



**RFP Ohio Small Business Development Centers  
Federal Fiscal Year 2017  
Request for Proposals (RFP)**

**Request for Proposal (RFP) for:**

1. The Ohio Small Business Development Centers (SBDC) Program
2. The Ohio SBDC Export Assistance Network

**Project Duration:** Federal Fiscal Year 2017: 10/01/2016 – 09/30/2017

**RFP Timeline:**

RFP Released on Wednesday, May 11, 2016  
 Bidders Conference Webinar: 10:30am Monday, May 16, 2016  
 Letters of Intent Due by Noon on Monday, May 23, 2016  
 Question submissions accepted Wednesday, May 11 – Monday, June 6, 2016  
 Proposals due by 10:00 am on Friday, June 10, 2016  
 Post Submission Negotiations mid-late June  
 Preliminary Award Notifications Wednesday, July 6, 2016  
 Post Award Submissions (Strategic & Marketing Plans) due before Saturday, October 1, 2016  
 Program Year begins October 1, 2016

**Availability of Funding and Required Cash Match:**

Program:	Funding Available	Required Local Match - Cash
SBDC	\$4,162,000	30%
SBDC Export Assistance Network	\$420,000 (\$60,000 per center)	30% for a standalone office 10% if proseed with an SBDC

**Registration for the Pre-Bid Conference Webinar at:**

<https://join.onstreammedia.com/register/54204012/OHIOSBDC>

**RFP Administered by:**

The Ohio Development Services Agency  
 Office of Small Business and Entrepreneurship  
 Contact: State SBDC Director  
 Small Business Development Center Program  
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## **1. Ohio SBDC Statement of Solicitation**

### **1.1 Overview**

This Request for Proposal (RFP) is being issued from the Ohio Development Services Agency (ODSA) which, through a shared cooperative agreement with the United States Small Business Administration (SBA), serves as host to the SBDC State Lead Center for Ohio. This RFP is intended to identify local partners to participate in the delivery of SBDC services to Ohio small businesses and nascent entrepreneurs allowing them to start and grow businesses, create jobs, increase sales and gain capital and investment. The goal of this RFP is to utilize a competitive process to leverage resources and partnerships in a manner that will ensure the greatest outcomes for the small business community in Ohio while ensuring accountability, transparency and impact for the state and federal taxpayer dollars used to fund the program. It is the goal of ODSA to regularly issue competitive RFPs for the SBDC program to ensure innovative services, exceptional customer service, and maximum economic impact for the state while ensuring the highest levels of accountability for taxpayer dollars.

Under this competitive RFP, applicants may submit proposals for one or a combination of the following SBDC service centers:

- Small Business Development Center
- Small Business Development Center with SBDC Export Assistance Director/Advisor
- Stand-alone SBDC Export Assistance Network Office

*Please note: Since the 2016 program year the Ohio SBDC Program has not separately identified or funded Manufacturing Technology Small Business Development Centers (MTSBDCs). While applicants are encouraged to propose specialized services to meet the needs of targeted business communities, separate lines of funding for MTSBDCs are not being offered for this competitive cycle.*

### **1.2 Background**

Ohio's SBDC Program is a partnership program funded by the U.S. Small Business Administration (SBA), ODSA and local host organizations. For over 30 years the State of Ohio has hosted the SBDC program in Ohio and has made a substantial economic impact on the state. During Federal Fiscal Year (FFY) 2015, the Ohio SBDC program provided over 55,000 hours of consulting services that helped entrepreneurs and small business owners:

- Create over 4,000 jobs
- Increase sales over \$490 million including over \$58 million in export sales
- Access over \$200 million in capital/investment

The program is designed to deliver high quality technical assistance to existing Ohio small businesses, startups and entrepreneurs. Assistance is provided through in-depth, personalized, one-on-one business advising, training and other activities that help businesses grow and create jobs. Individual centers offer both general business assistance and targeted innovative programming based on the needs of the local business community. A detailed overview of the program's scope and function is included in the SBA's Annual "Program Announcement" available at: <https://www.sba.gov/offices/headquarters/osbdc/resources/13279>. At the time of publication of this RFP the "FFY 2017 SBDC Program Announcement" has not yet been released by the SBA. The updated program announcement is not expected to be substantially different than the 2016 program announcement. Applicants will be notified when the updated program announcement is available.

