City Of Torrington

ECONOMIC DEVELOPMENT
(860) 496-5920

140 Main Street • City Hall
Torrington, CT 06790-5245

MEMORANDUM

TO: City Council

CC:

FROM: Rista Malanca, AICP

file

DATE: NOVEMBER 8, 2022

RE: Contract Award for small business grants and technical assistance

☐ URGENT ☐ FOR REVIEW ☐ PLEASE COMMENT ☐ FOR YOUR USE ☐ PLEASE RECYCLE

NOTES/COMMENTS:

Dear Council Members,

A RFQ/RFP to hire a consultant that would assist the City with the development and implementation of small business grants, using ARPA funds was issued. The City received four (4) proposals to the RFQ/RFP:

- Women's Business Development Council (WBDC)
- Booth Management Consulting
- LiveStories
- Brianna Regine Visionary Consulting

The ARPA Committee reviewed the written proposals and determined there were two qualified proposals WBDC and Brianna Regine Visionary Consulting. Both of these organizations were interviewed, and their fee proposals reviewed.

The ARPA Committee's recommendation is to award WBDC $500,000 of the City's ARPA funds, to provide technical assistance and grants directly to Torrington Businesses.

- $350,000 will be distributed to small businesses and start-up businesses in Torrington
- $150,000 will be used to provide outreach, technical assistance to Torrington's business community and grant administration.
- WBDC has agreed to provide $50,000 in additional grant funds to Torrington's Businesses and an additional $50,000 in administrative, marketing and staff support.

Women's Business
Development Council

Fee Proposal & Budget / City of Torrington RFP# TAG-039-091222

Name of Organization: Women's Business Development Council

Annual Expenses

Project Expenses:	WBDC Match	City of Torrington	WBDC Infratructure to be Leveraged
Salaries and Fringe 1 FT Position dedicated to Torrington, Other PT positions focused on Torrington	$ 35,400	$ 110,400	Executive, Finance, Marketing, Development, Impact, and Administrative support
Marketing/Outreach	$ 5,000	$ 12,500	Wide network of volunteers who serve as mentors, teach classes, and provide services to clients
Zoom Subscription		$ 200	Technology support for employees and clients
Specialized Consultants	$ 5,000	$ 5,000	Data and Impact Analysis regularly provided to funders
Office and Client Expenses	$ -	$ 8,260	Regional Advisory Boards made up of community members with experience in business, law, insurance, and many other fields
Administrative and General Cost (Approx 10%)	$ 4,600	$ 13,640	Online Learning Library
Total Operating Expenses =	$ 50,000	$ 150,000	Experienced grant reading committees
Grant Pool	$ 50,000	$ 350,000	Grant management software to facilitate efficient client application process
Program Total	$ 100,000	$ 500,000	$260,000+
		$ 600,000	

	Funding proposal Approved (4/4/22)	Actual/ anticipated Amount Approved	Difference	Date Approved
Administration costs				
City Grant admin	*$ 64,000.00*	$ 150,000.00	$ (86,000.00)	
NW Community Foundation for administration of Grants (est. 2% of funds)	*$ 45,000.00*	**$ 39,000.00**	$ 6,000.00	
Board of Education				
BOE: English as a 2nd language teachers, paras & tutors to address English learning students. Social workers at THS & TMS to address re-engagement and emotional support	$ 569,281.00	**$ 569,281.00**	$ -	6-21-21 (discussion) 8-16-21 (vote)
Building Improvements				
Access Control (All Buildings)				
Police	$ 95,000.00	$ 95,000.00	$ -	
Animal Control Facility	$ 1,000,000.00	**$ 1,000,000.00**	$ -	2/7/2022
Improvements to Armory				
Upgrade LED Lighting	$ 40,000.00	$ 40,000.00	$ -	
Side entrance ADA ramp	$ 15,000.00	$ 15,000.00	$ -	
Improvements to City Hall				
Technology Improvements to Council Chambers (City Hall) to improve community outreach and meeting participations	$ 125,000.00	**$ 242,485.00**	$ (117,485.00)	9/6/2022
Improvements to Fire Department (headquarters)				
Lighting	$ 57,000.00	$ 57,000.00	$ -	
VFD on motor	$ 5,000.00	$ 5,000.00	$ -	
BMS (Building Maintenance System)	$ 100,000.00	$ 100,000.00	$ -	
HVAC	$ 88,000.00	$ 88,000.00	$ -	
Lighting	$ 81,000.00	$ 81,000.00	$ -	
Security Cameras			$ -	
Armory	$ 25,000.00	$ 25,000.00	$ -	
Public Works	$ 45,000.00	$ 45,000.00	$ -	
Traffic Garage	$ 35,000.00	$ 35,000.00	$ -	
Franklin Plaza	$ 45,000.00	$ 45,000.00	$ -	
Improvements to Senior Center				
BMS @ Senior Center	$ 68,000.00	$ 68,000.00	$ -	
Community Grants				
Community Impact Grants - Rd 1	$ 875,000.00	**$ 875,000.00**	$ -	4/18/22
Community Impact Grants - Rd 2	$ 875,000.00	$ 875,000.00	$ -	
Façade Grant: Round 1	$ 286,937.00	**$ 286,937.00**	$ -	11/8/2021
Lead abatement program (TAHD)	$ 200,000.00	$ 200,000.00	$ -	
Facadde Grants: Round 2	$ 250,000.00	**$ 250,000.00**	$ -	6/20/220
Small Business & Non-Profit Direct Assistance Grant	$ 350,000.00	$ 350,000.00	$ -	WBDC - Pending
Workforce Navigator	$ 150,000.00	**$ 110,767.80**	$ 39,232.20	10/17/2022
Health Care: Community Support				
Social Care Provider: Data Collection & Strategic Plan	$ 50,000.00	$ 50,000.00	$ -	
Social Care Provider: Implementation of Study	$ 150,000.00	$ 150,000.00	$ -	
Stand up Medical Clinic to CHH	$ 36,000.00	**$ 36,000.00**	$ -	4/4/2022
Infrastructure Improvements (other than municipal buildings)				

100 Franklin Street - brownfield remediation	$ 226,500.00	**$ 226,500.00**	$ -	4/4/2022
Communications Radios	$ 2,700,000.00	$ 2,700,000.00	$ -	
Feasibility Study for Public Safety complex	$ 50,000.00	$ 50,000.00	$ -	
Police: CAD & RMS System	$ 300,000.00	$ 300,000.00	$ -	
Winsted Rd: Pedestrian tunnel - sewer improvements Winsted Rd	$ 750,000.00	$ 750,000.00	$ -	
Recreational Facilities Concept Plan	$ 50,000.00	$ 50,000.00	$ -	
Total	$ 9,801,718.00	$ 9,959,970.80	$ (158,252.80)	
Post approvals - from contingency				
CCM Printing Services for Torrington Alerts	$ 5,800.50	**$ 5,800.50**		1/3/2022
Custodian	$ 24,901.92	**$ 24,901.92**		
Printing for Torrington Alerts insert in Tax bills	$ 1,800.00	**$ 1,800.00**		6/6/2022
NW Transit District	$ 50,000.00	**$ 50,000.00**		6/20/2022
Total New	$ 82,502.42	$ 82,502.42		
Total Above	$ 9,884,220.42	$ 10,042,473.22		
Total ARPA funding to City	$ 10,074,000.00	$ 10,074,000.00		
Contingency remianing	$ 189,779.58	$ 31,526.78		

Women's Business Development Council

Fee Proposal & Budget / City of Torrington RFP# TAG-039-091222

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WBDC Infratructure to be Leveraged

Executive Finance, Marketing, Development, Impact, and Administrative support

Wide network of volunteers who serve as mentors, teach classes, and provide services to clients

Technology support for employees and clients

Data and Impact Analysis regularly provided to funders

Regional Advisory Boards made up of community members with experience in business, law, insurance, and many other fields

Online Learning Library

Experienced grant reading committees

Grant management software to facilitate efficient client application process

$100,000+

WBDC and City of Torrington Proposal

November 2, 2022

Women's Business Development Council 25 years

WBDC team

Brenda Thickett
SVP, Programs and People

Alicia De Sena
Opportunity Fund Coordinator

Objectives for today

- Introduce WBDC and our capabilities and experience
- Recap the proposal we submitted to the City of Torrington: Technical Assistance and Administration of Direct Business Grants Proposal
  - Submitted September 9, 2022
- Answer any questions you have for us

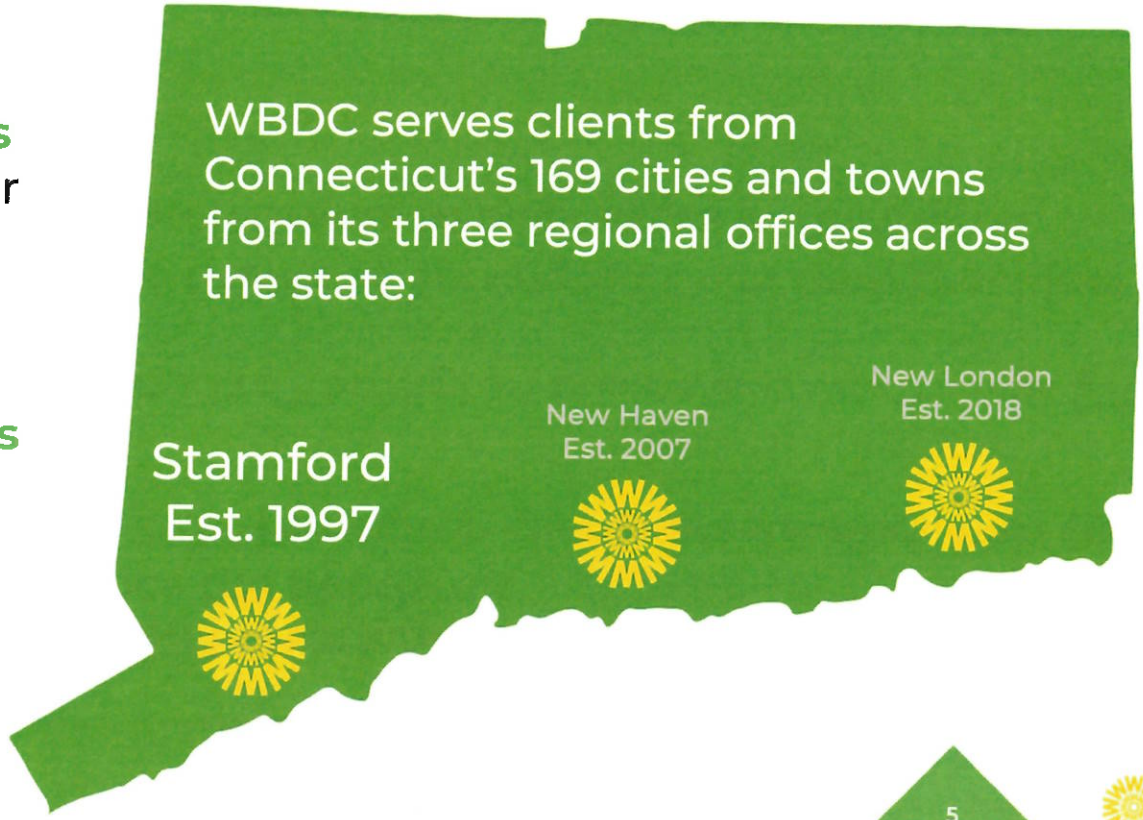
WBDC's MISSION

To strengthen and support economic prosperity for women through entrepreneurial services that create and grow sustainable jobs and businesses across Connecticut

WBDC was founded in Stamford and now has three offices in Connecticut, with strong impact across the state

12,500+ businesses launched or scaled

25,885+ jobs created or sustained



$569 million client earned revenue

$28.7 million client accessed capital

Women's Business Development Council 25 years

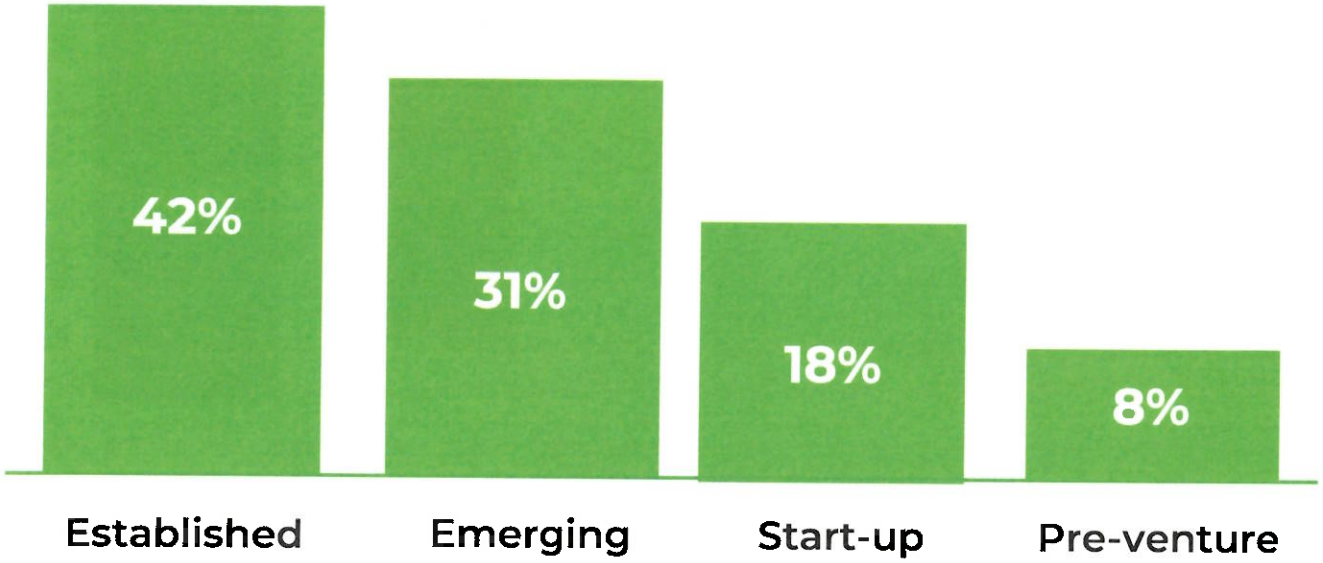
WBDC has a track record of serving businesses in Torrington

- 63 clients served in Torrington since our founding, 43 of which we have supported since the pandemic
  - 15% of our 2022 Torrington clients are located in an Opportunity Zone

- 8 grants awarded to Torrington businesses worth over $70,000 in in last two years
  - 6 Child Care Grants to Torrington Child Care providers
  - 2 Equity Match Grants to businesses in Torrington

WBDC serves all stages of businesses

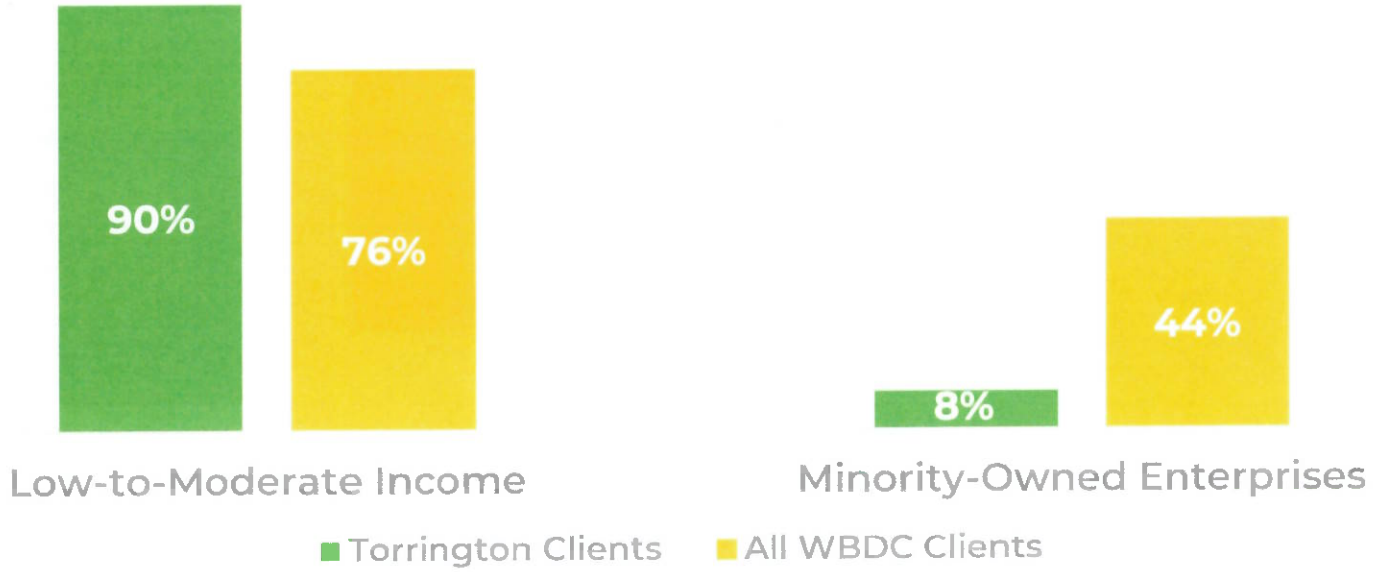
Stages of Business



Women's Business Development Council 25 years

90% of our Torrington clients are low-to-moderate income, and 8% are minority-owned businesses

Demographics



For clients served between January 2021 and September 2022 that reported demographics (19 clients for Torrington)

Women's Business Development Council 25 years

What we do: for 25 years, WBDC has served over 18,000 clients

Educate

Training, advising, and mentoring to guide aspiring, emerging, and established entrepreneurs along their growth journey

Invest

Grants and technical assistance to aspiring and established entrepreneurs through the Opportunity Fund

Cultivate

Networking among entrepreneurs to raise visibility and opportunities for their businesses

Advocate

Forums and opportunities to voice the needs and impact of women-owned businesses

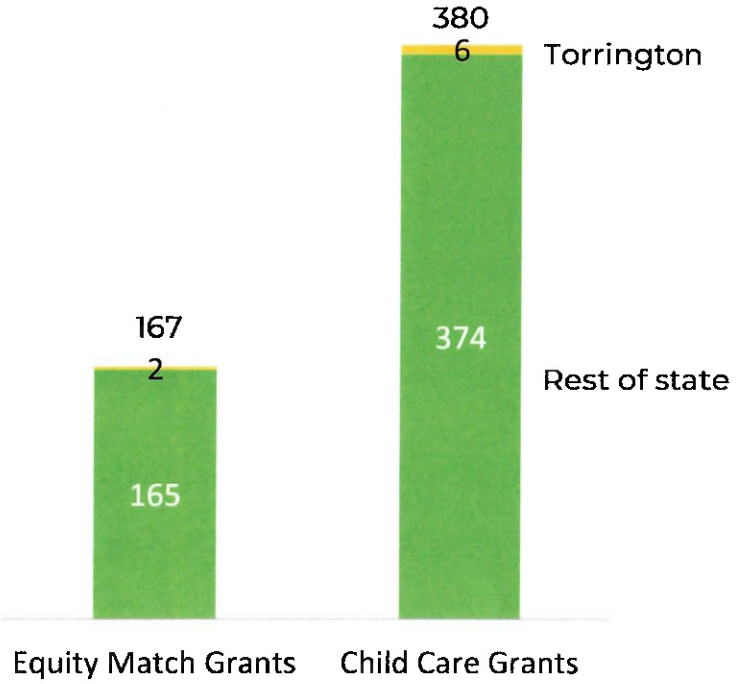
Women's Business Development Council 25 years

Core entrepreneurial training

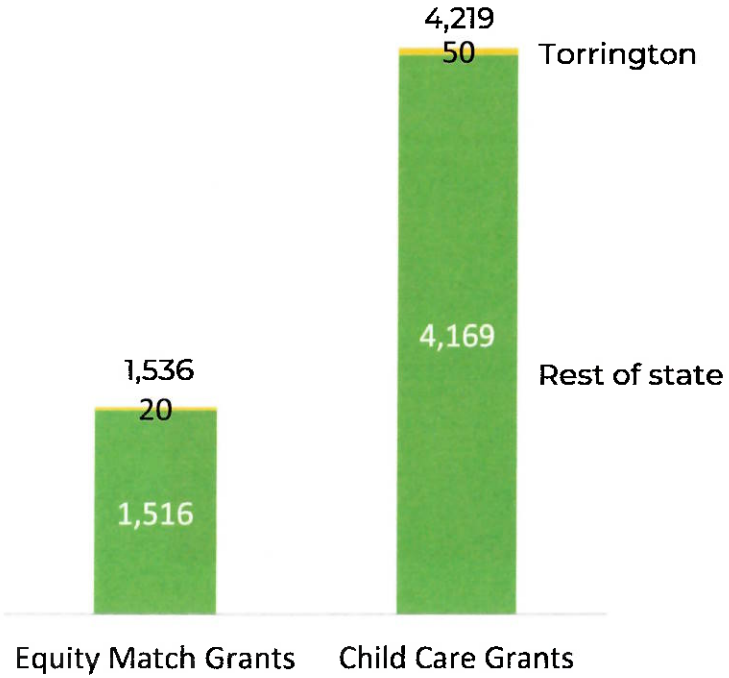
- **Classes**
  - Startup
  - Accounting & Finance
  - Sales & Marketing
  - Operations
  - Access to Capital
  - Contracting & Certification
  - Legal
- **On-demand learning**
- **One-on-one advising**
- **Mentoring**

History of success in running grant programs across the state and in Torrington in last two years

Number of grants distributed



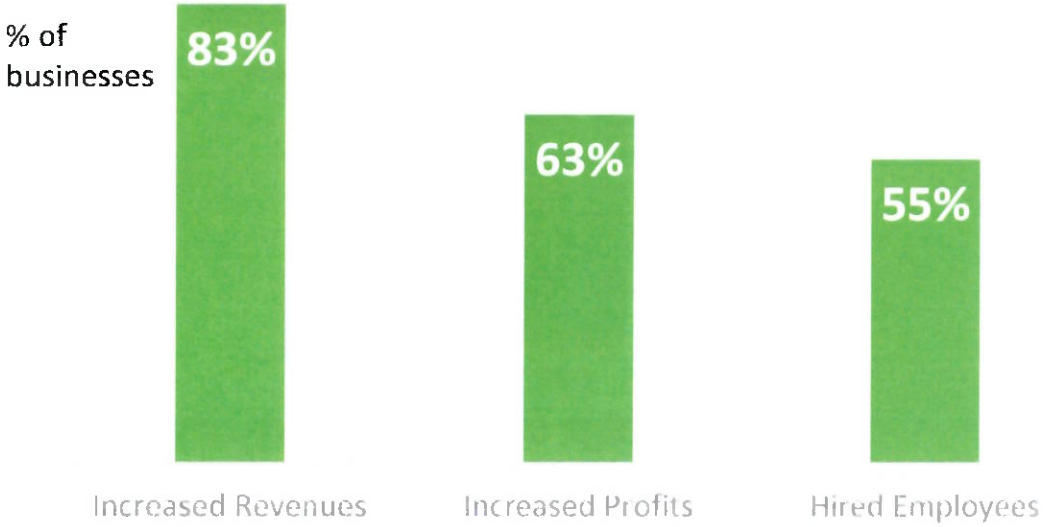
Dollar value of grants distributed, $K



Women's Business Development Council 25 years

Impact of small business grants: Strong increase in revenues, profits, jobs and access to capital based on quarterly surveys

Business Outcomes 12 months Since Receiving EMG Funds (55 businesses)



From Rounds 1 – 4
(98 businesses)

119 net jobs created across 56 companies

16 recipients have accessed 21 additional **capital infusions totaling over $1.2M**

Women's Business Development Council 25 years

Platinum Salon, Torrington CT

"The grant has helped me continue to grow my business even through the difficult times of Covid."

