



REQUEST FOR PROPOSAL (RFP)
NO. 003287-Oct2023

Small Business Development Center (SBDC)

Hosted by

University of California, Merced

Proposals must be received by the due date

All qualified, interested proposers are invited to submit proposals for:

Small Business Technical Assistance Services
for
Monterey and San Benito Counties

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SECTION I. INSTRUCTIONS TO PROPOSERS

A Issuing Office and University Contact

This RFP is being issued by the University of California, Merced Procurement Services and Contracts Division, which is the only authorized entity to change, modify, and clarify, etc., the provisions of this RFP and to award any contract(s) resulting from the RFP.

B Schedule of Events

Listed below are the key action dates/times for this RFP. If the University finds it necessary to change, any of the dates as indicated below, an addendum to the RFP will be issued.

Event	Date
RFP Issued	October 27, 2023
Proposer Conference (virtual)	November 2, 2023, 11:00 A.M.
Deadline for Questions regarding RFP	November 9, 2023 4:00 P.M. (PT)
Addendum Issued (if required)	November 20, 2023
Proposal Due Date	December 15, 2023, 4:00 P.M. (PT)
Oral Reviews and/or Site Visits, if needed	January 16-19, 2024
Award Notification (*anticipated date)	February 1, 2024
Anticipated Contract Commencement	April 1, 2024

**The University reserves the option to delay naming a winner of this RFP based on any significant changes in funding - federal or otherwise - or funding opportunities that arise between the time of the release of this RFP and the RFP evaluation period.*

Note: The above dates are subject to change at the option of the University.

It is the responsibility of each proposer to be familiar with all of the specifications, terms and conditions and the site condition (if applicable). The proposer agrees and acknowledges all RFP specifications, terms, and conditions and indicates the ability to perform by submission of a proposal. By the submission of a proposal, the proposer certifies that if awarded a contract, they will make no claim against UC Merced based upon ignorance of conditions or misunderstanding of the specifications.

C Proposer Conference

A non-mandatory pre-proposal meeting will be held “virtually” via Zoom on Thursday, November 2, 2023, from 11:00 A.M. – 12:00 P.M. to answer technical questions. Answers will be limited to clarifying RFP requirements but will NOT address “stylistic or subjective” questions regarding a proposal content.

To more efficiently coordinate the event and to allow time for all questions, it is recommended that each proposer limit the number of representatives attending to two (2) individuals. RSVP's by Tuesday, October 31st to kclark5@ucmerced.edu is required to receive the Zoom link to attend.

The Central CA SBDC Network reserves the right to accept or reject any or all proposals received as a result of this RFP, to negotiate with any qualified entity, or to modify or cancel all or part of this RFP if it is in the interest of The Central CA SBDC Network to do so.

Upon award of a contract to the successful proposer, the contract is between The Central CA SBDC Network and the applicant organization. The applicant organization does not have a direct contract relationship with the US Small Business Administration (SBA).

D Proposer Questions and Addenda to RFP

Proposer Questions

Each Proposer shall exercise their best professional, independent judgment in analyzing the requirements of this RFP to ascertain whether additional clarification is necessary or desirable before responding. If there are any discrepancies in, omissions to, or questions about the information provided in the RFP or by any other source, a request shall be submitted via the

CalUSource portal using the Discussion Forum  , which is located on the top right of the page.

Responses to individual Proposer questions shall be made available to all Proposers.

All contacts during the proposal process shall be through the Procurement and Contracts Division. Attempts by the proposer to contact department representatives may result in disqualification of the proposer from the proposal process.

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Addenda

Any changes, additions, or deletions to this RFP shall be in the form of written addenda issued by the University via the CalUSource portal. Any addenda to this RFP shall be distributed to all participating proposers via the CalUSource portal. The University shall not be responsible for failure of any prospective Proposer to receive such Addenda. All Addenda shall become part of the RFP.

E Instructions for Submitting Proposals

Proposals shall be submitted online using the University of California Supplier Registration and Sourcing web tool (CalUSource) **-no later than 4:00 P.M. (PT) on December 15th, 2023.**

Proposals submitted through any other means shall not be accepted and late proposals will be rejected.

Responses will take time to enter into the CalUSource System. Proposers shall provide a complete response to all prerequisites, questions and/or information in the RFP as requested in the CalUSource portal.

F Proposal Receipt

The University reserves the right to reject any or all proposals or to waive any informalities or minor irregularities in a proposal.

H Restriction on Communications

Proposers are not permitted to communicate with Central CA SBDC Network staff regarding this solicitation during the period between the Request for Proposal issue date and the announcement of award(s), except during:

- Proposers Conference on November 2, 2023, at 11:00 am. Pre-registration is required.

If Proposer is found to be in violation of this provision, the Central CA SBDC Network reserves the right to reject their proposal without redress.

I Proposer Representation

Each Proposer, by submitting a proposal, represents that he/she has:

- Read and completely understands the RFP and associated documents
- Based the proposal submittal upon the requirements described in the RFP

J Simplicity of Preparation

Proposals shall be prepared simply and economically, providing a straightforward, concise description of the Proposer's capability to satisfy the requirements of the RFP. Emphasis shall be on completeness and clarity of content. Promotional materials are especially discouraged.

K Complete Proposals

All proposals shall be full and complete at the time of the proposal submittal.