### **1.3 SBDC Export Assistance Network Background**

Ohio SBDC funds the Ohio SBDC Export Assistance Network, a team of specialists whose main functions are to assist companies with accessing international markets and to recruit and prepare more Ohio companies for exporting their goods and services. A global strategy is a vital component of growth competitiveness for many successful businesses. In today's highly competitive global marketplace, Ohio and its companies must strive to extend economic reach, build relationships and seize opportunities on a global scale. Accessing new markets through exports is a critical part of sustaining long-term economic growth and creating future jobs. The opportunity for Ohio companies to increase international sales is significant and growing. Today, 95% of the world's population and three-quarters of the world's purchasing power is outside of U.S. borders. The Ohio SBDC Export Assistance Network promotes exporting as way to grow business opportunities while providing technical assistance to help Ohio small businesses start or expand exports to foreign markets.

### **1.4 Reasons for Considering this RFP**

Ohio SBDC programs and services provide direct and measurable economic benefits to the communities they serve. The program demonstrates a significant return on investment that results in job growth, business creation and increased sales. By hosting a local SBDC, an organization has access to the entire SBDC Network of Certified Business Advisors (CBA) and consultants with decades of expertise in working with small businesses.

Becoming a partner of the SBDC leads to new opportunities with the broader academic, business, and economic development community; infusion and leverage of funding for business and community outreach service activities; access to specific resources including a proprietary client and economic impact tracking system, proprietary and complimentary industry research tools and experts and increased visibility within the local business community.

For over 30 years the Ohio SBDC program has served as the state's largest resource for small businesses and entrepreneurs. Additionally, SBDC hosts become part of one of the nation's largest and most impactful program supporting start-up and growing small businesses in all fifty states and U.S. territories. Ohio SBDCs are a part of a national network of service centers and one of 64 programs funded by the SBA.

### **1.5 RFP Process**

The RFP process will consist of the following steps:

- Release of RFP
- Submission of Letters of Intent
- Questions and Answers (Q&A) and Communications
- Submittal of Proposals
- Post Submission Negotiations (if necessary)
- Notice of Award Letters Released
- Submission of Marketing Plan, and Center Strategic Plan
- Issuance of Grant Agreements

All questions regarding this RFP must be submitted in writing via e-mail to: [SBDCRFP@development.ohio.gov](mailto:SBDCRFP@development.ohio.gov) with a subject line of "SBDC Q&A".

### **1.6 Eligibility**

SBDC and the SBDC Export Assistance Network funding is only available to non-profit organizations including:

- Institutions of Higher Education
- Local Governments
- Economic Development Organizations (Port Authorities, Economic Development Agencies, etc.)
- Chambers of Commerce
- Other non-profits with a strong focus on business assistance and economic development

*While "For-Profit" organizations can fund, contribute and sponsor SBDC activities, such organizations are not eligible to host an SBDC or receive funding through this RFP.*

Proposals are encouraged from organizations that can demonstrate:

- A history of local community leadership, economic development and accomplishment.
- The ability to assume a leadership capacity within the service delivery area to identify and align partners to support small business needs.
- Alignment with the State Lead Center's strategic priorities (see attached strategic plan)

- A history of efficient and successful federal grants management and/or accounting processes, systems and knowledge to manage and report on federally funded programs in accordance with federal Office of Management and Budget circular requirements (2 CFR 200).