- Diane Landrette

Renee's Cleaning, Torrington CT

"Can't thank you enough for the lift you gave to me and my business. I was able to upgrade much of my equipment and the response from my clients has been overwhelming."

-Renee Pirie

Women's Business Development Council

Child Care program: by the numbers

1,226 clients educated

6,028 hours of education

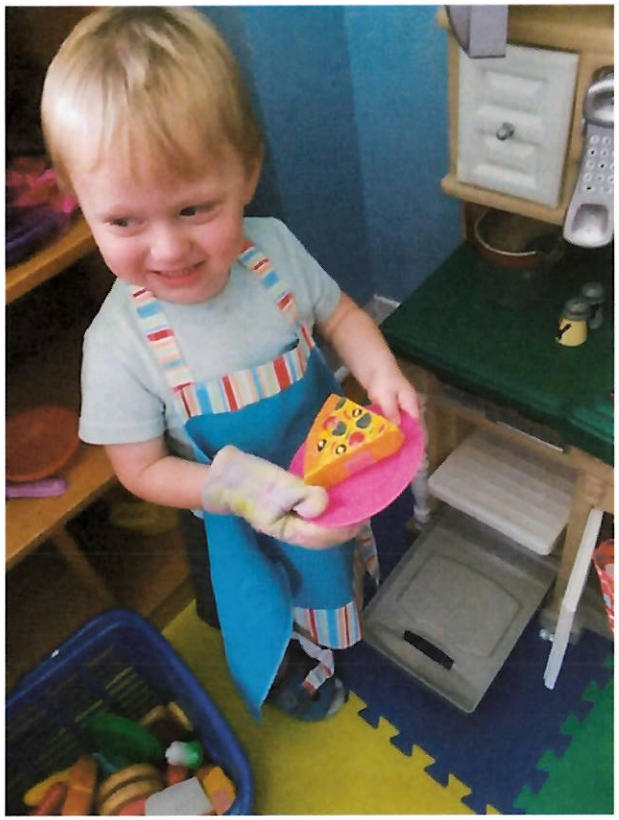
7,000+ jobs created or retained

30,000+ slots created or maintained

19 new businesses started

$8M+ capital accessed

Creative Kids Daycare



"I have **enjoyed the classes available**, and I am glad there is an organization that is **concerned about helping us succeed**. I am so extremely appreciative of obtaining the grants I have received. My families are much **happier with the safety of my play area now**. They were very concerned when it seemed that the old barn would fall. I am hoping to continue improving my area so I can bring new families into my Daycare.

Diane Matulis,
Creative Kids Daycare (Torrington CT)

Emergency, Facilities, and Business Incentive Grant Recipient, and EIDL Recipient

St. Paul's Hilltop Christian Early Learning Center

"This [Emergency Relief] grant allowed us to pay our employees during the pandemic. We were closed for 5 months and paid our staff to work from home providing online learning to our students."

Janet Mazzei,
St. Paul's Hilltop Christian Early Learning Center (Torrington CT)

Emergency and Technolgy Grant Recipient

Our proposal: $500K from the City of Torrington, supported by $100K from WBDC

Annual funding	City of Torrington	WBDC	Total
Direct grants to small businesses	$350,000	$50,000	$400,000
Fund WBDC's expert small business technical assistance, program operationalization	$150,000	$50,000	$200,000
Total	$500,000	$100,000	$600,000

Our proposal to the City of Torrington

Technical Assistance and Administration of Direct Business Grants Proposal (submitted September 9, 2022)

- Administer $350K ARPA grant program to small businesses from the City of Torrington
- $150K operating expenses to support Technical Assistance
  - Program Manager for Torrington Grant Program
  - Part time Business Advisor
  - Other operating costs
- WBDC match of up to $100K
  - $50K for operating expenses
  - $50K for grant pool
- 18 months duration of program

Will leverage 30-person state-wide WBDC team, $4M budget and 25-year proven infrastructure in support of Torrington program

- Executive, Finance, Marketing, Development, Impact, and Administrative support
- Wide network of volunteers who serve as mentors, teach classes, and provide services to clients
- Technology support for employees and clients
- Data and Impact Analysis regularly provided to funders
- Regional Advisory Board made up of community members with experience in business, law, insurance, and many other fields
- Online Learning Library
- Experienced grant review committees
- Grant management software to facilitate efficient client application process

We will expand our marketing effort to reach more businesses in Torrington

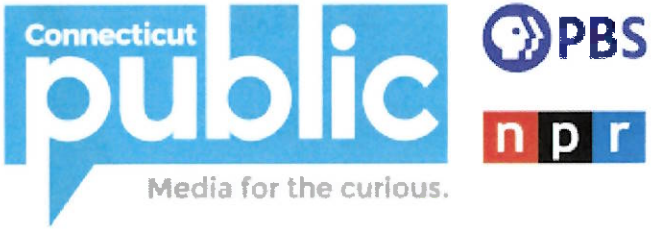
Marketing	WBDC email list Postcards and flyers
Social Media	LinkedIn, Instagram, Twitter, FB
Press	Newspapers Radio Podcast

Explain technical assistance (TA) offering

Grant program and eligibility

Highlight businesses who have received grants

Leverage existing relationships with media outlets and reporters



And leverage our relationships with partners as a trusted member of the community for over 25 years

New Program Manager role will focus on building on our existing relationships and forging new ones and be present in the community

- Northwest CT Chamber of Commerce
- SCORE Northwest CT
- Northwestern CT Community College
- Faith-based organizations
- Local bank branches
- Leverage existing WBDC clients to help spread the word

We will closely track the impact of the program

- Activity-based metrics: tracking the activity of our team
  - Number and hours of businesses advising, classes
  - Number of grant applications received
- Impact-based metrics: surveying the businesses quarterly to understand the impact of the grant program
  - Growth in revenues, profits
  - Jobs created
  - Slots created for child care businesses
  - Additional capital accessed
  - Softer metrics - e.g., expanded marketing, increased efficiency
- Tracked through our client management database, Neoserra
- And we will communicate the impact of the program in our reporting, marketing, and press

Data security: we leverage cloud-based systems with strong data security

- WBDC invests in protecting client data
  - Employ a myriad of cyber-safety tools including anti-virus and malware protection, firewall, and multi-factor authentication for all staff
- We use two cloud-based systems with strong data security, backed by encryption and SOC2 Type 2 Certification
  - Neoserra: for tracking all client activity
  - Zengine: to administer grant programs
- Carefully control who has access to client data and ensure its security
  - Two-factor authentication
  - Deletion of most sensitive files post-round

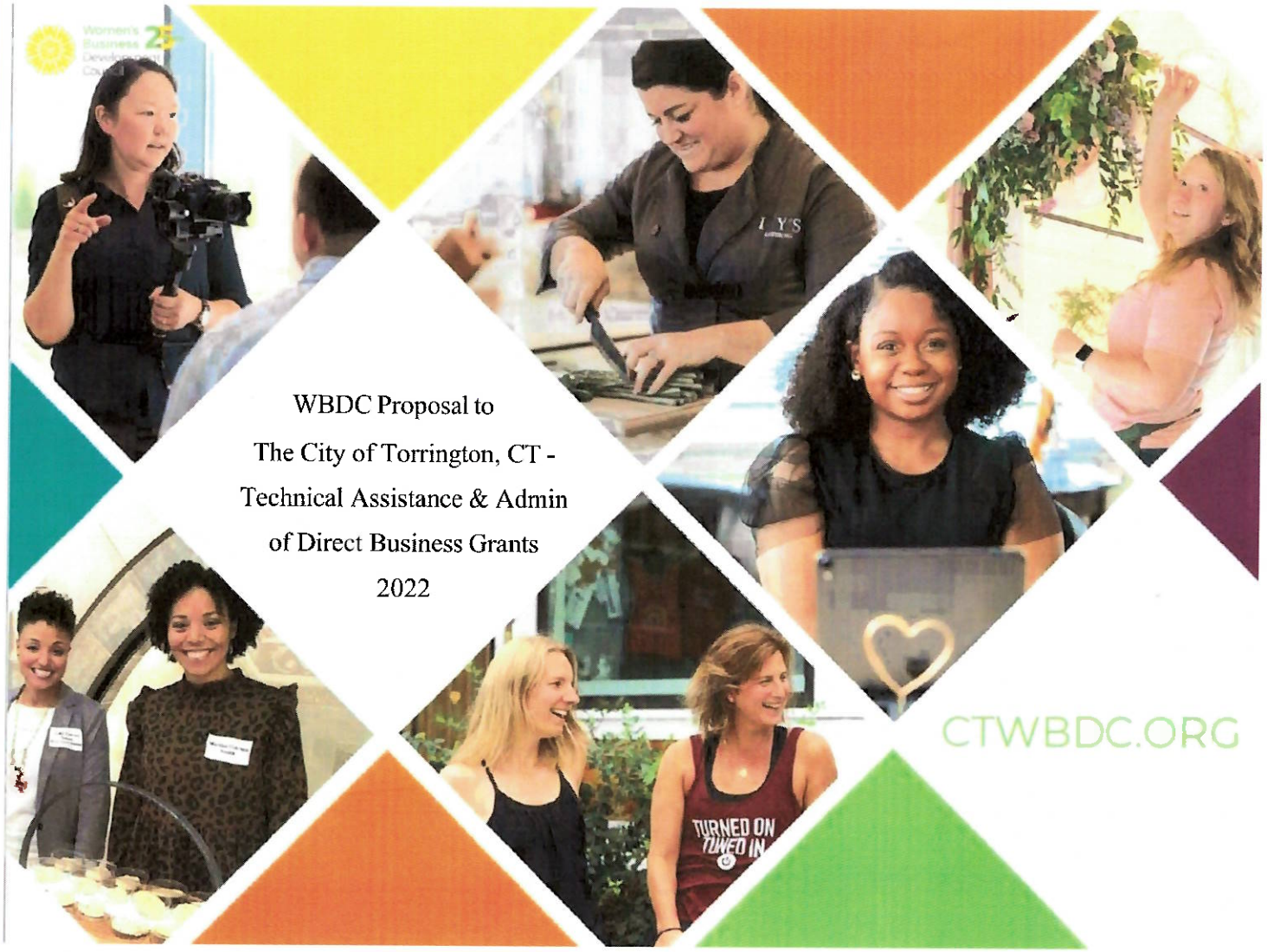
BE INSPIRED. BE IN TOUCH.
bthickett@ctwbdc.org | 203-353-1750
ctwbdc.org | @ctwbdc

RFQ / RFP #TAG-039-091222
City of Torrington – Technical Assistance and Administration of Direct Business Grants

Women's Business Development Council
184 Bedford Street, Suite 201
Stamford, CT. 06901

Authorized Contact:
Dorothy Bratchell
Title: Chief Operating Officer
dbratchell@ctwbdc.org

FEIN: 06-1493737
DUNS: 029970287



WBDC Proposal to The City of Torrington, CT - Technical Assistance & Admin of Direct Business Grants 2022

CTWBDC.ORG

Women's Business Development Council

184 Bedford Street, Suite 201
Stamford, CT. 06901

NARRATIVE: EXECUTIVE SUMMARY

The Women's Business Development Council (WBDC) – a non-profit technical assistance and grant-making organization that has been empowering small businesses in Connecticut for 25 years – respectfully submits this bid to partner with the City of Torrington as its primary consultant organization in developing and administering Torrington's $350,000 ARPA grant program for local and startup businesses.

If awarded, WBDC will manage the entire grant administration process, from outreach and pre-application technical assistance to comprehensive impact evaluation and reporting – and will allocate a $100K match from its own coffers as an investment to bolster this program's impact. The proposed grant program will be based on WBDC's existing and exceedingly successful microgrant program, which has awarded $4M to more than 365 now-thriving small businesses across the state of Connecticut since November 2020, and will be customized to achieve Torrington's specific program goals, as expressed by the City Council and City's ARPA Committee.

We envision awarding grants to at least 40 startup and established small businesses in Torrington over the next 18 months, and to providing 60 or more Torrington-based small businesses with the wrap-around technical assistance and expert training they need to sustain and grow resilient enterprises. Through targeted outreach of full-time staff; grant application design and online platform management; notice of awards and disbursement of funds; comprehensive entrepreneurial training and technical assistance to businesses at every stage of development; and project implementation support for grant recipients, WBDC will help Torrington to meaningfully grow existing small businesses, provide incentives to start-ups, and create a more sustainable and resilient small business community in a mid- / post-pandemic economy. This proposal will be valid for a period of at least 90 days after submission, and services can commence as soon as possible following award determination by the City.

METHODOLOGY

The ARPA grant program in Torrington as proposed here will be based on WBDC's successful Equity Match Grant (EMG) and *Launch Pad* microgrant programs, which provide infusions of capital to established and start-up businesses with clearly defined projects of impact. The EMG program provides microgrants up to $10K to businesses in operation for two years or more who demonstrate shovel-ready ideas that will enhance business growth; and the *Launch Pad* program provides incentivized microgrants of $2,500 to start-up enterprises who meet a standard criterion of promise and attend WBDC's Business Concept Clinic (detailed below). All applicants are also offered WBDC expert support and technical assistance throughout every stage of engagement. Past applicants have used the funds to expand product lines, purchase equipment or space, improve eCommerce capabilities, increase marketing, and more.

While the dollar amount of grant awards to each business can be adjusted based on the City of Torrington's needs, **WBDC has set the award amounts indicated above because they address an important gap in the small business community.** Small businesses typically do not require large amounts of capital to achieve their goals for business growth, yet micro-loan products are difficult to come by through both alternative and traditional lending institutions, mainly because of the high-risk nature of micro-businesses and financial institutions' reticence to make them. Additionally, low- and moderate-income clientele tend to shy away from accessing – or even applying for – traditional bank loans due to the high fees and collateral required, as well as persistent problems with poor credit scores and unimpressive cash flow. These factors have created a systemic disadvantage for low- and moderate-income business owners, and the pandemic exacerbated these challenges. By providing grants at this amount, small businesses can grow to scale and sustain; they can buy a refrigerated delivery truck or increase the size of their oven without creating unmanageable debt or unrealistic expansion. Moreover, WBDC's business advising and technical assistance prepares clients to successfully apply for loans and other sources of capital from SBA Microlenders and banks, effectively creating a pool of future borrowers.

To operationalize this program, WBDC will dedicate a full-time Program Manager staff position to Torrington, along with part-time staff efforts to market the program and engage local

entrepreneurs. Team members will leverage their knowledge of Torrington to conduct community-based outreach that effectively reaches small businesses in disenfranchised and distressed areas. WBDC will utilize a long-established network of partners and community organizations to reach those businesses and entrepreneurs in greatest need. Through regular communications with over 200 partners across multiple civic, government, social, and community-based sectors, WBDC will connect with organizations that help broaden its reach and deliver information sessions and classes to their clients and constituents. The full WBDC Marketing team and our marketing firm are also available to support the outreach and marketing efforts behind the program, with media, social media, and other marketing support.

In addition to ongoing strategic outreach to the community, WBDC will provide detailed applicant information sessions (virtually and in-person), host quarterly open application periods, and review applicants and award grants until funds are expended. Each application will be carefully screened by a diverse internal and external review committee, award / denial notifications will be made, and grant funds disbursed.

This program will use a well-designed grant application through WBDC's easy-to-use website portal. Available in both English and Spanish, the application collects a thorough spectrum of business data and financial information from applicants. This cutting-edge software has been very successful over the last three rounds of EMG and Child Care grant application periods, and applicants have had no issues uploading and submitting applications and supporting documentation through the web-based platform.

Trained staff will then conduct intake of Torrington businesses and provide tailored pre- and post-application TA. Wrap-around services for grant applicants includes customized business plan support as well as tailored counseling, financial education, mentorship, and networking. In addition to one-to-one business advising, creating access to future funding relationships, and providing Torrington businesses with access to an eLearning Library and Virtual Marketplace of 300+ small businesses, WBDC will offer its cornerstone entrepreneurial education and training programs. These include:

- Guide to Plan for Success (GPS), a 9-week intensive course which helps entrepreneurs and emerging business owners create a tangible business plan

- Business Concept Clinic, a 6-session learning enclave which takes participants through the steps needed to start their business, from basic business concepts and financials to marketing and pricing for profit.
- Exploring Entrepreneurship and Making Cents of Your Idea, both are 1-hour interactive classes that examine the practices needed to run a successful small business
- Topics-Specific Workshops and Counseling offered in three series -- Marketing Made Simple, Financial Foundations, and Let's Talk. Sessions and interactive panels focus on specific industries, such as child care and food service, and include skill-building in sales and marketing, accounting and finance, and business legal issues.
- Other workshops and seminars offered throughout the year cover topics in Banking, Credit, Human Resources, Government Contracting, Small Business Certification and more.

For those small businesses who successfully complete the application and screening process and are approved for a grant, WBDC's Business Counseling staff will work closely through the life of the grant to monitor progress on business growth and grant implementation goals (e.g., physical expansion of space or product lines, hiring staff, upgrading or purchasing needed technology, research and development, marketing and advertising, etc.) The result is a meaningful increase in the knowledge, preparedness, economic opportunities, financial acumen, and access to equity-building resources and relationships that low- and moderate-income business owners in Torrington need to survive and thrive in the local economy.

COMMITTED STAFF

Key WBDC staff that will work on this project include: CEO (Fran Pastore), COO (Dorothy Bratchell), VP of Programs and People (Brenda Thickett), Opportunity Fund Coordinator (Alicia DeSena), IT and Operations Manager (Sandhya Matthews), Marketing Manager (JoAnn Gulbin), Impact Manager (Nicole Brown), CFO (Tracy Gibbons), Finance Director (Karen Ham), Client Services Manager (Megan Wormser), Marketing Assistant (Grace Aleimeda), and Business Advisors (Carol Cheswick and Pat Klapper). We will also hire one (1) additional full-time staff to focus on the Torrington grant program. ***Please see attached resumes / bios of leadership***

MONITORING & EVALUATION

WBDC will collect data and documentation from all applications and will provide thorough reporting and proper metrics to the City of Torrington for ARPA reporting and auditing purposes. We have in place a rigorous client tracking and evaluation system which allows the organization to gather, report, evaluate, and analyze large amounts of financial and operational data. The ability to show ROI to its investors is what sets WBDC apart from other providers, and our data collection and reporting practices have long been recognized nationwide by the SBA as a model in the industry. The system includes three dedicated employees and industry-specific software which collects indicators of long-term business development and personal financial health outcomes. Client demographic data, program participation, impact measures, and performance indicators are defined and measured at initial consult, upon program completion, and finally through follow-up surveys administered to clients annually. Grant recipients are additionally surveyed quarterly to closely track the impact of the grants. Other evaluation instruments include random client samplings and staff interviews to track progress and qualitative impact.

FEE PROPOSAL

If awarded, WBDC will work flexibly with the City of Torrington to design the fund expenditure schedule that best suits its needs. The number of grants awarded to businesses varies slightly depending on applicant eligibility as well as grant award amount – in this case $2,500 for start-up businesses through the *Launch Pad* program or $10K for established businesses through the EMG program.

Please see attached fee proposal schedule / budget detail for additional information

Women's Business Development Council 25 years

BACKGROUND & RELEVANT EXPERIENCE

Founded in 1997, WBDC is an anchor in the Connecticut small business community, delivering expertly refined programming that has been field tested for 25 years. We serve all 169 cities and towns from our three regional offices across the state in Stamford, New Haven, and New London and specialize in serving a diverse body of business owners, including especially low- to moderate-income entrepreneurs of color. To date, WBDC has educated and trained more than 16,670 clients across Connecticut – helping underserved entrepreneurs launch or scale 12,500 businesses, create or retain 25,880 jobs, generate $355M in revenue, and access over $28M in outside capital.

Grant Administration:

When the COVID-19 economic crisis hit in March of 2020, WBDC pivoted programs and services to support a 650% surge in client volume and launched its own microgrant initiative – the Opportunity Fund – to help struggling small businesses. Deployed in November 2020 in response to the pandemic's disproportionately hard impact on 'main street' shops and minority-owned businesses, the Equity Match Grant (EMG), *Launch Pad*, and Child Care Grant verticals of the Opportunity Fund have been extremely successful, with over 365 grants totaling $3.7M administered and over 19,600 hours of training and counseling provided. Strikingly, results show that of the small businesses who have had their Equity Match Grants for 12 months or more, 83% have increased revenues, 63% have increased profits, and of all EMG recipients, [illegible]% have hired employees, creating 102 new jobs across 48 companies. As one client expressed, *"WBDC has given me hope and inspired me to reach further in life for things that I never thought I'd be able to achieve."* Indeed, WBDC knows that when desire, education, and preparation come together, opportunities are created, ideas are ignited – economies are expanded – and lives and communities can change.