L Specifications

Proposers are expected to meet or exceed the specifications in their entirety. Each proposal shall be developed in accordance with these specifications. If products and/or services as proposed do not comply with specifications as written, proposer shall attach to their proposal a complete detailed itemization and explanation for each deviation or variation from these specifications. Absence of any such itemization and explanation shall be understood to mean that proposer proposed to meet all details of these specifications as stated in the RFP. Successful proposer (contractor) delivering products and/or services pursuant to these specifications shall guarantee that they meet specifications as set forth herein. If it is found that materials/equipment and/or services delivered do not meet requirements of these specifications, the successful proposer shall be required to correct it at proposer's own expense.

M Amendments to RFP before Due Date

No individual is authorized to amend any part of this RFP in any respect, by an oral statement, or to make any representation of interpretation in conflict with provision of this RFP prior to the proposal submission date. However, if necessary, supplemental information in addenda form shall be provided to all prospective Proposers who have received this RFP from The University Procurement Services Department. Failure of any Proposer to receive such addenda shall not relieve the Proposer from any obligation under their proposal as submitted. All addenda so issued shall become part of this RFP.

N Firm Proposals

All Proposals shall be firm and fixed for one-hundred twenty (120) days following the deadline for RFP submissions, or until a contract is signed, whichever comes first.

The Proposer warrants that the prices offered herein are equal to or lower than those offered for equivalent quantities of products or services to similar institutional accounts. If Proposer offers a general price reduction that lowers the cost for any product or service below the cost provided in a resulting contract, the Proposer shall offer the appropriate cost reductions to the University.

O Proposal Preparation Costs

All costs incurred in the preparation and submission of proposal and related documentation, including Proposer presentations to UC (if required), shall be borne by the Proposer.

P UC Policy on Equal Opportunity in University Business Contracting

Every effort shall be made to ensure that all persons have equal access to contracts and other business opportunities with the University within the limits imposed by law or University policy. Each Proposer may be required to show evidence of its equal employment opportunity policy.

Q Proposal Format and Required Submittals

Proposers shall provide a written proposal addressing the full scope specified under this RFP. If the Proposer fails to provide any of the information, the University may at its sole discretion, ask the proposer to provide the missing information or evaluate the proposal without the missing information.

SECTION II. INTRODUCTION

A. Purpose

The Central California Small Business Development Center Program (Central CA-SBDC) hosted by University of California, Merced ("UC Merced") requests proposals be submitted from eligible organizations to provide high quality small business technical assistance services in accordance with each of the terms and conditions in this Request for Proposals ("RFP").

Small Business Development Center (SBDC) services include private business consulting, training events and seminars and business resource information in various topic areas including but not limited to; capital access, business start-up, marketing, HR, financial management and other specialty programs including government procurement, cyber security and technology commercialization/IP protection. The Central CA-SBDC funding made available for these services comes from the U.S. Small Business Administration (SBA). SBA mandates the measurement and reporting of economic impact produced from its funding; this is a goal-based program focused on achieving a high return on investment of federal funds. SBA funds require a \$1 to \$1 dollar match in expenditures. Matching Funds must be from non-federal sources.

B. Reasons for Considering this Solicitation

Becoming part of the Central California SBDC Network leads to new partnership opportunities within business and academic circles, infusion of federal funds for building capacity for delivering business service activities, corporate sponsorship opportunities, access to SBDC-specific resources including a proprietary client and economic impact tracking system, proprietary and complimentary industry research tools and experts, access to other SBDC-only funding streams including State funding and increased visibility for host organizations in their respective service areas and across the State.

Small Business Development Centers provide direct and measurable economic benefits to the communities they serve. Established during the Carter administration, the SBDC program is the largest federally-designated technical assistance program focused on supporting startup and growing small businesses in all fifty states and U.S. territories. SBDC host organizations join a "family" of experts who are willing to share advice, resources and help local business assistance providers focus on what they do best—growing great local companies!

The Central CA SBDC network has been an accredited program since 2005 and has received multiple accolades for its support of small businesses across the 14 counties of Central CA. UC Merced has hosted the Central CA SBDC network since 2003 and continues to be committed to supporting the success of the program and all of its Host organizations as they deliver SBDC services across their respective service areas.

C. Service Territory and Client Population

This RFP is issued for small business assistance delivered in Monterey and San Benito Counties for services to be available to startup and existing small business in the two counties.

D. Applicant Eligibility

Eligible host organizations include:

- Fully accredited **institutions of higher education** such as community colleges, public and private universities and state colleges;
- Private **nonprofit corporations** engaged in economic development activities and;
- Public **economic development institutions** such as workforce investment boards and economic development corporations.

Proposals will only be accepted from organizations that:

- Are qualified to conduct business in the State of California;
- Are in good standing with the Secretary of State;
- Have not been debarred or had contracts terminated by the federal government, State of California or local government;
- Have accounting processes and prior experience necessary to manage and report on federally-funded programs/activities in accordance with federal OMB circular requirements; and
- **Are NOT for profit businesses.**

It is NOT a requirement that a host organization's headquarters be physically located in the SBDC service territory.

A special note for institutions of higher education:

There are many different ways to structure an SBDC within a university or college. SBDC services can fall under business, economics, engineering, or other academic units; other SBDCs are hosted within the President's Office, extended/community education, service learning/career centers, or the office on a campus focused on community relations; special institutes and centers focused on entrepreneurship, technology commercialization, economic research, corporate internships, international trade, etc. are also potential places where SBDC services can be located and compliment pre-existing activities.

