

Ohio SBDC RFP Bidder's Conference

5/16/2016 10:30 am

(Audio will be streaming via webcast – Please make sure your computer speakers are plugged in and your volume is turned up)



Small Business
Development Centers



Development
Services Agency



All RFP Information Available at:

<http://sbdc.development.ohio.gov>

Agenda

- Program Background and Overview
- RFP Information
- RFP Process
- Program Eligibility
- Funding Basics
- The Proposal Application
- Submission and Next Steps

Background: Ohio Small Business Development Centers (SBDC)

- Background:
 - National Program
 - 31 Years in Ohio
 - A Unique Program – True Partnership

OHIO SBDC MISSION

Accelerating Business Success

OHIO SBDC VISION

*To be the resource
for business expertise.*

SBDC PURPOSE

The Ohio SBDC Program is designed to help entrepreneurs start new businesses, and help existing businesses create jobs, expand sales and access capital through

- Quality, in-depth, free and confidential ***counseling***, and ;
- No- to low-cost ***training*** to small businesses
– Program Income
- Our only limitations are the needs of our clients

SERVICES

...provide entrepreneurs with technical assistance and business training at each stage in the business life cycle.

- Business Training and Advising
- Flexible Service Delivery
- Entrepreneurial Networking
- Reassurance and Support
- Financial Package Preparation
- Targeted Assistance based on Expertise

Specialty Service: Ohio SBDC Export Assistance Network

The Ohio SBDC offers specialty counseling and training in exporting. Why?

- More than 90 percent of Exporters are small businesses with less than 500 employees.
- Annual Ohio Exports are over \$52 billion (up 37% in the last decade).
- Ohio is the ninth-largest exporting state in the U.S.

The SBDC Export Assistance Network serves as the first point of contact for new-to-export businesses, as well as those businesses expanding into new markets.

Services include export readiness assessment, international marketing plans, market research, export compliance education, and access to export financing.

Ohio Small Business Development Centers (SBDC)

- We currently operate 27 SBDCs in Ohio
- Diverse Mix of Service Providers
- Seven Centers Offer SBDC Export Assistance

ECONOMIC IMPACT—FY 2015

SBDC Client Economic Impact Results:

Increased Sales	\$490 million
Capital Access	\$201 million
Export Sales	\$58 million
Jobs Created & Retained	18,224
Business Starts	556

RFP PROCESS

- Request for Proposal Issued.
- Proposals from center Hosts for local service submitted and reviewed.
- Statewide Plan Negotiated and Developed; Submitted to SBA for approval.

The FFY 2017 Ohio SBDC RFP: Important Dates

- May 23 – Noon – Letters of Intent Due
- June 6 – Close of Business- Q&A Period Ends
- June 10 – 10:00 am - Complete Proposals Due
- Mid June – Questions and Negotiations
- July 6th – Award Notifications
- October 1 – Program Year Starts

**The FFY 2017 Ohio SBDC RFP:
ALL QUESTIONS AND SUBMISSIONS SENT TO:**

SBDCRFP@development.ohio.gov

The FFY 2017 Ohio SBDC RFP: Q&A Process

- All Questions Submitted to:

SBDCRFP@development.ohio.gov

- Subject Line: "SBDC Q&A"
- Questions and General Responses Will Be Updated at <http://sbdc.development.ohio.gov>

The FFY 2017 Ohio SBDC RFP

- RFP Document and Six Appendices:
- RFP
- I
- II
- III
- IV
- V
- VI
- Checklist & Forms