As the following small businesses attest, WBDC's microgrant program has been highly impactful:

> Clarus Tech Partners Inc. is a woman-owned Stamford-based technology business that became a WBDC client shortly after starting her business in 2018. Since coming to WBDC she engaged in 14 training events and 9 advising sessions, and applied for and was awarded a $10K EMG grant to purchase an automated software tool for cybersecurity. With this, Clarus Tech successfully accomplished a number of milestones as a result: she completed a formal business plan, increased her owner's draw, had a net gain of two jobs created, and increased her overall sales. WBDC also helped in her applying for and receiving CARES funding, including PPP and EIDL, and we continue to advise the client on forgiveness of these loans.

"This Grant was a shining light in an unpredictable and scary time. I was able to complete projects I knew I needed and wanted to focus on, without worrying about how I would fund them when revenue was drastically decreased. The coaching and trust helped strengthen me as a business owner."

- Cara Gilbride, owner of Callalily Studios

"The WBDC Equity Match Grant brought needed funding to my business impacted by the pandemic. Dew Yoga experienced over 70% loss in revenue. This grant is allowing us to rebuild our marketing platform, customer relationships and create business collaborations..."

– Jennifer Irwin, owner of Dew Yoga

"The impact grant has given me the support I needed to grow my business. In the short amount of time since I received it, I have grown my clients, my space and online presence. More importantly, I feel confident in the success and continued growth of my company"

- Aimee Elsner, owner of Balanced Bee-Beeing

Government Funding & Compliance:

As a decades-long U.S. Small Business Association (SBA) partner and steward of taxpayer dollars through multiple initiatives, WBDC is a respected and innovative provider of microgrants and technical assistance and has systems in place for compliance and reporting on the expenditures and activities conducted with government funds. Additionally, WBDC has familiarized itself with the US Treasury's *Final Rule* regarding ARPA funding and can easily comply as our mission is aligned with its tenets.

As a recent example, WBDC's Child Care Grant Program, in a partnership funded by the CT Office of Early Childhood (OEC), awarded 237 grants totaling $2.5M to businesses across 49 towns. Of these, 57% were made to minority-owned businesses – enabling all but one of these struggling businesses to remain open during the pandemic. Through this program, WBDC additionally created or maintained over 4,430 child care slots for children across the state and

provided business training for 868 unique clients. More than 70% of clients fell below the CT median income level and WBDC programs empowered recipients to create and/or retain 1,095 jobs.

In an upcoming partnership with the CT Department of Economic & Community Development, WBDC will administer a $9.8M award which will include full-service grant program management and disbursement of approximately 800 microgrants to businesses across Connecticut over the next five years.

Women's Business Development Council 25 years

REFERENCES

Reference 1:

Connecticut Senate	Legislative Office Building, Room 3300 Hartford, CT 06106-1591
Patricia Billie Miller, Senator, 27th District (Stamford and Darien), Connecticut Senate	M: (203) 253-4514 (mobile) / W: (860) 240-8585
patricia.miller@cga.ct.gov	2008 - present
WBDC served multiple business constituents in Representative Pat Miller's districts, and Ms. Miller can speak to the economic impact delivered as a result of WBDC programming. Representative Miller served in the State House from 2008 to 2021 and was elected to State Senate in 2021.	

Reference 2:

Office of Early Childhood (OEC)	450 Columbus Blvd Hartford, CT 06103
Beth Bye, Commissioner of the Office of Early Childhood	(860) 819-1971 (mobile)
Beth.bye@ct.gov	2020 - present
WBDC has partnered with the OEC since 2020 to provide business development technical assistance and grant funding totaling $2M+ to licensed childcare businesses in the state.	

Reference 3:

State of Connecticut, Department of Economic & Community Development (DECD)	450 Columbus Blvd Hartford, CT 06103
Sheila Hummel, Business Development Program Manager – Office of Small Business & Community Development Program	(860) 500-2405 C: (860) 989-2722
Sheila.hummel@ct.gov	

WOMEBUS-01

LJOHNSTONE

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 9/6/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER
The Russell Agency, LLC
317 Pequot Ave
Southport, CT 06890

CONTACT NAME:
PHONE (A/C, No, Ext): (203) 255-2877 FAX (A/C, No): (203) 254-8427
E-MAIL ADDRESS:

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A : Hartford Casualty Insurance	29424
INSURER B : Pacific Insurance Company, LTD	10046
INSURER C : United States Liability Insurance Company	
INSURER D : Travelers Cas & Surety Co of America	
INSURER E :	
INSURER F :	

INSURED
Womens Business Development Council Inc
184 Bedford Street, Suite 201
Stamford, CT 06901

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	X COMMERCIAL GENERAL LIABILITY CLAIMS-MADE X OCCUR	X	X	31SBAPI9183	12/10/2021	12/10/2022	EACH OCCURRENCE	$ 1,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence)	$ 300,000
							MED EXP (Any one person)	$ 10,000
							PERSONAL & ADV INJURY	$ 1,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	$ 2,000,000
	POLICY PRO-JECT LOC						PRODUCTS - COMP/OP AGG	$ 2,000,000
	OTHER:							$
	AUTOMOBILE LIABILITY						COMBINED SINGLE LIMIT (Ea accident)	$
	ANY AUTO						BODILY INJURY (Per person)	$
	OWNED AUTOS ONLY / SCHEDULED AUTOS						BODILY INJURY (Per accident)	$
	HIRED AUTOS ONLY / NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident)	$
								$
A	X UMBRELLA LIAB X OCCUR						EACH OCCURRENCE	$ 5,000,000
	EXCESS LIAB CLAIMS-MADE	X	X	31SBAPI9183	12/10/2021	12/10/2022	AGGREGATE	$
	DED X RETENTION $ 10,000							$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) Y / N	N / A		31WECNN2577	12/10/2021	12/10/2022	X PER STATUTE OTH-ER	
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. EACH ACCIDENT	$ 100,000
							E.L. DISEASE - EA EMPLOYEE	$ 100,000
							E.L. DISEASE - POLICY LIMIT	$ 500,000
C	Errors & Omissions			SP1558276G	1/5/2022	1/5/2023	Each Occurrence	1,000,000
D	Crime			105826849	8/20/2022	8/20/2023	Employee Theft	100,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
City of Torrington, 140 Main St., Torrington, CT, its subsidiaries, employees, volunteers, directors & officers are additional insureds as per written contract for the general liability limits listed above. A waiver of subrogation applies per contract where indicated above.

CERTIFICATE HOLDER

City of Torrington
140 Main Street
Torrington, CT 06790

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE
Lori Johnstone

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APPENDIX B

Request for Qualifications and Proposals
City of Torrington - Technical Assistance and Administration of Direct Business Grants
RFQ/RFP TAG-039-091222

Acceptance of Terms of this Agreement

Name of Proposer:
The Women's Business Development Council

Contact Person:
Dorothy Bratchell

Address:
184 Bedford Street, Suite 201

City/State/Zip:
Stamford, CT 06901

Telephone: **(203) 353-1750** Fax: _____

E-mail: **dbratchell@ctwbdc.org**

Authorized Signature *Dorothy Bratchell* Title: **Chief Operating Officer (COO)**

Name Printed: **Dorothy Bratchell** Date: **9/7/2022**

Federal Tax Identification Number: (FEIN) **06-1493737**

It is agreed by the above signed proposer that the signature and submission of this proposal represents the proposer's acceptance of all terms, conditions, and requirements of the proposal specifications, and, if awarded, the proposal will represent the agreement between the parties.

The proposer agrees that the cost of any work performed, materials furnished, services provided, or expenses incurred, which are not specifically delineated in the proposal documents, but which are incidental to the scope, intent, and completion of this contract, shall be deemed to have been included in the prices for the various items scheduled.

APPENDIX C
Request for Qualifications and Proposals
City of Torrington - Technical Assistance and Administration of Direct Business Grants
RFQ/RFP TAG-039-091222

NON-COLLUSION AFFIDAVIT

STATE OF CT COUNTY OF Fairfield

I, Dorothy Bratchell, being first duly sworn, deposes and says that:

1. I am Dorothy Bratchell of Women's Business Development Council the Bidder that has submitted the attached Bid for "RFQ/RFP TAG-039-091222";

2. I am fully informed respecting the preparation and contents of the attached Bid and of all pertinent circumstances respecting such bid;

3. Such Bid is genuine and is not a collusive or sham Bid;

4. Neither the said Bidder nor any of its officers, partners, owners, agents, representatives, employees or parties of interest, including this affiant, has in any way colluded, conspired, connived or agreed directly or indirectly with any other Bidder, firm or person to submit a collusive or sham Bid in connection with such Contract, for which the attached Bid has been submitted nor has it in any manner, directly or indirectly, sought by agreement or collusion or communication or conference with any other Bidder, firm or person to fix the price or prices in the attached Bid or of any other Bidder, or to fix any overhead, profit or cost element of the Bid price or the price of any Bidder, or to secure through any collusion, conspiracy, connivance or unlawful agreement any advantage against the City of Torrington or any person interested in the proposed Contract; and

5. The price or prices quoted in the attached Bid are fair and proper and are not tainted by any collusion, conspiracy, connivance or unlawful agreement on the part of the Bidder or any of it agents, representatives, owners, employees, or parties in interest, including this affiant.

(Printed) Dorothy Bratchell (Signed) [signature]

(Title) COO

Subscribed and sworn to before this 7 day of September, 20 22.

Giancarlo Manzone Notary Public Printed

[signature] Notary Public Signature

My Commission Expires 8-31-2023 GIANCARLO S. MANZONE Notary Public, State of Connecticut My Commission Expires Aug. 31, 2023 (Notary Seal)

NOTE: Documents must be signed before and sealed by a Notary Public. Only documents bearing a notary seal will be accepted.

Women's Business Development Council 25 years

Fran Pastore, Founder & CEO
Women's Business Development Council

Fran Pastore founded the Women's Business Development Council (WBDC) 25 years ago and continues to serve as the organization's CEO. WBDC is Connecticut's leading organization championing female entrepreneurship. Ms. Pastore is a devoted catalyst of women's economic equality across the country and around the globe.

In addition to her work with WBDC, Ms. Pastore has served as a member of The National Women's Business Council (NWBC), an independent source of counsel to then President Obama, Congress, and the U.S. Small Business Administration (SBA). She has been on the Board of Women Impacting Public Policy (WIPP), a member of the YWCA Greenwich Leadership Council, Pace University's Women's Business Leadership Council and The Global Advisory Board for the Akilah Institute for Women in Kigali, Rwanda. In 2018, Ms. Pastore was honored to serve on Connecticut Governor Lamont's Transition Team as Co-Chair of The Jobs and Economy Policy Committee. Most recently, she has served as Chair of the Economic Development Committee on Stamford Mayor Caroline Simmons' Transition Team and on the Governor's Workforce Council's BIPOC Committee.

Ms. Pastore has worked with women entrepreneurs globally; In Rwanda providing entrepreneurial training to genocide survivors resulting in the opening of the country's first ice cream parlor; In Costa Rica teaching rural women how to scale their enterprises; In Ethiopia teaching young women how to launch their own business; and in Turkey sharing best practices on entrepreneurship as a path to women's economic self-reliance and participation in the global economy.

For a quarter of a century, Ms. Pastore has been instrumental in the passage of legislation benefiting women entrepreneurs. She has provided numerous testimonies before the U.S. Congress and the Connecticut Legislature, addressing the state of women's entrepreneurship. Her advocacy efforts have included traveling to Istanbul to serve as a U.S. Delegate at the 2015 Women's Summit and the 2018 Global Entrepreneurship Conference.

Currently, Ms. Pastore serves as Chair of the Connecticut Paid Leave Authority and is a member of the Governor's Economic Advisory Council.

BRENDA THICKETT

Southport, CT 06890 | (917) 885-4872 | thickett.brenda@gmail.com

EXPERIENCE

WOMEN'S BUSINESS DEVELOPMENT COUNCIL **New Haven, CT**
Vice President, Programs and Business Services ***January 2021 – present***

- Lead the Programs and Business Services team of 15 people, providing entrepreneurial training services to women and men across the state of Connecticut
- Ensure the smooth implementation and delivery of quality entrepreneurial programs and services
- Raise the profile of WBDC within CT's entrepreneurial ecosystem and with stakeholders through impactful services and strong partner relationships
- Design and drive cross-functional strategies and systems to have wider community reach & stronger outcomes
- Manage and coach Program Managers and team to achieve goals and reach new heights
- Collaborate with the Senior Management Team to push forward and deliver on strategic objectives

BOSTON CONSULTING GROUP (BCG) **New York, NY**
Global Mobility and Staffing Director ***September 2019 – January 2021***

- Led the Mobility and Staffing function globally, working with global, regional and local leadership to ensure we effectively delivered our more than 10,000 consultants and their expertise to clients, by staffing them on the right projects or moving them across the globe
- Led Global Management Team of 20 for the function, who represented more than 100 local staffing and mobility team members in BCG's 90+ offices. Managed team of direct reports 8 who support the function globally
- Responsible for global IT systems platforms, one each for mobility and staffing, to deliver on effective resource allocation and tracking. Collaborated with IT team on functioning and continued enhancement of systems
- Led BCG's response to COVID-19 for Mobility and Staffing, and the short and long term challenges from the pandemic and our ability to staff, move and support our people
- Served on Consulting People Management Team, global cross-functional body setting the firm's People agenda

Global Practice Management Director, Social Impact ***January 2016 – July 2019***
Senior Manager, Social Impact ***December 2012 – December 2015***
Manager, Social Impact ***January 2011 – November 2012***
Senior Coordinator, Social Impact ***August 2006 – December 2010***

- Managed BCG's global Social Impact (SI) practice, directing firm's strategy and implementation of over 400 projects with 250 clients annually, in both global and local work across all BCG's offices. Over 13 years, built from initial project team, to internal Initiative to full-fledged BCG Practice
- Hired, developed, managed, and led team of 6 people, across Europe and the US, to run the Practice
- Drove BCG's strategy in SI, from approach to implementation and impact. Led shift from focusing on the social sector, to broader collaboration with the public and private sectors to increase BCG's positive impact on society
- Collaborated internally across functions within BCG to drive Practice goals; including Industry and Functional Practices, People Team, Knowledge Team, Recruiting, Finance, and Marketing
- **Portfolio of Social Impact work:**
  - *Global work:* Made investment recommendations to maximize BCG's impact. Guided BCG's partners leading relationships with the firm's global SI clients, including the *Bill & Melinda Gates Foundation, Save the Children, the World Food Programme, WWF,* and *Teach For All.* Led projects with Save the Children US on social enterprise, innovation and corporate partnerships
  - *Local work:* Liaised with teams across BCG's 90+ offices on their social impact projects and activities. Drove annual planning process, shared best practices, and provided knowledge support
- **People:** Drove approach for BCG's staff to engage in SI. Managed staffing on SI projects globally. Led development and growth of suite of SI people programs. Supported BCGers looking for leave of absence and job opportunities in the social sector globally
- **Knowledge**: Managed SI knowledge platform and team, driving intellectual leadership across topics, including Total Societal Impact, fundraising, strategy, and operations, across sectors including education, global health, global development, humanitarian response, and the environment
  - Organized, structured and ran global meetings for 100+ staff in cities around the world to share knowledge and strengthen affiliation in the practice, semi-annually
- **Communications**: Managed internal and external communications strategy and execution, including marketing, social media, media and thought leadership for SI Practice

Staffing Coordinator, New York Office ***June 2005 – June 2006***

- Responsible for staffing 100+ consultants to business projects; matching business and project needs of Partner team, as well as each individual's professional development needs and interests. Worked across industries including Consumer, Financial Institutions, Health Care, Technology, Media and Telecom

Senior Analyst, Healthcare Practice Area ***November 2003- June 2005***

- Supported senior team of six partners in business development efforts in the healthcare industry. Researched potential targets and wrote proposals. Supported case teams as expert researcher

Project Leader (promoted from Consultant) ***September 2000 – October 2003***

- Managed teams and projects in Consumer and Pharma industries. Developed customer strategies for retailers, including primary market research and analysis of customer data to identify opportunities. Presented recommendations to CEO
- Actively involved in recruiting and hiring of MBA and undergrad students, both marketing to and interviewing candidates, as specialist for Wharton

WHARTON SMALL BUSINESS DEVELOPMENT CENTER **Philadelphia, PA**
Business Consultant ***January – December 1998***

- Provided general management consulting services to 20+ start-up and emerging companies while attending MBA classes full time

SUPPORTING EMERGING ENTERPRISE PROGRAM **Cape Town, South Africa**
Co-Coordinator – Graduate School of Business (GSB), University of Cape Town ***May - August 1998***

- Created program to provide consulting services to historically disadvantaged black entrepreneurs in the townships around Cape Town, using 25 local MBA students as consultants. Returned in June 1999 to launch second year
- Developed & delivered multidisciplinary business course to train GSB MBA students as small business consultants

YOUNG & RUBICAM INC. **New York, NY**
Associate; Operations, Planning and Analysis ***September 1995 – May 1997***

- Provided internal strategy and new business consulting services to CEO, CFO and senior management team of $1.5 billion advertising and communications company

BANKERS TRUST NEW YORK CORPORATION **New York, NY**
Assistant Treasurer / Business Analyst; Corporate Development Group ***May 1994 - September 1995***

- Analyzed $900 million annuity business portfolio as member of strategic planning team. Evaluated cost and revenue drivers, competitive positioning, and growth trends, recommending invest/divest decisions

EDUCATION

THE WHARTON SCHOOL, University of Pennsylvania **Philadelphia, PA**
Master of Business Administration in Entrepreneurial Management ***May 2000***

- Director's Honor List; Students for Responsible Business (Net Impact) – Coordinator; Wharton International Volunteer Project

SCHOOL OF ADVANCED INTERNATIONAL STUDIES (SAIS), Johns Hopkins University **Washington, DC**
Master of Arts in International Relations and International Economics (focus on Economic Development) ***May 2000***

TUFTS UNIVERSITY **Medford, MA**
Bachelor of Arts in Quantitative Economics and International Relations, *Summa Cum Laude* ***May 1994***

- *Phi Beta Kappa,* Dean's List, Alumni Award (1898 Class), Marion Ricker Houston Prize Scholarship Economics
- Studied abroad for two semesters: Université de Niamey (Niger) and London Guildhall University (UK)

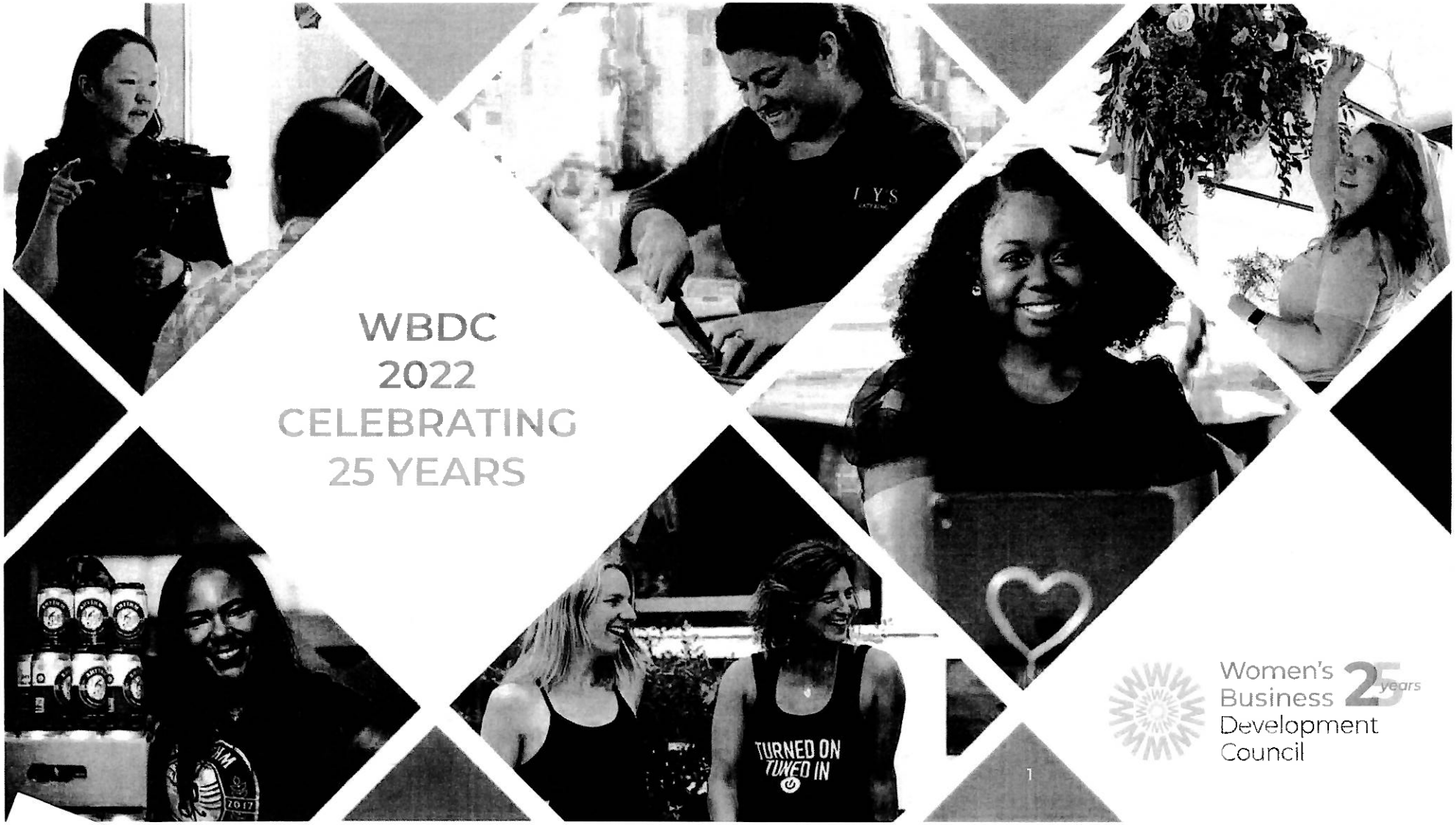
BOARD SERVICE

WOMEN'S BUSINESS DEVELOPMENT COUNCIL OF CONNECTICUT **Stamford, CT**
Board Member ***2013 – 2021***
Nonprofit providing entrepreneurial training to women and men in CT; advocates for women-owned small businesses
Chair (2017 – 2019), Vice Chair (2020; 2016), Treasurer (2015 – 2016)

NEW CANAAN MOUNTED TROOP **New Canaan, CT**
Board Member ***2017 – 2019***
Nonprofit providing comprehensive educational horsemanship, equine care and therapeutic programs

ADDITIONAL INFORMATION

Distance runner. Traveled extensively in the Americas, Africa, Europe and Australia. Proficient in French.