E. Funding Available

Funding for SBDC services in Monterey and San Benito Counties are available through a cooperative agreement between the United States Small Business Administration (SBA) and the Regents of The University of California ("The University"). Expected SBA funding for this award will be **\$175,000 for the twelve-month period (CY2024), provided funds are made available to The University by the SBA. Annual funding thereafter will be determined based on the annual award to UC Merced from the SBA. The Regional Director reserves the right to award more or less in each subsequent year. Once a contract is awarded to the Host organization, future funding is considered to be a continuation of the original award dependent on successful program outcomes and fiscal management.** 90% of SBA funding must be expended for direct service delivery.

The awarded contract requires a one hundred percent (100%) match. In addition to any State funding made available to the successful proposer by UC Merced, proposers are expected to provide fifty percent (50%) of the required match contribution as "LOCAL" cash match.

Proposals with at least 50% local cash match will receive extra points in scoring: 50-75% local cash match will receive 5 extra points; 76-100% local cash match will receive 10 extra points; 101-125% local cash match will receive 15 extra points; more than 125% local cash match will receive 20 extra points. Proposal scoring (without bonus) is based on a maximum of 120 points.

State of CA “Match” Funding: The State of CA through CalOSBA is currently providing funding to the University to support the delivery of SBDC services across Central CA. The anticipated State funding for SBDC services to Monterey and San Benito counties for CY2024 is \$100,000. State funding would be made available to the successful proposer upon completion of a separate subaward between the University and the awarded Host organization.

Cash Match outlay must not include other Federal funds (except for CDBG funding), indirect costs, in-kind contributions, or program income derived from activities supported in whole or in part with Federal or match funds. If needed, any remaining match required to meet the 100% match minimum may be provided as in-kind match as defined by federal OMB circulars. All in-kind match will be valued at market value and require support documentation. Waived indirect on SBA funds will be applied towards in-kind match by the Lead Center.

The SBDC is a reimbursement program; the host organization pays for expenses incurred by the SBDC and then submits quarterly invoices for reimbursement. Applicants must have cash on hand to account for quarterly invoicing with net 60 days for payment (from the point of invoice and support paperwork approval). At the discretion and approval of UC Merced, host organization may request monthly invoicing if quarterly reimbursement period presents an undue financial burden.

F. Duration of Contract and Renewal Option

The first contract performance period between The University and the successful proposer is expected to begin upon the date of contract execution and terminate on March 31, 2025. The actual start date for launching SBDC services under the initial contract will be negotiable. The University will renew its contract with the successful proposer at the end of 2024 performance period, providing funding to do so is appropriated for this purpose in subsequent Federal, State and Central CA SBDC budgets. Proposed renewals (for a maximum of one (1) year after the contract period), are assessed annually according to complete and satisfactory contractor performance, the Central California SBDC Network guidelines, funding, budget allocation and scope of work/milestone continuity.

G. General Information

The proposal process for this procurement of services is competitive and proposals will be judged based on their compliance with RFP guidelines, and each respondent’s ability to meet stated requirements in SECTION V, PROPOSAL FORMAT AND CONTENT. Only those proposals that meet these requirements will be evaluated according to the criteria in SECTION VI, SELECTION PROCESS AND EVALUATION CRITERIA. Further review may occur through interviews and/or site visits to one or more applicant. Oral communications with the Central CA SBDC Lead Office and The University officers and employees shall be non-binding on The University and shall in no way exclude the proposer of obligations as set forth in this RFP package.

A. University of California, Merced

UC Merced was awarded the SBA contract to manage the SBDC program across Central CA in 2003. The network's mission is to provide entrepreneurs and small businesses with high quality consulting, support for innovation, access to information and the tools necessary to build successful sustainable businesses.

UC Merced opened in 2005 as the newest campus in The University of California system and the first American research university built in the 21st century. The campus enjoys a special connection with nearby Yosemite National Park, is on the cutting edge of sustainability in construction and design and supports highly qualified first-generation and underserved students from the San Joaquin Valley and throughout California. The Merced 2020 Project, a \$1.3 billion public-private partnership that is unprecedented in higher education, will nearly double the physical capacity of the campus and support enrollment growth to 10,000 students by 2025.

B. SBDC Lead Office

The administrative headquarters for the Central California SBDC is called the "Lead Office." The Lead Office manages and administers the small business assistance network in the 14-county region under terms of a Cooperative Agreement between the U.S Small Business Administration and the Regents of The University of California at UC Merced. There are 63 Lead Centers nationwide. The Central CA SBDC Lead Center is located in Merced, California. Kurtis Clark is presently the Central CA SBDC Region Director and manages the Lead Office.

The proposer shall report to the Lead Office in compliance with the Central California SBDC Network Policy and Procedures Manual, the Standard Operating Procedures, sub-award agreement, SBA regulations, applicable OMB Circulars, and UCM regulations.

C. Central CA SBDC Network

The Central CA SBDC Network is the collaborative partnership organization of SBDC service providers in the following counties: Fresno, Madera, Kern, Inyo, Mono, Tulare, Kings, San Luis Obispo, San Benito, Stanislaus, Tuolumne, Merced, Mariposa and Monterey. The network serves a population of about 4.3 million and covers a diverse geographic area of 51,000 square miles spanning from the Eastern Sierras to the Central Pacific Ocean.