The FFY 2017 Ohio SBDC RFP: Eligibility

- Entities
- Experience
- Capacity
- Exclusions

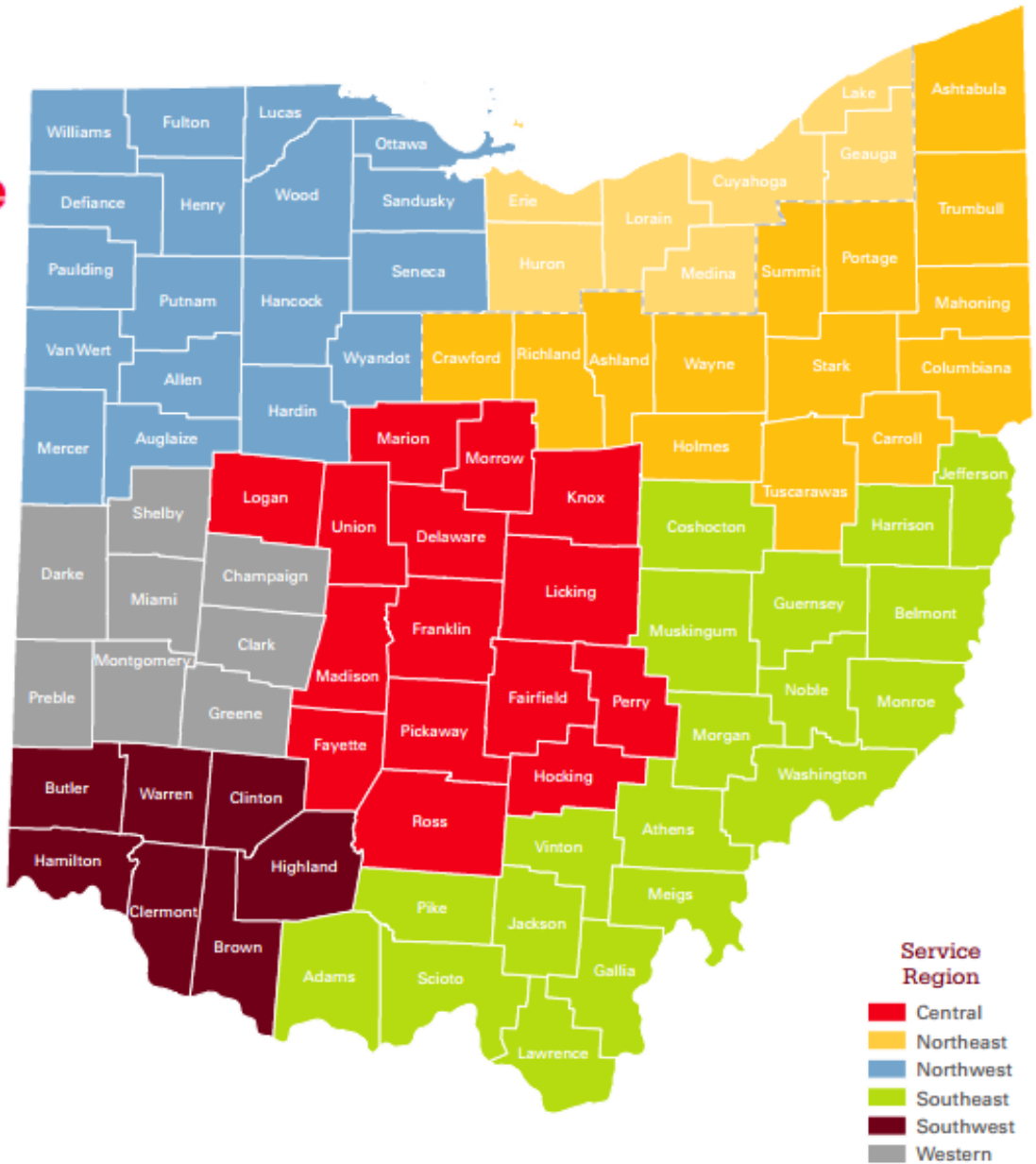
The FFY 2017 Ohio SBDC RFP: Funding

- Over \$4.5 million in grant funding available
- \$ 420,000 specifically available for SBDC Export Assistance Activities
- Match Requirements:

Program	Cash Match
SBDC	30%
SBDC W/Export Assistance	10%
Stand Alone SBDC Export Assistance	30%

- Regional Funding

Business Assistance Center Service Regions



- Service Region**
- Central
 - Northeast
 - Northwest
 - Southeast
 - Southwest
 - Western

The FFY 2017 Ohio SBDC RFP: Attachment 1 Written Proposal

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

The FFY 2017 Ohio SBDC RFP: Written Proposal Continued

Tell Your Story:

- Whom do you intend to serve;
 - What services will be offered to small businesses;
 - Why those services are relevant and in demand to the small business community;
 - How will those services will be impactful; and
 - How the center will deliver those services in a manner that will achieve maximum economic impact.
-
- Hint: Look for the words "Written Proposal Should" in Appendix II

The FFY 2017 Ohio SBDC RFP: Attachments 2, 3, &4

- **Attachment 2** – Holiday Schedule
- **Attachment 3** – Training Projection
 - Training topics and need should be justified in written proposal
- **Attachment 4** – Host Funding From Other Partners Programs and Resources
 - Identify other funding streams and partners; federal, state and local.