WBDC 2022 CELEBRATING 25 YEARS

Women's Business Development Council 25 years

MISSION

To strengthen and support economic prosperity for women through entrepreneurial services that create and grow sustainable jobs and businesses across Connecticut.

WOMEN AS THE ECONOMIC ENGINE

12.9+ million
women-owned businesses

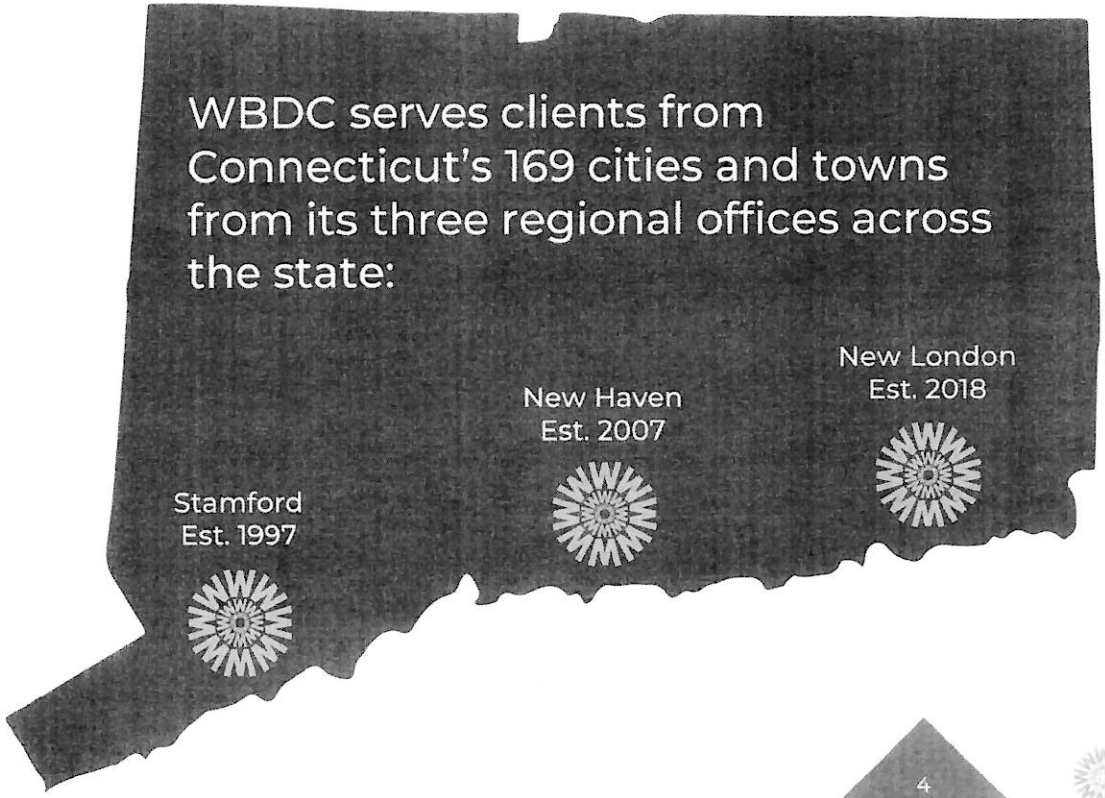
→ Generate **$1.9+ trillion** in annual revenue & Employ **9.4+ million** people

112,000+
women-owned businesses

→ Generate **$16.5+ billion** in annual revenue & Employ **95,000+** people

Source: AMEX OPEN State of Women-Owned Businesses Report 2019

CT . . . WE'VE GOT YOU COVERED



Women's Business Development Council 25 years

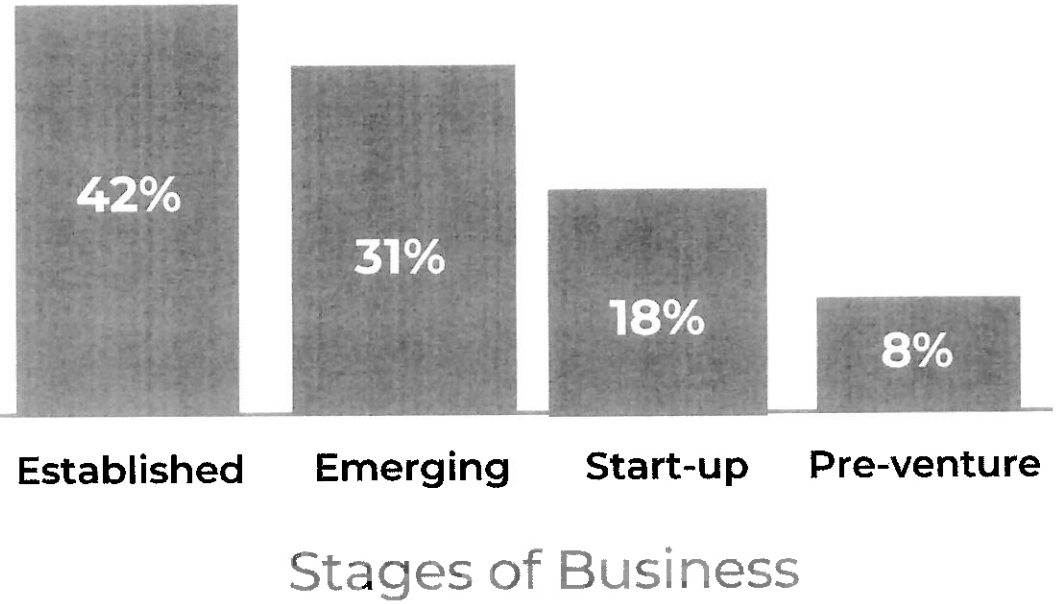
ECONOMIC IMPACT OF WBDC CLIENTS

From January 2020 to December 2021, WBDC trained nearly 6,000 clients and advised 1,540+ clients, resulting in:

- ✓ 714 capital transactions totaling $20.5M
- ✓ 4,402 jobs created or maintained
- ✓ 82 new business starts
- ✓ $215M in net revenue generated

DEMOGRAPHICS AND BUSINESS STAGES - 2021

WBDC's clients reflect the demographic makeup to the population in Connecticut.



Demographics

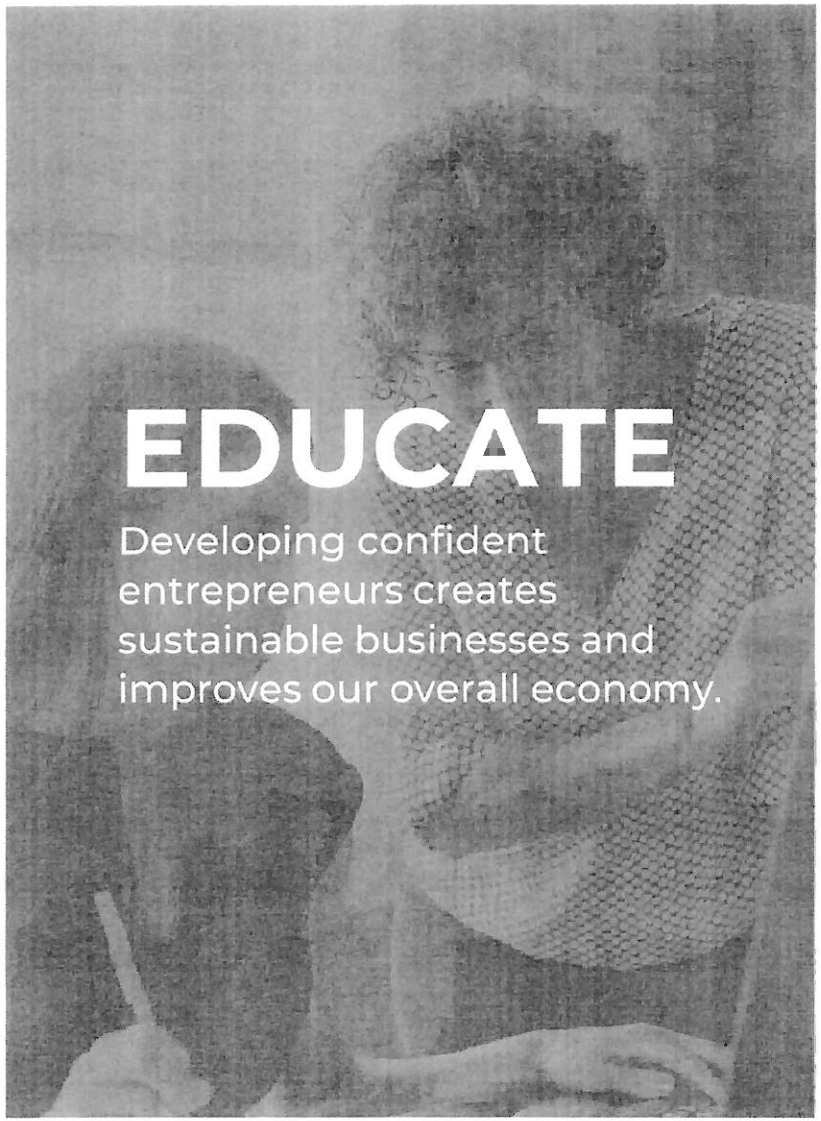
48%: Minority-Owned Enterprises

61%: Low-to-Moderate Income

Women's Business Development Council 25 years

WHAT WE DO

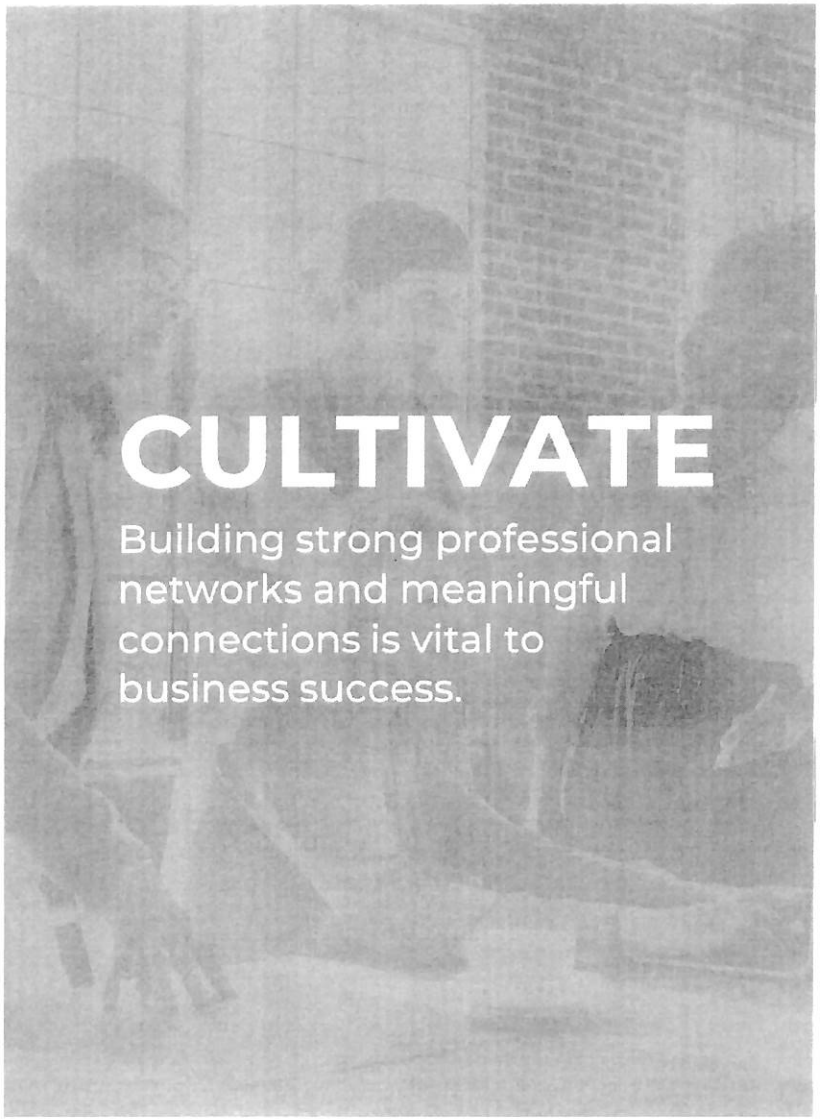
Women's Business Development Council



WBDC provides the training necessary to guide aspiring, emerging, and established entrepreneurs along their growth journey.

- 1:1 business advising
- Classes (currently virtual)
- On-demand learning

Most services are available at no cost, and several are offered in Spanish!



CULTIVATE

Building strong professional networks and meaningful connections is vital to business success.

WBDC connects our clients, donors, and other stakeholders, fostering business growth through collaboration and community support.

- Networking
- Mentorship programs
- *Courageous Conversations* podcast
- Online business directory
- Annual Gala and special events

ADVOCATE

Channeling one unified voice to engage Connecticut's leaders on behalf of all women entrepreneurs.

WBDC voices the needs and concerns of our clients to national, state, and local leadership to affect changes that positively impact their businesses.

- Creating opportunities for meaningful dialogue between lawmakers and small business owners, including Annual Women-Owned Business Day
- Testifying before the U.S. Congress and the Connecticut Legislature
- Serving on national, state, and local boards and commissions

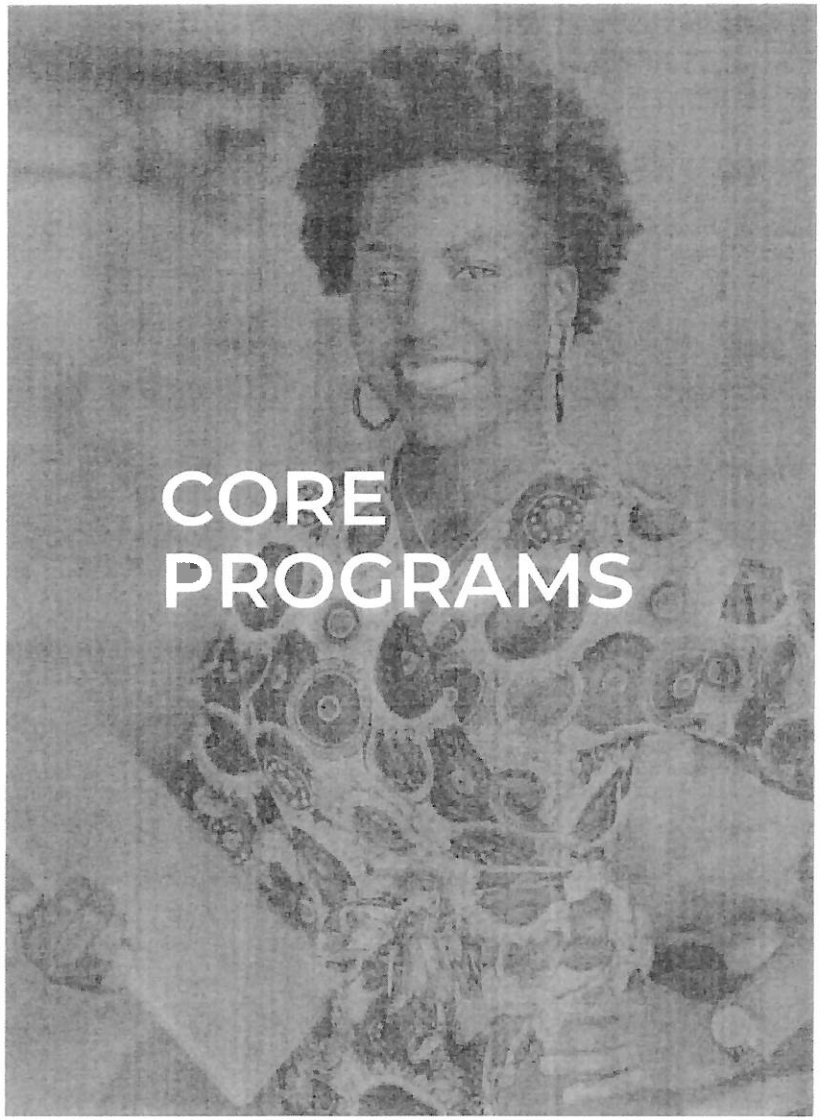
WBDC helps our clients identify sources of capital which align with their unique business needs, and provides technical assistance through the application process and beyond.

Financial resources:

- WBDC's Opportunity Fund
- Loans
- Equity investments
- Non-WBDC grants

WBDC PROJECTS & INITIATIVES

Women's Business Development Council



CORE PROGRAMS

Since 1997, WBDC has provided the training necessary for women to launch and grow their businesses.

We believe that when desire, education, and preparation come together, opportunities are created, ideas are ignited, and economies are expanded.

CORE ENTREPRENEURIAL TRAINING

- **Classes**
  - Accounting & Finance
  - Sales & Marketing
  - Operations
  - Access to Capital
  - Contracting & Certification
  - Legal
- **On-demand learning**
- **One-on-one advising**
- **Mentoring**
- **Town Halls & legislative roundtables**

CHILD CARE BUSINESS SUPPORT

Child care and early childhood education is a critical part of our national infrastructure.

Recognizing the important role these businesses play in our economy, WBDC offers a comprehensive suite of business development services for home and center-based child care providers, helping them to launch, sustain, and grow their businesses.

A partnership with the Connecticut Office of Early Childhood (OEC)

A unique program with customized supports

Business training, technical assistance, and resources to licensed child care businesses in Connecticut, supporting them in stabilizing and achieving long-term growth

- Entrepreneurial and Financial Training
- Entrepreneurial and Financial Advising
- Opportunity Fund Grants & Incentives
- Advocacy
- Train the Trainer

In partnership with the Connecticut Office of Early Childhood (OEC)

By the Numbers Snapshot

1,040 clients educated

10,100+ slots created or maintained

4,602 training hours

446 advising hours

7,000+ jobs created or retained

$8M+ capital accessed

CHILD CARE BUSINESS OPPORTUNITY FUND

A key component of the business support program is WBDC's Child Care Business Opportunity Fund, providing financial relief and capital to licensed child care providers

Created to stabilize the industry in Connecticut, and drive growth for the businesses by **providing grants of up to $25,000** to qualified applicants

Application for next round slated to open Fall 2022, with some grant programs on a rolling basis

Child Care Business Opportunity Fund

Designed to help licensed & aspiring child care businesses grow!