*Because of a federal preference, it is strongly recommended that applicants who are not institutes of higher education collaborate with local higher education partners in developing a service delivery plan when responding to this RFP. Additionally, those applicants at institutions of higher education should collaborate with local economic development organizations and small business service partners.*

**Excluded Entities:**

An applicant will not qualify for funding if it:

- Is for profit;
- Is not qualified to conduct business in or is not in good standing with the State of Ohio and Federal Government;
- Has been debarred or had contracts terminated by the federal government;
- Is unable to meet financial stability tests including a Risk Analysis Conducted by the State Lead Center as part of the RFP process;
- Is unable to comply with state and federal laws outlined in the section listed “Terms and Conditions”; and
- Is unable to demonstrate a successful history of leadership, economic development and business assistance.

## **2 Program Description**

### **2.1 Purpose**

Ohio SBDC programs deliver professional, high quality, individualized business advising and technical assistance to existing small businesses and pre-venture entrepreneurs. SBDCs shall provide problem solving assistance to help small businesses access capital, develop and exchange new technologies, and improve business planning, strategy, operations, financial management, personnel administration, marketing, export assistance, sales and other areas required for small business growth and expansion, management improvement, increased productivity and innovation. Local programming should be flexible and continuously evaluated to address specific needs of the small business communities they serve.

### **2.2 Clients**

All Ohio small businesses and nascent entrepreneurs are potentially eligible clients. See Appendix IV for client and other program definitions. All clients should demonstrate growth potential and must have signed the SBA’s client intake form (Form 641) or equivalent.

SBDC Export Assistance Network clients must meet the above mentioned requirements and must capably demonstrate the potential to overcome the barriers to accessing international markets.

## **2.3 Partnership Model and Services Offered by the State Lead Center**

Ohio SBDC operates as a partnership between ODSA, the SBA and numerous local host organizations. The Ohio SBDC program is hosted at the Ohio Development Services Agency through the Office of Small Business and Entrepreneurship at the SBDC State Lead Center. The lead center is staffed by the state SBDC director, associate director and a small team dedicated to the support of the statewide SBDC network. Through this RFP process ODSA formalizes its partnership with local host organizations into a singular proposal which will be submitted to the SBA as a plan for the delivery of services during FFY 2017.

### **2.3.1 The Ohio SBDC State Lead Center**

The State Lead Center provides for the leadership, administration and support of the Ohio SBDC Network. These services include, but are not limited to:

- Strategic leadership of the Ohio SBDC network
- Evaluation of the quantity and quality of client services provided
- Program and resource development
- Program management
- Conducting client satisfaction and loyalty surveys
- Securing State and Federal funds for program operations
- Promotion and public relations for the Ohio SBDC network
- Financial accounting, invoice approval, grants management and oversight
- Partnership development and identification of new funding sources
- Professional development for SBDC Counselors
- Coalition building
- Targeted programming and/or events
- Access to proprietary counseling and market research tools
- Management and oversight of statewide client management system known as Center IC
- Coordination with other state and regional economic development programs and partners
- Access to additional targeted funding
- Accountability to State and Federal funders

### **2.3.2 ODSA State Export Assistance Office**

The Ohio SBDC Lead Center works in tandem with the State’s Export Assistance Office within ODSA to ensure that SBDC Export Assistance Network Advisors/Directors have access to the latest information, tools, programming and technology to assist their clients. Ohio’s Export Assistance Office will assist the SBDC network by offering access to in-depth market research in 42 countries to help small businesses build local relationships. Ohio’s Export Assistance Office will also offer assistance by locating qualified distributors and end-users to sell Ohio business services and/or products, provide international marketing grants to encourage more investment into international market development and provide export-trained internships to support export growth.

**2.4 Available Funding and Cash Match Requirements**

**2.4.1 Regional Funding**

In an effort to be fair and equitable with the distribution of funding across the state, the chart below identifies recommended SBDC funding by region. This chart should be used to provide general guidance on reasonable funding for a particular service area. Distribution was developed using a formula prescribing a flat dollar amount per county with a population based multiplier. Final funding distributions will be based on the quality of applicants, the availability of local cash and may not necessarily reflect the chart below. Additionally, all finding is projected and is subject to funding from state and federal sources.