The Central CA SBDC Network provides technical services (consulting and training) to existing and emerging small businesses with a focus on growth industries in their area. Each host organization for a local service location becomes a partner in the Central CA SBDC Network via a sub-award with the Regents of The University of CA. At the time of this RFP, there are six (6) full time SBDC service centers plus 6 outreach centers providing SBDC services within the network's territory. There are 20 full-time staff and 4 part-time staff with approximately 140 contract consultants. Where applicable, student interns have an opportunity to work part-time with service learning opportunities.

D. SBDC Services

The Central CA SBDC Network offers a full range of business assistance services made available to small businesses located in rural and metropolitan areas. Service Centers provide in-depth, high-quality assistance to small business in complex areas that require specialized expertise. These areas may include, but are not limited to: management, marketing, financing, accounting, strategic planning, regulation and taxation, capital formation, venture capital, procurement, human resource management, production, manufacturing and distribution, supply chain management, operations, economic and business data analysis, engineering, technology transfer, innovation and research, new product development or commercialization, product analysis, agriculture, business law, exporting, office automation, site selection, or any other areas of assistance required to promote small business growth, expansion and productivity.

In addition to consulting, the Central CA SBDC Network provides targeted training, conducts special projects and provides business-specific research.

E. Small Business Administration's SBDC Authorization

The Small Business Development Center (SBDC) Program is authorized through Congress and partially funded by the U.S. Small Business Administration (SBA). The SBDC Program is the SBA's largest technical service delivery program providing business support and training to the small business community. Federal SBDC funding from SBA is apportioned for each state based on population. The SBA maintains cooperative agreements with 63 SBDC Lead Centers—including the one at UC Merced—and annually distributes SBDC funding through these contractual relationships. The Central CA SBDC Network maintains a strong working relationship with the SBA District Office located in Fresno, California.

F. SBDC Services in Monterey and San Benito Counties

The successful local SBDC host shall service Monterey and San Benito Counties, providing specialized technical assistance to small business owners and managers and prospective small business owners. Services will include private consulting, research assistance and training. SBDC services must be available to business owners' in-person, within a short drive and online. Training must also be offered in multiple locations. Significant efforts must be made to provide SBDC services to historically underserved populations and to the rural areas of the two counties.

G. Structure of a Local SBDC Service Location

There are varieties of ways in which local SBDCs are structured. This RFP is intentionally non-prescriptive in regards to structure in order to allow for creativity from the applicant and to encourage a wide variety of host organizations to consider the possibilities of hosting an SBDC.

In designing the SBDC structure, the proposer is encouraged to leverage existing office and training space, share use of equipment, leverage administrative and financial expertise and other assets of the host organization. Additionally, alignment with pre-existing business assistance programs at the host organization and access to and support from upper management should be considered.

A summary of elements that an applicant will want to consider in designing a proposed service delivery structure include the following:

- Lines of reporting and where the SBDC best fits within the host's organization;
- Host organization's ability to provide fiscal and operational support functions;
- Pre-existence of related business technical assistance program(s);
- Pre-existing management and staff focused on business/economic programs;
- Use of internal personnel and/or contractors to perform business consulting;
- Physical location(s) of host organization in relation to SBDC service location(s); and
- Size of total SBDC budget (SBA funds, cash match, in-kind match and program income).

Following are several **fictitious** examples that show a range of possibilities. Applicants *should not* be limited to structures detailed in these examples or limit their thinking based upon existing SBDC models in California.

EXAMPLE #1	A Private University
Location within Organization	SBDC will be located within the College of Engineering and be run as a program of The University's Institute for Applied Technology.
SBDC Services Focus	This University wants to host the SBDC in order to enhance and expand its special institute focused on commercialization of technology. They propose an SBDC service offering that includes a special emphasis on commercialization and securing equity funding for small businesses. Further, The University proposes utilizing MBA students to provide a portion of the SBDC consulting.
Lead Program Manager(s)	Engineering Professor named Joe Smith who is focused on technology commercialization and who runs The University's Institute for Applied Technology is the identified SBDC program manager. <ul style="list-style-type: none"> - Joe Smith commits 20% time to the SBDC—focused on strategy, performance, partnerships, and interactions with SBDC Lead Center. Several other faculty members from the school of business and the school of engineering who work with Joe at the institute also will be involved in strategic decisions, but not as the core SBDC manager.
Description of Budget	\$150,000 in SBA funding \$25,000 from a private donor interested in entrepreneurship and The University's internship opportunities within emerging technology companies \$30,000 from a corporate sponsor \$25,000 from one or more local municipality sponsors \$30,000 in university salary contributions (part time administrative assistant and part time MBA interns in the business school who do business consulting for the SBDC)
Administrative Support	Full time administrative assistant named Sally Jones focuses on the SBDC program 50% time, and reports to Joe Smith. <ul style="list-style-type: none"> - Sally also oversees all the part time graduate students who work on various research under the institute and who will be doing a portion of the SBDC consulting. 2 undergraduate student interns who assist with data entry and coordination of non-credit trainings offered through the SBDC.
Financial Compliance	This university's research office manages all the contracts and grants for Joe Smith and his work at the Institute for Applied Technology. The research

	office assigns the SBDC a financial/grant analyst who works with Joe to set budgets, and works with Sally on AP/AR.
Business Consulting	<p>The center utilizes 10 contract consultants who have a range of expertise in business management and business finance. Beyond this, there are:</p> <ul style="list-style-type: none"> - Two MBA students who provide business consulting under the supervision of a lecturer from the business school—and who is one of Joe’s colleagues. - Three faculty members from Business provide specialty business consulting on topics of: exporting, market research and energy efficiency. - Two Spanish-speaking graduate students within Engineering also develop curriculum for and teach non-credit courses to the local Hispanic community about business operations, marketing and product commercialization.
Location(s)	SBDC services are offered from the offices of the Institute for Applied Technology (on campus), as well as in the conference rooms of three local chambers of commerce. They plan to expand to two other satellite locations affiliated with angel capital groups who have investors in common with The University’s donor list.