- Support business growth and long-term sustainability
- Competitive application process that prepares businesses for bank or non-bank funding

Start-up Grant

- Up to $5,000 for start-up operating expenses
- Aspiring and newly licensed child care providers

Business Incentive Program

- Up to $10,000 in incremental cash grants, tech, and more for business progress
- Licensed providers with enrolled children for 1+ months

Emergency Facilities Grant

- Up to $25,000 for emergency projects to remain open & safe
- Licensed providers with children for 6+ months

Expansion Grant

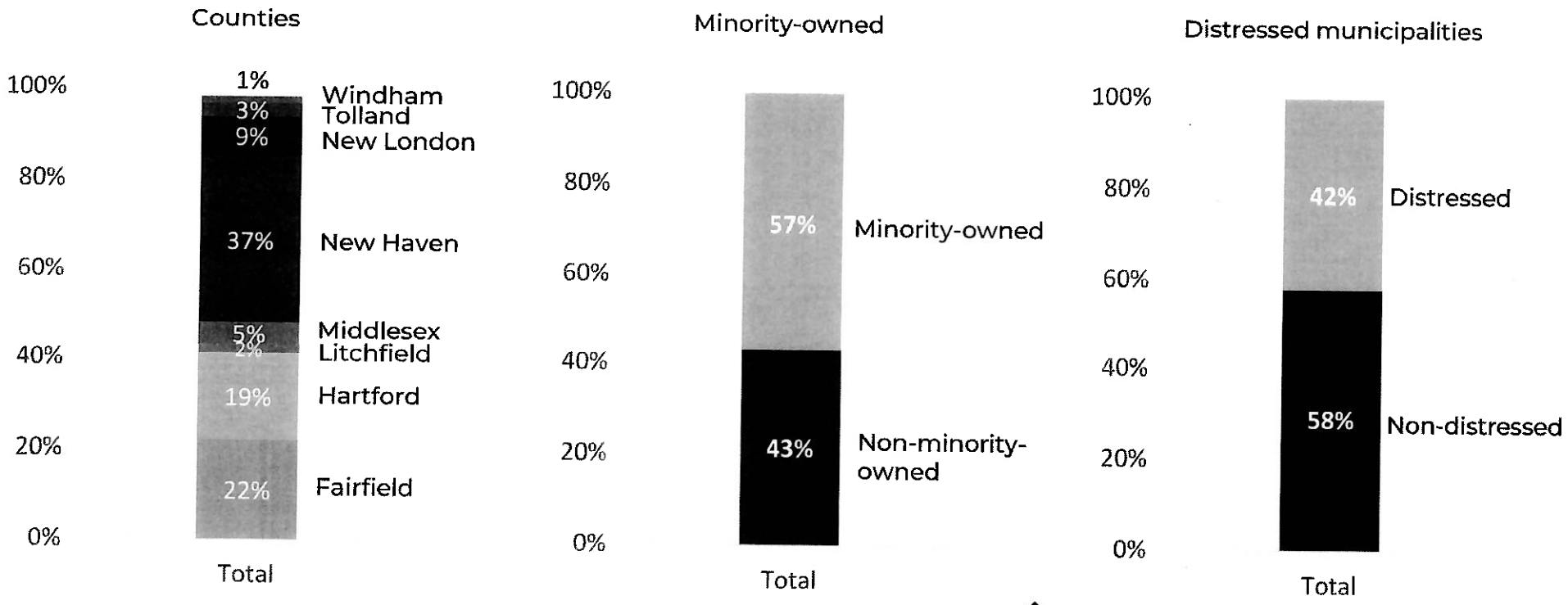
- Up to $25,000 to create slots, maximize enrollment, create new revenue streams
- Licensed providers with children for 2+ years

Launched 4 rounds of grants since Fall 2020

358
grants

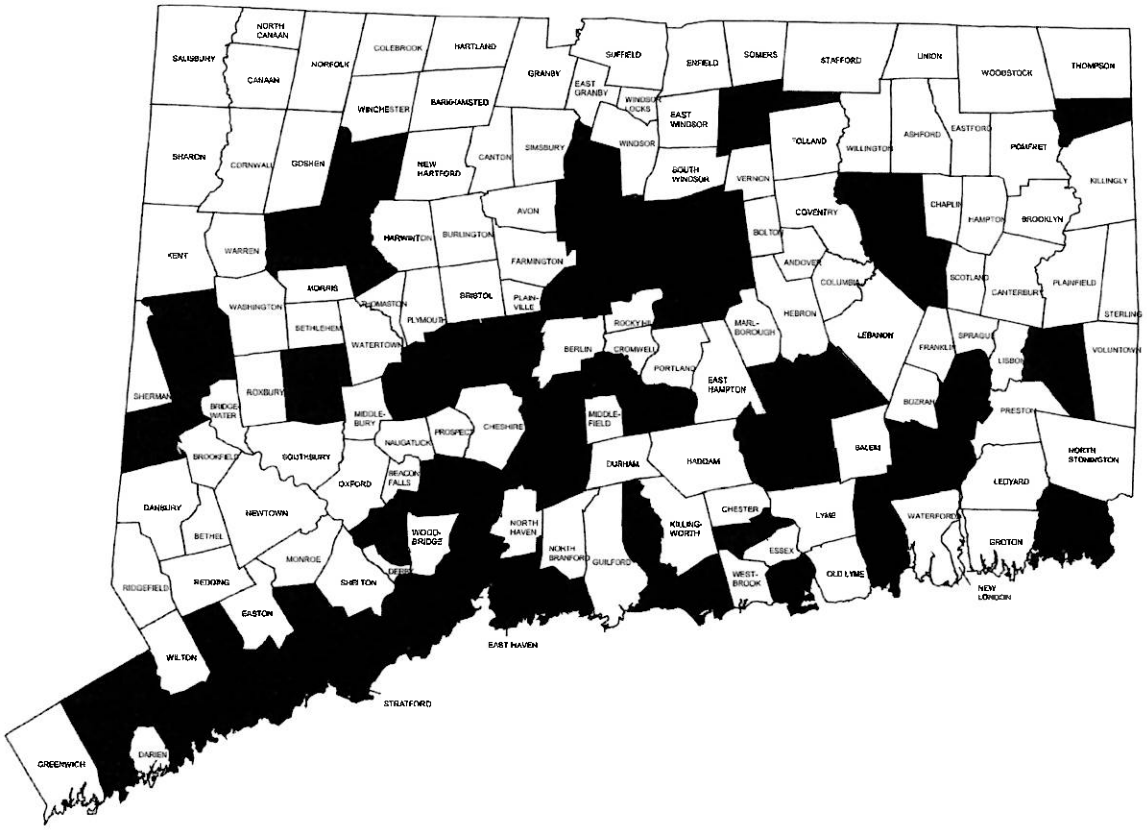
$4.03M
distributed

Grants made in all 8 counties with 57% of grants going to minority owned businesses and 42% to distressed



Women's Business Development Council 25 years

Grant recipients from 54 towns to date



Ansonia
Bethany
Bloomfield
Branford
Bridgeport
Clinton
Colchester
Deep River
East Haddam
East Hartford
East Haven
East Lyme
Ellington
Fairfield
Glastonbury
Griswold
Hamden
Hartford
Litchfield
Madison
Manchester
Mansfield
Meriden
Middletown
Milford
Montville
New Britain
New Canaan
New Fairfield
New Haven
New Milford
Newington
Norwalk
Norwich
Old Saybrook
Orange
Putnam
Seymour
Southington
Stamford
Stonington
Stratford
Torrington
Trumbull
Wallingford
Waterbury
West Hartford
West Haven
Weston
Westport
Wethersfield
Windham
Wolcott
Woodbury

Women's Business Development Council 25 years

Impact based on survey at 6 months

6 months after receiving an Emergency Grant:

- 106 out of 107 programs remained open
- 3 clients opened a new location
- 21% experienced an increase in their enrollment during the reporting period (Jan-Jun 2021)

1,095
jobs maintained

3,567
slots maintained

Just a Helping Hand Daycare – WBDC Client Since 2006

I joined WBDC in 2006. It gave me the know how to do a business plan and to have things a business owner needs to successfully run a business. Now we realize that our passion can make us money and that it is a business we need to take seriously.

Davette Stephens, Just a Helping Hand Daycare (Stamford CT)

Creative ME (New Haven) used grant to outfit new location, and slot capacity increased by 30 children

With the help of 2 WBDC grants, Creative ME was able to expand its program from 27 children to a capacity of 57 children, while completing renovations on its new space, and hiring staff with high credentials.

"WBDC is the hub for women supporting one another, giving feedback, and passing information and sharing resources. What an amazing organization to be a part of."

- Mechele Ellis, Owner
Child Care Center

Play Smart: used grant to make payroll to stay open, and now seeing enrollment return

"With WBDC's [Emergency] Grant, I was able to prevent my business from permanent closure, and it has helped me get through the pandemic. Thank you for all your support!"

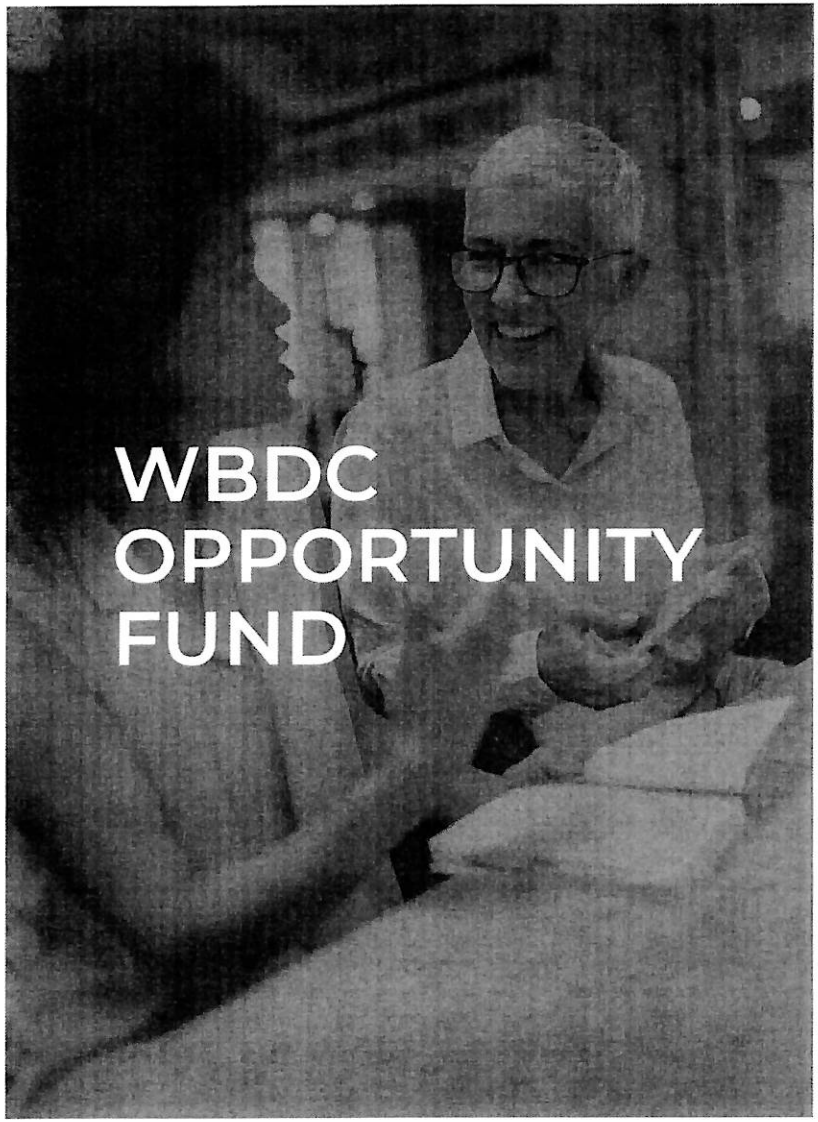
Zaneta used the funds to make payroll during severe revenue shortages and has since seen an increase in enrollment.

- Zaneta Moravec
  Family Home Provider
  Accredited Program

Little Wise: used grant to replace leaky sump pump and flooring in her home daycare

- Diana Gil
Family Home Provider

Listen to Diana's story:
https://youtu.be/sgUIPRExONw



WBDC OPPORTUNITY FUND

WBDC's Opportunity Fund provides grants to women-owned enterprises launch, expand, and scale.

- Equity Match Grant Program
- Launchpad Grants
- Child Care Opportunity Fund

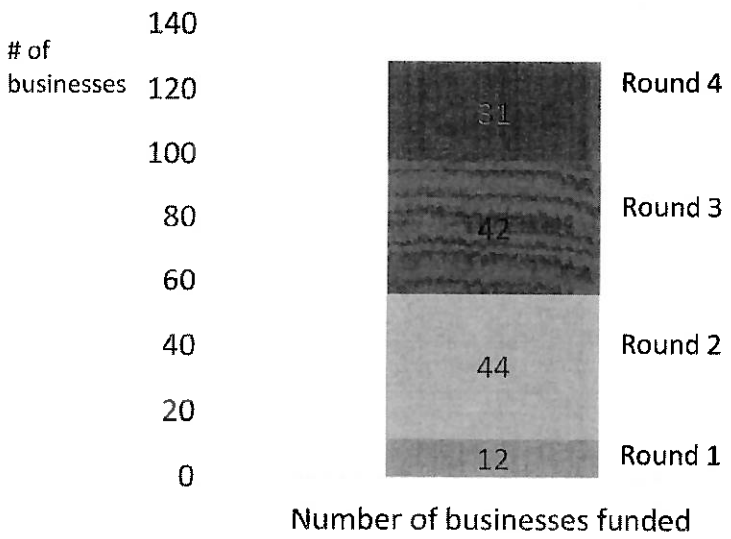
EQUITY MATCH GRANT PROGRAM

- WBDC's Equity Match Grant program was created to assist Connecticut's women-owned businesses, especially disenfranchised populations and those in distressed communities, providing grants of up to $10,000 to qualified applicants.
- With a required match from the business owner, grant recipients invest in a clearly defined project that will have a measurable impact on the business, its growth and profitability, allowing them to expand their business, add a new product or service or access new markets.

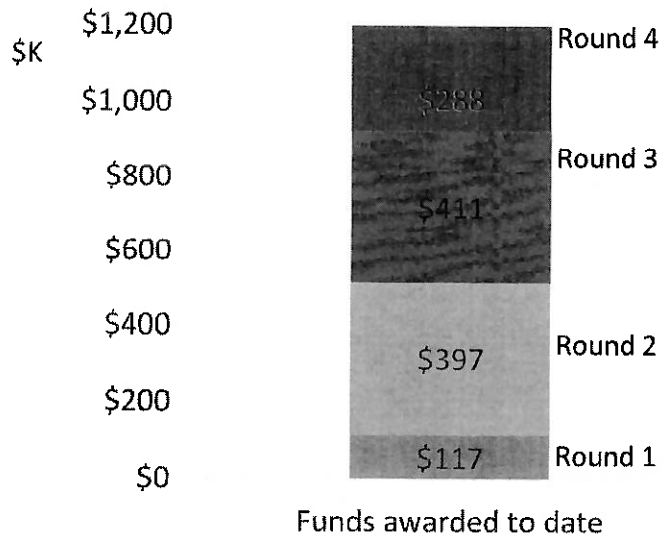
*Includes grants awarded through December 2021

129 grants totaling $1.2 million made in first 4 rounds

129 businesses funded to date

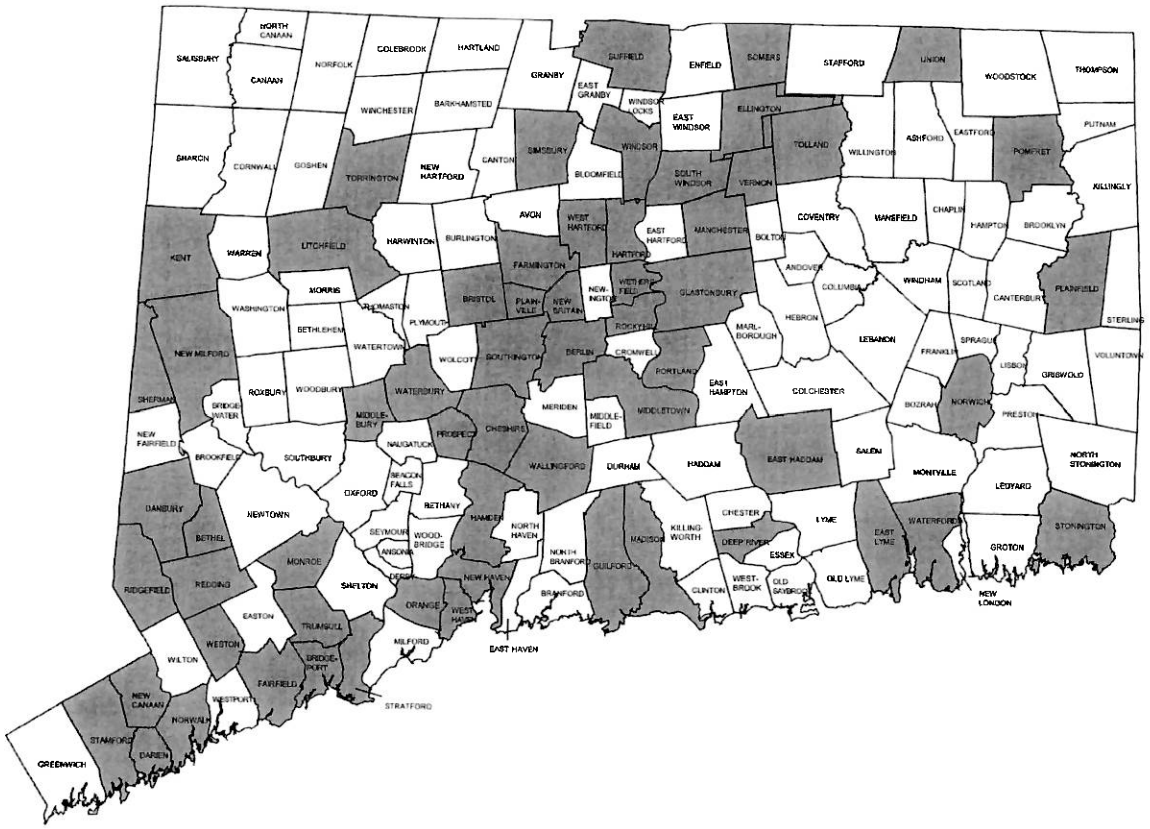


$1.2 million awarded to date



Women's Business Development Council 25 years

EMG recipients from 61 towns in Rounds 1-4



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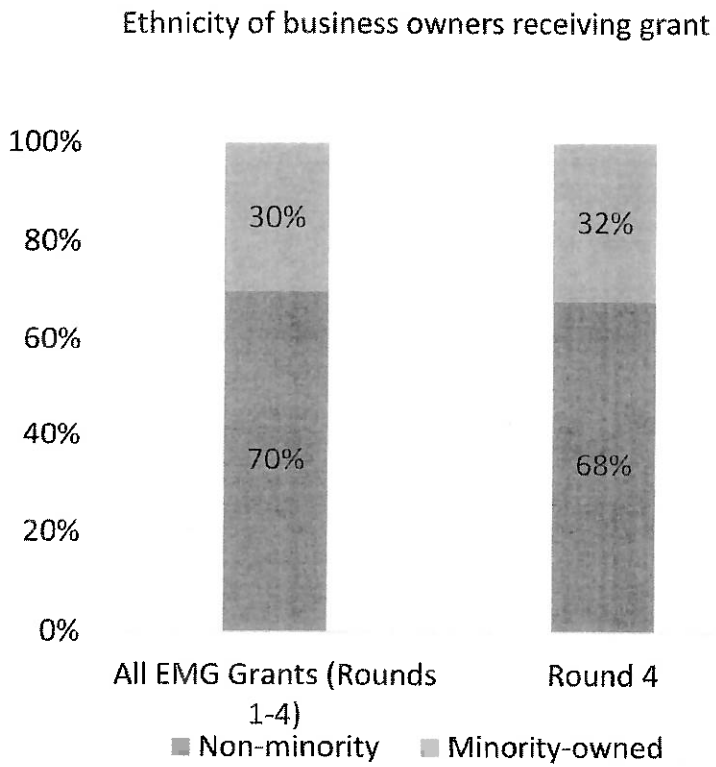
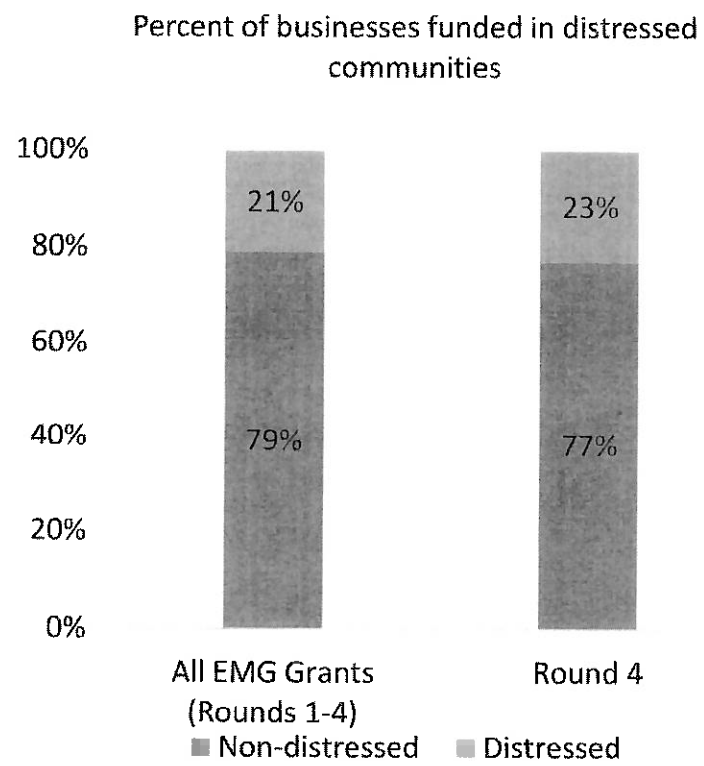
Ellington
Fairfield
Farmington
Glastonbury
Guilford
Hamden
Hartford
Kent
Litchfield
Madison
Manchester
Middlebury
Middletown
Monroe
Moodus
New Britain
New Canaan
New Haven
New Milford
Newtown
Norwalk
Norwich
Orange
Plainfield
Plainville
Pomfret Center
Portland
Prospect
Redding
Ridgefield
Rocky Hill
Sherman
Simsbury
Somers
S. Windsor
Southington
Stonington
Stamford
Stratford
Suffield
Tolland
Torrington
Trumbull
Union
Vernon
Wallingford
Waterbury
Waterford
West Hartford
West Haven
Weston
Wethersfield
Windsor

Women's Business Development Council 25 years

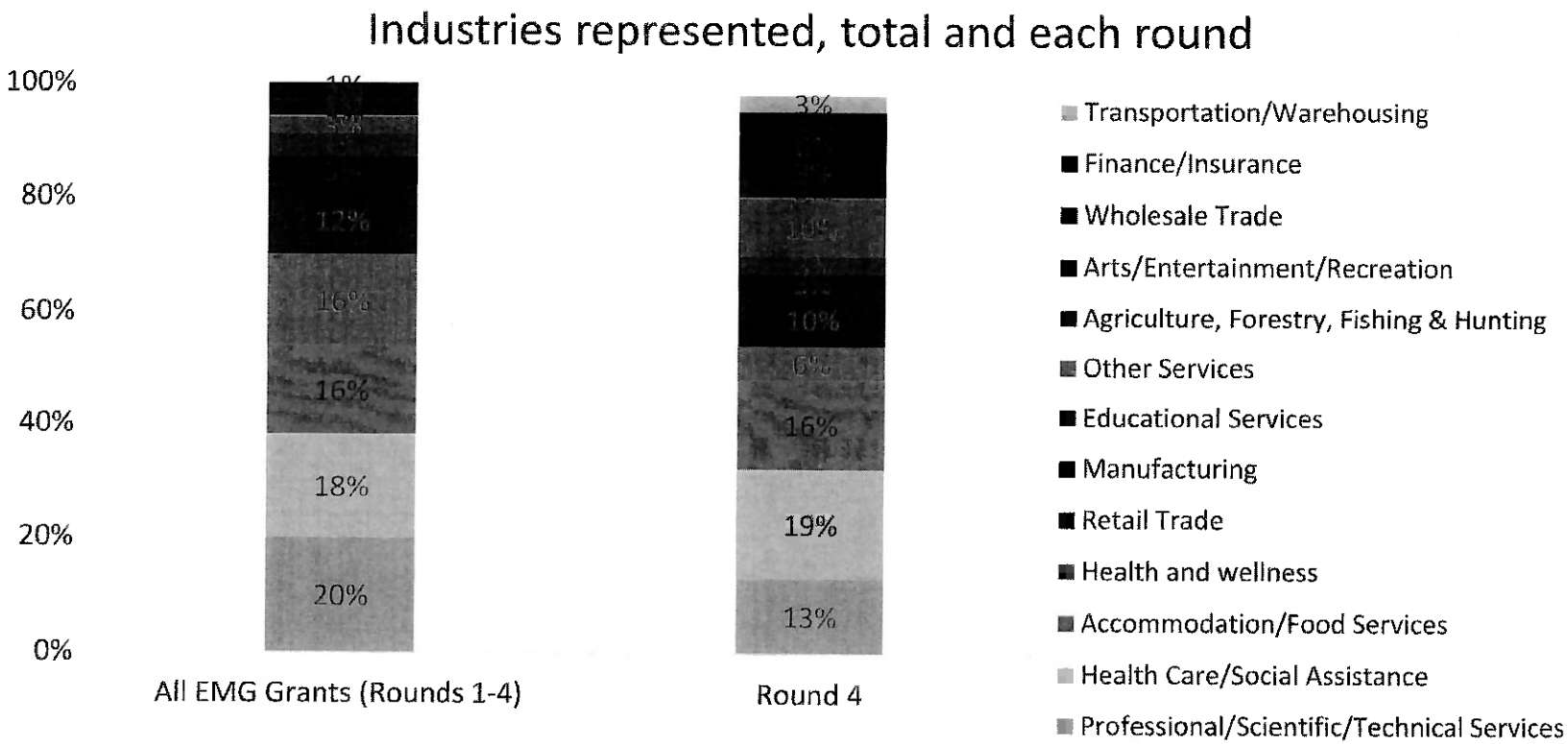
Demographics: Diversity and Distressed Communities