Northwest	\$ 683,000.00
West	\$ 393,000.00
Southwest	\$ 559,000.00
Central	\$ 694,000.00
Northeast	\$ 1,651,000.00
Southeast	\$ 602,000.00

A visual representation of regional territories is available in Appendix I.

**2.4.2 Regional SBDC Export Assistance Network Funding**



In the case of the SBDC Export Assistance Network funding, \$60,000 is available in each region with the exception of the Northeast Ohio region in which \$120,000 in funding is available. The SBDC Export Assistance Network funding is incorporated in the table above.

### 2.4.3 Cash Match Requirements

The Ohio SBDC program requires local cash match. Cash match may not be derived from any source of federal dollars with the exception of some Community Development Block Grant (CDBG) funds (See Appendix III financial management and budget guidance for full details).

Cash match requirements are as follows:

Center Type	Matching Funds Required
Small Business Development Center	30%
Small Business Development Center with Export Assistance Director/Advisor	10%
Stand-alone SBDC Export Assistance Network Office	30%

For example: A center requesting \$200,000 in grant funding would require a minimum \$60,000 local cash match. Similarly, an applicant applying as a stand-alone SBDC Export Assistance Network Office would require a 30 percent cash match. In the case of an applicant proposing to host both an SBDC and SBDC Export Assistance Network location, SBDC funding would still require a 30 percent match however the portion of SBDC Export Assistance Network funding (up to \$60,000 per region) would only require a ten percent match. Thus, a center proposing to receive grant funding of \$200,000 in SBDC funding and \$60,000 in SBDC Export Assistance Network funding would be required to contribute a local cash match of \$66,000.

**The above listed cash match requirements are considered a minimum cash match. Programs proposing larger percentages of match may score significantly higher in this area during proposal evaluation.** Significant local and third party in-kind donations to the program will not count toward local cash match, but will be noted when scoring proposals (see Appendix III for details).

## 3. SBDC Performance Measures and Impact

For the 2017 program year, the Ohio SBDC is simplifying goals in an effort to expand focus on customer service and client-based outcomes. The Ohio SBDC and SBA have identified target program goals and performance measurements. For the FFY 2017 program, the performance measures are outlined below.

### 3.1 Goals, Outcomes and Diagnostic Measures

Goals represent categories in which centers are expected to meet a specific metric. Centers will be evaluated based on their ability to meet metrics over the course of the program year in the following categories:

- Number of long-term clients - (More than five hours of counseling per year);
- New businesses created;
- Dollar amount of capital infusion (to include SBA loans, non-SBA loans and equity investment, lines of credit);
- Total counseling hours; and
- Percentage of clients reporting impact.

### **3.1.1 SBDC Export Assistance Network Goals**

The SBDC Export Assistance Network provides a specialized service in which separate goals are identified. Goals represent categories in which SBDC Export Assistance Advisors are expected to meet specific metrics (by the end of the program year). Centers will be evaluated based on their ability to meet metrics in the following categories:

- Long-term clients counseled (greater than five hours in a given program year)
- Total clients counseled
- New SBDC Export Assistance Network clients counseled
- Percent of clients reporting impact
- Partner events
- Total counseling hours

### **3.2 Measured SBDC Client Outcomes**

Client outcomes are performance measures that demonstrate a center's economic impact. While centers do not have goals associated with client outcomes, **these outcomes are of the utmost importance to the program**. Outcomes are reported to both Federal and State funders and are ultimately how the overall performance of the program and individual centers is determined. Measured client outcomes include:

- Net jobs created
- Jobs retained
- Sales increase

#### **3.2.1 SBDC Export Assistance Network Measured Client Outcomes**

SBDC Export Assistance Network client outcomes are performance measures that demonstrate a center's economic impact. While centers do not have goals associated with client outcomes, **these outcomes are of the utmost importance to the program**. Outcomes are reported to both Federal and State funders and are ultimately how the overall performance of the program and individual centers is determined. Measured client outcomes include:

- Increased export sales
- Net jobs created
- Jobs retained
- Capital infusion related to export activities

### **3.3 Diagnostic Measures and Benchmarked Performance**

In addition to goals and measured client outcomes, the State Lead Center benchmarks center performance comparatively on a center-by-center basis. The State Lead Center regularly evaluates all program metrics including, but not limited to:

- Total clients served;
- Jobs created per 1,000 counseling hours;
- Sales increases per 1,000 counseling hours;
- Client loyalty – measured utilizing a Net Promoter Score;
- General client satisfaction;
- Ratio of existing business clients to pre-venture clients (existing businesses and start-ups should be greater than 65% of the entire client base and pre-venture clients should be less than 35% of the total client base); and
- Cost per counseling hour.

#### **3.3.1 SBDC Export Assistance Network Diagnostic Measures and Benchmarked Performance**

In addition to goals and measured client outcomes, the State Lead Center benchmarks SBDC Export Assistance Network performance comparatively on a center-by-center basis. The State Lead Center regularly evaluates all program metrics including, but not limited to:

- Total businesses served;
- Jobs created per 1,000 counseling hours;
- Export sales per 1,000 counseling hours;
- Client loyalty – measured utilizing a Net Promoter Score;
- General client satisfaction;
- Ratio of existing business clients to pre-venture clients (existing businesses and start-ups should be greater than 90% of the entire client base and pre-venture clients should be less than 10% of the total client base); and
- Cost per counseling hour.

### **3.4 Performance Coaching**

It is the goal of the State Lead Center to promote an environment of excellence, achievement, and continuous improvement across the entire SBDC network. While individual goals and measures are important, the State Lead Center continuously evaluates all center data and compares results across the network. In cases where data evaluation identifies areas of

opportunity or when centers continuously fail to perform as well as their counterparts on multiple diagnostic measures, the State Lead Center will collaborate with individual SBDCs or small groups of SBDCs to identify ways to increase performance. Such performance coaching could include sharing of best practices, marketing assistance, specialized training or mentoring from another SBDC Director. Performance coaching plans are intended to improve service delivery, client outcomes and customer service.

### **3.5 Proposed Goals**

As part of the proposal process, applicants will use the guidelines included in the “Goals Projection Worksheet” (Attachment 9) to develop their own goals. Centers are highly encouraged to propose goals that exceed the minimum suggested goals. Any goals that fall below the recommended minimum suggested goals and are not clearly justified in the written proposal, may cause the center to score poorly in the proposal evaluation. The State Lead Center reserves the right to require higher goals as part of the proposal evaluation/negotiation process. Centers that propose goals above recommended minimums can score significantly higher.

In addition to the “Goals Projection Worksheet” the written proposal should contain a similar table outlining the applicant’s proposed goals. The proposal should clearly articulate the basis for the goals, reference past performance and any regional or business analysis data used to develop the goal justification.

### **3.6 Impact Collection**

As a program that is measured on outcomes, the ability of the SBDC to collect and report impact is of the utmost importance. All service centers are required to collect economic impact data from the clients. The proposal should outline a clear strategy to collect impact data in a manner that will result in the highest levels of impact collection and client participation. Additionally, impact data should be collected regularly on an ongoing basis so that center performance may be regularly reviewed by the State Lead Center. All impact data is required to be entered into Center IC in the follow-on session notes and reportable impact chart. The data must be verified with client signature and attributed to the program activities. The State Lead Center issues standard reporting documents and validates economic impact data for each client.

## **4. General Proposal Submission Guidelines**

The proposal and attachments must be submitted in the format(s) specified in the document “2017 SBDC Checklist” and comply with the specified instructions outlined in this section. The complete proposal shall be submitted to [SBDCRFP@development.ohio.gov](mailto:SBDCRFP@development.ohio.gov) with the subject line: “[Applicant Organization] SBDC Proposal Submission” and because the SBDC RFP requires

multiple attachments; the applicant may wish to distribute attachments over several separate emails to ensure delivery. In such cases the subject line should be modified to include the additional information “1 of 3”, “2 of 3” etc. Alternatively the applicant may submit multiple files in a compressed or “Zip” file format.