EXAMPLE #2	A Microenterprise Nonprofit Organization
Location within Organization	This organization is 100% dedicated to providing business technical assistance. Eight staff members report to an Executive Director who reports to a Board of Directors. SBDC funding is applied directly to the host organization’s core services.
SBDC Services Focus	This nonprofit has a strong track record of serving micro-enterprises in a neighboring county and is looking at expanding both geographically and in terms of the size of business the organization serves. With SBDC funds, this organization could expand its footprint and serve more midsized small enterprises.
Lead Program Manager(s)	The Executive Director asks the Program Manager, to take the lead on the SBDC program. The Program Manager oversees three different grants that all pay for direct technical assistance to small businesses. The SBDC contract becomes the Program Manager’s biggest program but is like all the rest of the work. The Program Manager is paid 50% by the SBDC funding and spends 20% of her time providing business advising with SBDC clients.
Description of Budget	<p>\$150,000 in SBA funding</p> <p>\$150,000 from a Community Development Block Grant (CDBG)</p> <p>\$ 78,000 from a corporate foundation that donated to the nonprofit in order to help them expand delivery of small business services to a larger area.</p>
Administrative Support	Shared support from the core administrative staff.
Financial Compliance	Handled by the in-house bookkeeper with oversight by a CPA that has a background in fund accounting and federal contract management.

Business Consulting	The nonprofit has 11 existing business advisors under annual contracts who provide consulting through its multiple funding sources. These individuals are already used to tracking their work in a database and attributing it to the different funding sources. The Program Manager adds several additional part time advisors who are focused exclusively on supporting SBDC clients with access to capital.
Location(s)	The nonprofit decides to pay for an office collocated with several economic development programs in each of the two counties served by the SBDC. Being in this space allows the nonprofit to get a leg up on the expanded geographic territory and provides for many good referrals from the County Business license dept.

H. Focus on Economic Results

A core differentiator between the SBDC and other federal, state and local business assistance programs is the SBDC's focus on economic results produced by its services. All SBDC consulting aims at creating measurable successes such as: business startups, increases in sales, obtaining loan financing or equity investment, job creation and retention, etc. Reported outcomes must be verified and attributed by clients and are analyzed annually by an out-of-state third party researcher.

In CY2022, the Central California SBDC network provided one-on-one consulting and training to 4,649 unique small businessowners and entrepreneurs. Client businesses receiving individual private consulting attributed the following results to the help received from SBDC:

- Sales increases of more than \$56.4 million
- 1,029 jobs created and 16,955 jobs retained
- Over \$86.7 million in capital infusion (funding secured from equity investors and lenders)

I. Other Clarifications

Applicants shall note that the SBDC is not a social, entitlement or workforce development program. The Network's business model is to serve small business owners and entrepreneurs. **Training of employees (workforce) is not an eligible activity of the program.**

SBDCs serve pre-venture entrepreneurs, startup (early-stage) and established businesses. **The primary focus of the Central CA SBDC Network is on existing (in business) companies.** Sixty percent (60%) of all clients receiving services from the Network in 2022 were existing small businesses beyond the initial startup phase of operations and were specifically looking for help growing their enterprises and responding to challenges and opportunities in their markets.

SECTION IV. SCOPE OF WORK

All SBDC services are provided pursuant to the Central California SBDC Network Cooperative Agreement with the U.S. SBA; Federal OMB circulars; U.S. SBA Guidelines and Regulations; and the Central CA SBDC Network Policy and Procedures/SOP Manual. In addition, local host organizations receive fiscal and programmatic examinations/reviews each year, or as necessary pursuant to the SBA's and UC Merced grant audit procedures.

The local SBDC service provider shall design and manage direct delivery of in-depth and high-quality confidential business consulting and assistance in the areas specified in the annual Program of Work. This is to include an emphasis on business startup, access to capital, market expansion, procurement in English and other languages as reflect by the needs of clients within the service area. In addition, the local host may provide specialized training and events. Client services shall meet specific needs of small businesses in Monterey and San Benito Counties. Services may be provided by staff of the host organization and/or contracted consultants/trainers of the SBDC.

The Program of Work to be conducted through the contract resulting from this RFP consists of the following:

A. Mandatory Services

1. Consulting

The core service provided through SBDC is consulting. **All service and performance goals for the SBDC shall be based on the results from consulting activities provided to SBDC clients. All consulting must be provided confidentially and at no-cost to the clients.**

The SBDC shall design and provide quality-consulting services to improve the skills and knowledge of existing and prospective small business owners/managers. All consulting shall have an identified and measurable goal that is agreed upon by consultant and client. Consulting is a process of in-depth, two-way communication between client and consultant. This process includes identifying and analyzing the client's unique needs and problems.

The SBDC shall assist small businesses in solving problems in such areas as: operations, manufacturing, evaluation and adoption of new technology solutions, personnel administration, marketing, sales, merchandising, accounting, loan readiness, technology commercialization, equity financing, securing loans, business strategy development and other disciplines required for small business growth, expansion, innovation, productivity and management improvement.