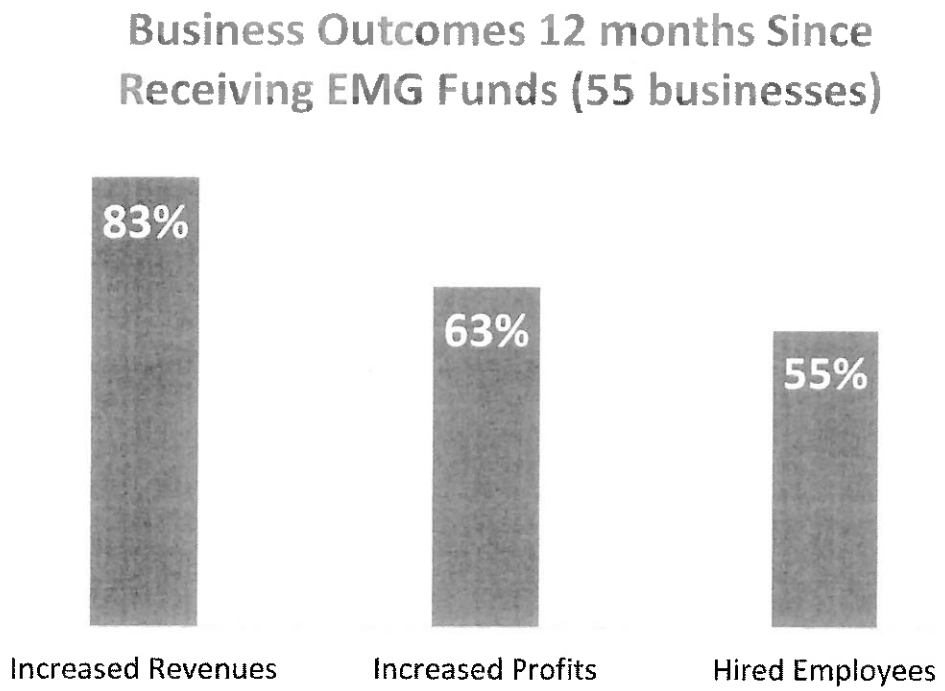


Women's Business Development Council 25 years

Industries: professional, scientific and technical services; healthcare/social assistance and food >50% of grants



Impact: Strong increase in revenues, profits, jobs and access to capital based on quarterly surveys



From Rounds 1 – 4
(98 businesses)

119 net jobs created across 56 companies

16 recipients have accessed 21 additional **capital infusions totaling over $1.2M**

PROGRAM IMPACT

- A Stamford coffee shop owner used her grant to buy a convection/ microwave oven, projected to increase her sales by 10%–30%.
- A New Haven massage therapist used her grant to train in breast cancer recovery work, and for promotion of the business's new services.
- A Milford bakery owner used her grant to obtain new/larger equipment to grow her educational classes and events with the biggest profit margin.
- A Hartford consultant used her grant to update her company website and provide more comprehensive solutions for her clientele.
- A Farmington vegetable and flower farmer is using her grant for a hay wagon to offer classic hayrides to the pumpkin patch, and deer fencing to expand the land she is farming and protect the crops
- A Bridgeport hair braiding studio owner is using her grant to improve her marketing and expand into selling hair products
- A New London dog training and services business owner is using her grant to improve the company's website and marketing

PROGRAM FUNDERS

- More than **$2 million** raised from public and private sources
- Fundraising efforts continue to build partnerships across Connecticut

Bank of America | Bankwell | BNY Mellon | Chelsea Groton Bank | Connecticut Community Bank
Connecticut DECD | Dime Bank | DR Bank | Eastern Connecticut Savings Bank | Essex Savings Bank
Fairfield County Bank | Fieldpoint Private | First County Bank | First Bank of Greenwich
Guilford Savings Bank | Ion Bank Foundation | JPMorgan Chase & Co | Key Bank | Liberty Bank
M&T Bank | NationSwell | Newtown Savings Bank | Northwest Community Bank
Patriot Bank | People's United Bank | Salisbury Bank | Savings Bank of Danbury
Steven & Alexandra Cohen Foundation | TD Bank | The Milford Bank | Thomaston Savings Bank
Torrington Savings Bank | Travelers | Tudor Foundation | Union Savings Bank | Webster Bank

LAUNCH PAD GRANT PROGRAM

- WBDC's Launch Pad Grant program provides grants of up to $2,500 to nascent businesses.
- Benefits beyond funding, as recipients also receive the guidance and support they need to become successful industry leaders.
- Program recognizes the importance of start ups and the limited access they have to capital
- Applicants must have
  - Been in business for 24 months or less
  - A clearly articulated business concept
  - A record of sales or product prototype
  - Proven growth or progress toward revenue targets and business goals
  - Completed WBDC's Guide to Plan for Success (GPS) 9-week business planning course (or been recommended by a WBDC Business Advisor)
- Applicants compete in a "pitch competition" and judges determine grant awardees

The Well for Women: used EMG to expand marketing and training, and revenues up 103%

"The WBDC equity match grant allowed us to contract with a marketing specialist who has firmly established our brand in social media. Year-to-Date sales are up 103% from 2020, and a big part of our successful rebound was the ability to get the word out that we were open, and ready to support people with their pandemic stress through massage. I can't thank the WBDC team enough!"

- Julie Robbins, Owner

Illumina Skin Care Massage (Simsbury) used EMG to purchase equipment and training

"I can't get enough of WBDC's services... I am always on their website and spreading the word about how amazing WBDC has been. I deeply believe in women supporting women, especially in business. WBDC takes this concept to a whole other level and I'm forever grateful to be a part of it."

-Lillian Freire, Owner

illumina
SKIN CARE | MASSAGE

Brown Butter Creations (Glastonbury) used EMG to purchase a walk-in cooler/freezer

"We are grateful to the Women's Business Development Council for selecting us to be one of the recipients of an Equity Match Grant. The funds we received were put towards the purchase of our walk-in cooler/freezer at our new bakery. This piece of equipment is critical to our daily operations."

-Ashli Esteves-Nelson, Co-Owner

https://youtu.be/dMoAoEi06V0

Rhythm Brewing: used EMG to expand marketing and PR efforts, and revenues increasing

"WBDC helped my small business to navigate through some of our toughest entrepreneurial adversities. The Equity Match Grant allowed our Brewing Co. to continue with the much-needed marketing resources that allowed us to stay connected with our customers. We are grateful to the WBDC for their unwavering dedication to Small, Women and Minority owned businesses."

- Alisa Bowens-Mercado

Family Eyecare of Orange used EMG to purchase an additional exam chair

"I'm proud to say I am a recipient of the Equity Match Grant. I'm excited because this money will be used to expand my practice. We will be able to hire another doctor and see twice as many patients as we typically see in a day."

-Dr. Natacha Louis-Charles

Scantic Valley Farms (Somers) is using the funds to purchase a temperature-controlled delivery van

"I'm hoping to double our sales this year and double that the following year. I am super excited about getting the grant. $10,000! I need a delivery van... Our other farm vehicles don't have the capacity for taller branches and or temperature control. This is critical for our flowers because they different sizes and are such a perishable item."

- Nancy Barrett

CeramiK (New Haven) used the grant to open a storefront studio

"WBDC has offered both tools and financing which have helped me feel more confident about what I am doing and has given me a better understanding on how to do it.
I am very grateful I have been able to transform my passion for ceramics into a promising business. For years I thought that having both a studio and a storefront together was merely a dream. Having been able to materialize it is even better than the dream."

- Kiara Matos, Owner

Leaps and Bones (South Windsor) is buying refrigeration for their new, larger bakery facility

"We're very honored to receive the grant from the Women's Business Development Council. We are using the funds to buy $10,000 worth of refrigeration to support our bakery expansion. We're going from about 200 square feet to 2300 square feet."

- Laurie Surprenant & Amy Kenkel

LAUNCH PAD GRANTS

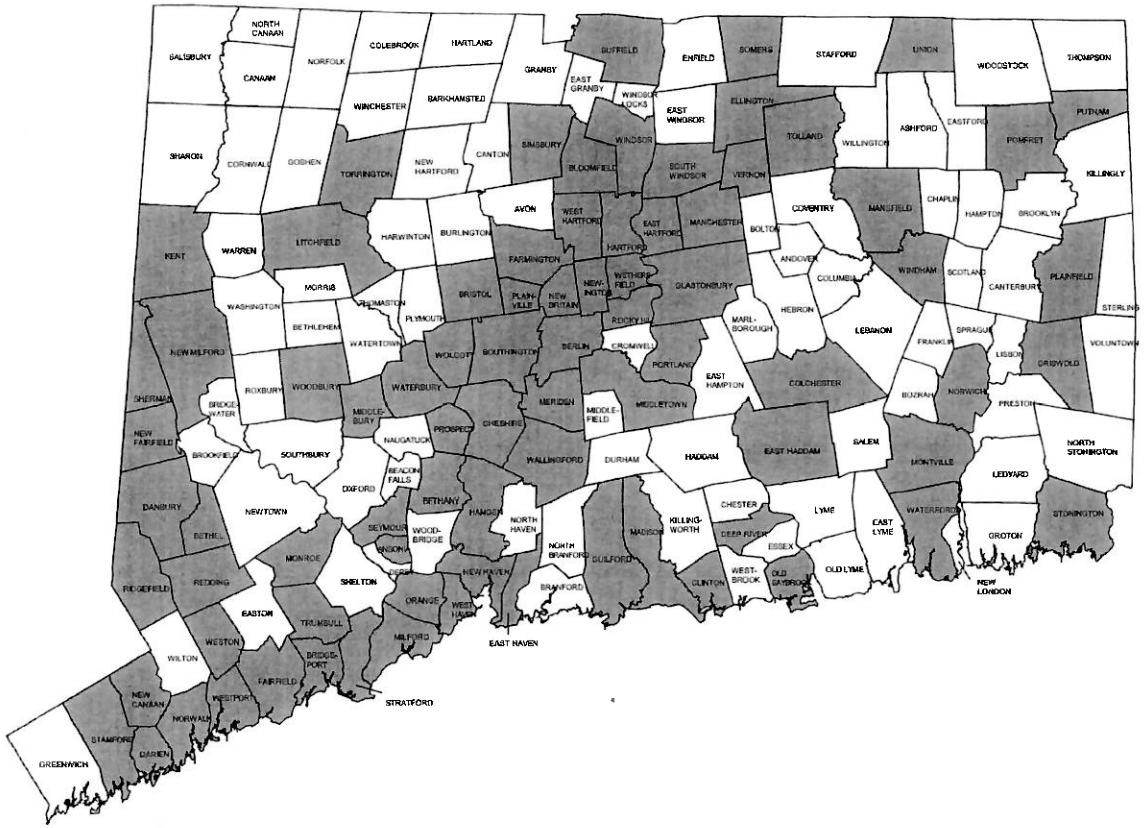
Pilot Launched January 2022

- 5 grants awarded
- $12,500 distributed

Round 2 – April 2022

- 8 grants awarded
- $20,000 distributed

WBDC Opportunity Fund Grants – Reached 84 towns to date



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East Haddam
East Hartford
East Haven
East Lyme
Ellington
Fairfield
Farmington
Glastonbury
Griswold
Guilford
Hamden
Hartford
Kent
Litchfield
Madison
Manchester
Mansfield
Meriden
Middlebury
Middletown
Milford
Monroe
Montville
New Britain
New Canaan
New Fairfield
New Haven
New Milford
Newington
Newtown
Norwalk
Norwich
Old Saybrook
Orange
Plainfield
Plainville
Pomfret Center
Portland
Prospect
Putnam
Redding
Ridgefield
Rocky Hill
S. Windsor
Seymour
Sherman
Simsbury
Somers
Southington
Stamford
Stonington
Stratford
Suffield
Tolland
Torrington
Trumbull
Union
Vernon
Wallingford
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West Hartford
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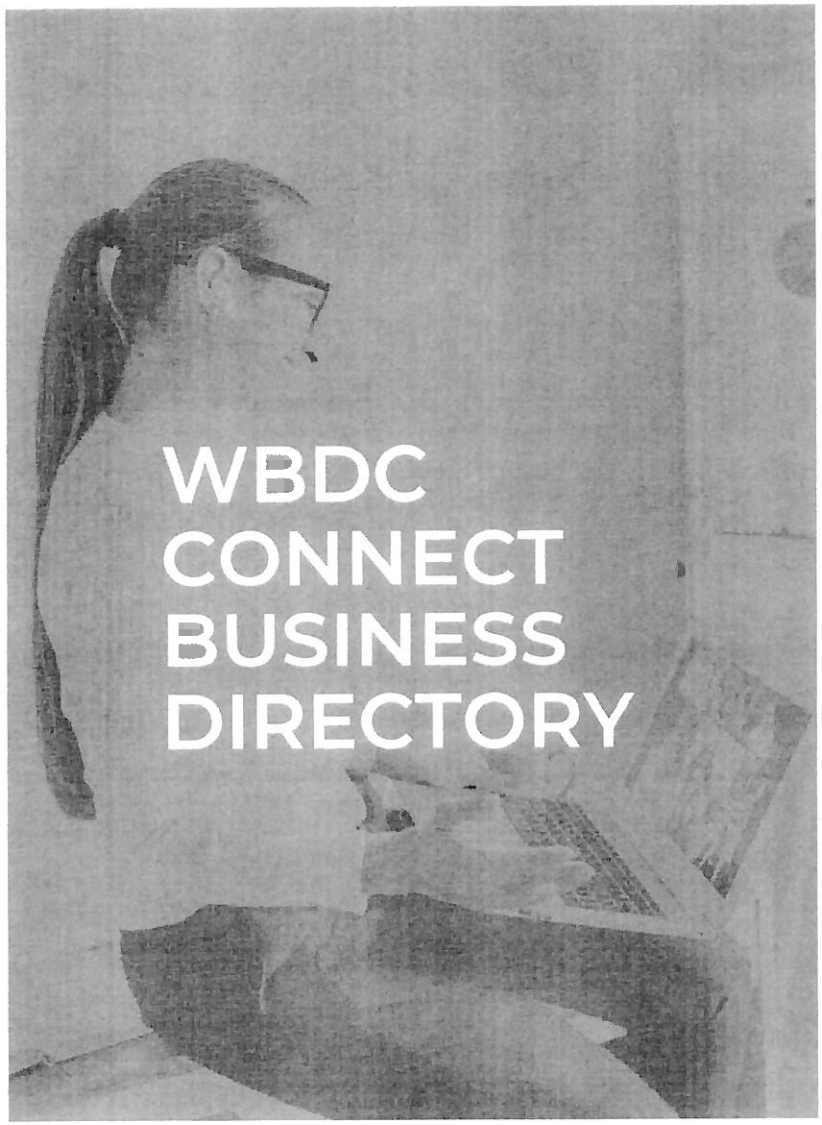
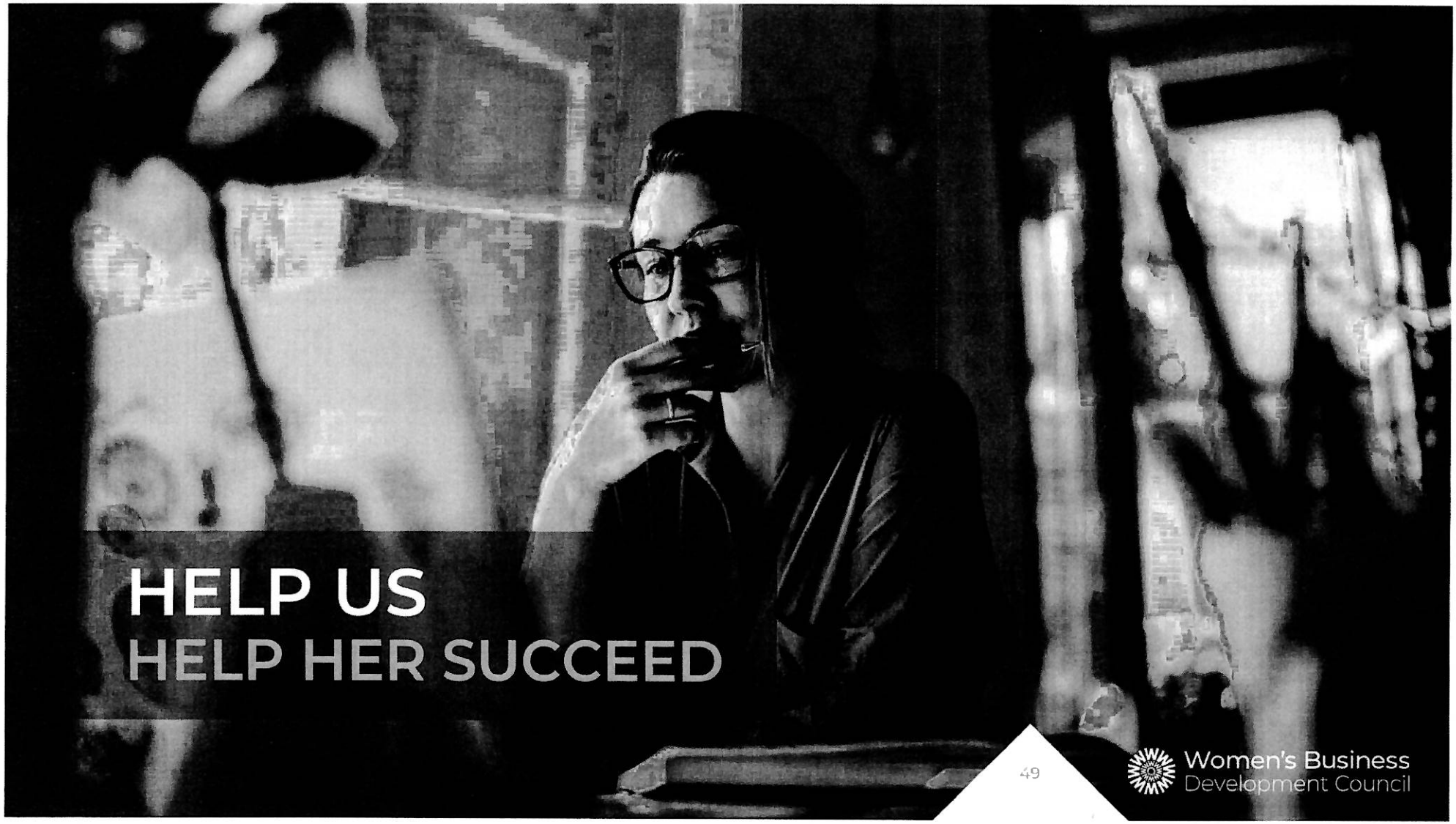
Westport
Wethersfield
Windham
Windsor
Wolcott
Woodbury

Women's Business Development Council 25 years



WBDC's **online women-owned business directory** highlights more than 350 small businesses from various industries. Plans are underway to expand the directory and its accessibility, encouraging consumers to shop small, shop women-owned, and shop local.


HELP US
HELP HER SUCCEED
Women's Business
Development Council

WAYS TO PARTNER WITH WBDC

Amplify our message.
Refer your colleagues, friends, and associates to WBDC.

Contribute to WBDC.
There has never been a more critical time to support women in business.

Become a part of our leadership team!
Join our Board of Directors or Regional Advisory Council.

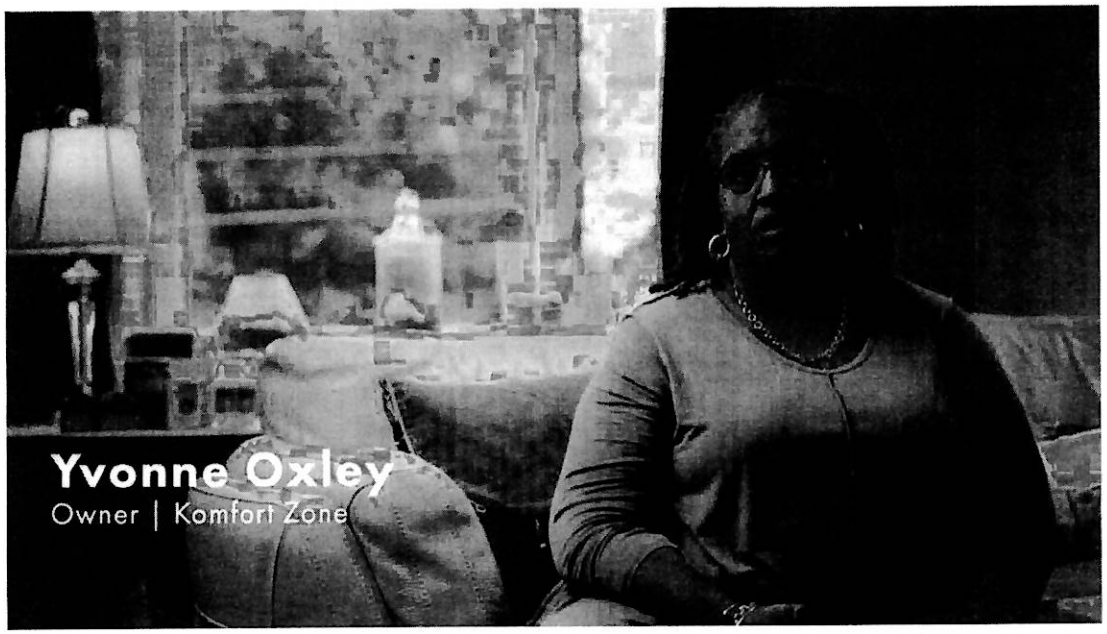
Volunteer.
Advise, teach, and mentor female entrepreneurs.