#### **4.1 Letter of Intent**

Each applicant wishing to submit a proposal in response must submit a letter of intent to the State Lead Center. Noon on Monday, May 23, 2016. Letters of intent shall be submitted to [SBDCRFP@development.ohio.gov](mailto:SBDCRFP@development.ohio.gov) with the subject line SBDC Letter of Intent. A sample letter of intent is available with the other RFP attachments on development’s website.

#### **4.2 Attachment Naming Conventions**

Each attachment should display the following naming convention: [Host name] Attachment number]. For example “hometownuniversity\_Attachment4”. It is the Applicant’s responsibility to ensure submission of a complete proposal based on all requirements of this RFP.

#### **4.3 Order and Content of proposal Sections**

Unless otherwise noted, the proposal must address all of the elements listed in this section, and in the order requested.

##### **4.3.1 Attachment 1: Written Proposal Guidelines:**

- Written proposals are to be submitted on 8.5 x 11-inch format
- Font must be 11 point or larger with no more than 6 lines per inch
- All pages must be numbered consecutively
- The proposal title and Lead Applicant name must appear at the bottom of each page
- Proposals should not include color figures that cannot be understood when photocopied in black and white

Proposals should not exceed 12 pages excluding the cover page. If an applicant is applying for both SBDC and SBDC Export Assistance Network grant funding the proposal should not exceed 17 pages excluding the cover page.

The proposal shall have a cover page listing the following information:

- The applicants contact information highlighting the main point of contact for the proposal including organization mailing address, telephone and email address
- The Applicant’s DUNS number
- The types of funds being applied for (SBDC or SBDC Export Assistance Network)
- A list of counties or portions thereof the applicant proposes to serve
- Grant dollars requested
- Local cash match contributed toward the program

The proposal should concisely and clearly demonstrate that the applicant has a strong understanding of and ability to meet the program requirements as described in Appendix II and should follow the general format outlined below.

1. SBDC Host organization
2. Proposed Service Territory
3. Regional Awareness and Collaboration
4. Facilities
5. Staffing
6. Clients - Knowledge of Market Sectors, Client Needs and Expectations
7. Market Sector Focus
8. Services
9. Training
10. Additional Information for Consideration

Through the written proposal the applicant should clearly identify and justify:

- Whom it intends to serve;
- What services will be offered to small businesses;
- Why those services are relevant and in demand to the small business community;
- How those services will be impactful; and
- How the center will deliver those services in a manner that will achieve maximum economic impact.

#### **4.3.2 Attachment 2 – Holiday Schedules**

Complete the document listing any and all planned center closures following the instructions on the form.

#### **4.3.3 Attachment 3 – Training Projection**

Complete the document listing proposed trainings by quarter. Training topics should be based on the needs of the small businesses and market sectors the SBDC intends to serve. Such justification should be included in the written proposal.

#### **4.3.4 Attachment 4 – Host Funding From Other Resources, Partners and Programs Worksheet**

This worksheet should provide an overview of other sources of funding received by the host organization. In the case where the applicant is a university, city or other large organization, this list may be limited to a reasonable sub-unit or governing body. For example, if the host is a specific office within a university, only funding contributed to that office would need to be included in the document.

#### **4.3.5 Attachment 5 – Projects and Publications**

Complete the form as specified for each section.

**A. Special Projects:** Provide details on special projects needed to support the local small business community. Include projects that require funding along with sources of the project funding, as well as those that do not require funding. *Example: Market Research Projects for Student Teams to work directly with business owners.* This information is used to support the Ohio SBDC Program Proposal to the SBA. Such projects should also be identified and explained and justified in the written proposal.

**B. Research Projects:** Provide details on any research developed and/or maintained to support the needs of the local small business community. Include projects that require funding along with sources of the project funding, as well as those that do not require funding. *Example: Research to support a change in the local economic environment with the closing of a steel company.* This information is used to support the Ohio SBDC Program Proposal to the SBA. Such projects should also be identified and explained and justified in the written proposal.