Fees may not be charged for SBDC consulting. If an applicant to this RFP serves fee-based clients, methods shall be identified for how referrals will be made to the SBDC and how the proposer will ensure conflicts will not arise between fee-based and free consulting.

2. Expected Consulting Results

Annually, the Small Business Administration sets measurable goals to be obtained by the SBDC Networks. In CY2024, the Central California SBDC Network is responsible for producing and documenting following results from serving clients in Monterey and San Benito counties.

Service Results	2023 Expected Outcome
# of business clients to receive private (1-on-1) business consulting	525
Total # of hours of consulting	1,500
In-business clients	60%
Success stories	4 (one per quarter)
Economic Impacts (Client Success)	2024 Expected Outcome
Total New Businesses Started	24
Number of Capital Transaction	75
Total Capital Infusion (Dollar amount of Business Loans Secured + Dollar amount of Equity Capital Secured)**	\$6,000,000

**A new business start is realized when a pre-business client of the SBDC takes steps to complete required registration(s) with local, state and/or federal government (e.g., DBA registration, business licenses, tax identifications, etc.) AND has documented transactions (more than one) from the sale of a product or service for the purpose of gain or profit.*

***Capital infusion includes all loans secured by business clients PLUS all equity capital investments secured. Owner-infused equity capital is included in equity capital.*

3. Capital Access Assistance

The SBDC shall assist small businesses obtain growth capital through lending and equity investments. Services in this area shall include business plan development, financial statement preparation and analysis, cash flow preparation and analysis, understanding lending terms, loan application assistance, coaching on presentations for equity investors, etc. This includes assisting client source appropriate financing but at no time is the SBDC allowed to represent a client in lending discussions.

The SBDC shall develop and keep current a wide range of close partnerships with traditional banks, community lenders, angel capital networks/groups, and other equity investment organizations. Regular networking that links lenders and equity investors with business owners is mandatory.

4. Client Activity and Performance Tracking

The SBDC shall participate in measurement of services delivered and client successes through use of a proprietary online tracking system named NeoSerra. The Neoserra platform is paid for by the Network Lead Center and provided at no-cost for use by all SBDC Service Centers in the network. Training on the use of this system will be provided by the Central CA SBDC Lead Office for the SBDC personnel.

B. Additional Services

1. Training

The SBDC is able to offer trainings/workshops that are relevant to groups of business owners and/or entrepreneurs in Monterey and San Benito Counties. The Proposer is encouraged to arrange for co-sponsored training with the private sector and other community-based organizations, to extend outreach and productivity. **The SBDC is allowed to charge Training attendees a nominal fee to attend training workshops.** Fees collected from training attendees are considered “program income” and MUST be tracked by the SBDC separate from SBA and Match expenditures. Program Income is held in “trust” by the Center and can only be expended for allowable uses to further the SBDC program. Program Income balance must be returned to the Lead Center if the Host organization withdraws from the SBDC program.

While trainings are a cost-effective way to provide education on topics that many small businesses have in common, trainings should be viewed as a secondary service of the SBDC, behind consulting and capital access assistance. Trainings can and should be used to generate new consulting leads. Costs of training should primarily be covered from program income, sponsorships or other co-hosting partners. **The cost for delivering training cannot exceed 20% of the Center’s operating annual budget (SBA + Cash Match funds).**

2. Special Projects

Special projects include market research; publications; conferences for minority, women, veterans or disabled person-owned businesses; services provided in languages other than English; etc. To the extent possible, Special Projects should primarily be funded by non-SBA sources.

SECTION V. PROPOSAL FORMAT AND CONTENT

These instructions detail the mandatory proposal format and content to be used in each proposal.

PROPOSALS MUST BE PREPARED AND SUBMITTED IN THE FOLLOWING FORMAT TO ENSURE ACCURATE EVALUATION.

A. Required Content and Format

1. **Sec 1 - COVER SHEET.** The Cover sheet must include Name and contact information of the Proposing Organization. Name and contact information for the primary contact person for the Proposer. Include the UC Merced RFP number, "Proposal for SBDC Services for Monterey and San Benito Counties" and date the proposal was submitted.
2. **Sec 2 - Table of Contents:** Information is organized as outlined in this Section with page references.
3. **Sec 3 - Narrative:** The narrative portion of the proposal will address all of the following items and not be longer than 20 pages in length excluding attachments. **Applicants are encouraged to focus on providing complete content in a streamlined manner. There are no extra points provided for using all 20 pages of allowable narrative space. Please keep it simple!**

A. Description/Qualifications of Proposing Host Organization

- Provide a brief **history** of the organization, when it was established, when existing business assistance services were initiated by the organization and in which community(s), and location(s) the applicant currently operates. What are the primary markets and target clients/customers of the organization? Describe services provided to historically underserved populations including Rural, women, veteran and minority communities and groups.
- Describe the organization's capacity to establish, maintain and successfully operate the SBDC. Discuss **how the SBDC "fits"** within the organization and the purpose/mission of the SBDC aligns with the purpose/mission of the organization. Why does the applicant want to host an SBDC? Besides funding, what benefits will be realized by the host organization?
- Provide a description of the host organization's **primary services** and activities. Describe how business and/or economic development activities fit within the larger mission of the organization if the primary focus is not business and/or economic development.
- Provide a short description of all **business/economic development programs/projects** operated by the applicant during the last three (3) years and the specific funding source for each. If any such programs were discontinued prior to the end of the contract period, list the name of the funding source, the amount of the funds, program title, contract number and contract period. Indicate the reason the contract was discontinued early.