The FFY 2017 Ohio SBDC RFP: Attachment 5 Projects and Publications

- Special Projects
- Research Projects
- Publications
- ODSA Relationships

The FFY 2017 Ohio SBDC RFP: Attachments 6,7,&8 Projects and Publications

Sign and Scan

- Drug Free
- Lobbying
- Debarment & Compliance

The FFY 2017 Ohio SBDC RFP: Attachment 9 Goals

- New for FFY 2017 – Goal Simplification
- SBDCs:

Goals	Recommendation per FTE
Long Term Clients	40
New Businesses	10
Capital Infusion	\$1.9 Million
Counseling Hours	1200/400
Percentage of Clients Reporting Impact	30%

The FFY 2017 Ohio SBDC RFP: Attachment 9 Goals

SBDC EXPORT ASSISTANCE

- New for FFY 2017
- Increased Focus on Attraction and Specialization

Goals	Recommendation per FTE
Long Term Clients	35
Total Clients	65
New to Export Assistance	12
Partner Events	20
Counseling Hours	800
Percentage of Clients Reporting Impact	40%

Goals and Performance Tracking

- Fewer Goals
- Outcomes:
 - Business Starts
 - Jobs Created
 - Increased Sales (Increased Export Sales)
- More Measuring and Benchmarked Performance

Goals and Performance Coaching : Continuous Improvement

Other Performance Measures

Jobs per 1000 counseling hours

Business Starts per 1000 hours counseled

Client Satisfaction/Client Loyalty

Percent of Pre-venture to Existing Businesses

Other Qualitative Measures

Monthly Reports

Event Attendance

Results Compared to Peers

The FFY 2017 Ohio SBDC RFP: Attachment 10 Budget Worksheet

- Applicable, Allocable, Reasonable
- Cash Match v. In-Kind Match
- Appendix III describes items in detail
- General Cost Categories:
 - Personnel
 - Fringe
 - Travel
 - Equipment
 - Supplies
 - Contractual
 - Consultants
 - Indirect Costs

The FFY 2017 Ohio SBDC RFP: Attachment 10 Budget Worksheet Continued

- Personnel
 - No positions superior to SBDC Director may be funded
 - Consultants listed later
- Fringe
- Travel
 - Strong Restrictions
 - Mileage reimbursement capped at \$.54
 - Meal Reimbursement – Read the fine print

The FFY 2017 Ohio SBDC RFP: Attachment 10 Budget Worksheet Continued

- Equipment – Items over \$5000
- Supplies – General Consumable office supplies
 - No Coffee or Creamer
- Contractual
 - Professional Services
 - IT
 - Janitorial
 - Accounting
 - Invoices needed for reimbursement
- Consultants
 - Individuals hired under contract
 - Generally limited to \$50 per hour
 - Projections needed
- Indirect Costs-Must have an Indirect Cost Rate Agreement
 - Not Reimbursable

The FFY 2017 Ohio SBDC RFP: Attachment 11

Certificates of Cash Match

- Must have one certificate per contributor
- Must be signed

The FFY 2017 Ohio SBDC RFP: Attachments 12, 13, 14, 15 & 16

- **Attachment 12** – Indirect Cost Rate Agreement
- **Attachment 13** – Org. Chart
- **Attachment 14** – Written Travel Policy
- **Attachment 15** – Floor Plan – Include Square footage and price justification (3 comparable rates)
- **Attachment 16** – Other support documents for in-kind or further explanation of any other part of the proposal.

In Review

- This is a collaborative process.
- Broad flexibility on the Service Delivery Side
- Very specific rules on funding side
- Reach out to other applicants and the Economic Development Community
- Don't hesitate to contact us!

Questions?



- Jim Laipply, SBDC State Director
- Susan Foltz, SBDC Associate State Director
- Email - SBDCRFP@development.ohio.gov

Thank You. We Look Forward to Your Proposals!