby is doing an exemplary job on the contract for the past three years. They are in compliance and the contract continues to be on time and within budget.
- (7) **How satisfied are you with the reference subject's ability to perform based on your expectations and according to the contractual arrangements?** Extremely satisfied. Our clients have provided extremely positive feedback regarding the work received. We have been making impact in our small business ecosystem.

(8) **In what areas of goods or service delivery does/did the reference subject excel?** Revby excelled in their customer service and attention to detail. They provided key tools and resources to businesses who needed direct technical assistance during the pandemic and current day.

(9) **In what areas of goods or service delivery does/did the reference subject fall short?** We did not experience a shortfall of service delivery working with Revby under our contract.

(10) **What is the level of your satisfaction with the reference subject's project management structures, processes, and personnel?**

Please respond by circling the appropriate number on the scale below.

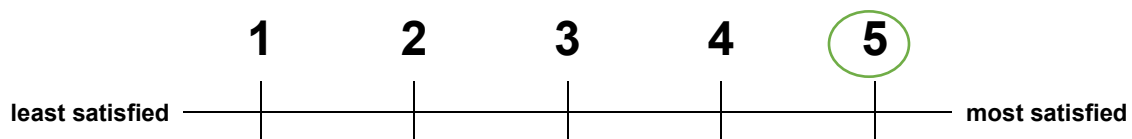


What, if any, comments do you have regarding the score selected above? We have found the Revby Team to be extremely empathetic and professional when working with our clients. They are able to meet our clients where they are – no matter the challenges to provide excellent service.

RFP REFERENCE QUESTIONNAIRE — PAGE 3

(11) **Considering the staff assigned by the reference subject to deliver the goods or services described in response to question 3 above, how satisfied are you with the technical abilities, professionalism, and interpersonal skills of the individuals assigned?** Extremely satisfied.

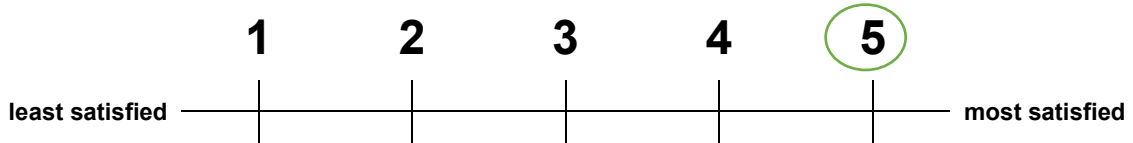
Please respond by circling the appropriate number on the scale below.



What, if any, comments do you have regarding the score selected above? Everyone on the team is extremely professional and offers 100% to the clients.

(12) **Would you contract again with the reference subject for the same or similar goods or services? Yes. I can highly recommend their organization.**

Please respond by circling the appropriate number on the scale below.



What, if any, comments do you have regarding the score selected above? I would enthusiastically agree to contract with Revby for our program. We are really pleased with the results and the positive impact they have made on our community.

REFERENCE SIGNATURE:

(by the individual completing this request for reference information)

Tara Palacios

DATE: January 18, 2024