B. SBDC Structure and Management

- Provide a description of the proposed **SBDC location(s) and facilities**, demonstrating accessibility to the small business community to be served. The facilities must be disabled-accessible, allow for posting of SBDC signage, include private office space for individual consulting, and provide accessible, free or low-cost parking. For each planned facility, describe if the location is currently under the control of the applicant or if space would need to be identified, negotiated and/or leased.
- Provide a description of the proposed SBDC **personnel structure**. Include titles and duties for all individuals who will be involved in service delivery and oversight and the percentage of time they will be dedicated to the SBDC project. It is acceptable if host organization's proposed SBDC structure includes personnel yet to be hired; note positions to be hired. *Provide résumés for all host organization pre-existing employees and pre-existing contract consultants that will be involved in SBDC services and oversight as part of the Attachments.*
- Indicate the individual(s) who will provide **management and supervision over the SBDC** services, who this position reports to, what other programs they currently or will manage, and how long they have been with the organization.
- If business consultants will be private contractors, provide the **hourly consulting rate** agreed upon for hourly services. (Note: SBA guidance requires pre-approval for Contract Consultant rates in excess of \$100 per hour).

C. Fiscal Compliance

- Explain how **financial management** will be handled by the host organization. Indicate the individual that will have oversight of the budget and the position responsible for tracking expenditures and submitting invoices. For each person, include who these individuals report to, what other fiscal responsibilities they have, and how long they have been employed by the organization. *Provide résumé(s) as part of the Attachments.*
- Describe the organization's ability to maintain **separate ledgers and transaction journals** for SBDC financial activity to ensure a clear audit trail of the financial resources used under this agreement. SBDC expenditures of federal, matching, and program income must be accounted for separately from each other, from other host resources and shall be identifiable by contract year (i.e. calendar year) in which they were provided.
- Discuss the host organization's background in **fund accounting** and prior experience with fiscal management of Federal and/or State contracts.

D. Financial Stability

- Describe the organization's **core funding**. What are the primary ways the organization is funded and what have been the funding trends in recent years? If funding for the organization has significantly increased/decreased (+/- 20% or more) over the last three (3) years, describe these circumstances.
- In addition to State funds, discuss how the organization intends to raise the required 1:1 Match for SBA funding. (minimum of 50% in LOCAL Cash Match is expected)
- Discuss the organization's ability to manage a **reimbursement program**. What safeguards does the applicant have to ensure proper cash-flow over the year?

E. Service Delivery

- Address how **consulting services** will be implemented and managed, especially to rural and underserved populations. Include information about how consulting will be accessible throughout the geographic territory. Discuss any specialty/emphasis topics to be provided and how resources will be managed for maximizing economic impact of services.
- Address how **capital access assistance** will be implemented and managed. Include information specific to assisting client with loan access and specific to clients securing equity capital. Describe any significant relationships with lenders or equity capital-related partners.
- Address how **training services** will be implemented and managed. Include information about how training will be distributed throughout the geographic territory. Discuss any specialty/emphasis topics to be provided or if web-based training will be provided. If SBDC funding will be expended on curriculum development, note which training topics will require curriculum development. If trainings will be co-sponsored, indicate partner organizations that will collaborate on trainings.
- Describe all **special projects** that would be initiated/take place within the contract year. Include any special expertise or targeted programs not listed elsewhere. *Special projects are not required; however, if any resources will be spent on special projects they must be detailed.*
- If the applicant plans on specialized services for a **target market** within the general business population. Explain how this will be executed and estimate what percentage of SBA funds will be applied to target clients. IE serving Technology clients
- If any funding will be used to **enhance existing business assistance** services, note where funding will be made to expand/enhance programs rather than develop new services. Note: Expansions/enhancements are perfectly fine so long as services are aligned with the SBA-required assistance areas.
- SBA Rules do not allow for the Sub-contracting of SBDC operations, in their entirety, to a 3rd party. However, if any portion of the Scope of Work is proposed to be contracted out, the proposer shall identify **work to be performed by subcontractors**, their qualifications and expertise, and describe the pre-existing relationship between the subcontractor and the applicant. At no point does a sub-contract of services release the Host organization from full responsibility for fulfilling the contract for SBDC operations between the organization and UC Merced. *This does not relate to individual private contract consultants who may be engaged to provide consulting to clients under the supervision of the SBDC.*
- Provide a list of current community, business and corporate **partnerships** and explain the extent of the working relationships. If appropriate, document what these organizations have committed to do in specifically helping launch SBDC services to be provided by the applicant in Monterey and San Benito Counties.
- Discuss all forms of **outreach and promotion** that will be used to attract business clients. Note which of these methods and tools are pre-existing and which will be new efforts specific to the SBDC program.

- Describe the organization’s realistic **startup timeline** to scale to full SBDC operations in a timely manner. Include extent to which operations would be in place by April 1, 2024.