Engage.
Invite WBDC to speak with your employees about developing the entrepreneurial mindset.

2021 Client with Impact Honoree

Yvonne Oxley, Komfort Zone Soaps -

https://vimeo.com/636596006/7c9e15c85b



BE INSPIRED. BE IN TOUCH.
fpastore@ctwbdc.org | 203-353-1750
ctwbdc.org | @ctwbdc

BRIANNA RÉGINE
Visionary Consulting

Brianna Régine Visionary Consulting
Primary Contact: Brianna Régine Walston
1000 Lafayette Blvd, Suite 1100 - #108
Bridgeport, CT 06604
Business #: 475-999-4371
Direct #: 203-526-2915
Email: brianna@brvisionaryconsulting.com

Fee Proposal

RFP: #TAG-039-091222

Kindly note, all customized proposals are crafted with value in mind, not itemization. Fees reflect the value of BRVC's support and therefore considers: time, effort, expertise, returned time/energy to the Client for other tasks, projected hours and the standard as well as capacity to which services are provided. Kindly note, out of state travel on behalf of the client isn't included.

Total Fee for One Initial Year of Services - $86,439.60

We kindly request this be paid in monthly installments of $7,203.

This accounts for approximately 40hrs/a month.

Kindly note, the fee proposal above accounts for the scope of work which includes:

- Developing the grant application
- Providing an Online platform for applicants to submit applications
- Compiling application information in a format that is easily reviewed by the City's ARPA Committee
- Providing award/denial letters
- Collection of data and documentation from applicants

The tasks below are to be administered by the City of Torrington, with consultative guidance from BRVC:

- Disbursement of funds (This should be done using the Town's systems/ bookkeeping/resources)
- Provide proper documentation for both ARPA reporting and auditing purposes (We will most certainly work with you to define the reporting materials needed from applicants. That's not a problem. However, submitting federal and state reports should be administered by the City of Torrington.)

Inquiries about fees, negotiation and payment methods can be addressed to brianna@brvisionaryconsulting.com or 203-526-2915.

BRIANNA RÉGINE
Visionary Consulting

RFQ/RFP TAG-039-091222

Produced by Primary Contractor:

Brianna Régine Walston

CEO & Founder / Owner

Brianna Régine Visionary Consulting

On September 9, 2022

Brianna Régine Visionary Consulting
Primary Contact: Brianna Régine Walston
CEO & Founder
Business #: 475-999-4371
Direct #: 203-526-2915
Email: brianna@brvisionaryconsulting.com

This submission to RFP #TAG-039-091222 is conducted by and submitted on the behalf of principal officer, Brianna Régine Walston—CEO & Founder and Owner—of Brianna Régine Visionary Consulting.

Brianna Régine Visionary Consulting agency information:

Business Mailing Address:
1000 Lafayette Blvd, Suite 1100 - #108
Bridgeport, CT 06604

Business Residential Address:
45 Dixon Street
Bridgeport, CT 06604

Business Number: 475-999-4371
Direct Line: 203-526-2915

Direct Email Address: brianna@brvisionaryconsuting.com

Brianna Régine Visionary Consulting principal officer information:

Brianna Régine Walston
45 Dixon Street
Bridgeport, CT 06604

Kindly note, this proposal is valid for up to 90 days from the date of submission.The 90 day period may be extended upon written mutual agreement.

BRIANNA RÉGINE
Visionary Consulting

Brianna Régine Visionary Consulting
Primary Contact: Brianna Régine Walston
CEO & Founder
Business #: 475-999-4371
Direct #: 203-526-2915
Email: brianna@brvisionaryconsulting.com

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Required Documents

SECTION 1:
Official Letter of Interest, Project Approach, Timeline & Team

BRIANNA RÉGINE
Visionary Consulting

Brianna Régine Visionary Consulting
Primary Contact: Brianna Régine Walston
CEO & Founder
Business #: 475-999-4371
Direct #: 203-526-2915
Email: brianna@brvisionaryconsulting.com

Official Letter of Interest Re: RFP #TAG-039-091222
September 9, 2022

Dear City of Torrington Team,

My name is Brianna and I'm the CEO of Brianna Régine Visionary Consulting (BRVC)—a CT-based agency that takes an inside-out approach to helping decision makers, like you, build brands of longevity and impact with communications, marketing and operations services. My team and I are excited to express our interest in confidently executing and exceeding your consulting services needs, which will efficiently and effectively develop and administer your grant program for local and startup businesses.

We understand that facilitating a program that adequately supports the unique infrastructures, cultures and processes found within small and startup business models requires many interconnected pieces. My team and I take pride in our well-rounded, innovative and customized approach for our clients. If selected, our diverse expertise, proactiveness, agility, and solution-oriented mindset would allow us to implement operations management services that thoroughly assesses the specific needs of Torrington's local and startup businesses in order to ensure the shared grant materials align with legal requirements (particularly with U.S. Treasury's Final Rule and Compliance and Reporting Documents), grant information is clearly communicated and promoted to prospective applicants, the application process is conducted as seamlessly and fairly as possible, the facilitation of communication so that all relevant parties can be kept knowledgeable on awardees, and the implementation of administrative support to upkeep maintenance and reporting. We also believe our transparent, mutual-learning and human-first values make us best equipped to not only, understand the complexities and challenges that may arise in these tasks, but also face them head on with intentionality, mindfulness and respect.

We know how to get things done; and our number one goal is helping you thrive. I'm hopeful we'll be able to do just that in our collaboration. Kindly note, I will be the primary contractor responsible for this proposal so please feel free to direct questions to brianna@brvisionaryconsulting.com or call me directly at 203-526-2915.

Thank you for your consideration.

With gratitude,
Brianna Régine Walston
Founder & CEO of Brianna Régine Visionary Consulting, LLC

Brianna Régine Walston

Brianna Régine Visionary Consulting
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1000 Lafayette Blvd, Suite 1100 - #108
Bridgeport, CT 06604
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BRVC's approach

Below is an outline of BRVC's approach to the scope of work. Kindly note, this approach isn't exhaustive and can be modified after preliminary discussions.

1) Conduct preliminary discussion(s) to become familiar with current functionalities of program and desired outcomes for the upcoming facilitation of the program
2) Conduct an audit on current materials, promotional efforts and messaging to identify areas of improvement, that align with expressed desired outcomes
3) Draft official timeline for development and administering of program (especially the logistics of the application process)
4) Conduct implementation phase, as needed (which can include: creation of application – if applicable, disseminating application to applicants, addressing incoming questions about eligibility, reviewing applications, and selecting awardees)
5) Provide support and maintenance, as needed (which can include: follow-ups, tracking, check-ins, coaching/consulting)
6) Conduct tracking and reporting (which can include: quantitative data on applicants, budget monitoring, and qualitative data from selected awardees that can be used to illustrate grant's impact)

BRVC's operations management team has 7+ years of project management, administrative assistance and communications experience required for this project. We also have experience with collaborating with municipalities to facilitate grant applications and programs (see below for work done with the Connecticut Office of the Arts and the Town of Waterford.)

ARPA Small Business Grant Program Timeline (Sample)

Aug 1, 2022

ARPA Pilot Program Timeline	
Week 1 of October	Draft of survey and round table "save the date" language that will go out to small businesses/nonprofits.
Week 1 - 2 October	Gather list of local and startup businesses in City of Torrington
Beginning Week 3-4 of October	Collaborate with the City of Torrington to produce marketing/communication materials and send for feedback/approval.
Week 4 of October	Marketing & Communication materials begin to go out
Week 1 of November	Request that landing page template be created by City of Torrington's staff. We will have them fill in the information by two days before the launch date.
Week 1 of November	Begin crafting program outline/framework—particularly a list of items to include in grant eligibility guidelines
Week 2-3 of November	Draft/Update eligibility and reporting guidelines & send to City of Torrington
Week 3-4 of November	Get eligibility guidelines on the unpublished landing page.
Week 1 of December	Landing page & application is up. - use this as an example. Includes FAQ, Resource Page, etc. Marketing channels begin to post information to promote the program.
Week 2 of January	Hold an info session and record it to send out to all of the small businesses on our list + everyone who signs up for the info session.
Week 1 of February	Deadline for application inquiries and applications
Week 2 of February	City of Torrington & BRVC present award recommendations to ARPA Committee. Committee votes on final selection of awardees.
Week 1 of March	Awards are granted

Brianna Régine Visionary Consulting
Primary Contact: Brianna Régine Walston
CEO & Founder
Business #: 475-999-4371
Direct #: 203-526-2915
Email: brianna@brvisionaryconsulting.com

This project will be facilitated primarily by BRVC's Operations Management Team, with support from the Creative Strategy Team, where applicable. Specifically, this would look like:

Team:

1) Brianna Regine Walston – Resume | LinkedIn
   Percent of time allocated towards project: 15%
2) Operations Management Team Members:
   a. A Connecticut-based Project Manager with work experience equivalent to Brianna or Megan Fontaine
      Megan Fontaine – Resume | LinkedIn
      Percent of time allocated towards project: 50%
   b. A Connecticut-based Project Management Coordinator with relevant work experience
      Percent of time allocated towards project: 30%
3) Creative Strategy Team Member – which will be any of the following:
   Karie Pinnix – Resume | LinkedIn
   Renee Hewitt – Resume | LinkedIn
   Amandine Demange – Resume | LinkedIn
   Percent of time allocated towards project: 5%

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Kindly note, Brianna and Megan have worked together to provide project management support and event PR and coordination consulting to RiseUP for Arts' Arts ManiFESTation event happening on June 25th. The event is taking place in Hartford, and since November 2021, Megan and Brianna's services have given RiseUP for Arts (a team of 15 individuals) a return on investment that includes: risk mitigation, accountability, increased productivity levels, time and energy available to complete other tasks, establishment and maintenance of efficient business systems and processes, and documented processes (to help plan for future events). Here is May 2022's recap report. Currently, Brianna and Megan (and Jyne, pictured above) are also working together to facilitate the Town of Waterford's Small Business Grant Program funded by ARPA--and in alignment with U.S. Treasury's Final Rule and Compliance and Reporting Guidance documents.

(Kindly note, Brianna will always remain the main point of contact. Any changes to subcontractors on this project will be immediately shared with, as well as discussed and approved by the City of Torrington.

Brianna Régine Walston
C: (203) 526-2915 | E: brianna@brvisionaryconsulting.com | www.linkedin.com/in/briannareginewalston/

Profile: I am a dedicated, resourceful & hardworking team-player & self-starter who is solution-oriented. I'm passionate abou storytelling, improving ecosystem efficiency & empowering organizations & marginalized individuals to fulfill their purpose.

Work Experience

October 2020 – Present

Mentor, Coach and Youth Development Facilitator | UConn Werth Institute (View More) & UConn Stamford

- Werth Institute (Present)
  - Provide 1-on-1 monthly support to UConn students on their pathway to leadership through meaningfu conversations that recognize their barriers, offer resources, and provide practical steps that guide their caree exploration within entrepreneurship, technology and innovation fields.
  - Prepare session plans that prioritize mentee objectives; and help to assess student's progress in the program.
  - Help to organize monthly mentor info sessions and collaborate on content creation to support mentor/mentee relationships for The Werth Institute's NetWerx program.
  - In addition to 1-on-1 mentorship, I serve as a career coach for a cohort of students (up to 8) which involves providing monthly support and insight for their future career paths; and I consult on the growth of the NetWerX program.
- Launched and facilitated programming for UConn Stamford's Affinity Collaborative & Community Center (August 2021 – May 2022) – View Recap of Work

July 2018 - Present

Freelance & Spotlighted Agency Clients | Keynote Moderator, Panelist & Consultant

- *(November 2019 – Present, BRVC client)* Consult, supervise and provide support to CT Office of the Arts' Arts Workforce Initiative by selecting underrepresented candidates in the community for paid apprenticeships with non-profit organizations that adhere to the program's core framework: Relevance, Equity, Accessibility, Diversity and Inclusion.
  - Assist with developing the program's mentorship pillar aimed to broaden cultural awareness of the arts, provide professional and social networking and foster community within CT's talent and non-profit arts organizations.
- *(May 2021)* Moderate Greenwich Academy's BIPOC Affinity Group panel for graduating high school seniors; which includec analyzing the school's existing BIPOC support, consulting on the goal of the conversation, and creating/asking questions that illustrate accurate representations of the college experience for students of color.
- *(2019)* Curate, speak on and facilitate a variety of discussions/events determined to help marginalized groups—including individuals that identify with diverse sexualities, genders, ethnicities and socio-economic backgrounds—be seen, heard anc supported; and be given access to opportunities in the arts, networking, entertainment, entrepreneurship, social causes anc corporate spaces.

December 2016 – Present

Founder | Strategic Communications, Marketing & Operations Professional – Brianna Régine Visionary Consulting, LLC

- Implement brand development, digital marketing, public relations, event management & business operational support state non-profit, for-profit, entertainment, lifestyle, beauty and independent organizations.
- Support includes: Create and execute integrated marketing communications campaigns to increase brand awareness engagement and longevity (*includes brand messaging & identity, media relations, press releases, creation of PR assets influencer marketing and brand partnerships.* Execute digital campaigns that increase organic engagement, brand advocacy subscriptions/followers and brand interest *(includes content production and social media management.* Develop interna communications, staff recruitment and team management, business planning, project management, administrative duties and curation of professional development workshops. Brainstorm, plan and strategically execute events (*from inception tc completion)*—past events include: a fashion show hosted by a non-profit organization; a brunch/panel discussion; a multi-day community event; and product launches. To date, our events garnered a total of 700+ attendees *(including influencers media & VIP guests).*
- Conduct outreach and coordination for vendors, sponsors, brand partnerships & media—past efforts have resulted ir collaborations with: Audiomack, Martell Cognac, BET, InStyle Magazine, Tycoon Music Festival, Alikay Naturals, Thrive Causemetics, CT Office of The Arts, Curls, ABC, BlackEnterprise.com, NYTimes.com, AfroTech.com, FOX Soul SheenMagazine.com, ThisIsRnB.com, Earmilk.com, and more.
- Used Resources, Case Studies & Results: Hootsuite, MeetEdgar, Canva, WordPress, Wix.com, Bit.ly, Twitter, Instagram Facebook, Snapchat, Youtube, Pinterest, LinkedIn, Slack, Microsoft Office Suite Products, iMovie, Survey Monkey Handshake, Adobe, Planoly, Asana & more. http://www.brvisionaryconsulting.com/our-impact

Education: UCONN (Stamford, CT) – B.A. in Communication – Graduated | Greenwich Academy (Greenwich, CT) – Graduated

Megan Fontaine

Portland, OR 97222 | (513) 264-1185

meganfontaine21@gmail.com | https://www.linkedin.com/in/megan-fontaine-3b1b20105/

Self-motivated and passionate coordinator with background in producing impactful and on-time results. Applicable experience in clerical duties, design processes, marketing, organization, and planning.

SKILLS

- Multitasking & Prioritization
- Organization & Planning
- Written & Verbal Communication
- Ability to work under pressure
- Event coordination
- Vendor Coordination
- Collaboration & Teamwork
- Dependability
- Problem-solving
- Adaptability
- Marketing

PROFESSIONAL EXPERIENCE

Marketing Designer, Tire Discounters Headquarters, Cincinnati, OH (May 2019 – June 2021)

Marketing designer and coordinator at Tire Discounters Headquarters, responsible for designing digital and print advertisements for 146 stores, coordinating all print projects with vendors, collecting necessary content for all projects, and prioritizing 15+ projects per week.

- Developed timelines, proposals, presentations, creative briefs, and other internal documents within project budget and scope
- Coordinated multiple print projects with vendors, decreased request time by 50% with a customized spreadsheet
- Scheduled and ran creative meetings
- Trafficked approvals between team members and stakeholders
- Collected project specifications from the internal client and accurately executed those specifications on projects
- Proofed website updates and social media posts

Lead Student Designer, Ohio University Marketing Dept., Athens, OH (January 2016 – May 2019)

Lead Designer, responsible for assigning tasks to team members based on their experience and career goals, meeting with clients to ensure their marketing needs are met, and restructuring digital files to ensure ease of locating files for the design team.

- Designed a variety of digital and print advertisements for on-campus events (social media posts, flatscreens, videos, business cards, flyers, signage, menus, event invites, etc.)
- Collaborated with the Design Director to restructure student workflow, eliminating time it took managers to request a project update by 60%
- Managed and organized digital files
- Tracked approvals between team members and stakeholders

- Coordinated updates with clients to ensure optimal design productions
- Led a team of five graphic designers

TOOLS:

- Asana
- Trello
- Basecamp
- Adobe Creative Suite
- Salesforce
- Risk Management Plan
- Project Charter
- Statement of Work (SOW)
- Project Budget
- OKR Chart
- Microsoft Office
- Gantt Chart
- Kanban
- Communication Plan

EDUCATION AND CERTIFICATIONS

Google Project Management Professional Certificate - October, 2021

Ohio University, Athens, OH, May 2019
Bachelor of Science - Visual Communications, Marketing Minor

SECTION 2:
Relevant Experience, Current Projects & References

Brianna Régine Visionary Consulting
Primary Contact: Brianna Régine Walston
1000 Lafayette Blvd, Suite 1100 - #108
Bridgeport, CT 06604
Business #: 475-999-4371
Direct #: 203-526-2915
Email: brianna@brvisionaryconsulting.com

Description of BRVC's technical capabilities, areas of expertise & experience:

Brianna Régine Visionary Consulting, LLC (BRVC) is a strategic communications & marketing agency that takes an inside-out approach to helping business owners, creatives and decision makers build brands of longevity.

Our creative strategy and operations management services include: brand development, social & digital strategy, public relations, event public relations & coordination, project management, administrative assistance and team development & engagement.

(Visit www.brvisionaryconsulting.com/about to view our full capabilities and service decks.)

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In addition to our recommended approach above, please see below for documented examples utilized and/or aggregated from our past program development, event planning, marketing and analytic experience which demonstrate our understanding of all facets of this project as well as our metrics of success. (i.e. event goals/objects, date, branding, collaborators, budgeting, etc).

The Affinity Collaborative & Community Center – View

The Breed Weekend Event Deck – View

RiseUP For Arts – Arts ManiFESTation Project Management Event Checklist - View

Current Projects:

- Administering and facilitation of Town of Waterford's Small Business Grant Program
  - Ends June 15, 2023 (which potential for renewal)
  - Operations Management
  - Scope of Work / Recap of Work (See Appendix)
  - Contact: Abby Piersall, Planning Director, (860) 444-5813, apiersall@waterfordct.org
  - Fee: $5,500/month
- Facilitating the Arts Workforce Initiative Program through the Connecticut Office of the Arts
  - Ends June 2023
  - Operations Management and Creative Strategy
  - Scope of Work / Recap of Work (See Appendix)
  - Contact: Kolton Harris, Program Associate, (860) 500-2328, Kolton.Harris@ct.gov
  - Fee: $4,200/month
- Create brand awareness and scale Powerful Penny LLC, ran by former SVP of. Global research company turned full-time entrepreneur—Cheryl Grace
  - Ends October 2022
  - Operations Management and Creative Strategy
  - Scope of Work – View
  - Contact: Cheryl Grace, Founder & CEO, cheryl@iamcherylgrace.com
  - Fee: $6,000/month

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Reference #1

- City of New Haven – Department of Cultural Affairs and Tourism
- Adriane Jefferson
  - Director of Arts, Culture and Tourism
  - Executive Director of New Haven Festivals
  - Phone: 203-238-2344
  - Email: ajefferson@newhavenct.gov

Reference #2

- University of Connecticut – Werth Institute
- Julie Gehring
  - Director of Mentorship and Student Development
  - Phone: 941-518-6553
  - Email: julie.gehring@uconn.edu

Reference #3

- The Breed Entertainment
- Aaron Rogers
  - Co-Founder & CEO
  - Phone: 475-243-6128
  - Email: athebreed@gmail.com

Reference #4

- University of Connecticut – Stamford
- Erica Granoff
  - Director of Student Services
  - Phone: (203) 251-8484
  - Email: Erica.Granoff@uconn.edu

Reference #5

- Connecticut Office of the Arts
- Kolton Harris
  - Program Associate
  - Phone: (860) 500-2328
  - Email: Kolton.Harris@ct.gov

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Overview of Relevant Agency Experience

Project Name/Type: Communications/Creative Strategy & Operations Management Support
Client Name: Cheryl Grace (CEO & Founder of Powerful Penny LLC; and formerly the SVP of global marketing research firm, Nielsen)
Collaboration Timeframe: May 2021 – Present
Required Outcomes:

- Leverage Cheryl Grace's existing accolades & position the Powerful Penny LLC brand as a valuable contributor to the business-lifestyle space through visibility opportunities—which will prioritize Cheryl as an executive coach.
- Main goal: Bring awareness to Powerful Penny LLC's value through Cheryl Grace's recognizable identity via earned media (traditional and non-traditional), speaking engagements and strategic partnerships
    - A minimum of 2-4 earned media placements/month (PRIORITY)
    - A minimum of 2-4 speaking engagements/month (PRIORITY)
    - A minimum of 1 strategic partnership/month
- Establish and maintain business systems in order to improve efficiency, professional appeal, productivity and scalability.
    - Project management
    - Administrative assistance

Person in Communications Firm Responsible: Brianna Régine Walston (CEO & Founder), Renee Hewitt (Account Manager & Strategist), Amandine Demange (Account Manager & Strategist), Karie Pinnix (Account Coordinator) and Megan Fontaine (Project Manager Coordinator)
Activities Undertaken: Narrative framing, conceptualization of brand guidelines, social & digital strategy consulting, competitor as well as internal marketing communications audits, strategic planning & implementation, media relations outreach & coordination, speaking engagement outreach & coordination, strategic partnership outreach & coordination, asset review and counseling, goal/scope assessment, project supervision, internal communications (i.e. for campaigns, top-down, bottom-up, memos, reports, itineraries, contracts, invoices, and agendas), process development, and administrative support.
Results Achieved: Was successful in sharing Cheryl's story about her transition from her 25+ corporate career to being a full-time executive coach through her own business. This involved being mindful of the complex narrative surrounding her transition and positively positioning her as an executive coach and leader. Our efforts resulted in coverage from Daytime Chicago, Sheen Magazine, Yahoo News, Well + Good, Black Women's Expo, and more. We've also streamlined internal communication across all her vendors to create consistency of her brand's presence; as well as directly with corporate clients and her target audience.
Timeframe for Achieving Results: In a 9-month time frame (operations support beginning within the last 4 months), within two months, we met our media goals by 66%, our speaking engagement

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goals by 50%, and substantially improved Powerful Penny's output and responsiveness to customers, clients and vendors.