**C. Publications:** Provide details on any publications, including video or web-based text that will be used to address the needs and/or communications for the local small business community. Include projects that require funding along with sources of the project funding, as well as those that do not require funding. *Example: A Columbus CEO Magazine inserts that markets a program's success to help promote the SBDC across the entire state.* This information is used to support the Ohio SBDC Program Proposal to the SBA. Such publications should also be identified and explained and justified in the written proposal.

**D. List all other divisions within ODSA with which your Host conducts business:** Provide a list of other offices, programs and/or divisions that your Host receives funding to operate. Used as part of the Risk Assessment required by the OMNI Circular to establish a level of due diligence for each federal program.

#### **4.3.6 Attachment 6 – Drug Free Workplace Certification**

Sign and submit the attached document.

#### **4.3.7 Attachment 7 – Certification Regarding Lobbying**

Sign and submit the attached document.

#### **4.3.8 Attachment 8 - Debarment and Compliance Certification**

Sign and submit the attached document.

#### **4.3.9 Attachment 9 – Goals Projections**

Complete the prescribed worksheet projecting goals for the program year. All goals should be clearly justified based on the market and client analysis in the written proposal. Recommended goal levels are included in the worksheet.

#### **4.3.10 Attachment 10 – Budget Worksheet**

Complete the budget worksheet using the guidance provided (see Appendix III Financial Management and Budget Guidance). The worksheet must be submitted in the original Excel format.

#### **4.3.11 Attachment 11 – Certifications of Cash Match**

Complete the Cash Match Certificate for each contributor to the SBDC including a signature from an authorized representative. A separate certificate is required for each contributor. In the remarks section, identify the reason for contributing. Multiple cash match certificates should be compiled as one PDF file.

#### **4.3.12 Attachment 12 Indirect Cost Rate Agreement**

Attach a copy of the Host's Indirect Cost Rate Agreement (See Appendix III for more information).

#### **4.3.13 Attachment 13 – Organization Chart**

Attach a copy of an updated organization chart identifying all proposed SBDC personnel and the reporting structure through the organization's director, president, chief executive or equivalent.

#### **4.3.14 Attachment 14 – Travel Policy**

Attach a written host travel policy or provide a link to an online copy (For current SBDC applicants this attachment is only necessary if changed from previous year).

#### **4.3.15 Attachment 15 – Floor Plan Map**

Attach a floor plan map clearly identifying SBDC office space, square footage and a justification as to why the costs associated with the office space are reasonable.

**4.3.16 Attachment 16** – Other attachments and support documentation for "In-Kind" contributions (other than office space noted in attachment 15) may be compiled and attached as a single file listed as Attachment 16. If multiple documents will be submitted please create a cover page identifying a table of contents listing the documents included.

## **5. Proposal Evaluation**

Proposals will be evaluated by the State Lead Center. Review teams consisting of lead center staff supported by ODSA staff will review proposals and make recommendations to the SBDC State Director and SBDC Associate Director who will make the final decisions regarding program funding. Proposal evaluation will be based on the following criteria:

- Responsiveness to all the requirements of this RFP;
- Financial contribution to the program;
- The applicant's response to any additional information that may be requested;
- Alignment of the Host with program purpose, goals, objectives and eligibility;
- Cost effectiveness of the proposal;



- Accessibility of clients to services;
- Focus on the needs and overall customer service delivery to the client;
- Quality of responses to the requirements of the written proposal and goal projections;
- Quality of services and resources for assisting small businesses and entrepreneurs;
- Likelihood of achieving the proposed projections;
- Level of coordination and leveraging of other regional small business and entrepreneurial support networks/programs;
- Track record in advancing companies and creating economic impacts;
- Depth of understanding client needs within specific segments in the proposed service territories; and
- In the case of existing SBDC service providers, past performance.