Additional Reference Links:

Cheryl Grace Press Kit (This is an example of communications material that we've created for her.)

Project Name/Type: Arts Workforce Initiative (AWI) – Communications/Creative Strategy & Operations Management Support

Client Name: Connecticut's Office of The Arts (COA)
Collaboration Timeframe: December 2019 – Present
Required Outcomes:

- Maintain retention of apprentice placements in selected organizations
- Show that AWI/employment in the arts contributes to the economic growth in CT
- Be able to gather accurate apprentice demographics, and use data to further improve diversity, equity and inclusion in the program
- Build trust as well as organic & ongoing relationships between COA, apprentices & organizations *(receive genuine trackable & quality feedback from organizations & interns in regards to their experiences with one another, as well as COA/AWI)*
- Instill professional development workshops/trainings for intern applicants & selected organizations
- Long-term: Receive applications that align with the cross-sectors of the arts' community *(i.e. public relations, marketing, etc.)*

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Email: brianna@brvisionaryconsulting.com

Person in Communications Firm Responsible: Brianna Régine Walston (CEO & Founder)

Activities Undertaken: Worked with COA's leadership to thoroughly assess and update internal messaging for the program to ensure it maintains its integrity of following state policy as well as its READI principles; provided messaging and counsel for public information sharing via newsletters, social media and directly with stakeholders; strategically and carefully implemented communications and operational practices/counsel to COA, stakeholders and apprentices as they navigated COVID-19; and planning and implementation

Results Achieved: A total of 35 apprentices were provided job opportunities in 35 non-profit organizations within 2 years. *(Please view our reports for details on the impact of our work and how we met/exceeded required outcomes: 2021 and 2020. Kindly note, each of our client collaborations include frequent check-ins, agendas and recap reports. Please see below for reports that were printed for your convenience)*

Timeframe for Achieving Results: The apprenticeships take place June – August, however, there's a 6-month lead time for preliminary steps.

Additional Reference Links:

AWI Website (*Kindly note, BRVC is a part of the program's redesign for 2023. Our work involves: brand development, social & digital strategy, public relations and project management.)*

2021 Selected Apprentices

2020 Selected Apprentices

Costs per month (present day rate): Starts at $3600/month

More project examples and client testimonials can be viewed in our capabilities deck.

Details of our services can be viewed here.

Resources we have to help perform services/platforms we're familiar with: SurveyMonkey, SurveyMonkey Apply, MuckRack, Google Drive/Gmail, Asana, all social media platforms, Hootsuite, Planoly, Basecamp, GoDaddy, Wordpress, Slack, Constant Contact, Canva, Microsoft Suite, Outlook, and more.

SECTION 3:
Proof of Insurance

ACORD

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 01/29/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER

StateFarm

State Farm: Colleen Tighe Agency
102 Kings Highway E
Fairfield, CT 06825

CONTACT NAME: Skyler Mann
PHONE (A/C, No, Ext): 203-953-3220 FAX (A/C, No): 203-763-4072
E-MAIL ADDRESS: skyler.r.mann.ddwu@statefarm.com

INSURER(S) AFFORDING COVERAGE — NAIC #

INSURER A: State Farm Fire and Casualty Company — 25143
INSURER B:
INSURER C:
INSURER D:
INSURER E:
INSURER F:

INSURED

Bnanna Regine Visionary Consulting, LLC
45 Dixon St
Bridgeport, CT 06604

COVERAGES **CERTIFICATE NUMBER** **REVISION NUMBER**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	COMMERCIAL GENERAL LIABILITY CLAIMS-MADE X OCCUR GEN'L AGGREGATE LIMIT APPLIES PER X POLICY PRO-JECT LOC OTHER:		Y	97-BR-J783-1	03/03/2022	03/03/2023	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG	$ 1,000,000 $ 300,000 $ 5,000 $ $ 2,000,000 $ 2,000,000 $
	AUTOMOBILE LIABILITY ANY AUTO OWNED AUTOS ONLY HIRED AUTOS ONLY SCHEDULED AUTOS NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)	$ $ $ $ $
	UMBRELLA LIAB OCCUR EXCESS LIAB CLAIMS-MADE DED RETENTION $						EACH OCCURRENCE AGGREGATE	$ $ $
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) Y/N N/A If yes, describe under DESCRIPTION OF OPERATIONS below			97-BR-J784-3	03/03/2022	03/03/2023	PER STATUTE OTH-ER E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	$ 100,000 $ 100,000 $ 500,000
A	ERRORS & OMISSIONS PROFESSIONAL LIABILITY			PS0000007036500	03/10/2022	03/10/2023	EACH ACT TOTAL LIMIT OF LIABILITY	1,000,000 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Location: 45 Dixon St, Bridgeport, CT 06604

CERTIFICATE HOLDER

To be the City of Torrington

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Skyler Mann

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State Farm Fire and Casualty Company
A Stock Company with Home Offices in Bloomington, Illinois
Herein called the Insurer

MISCELLANEOUS ERRORS AND OMISSIONS LIABILITY INSURANCE POLICY

Policy No: PS0000007036500
Renewal of Policy No:

PART 1. DECLARATIONS PAGE

THIS IS A CLAIMS MADE POLICY. **DEFENSE COSTS** ARE INCLUDED IN THE LIMIT OF LIABILITY. PLEASE READ THE ENTIRE POLICY CAREFULLY.

THIS DECLARATIONS PAGE, ALONG WITH **YOUR** SIGNED **APPLICATION OR RENEWAL APPLICATION** AND ALL FORMS AND ENDORSEMENTS LISTED IN ITEM 8. BELOW COMPLETE THE POLICY.

IN RETURN FOR THE PAYMENT OF THE PREMIUM, **WE** AGREE WITH **YOU** TO PROVIDE INSURANCE UNDER THE PROVISIONS OF THIS POLICY.

Item 1. **Named Insured**: BRIANNA REGINE VISIONARY CONSULTING

Address: 45 Dira St
Bpt, CT 06604

Item 2. **Policy Period**:
Effective Date: March 10, 2022 Expiration Date: March 10, 2023
(12:01 A.M. Standard Time at the Address stated in Item 1.)

Item 3. **Retroactive Date**: March 10, 2022 IF NO DATE IS STATED HERE, COVERAGE DOES NOT APPLY TO **WRONGFUL ACTS** COMMITTED PRIOR TO THE EFFECTIVE DATE STATED IN ITEM 2. ABOVE.

Item 4. Schedule of **Insured Services:**

Public relations, management and marketing consulting including organizational consulting, leadership development, executive coaching, strategic communication, brand development, digital marketing, event management, social media management, business operational support, and related project management services

PART 1. DECLARATIONS PAGE (Continued)

Named Insured: BRIANNA REGINE VISIONARY CONSULTING
Policy No: PS0000007036500

Item 5.	Limit of Liability:	a.	$1,000,000	Each **Wrongful Act**
		b.	$1,000,000	Total Limit of Liability
Item 6.	Retention:		$2,500	Each **Wrongful Act**
Item 7.	Premium:		$2,143.00	

Item 8. Form(s) and Endorsement(s) made part of this Policy at the time of issuance:

PSMS4000CT(06/04)	Miscellaneous Errors and Omissions Liability Insurance Policy
PS1030(01/01)	Changes Endorsement
PS1044 (02/21)	U.S. Treasury Department's Office Of Foreign Assets Control ("OFAC") Advisory Notice To Policyholders
PS1045 (02/21)	Trade Or Economic Sanctions
PSMS4047(01/01)	Independent Contractors - Persons Insured Endorsement
PSMS4049CT(07/03)	Connecticut Amendatory Endorsement

Item 9. Notices to the Insurer - All notices to the Insurer pertaining to this Policy must be sent to:

State Farm Specialty Products
222 South Riverside Plaza, Suite 2400
Chicago, IL 60606

Date of Issue: March 29, 2022

By: James Elizondo
Authorized Representative

WORKERS COMPENSATION AND EMPLOYERS LIABILITY POLICY
CLAIM KIT NOTICE

28-0185-FB0D

POLICY NO. 97-BR-J784-3

STATE FARM FIRE AND CASUALTY COMPANY
PO Box 888854, Dunwoody GA 30356-0854

NAMED INSURED & MAILING ADDRESS:

BRIANNA REGINE VISIONARY
CONSULTING LLC
45 DIXON ST
BRIDGEPORT CT 06604-1802

Thank you for allowing State Farm® to provide your business with Workers' Compensation Insurance. To help you remain ***compliant*** with your state(s) regulations, required posters have been made available to you through www.statefarm.com.® It is **YOUR RESPONSIBILITY TO POST** this information as required by the state(s) in which you conduct business.

To download and print your **required postings**:

1. Go to www.st8.fm/claimkit
2. Scroll to locate the State(s) you operate in and select the link

The information on the **right side** of the page includes state required bulletins and posters which need to be **printed and displayed** in your place of business.

In addition, while we hope you never experience a workplace injury, we want you to be prepared in the event you need to report a claim. You can also download and print the **First Report of Injury** document from the same web page.

On the **right side** of the page you will locate the **'First Report of Injury,'** which is **YOUR RESPONSIBILITY TO USE TO NOTIFY US OF ALL EMPLOYEE INJURIES** as soon as the injury occurs. In addition, the information on the **left side** of the page is what you will need when reporting a claim, including phone and fax numbers and mailing address.

If you do not have access to the internet or the ability to print the required posters, please contact your State Farm agent or call 1-855-264-2229 for a claims kit to be mailed to you.

Again, we thank you for choosing State Farm to provide your business with Workers' Compensation Insurance.

Prepared 04/07/2022

597-633.3 12-13-2019 (F0303D)

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Includes copyrighted material of Insurance Services Office, Inc., with its permission.

WORKERS COMPENSATION AND EMPLOYERS LIABILITY POLICY
INFORMATION PAGE

28-0185-FB0D

POLICY NO. 97-BR-J784-3

COVERAGE IS PROVIDED BY
STATE FARM FIRE AND CASUALTY COMPANY
PO Box 888854, Dunwoody GA 30356-0854

NCCI CARRIER CODE NO. 14842

1. NAMED INSURED & MAILING ADDRESS
BRIANNA REGINE VISIONARY
CONSULTING LLC
45 DIXON ST
BRIDGEPORT CT 06604-1802

FEIN 823069941

WORKPLACE NOT SHOWN

INSURED IS LIMITED LIABILITY COMPANY

COPYRIGHT 1987 NATIONAL COUNCIL ON COMPENSATION INSURANCE

2. THE POLICY PERIOD IS FROM 03/03/2022 TO 03/03/2023 12:01 A.M. STANDARD TIME AT THE INSURED'S MAILING ADDRESS.

3A. WORKERS COMPENSATION INSURANCE: PART ONE OF THE POLICY APPLIES TO THE WORKERS COMPENSATION LAW OF THE STATES LISTED HERE: CT

B. EMPLOYERS LIABILITY INSURANCE: PART TWO OF THE POLICY APPLIES TO WORK IN EACH STATE LISTED IN ITEM 3A. THE LIMITS OF OUR LIABILITY UNDER PART TWO ARE:
BODILY INJURY BY ACCIDENT $ 100,000 EACH ACCIDENT
BODILY INJURY BY DISEASE $ 100,000 EACH EMPLOYEE
BODILY INJURY BY DISEASE $ 500,000 POLICY LIMIT

C. OTHER STATES INSURANCE: PART THREE OF THE POLICY APPLIES TO ALL STATES EXCEPT ME, MT, ND, OH, RI, WA, WV, WY AND STATES LISTED IN 3A.

D. THIS POLICY INCLUDES THESE ENDORSEMENTS AND SCHEDULES: WC000404 WC060303C WC060301/0484 WC000000C WC000424 WC060601A WC000414A WC000422C WC000421E WC000308

4. THE PREMIUM FOR THIS POLICY WILL BE DETERMINED BY OUR MANUALS OF RULES, CLASSIFICATIONS, RATES AND RATING PLANS. ALL INFORMATION REQUIRED BELOW IS SUBJECT TO VERIFICATION AND CHANGE BY AUDIT.

CODE NOS. AND CLASSIFICATIONS	PREMIUM BASIS TOTAL ESTIMATED ANNUAL REMUNERATION	RATE/$100 REMUNERATION	ESTIMATED ANNUAL PREMIUM
8810 CLERICAL OFFICE EMPLOYEES NOC	100	.12	0
CATASTROPHE (OTHER THAN TERRORISM) 9741	100	.01	1
PREMIUM ADJUSTMENT REQUIRED FOR MINIMUM PREMIUM			27
TERRORISM 9740	100	.03	1
EXPENSE CONSTANT			25
MINIMUM PREMIUM $ 52 CONNECTICUT	TOTAL ESTIMATED ANNUAL PREMIUM $(MIN.)		54

DEPOSIT PREMIUM $ 54
CT 2ND INJURY FUND SURCHRG $ 1.20
CT ASSESSMENT FUND $ .51

PREPARED 04/07/2022

WC 00 00 01 A

COUNTERSIGNED_____

WORKERS COMPENSATION AND EMPLOYERS LIABILITY POLICY
INFORMATION PAGE ENDORSEMENT
PAGE 01

28-0185-FB0D

THIS FORMS A PART OF
POLICY NO. 97-BR-J784-3

COVERAGE IS PROVIDED BY
STATE FARM FIRE AND CASUALTY COMPANY
PO Box 888854, Dunwoody GA 30356-0854

NAMED INSURED AND MAILING ADDRESS
BRIANNA REGINE VISIONARY
CONSULTING LLC
45 DIXON ST
BRIDGEPORT CT 06604-1802

THE EFFECTIVE DATE IS 03/03/2022

THE EXPIRATION DATE IS 03/03/2023

LOCATION OF THE INSURED

LOCATION NUMBER		
01	45 DIXON ST ENTITY:ET01	BRIDGEPORT CT 06604-1802 NAICS:561110

ALL OTHER TERMS AND CONDITIONS OF THIS POLICY REMAIN UNCHANGED.

WC 99 00 02 04-84

PREPARED 04/07/2022

APPENDIX

State of Connecticut

Department of Administrative Services
Supplier Diversity Program

This Certifies **Brianna Régine Visionary Consulting, LLC**

1000 Lafayette Blvd Bridgeport CT 06604

As a **Black American Woman Owned Small/Minority Business Enterprise**

February 09,2022 through February 09,2024

Owner(s): Brianna Regine Walston

Contact: Brianna Regine Walston **Telephone:** (475) 999-4371 Ext: **FAX:**

E-Mail: brianna@brvisionaryconsulting.com **Web Address:** www.brvisionaryconsulting.com

****Affiliate Companies:**

Meg Yetishefsky

Supplier Diversity Director

Supplier Diversity Specialist

** A contractor awarded a contract or a portion of a contract under the set-aside program shall not subcontract with any person(s) with whom the contractor is affiliated.

APPENDIX A

Request for Qualifications and Proposals
City of Torrington - Technical Assistance and Administration of Direct Business Grants
RFQ/RFP TAG-039-091222

INSURANCE REQUIREMENTS

Certificate of Insurance: All insurance policies must include a Waiver of Subrogation whereby the insured waives its right to subrogate against the City, its subsidiaries, employees, volunteers, directors and officers. Proof of proper insurance coverage, Workers Compensation Insurance, Liability and Property damage, and Vehicle Insurance shall be filed with the City of Torrington Purchasing Agent within 10 days after the award of the bid. The Certificate of Insurance must name the City of Torrington, 140 Main St., Torrington, CT, its subsidiaries, employees, volunteers, directors & officers as the "Additional Insured" and filed with the Purchasing Agent prior to commencement of work. Renewal Certificates of Insurance must be mailed to the Purchasing Agent 10 days prior to the expiration of the required coverage. –

NON-DISCRIMINATION

The respondent agrees and warrants that in the performance of the contract pursuant to this solicitation he/she will not discriminate or permit discrimination against any person or group of persons on the grounds of sex, race, color, religion, age, marital status, ancestry, national origin, past history of mental disorder, mental retardation or physical disability or other basis in any manner prohibited by the laws of the United States, the State of Connecticut or the City of Torrington. –

FEDERAL PROCUREMENT: Any procurement made pursuant to a federal award or subject to reimbursement, in whole or in part, with federal funds must comply with the City of Torrington's purchasing procedures, state law, and the applicable Federal Procurement Requirements, including 2 CFR § 200.322 ("Procurement of recovered materials"), 2 CFR § 200.323 ("Contract cost and price"), 2 CFR § 200.324 ("Federal awarding agency or pass-through entity review"), 2 CFR § 200.325 ("Bonding requirements"), and 2 CFR § 200.326 ("Contract provisions"). In the event of any conflict between Town, State, or federal requirements, the most stringent requirement must be used. (See 2 CFR § 200.318.) City employees must comply with funding agency requests for review of technical specifications or procurement documents as provided in 2 CFR § 200.324. –

INDEMNIFICATION

To the fullest extent permitted by law, the Firm shall indemnify and hold harmless the City and their respective consultants, agents, and employees from and against all claims, damages, losses and expenses, direct, indirect or consequential (including but not limited to fees and charges of attorneys and other professionals and court and arbitration costs) arising out of or resulting from the performance of the Firm's work, provided that such claim, damage, loss or expense is caused in whole or in part by any negligent act or omission by the Firm, or breach of its obligations herein or by any person or organization directly or indirectly employed or engaged by the Firm to perform or furnish services, or anyone for whose acts the Firm may be liable, regardless of whether or not it is caused in part by a party indemnified hereunder.

As to any and all claims against the City or any of its consultants, agents or employees by any employee of Firm, by any person or organization directly or indirectly employed by Firm to perform or furnish any of the work, or by anyone for whose acts Firm may be liable, the indemnification obligation under this section shall not be limited in any way by any limitation on the amount of type of damages, compensation or benefits payable by or for Firm under worker's or workman's compensation acts, disability benefit acts or other employee benefit acts. –

APPENDIX B

Request for Qualifications and Proposals
City of Torrington - Technical Assistance and Administration of Direct Business Grants
RFQ/RFP TAG-039-091222

Acceptance of Terms of this Agreement

Name of Proposer:
Brianna Regine Visionary Consulting
Contact Person:
Brianna Regine Walston
Address:
1000 Lafayette Blvd - Suite 1100
City/State/Zip:
Bpt, CT 06604

Telephone: 203-526-2915 (Direct) 475-999-4971 (Business) Fax: ——

E-mail: Brianna@brvisionaryconsulting.com

Authorized Signature B C Title: CEO + Founder

Name Printed: Brianna Regine Walston Date: 9/9/22

Federal Tax Identification Number: (FEIN) 82-3069941

It is agreed by the above signed proposer that the signature and submission of this proposal represents the proposer's acceptance of all terms, conditions, and requirements of the proposal specifications, and, if awarded, the proposal will represent the agreement between the parties.

The proposer agrees that the cost of any work performed, materials furnished, services provided, or expenses incurred, which are not specifically delineated in the proposal documents, but which are incidental to the scope, intent, and completion of this contract, shall be deemed to have been included in the prices for the various items scheduled.

APPENDIX C
Request for Qualifications and Proposals
City of Torrington - Technical Assistance and Administration of Direct Business Grants
RFQ/RFP TAG-039-091222

NON-COLLUSION AFFIDAVIT

STATE OF Connecticut COUNTY OF Fairfield

I, Brianna Regine Walston, being first duly sworn, deposes and says that:

1. I am CEO + Founder of Brianna Regine Visionary Consulting, the Bidder that has submitted the attached Bid for "RFP TAG-039-091222";

2. I am fully informed respecting the preparation and contents of the attached Bid and of all pertinent circumstances respecting such bid;

3. Such Bid is genuine and is not a collusive or sham Bid;

4. Neither the said Bidder nor any of its officers, partners, owners, agents, representatives, employees or parties of interest, including this affiant, has in any way colluded, conspired, connived or agreed directly or indirectly with any other Bidder, firm or person to submit a collusive or sham Bid in connection with such Contract, for which the attached Bid has been submitted nor has it in any manner, directly or indirectly, sought by agreement or collusion or communication or conference with any other Bidder, firm or person to fix the price or prices in the attached Bid or of any other Bidder, or to fix any overhead, profit or cost element of the Bid price or the price of any Bidder, or to secure through any collusion, conspiracy, connivance or unlawful agreement any advantage against the City of Torrington or any person interested in the proposed Contract; and

5. The price or prices quoted in the attached Bid are fair and proper and are not tainted by any collusion, conspiracy, connivance or unlawful agreement on the part of the Bidder or any of it agents, representatives, owners, employees, or parties in interest, including this affiant.

(Printed) Brianna Regine Walston (Signed) B. W

(Title) CEO + Founder

Subscribed and sworn to before this 9th day of September, 2022

Lendia Draines Notary Public Printed

Notary Public Signature

My Commission Expires 06/30/2026

(Notary Seal)

LENDIA SHANE DRAINES
Commission Expires
NOTARY PUBLIC
06-30-26
CONNECTICUT

NOTE: Documents must be signed before and sealed by a Notary Public. Only documents bearing a notary seal will be accepted.