4. ATTACHMENT 1 - BUDGET FORMS

- Format shall not be altered. Complete all 3 tabs (Budget Proposal, Budget Justification and Salary FTE).
- ALL costs associated with the implementation of this proposal shall be included. **Proposals with incomplete budgets will not be scored.**
- The CY2024 SBA funding to support delivery of SBDC services in Monterey and San Benito Counties is expected to be \$175,000; including allowable indirect costs. Complete all expected SBA expenditures under Tab – 1.
- Local Cash Match expenditures totaling at least 50% of SBA funding is expected. And must be included on ATTACHMENT 1, BUDGET FORM. Applicants with more than 50% of Local cash match will get up to 30 extra points in the proposal scoring. (See top of page 10 in the RFP)
- State funding provided by UC Merced to support the Monterey/San Benito Center is expected to be \$100,000 for CY2024. State funds can only be used for Direct Client services (Consulting and Training) provided by SBDC staff or independent consultants. Complete all expected State expenditures under the “CIP/TAP” column.
- In-kind match should be used to make up any difference between total Cash Match (State and Local) and the minimum one hundred percent (100%) match requirement. Overmatch (more than 100%) is allowable and encouraged. Only allowable expenditures made during the CY2024 performance period count towards Match. A pledge of funding or cash reserves do not count towards required Cash Match. Waived in-direct counts towards in-kind match and will automatically be tracked by the Lead Center and reported to SBA.
- **All costs proposed require justification and narrative explanation (Budget - Tab 2).**
 - Example 1- Personnel: If an employee will be working part time on the SBDC project, provide the percentage of time and salary for the employee.
JUSTIFICATION: Frank Jordan, Business Consultant, annual salary of \$80,000 x 20% time for SBDC = \$16,000 salary expense.
 - Example 2- Contractual: If there will be multiple contract business consultants, provide estimates on how dollar amount is to be distributed.
JUSTIFICATION: 8 contract consultants. 4 consultants will average 10 hours/week and other 4 will average 5 hours/week. Hourly rate = \$65. Average of 60 hours/week x 48 weeks (assuming vacations, holidays, etc.) = 2880 hours x \$65/hour = \$187,200.
 - Example 3- Other: If there are costs associated with conducting trainings, list out costs and then list categories of costs under the “other” category.
JUSTIFICATION: Proposing 20 trainings, for each training—handouts/printing cost of \$200, training facility rental of \$500, coffee and water (refreshments) of \$50

Handouts/printing: \$4,000
Training facility rental: \$10,000
Refreshments: \$1,000

- The completed budget shall specify which program costs will be paid by each type of award dollars (federal, cash match or in-kind match).
- Include estimated waived indirect based upon applicant organization's federally recognized indirect rate. Waived indirect may be applied towards in-kind match.
- Estimate any fees or charges to clients for attending training workshops/seminars, special events, and non-business advising activities; all program income collected must be used in the direct support of the program and the use of these funds must be separately and clearly tracked and identified. By SBA mandate, **program income cannot be used towards cash match or in-kind match requirements.**

5. ATTACHMENT 2 - CERTIFICATION OF CASH AND IN-KIND MATCH: The amount and source of funds being provided as local match shall be clearly indicated.

- If a portion of local match funding has been applied for but is not yet secured at the time of the applicant's submission to this RFP, please provide a narrative to this fact and an estimated date on when the funding notification will occur.

6. Match Verification Documents

- Include support documentation for each local match source listed on ATTACHMENT 2, CERTIFICATION OF CASH AND IN-KIND MATCH. Support documentation may include: cover sheets from other grants/contracts; letters or emails from other funding entities, which include a funding amount, funding purpose and funding end date for cash match; letters or emails from host organization guaranteeing match from general funds; etc.
- In-kind match contributions shall be fully explained to show how their value is determined. Support documentation (such as signed commitment letters showing reasonable value of in-kind match amounts) for each match source is required.

7. Applicant Organization's Supporting Financial Information

- Provide a PDF copy or an online link to the organization's most recent external audit report (A-133) to equivalent audit report.
- Provide a copy of the host organization's Indirect Cost Rate Agreement (federal cognizant rate agreement) if applicable. If the organization does not have a current Indirect Cost Rate Agreement with a Federal cognizant agency, the Fresno SBA District office can provide an IDC agreement letter should the organization be selected.
- Provide documentation of incorporation, if appropriate.

8. ATTACHMENT 3 – ORGANIZATIONAL CHART

- Submit an organization chart showing the hierarchy of the organization and how the SBDC will be administered. The chart shall show the relationship between the proposed host entity, SBDC personnel and personnel of the host organization that will provide part time support to the SBDC. The chart shall include those individuals who will manage the fiscal aspects of the contract.

9. ATTACHMENT 4 - PLANNED CLOSURE DATES FOR 2024

10. Résumés for Proposed SBDC Personnel

11. Other Attachments

Any additional attachments provided by the proposer – such as letters of support, media clippings and host organization collateral – are allowed but are not required. **Information included beyond the required documents will not count towards the formal evaluation and scoring of the proposal.**

SECTION VI. SELECTION PROCESS AND EVALUATION CRITERIA

Each proposal shall be evaluated to determine responsiveness to the Central CA SBDC Network needs as described in this proposal package. Central CA Regional Director reserves the right at any time to reject any or all proposals.

A. Selection Process

1. After the period has closed for receipt of proposals, each proposal shall be evaluated to determine compliance with general RFP guidelines and specific requirements of SECTION IV, PROPOSAL FORMAT AND CONTENT. If a proposal does not meet all requirements, it will be considered nonresponsive and rejected from further evaluation.
2. The evaluation committee will then review all responsive proposals against the evaluation criteria listed below. Proposals will be ranked based upon score.
3. The evaluation committee reserves the right to designate one or more members of the committee to perform oral interviews with one or more finalist. The oral interviews will confirm information presented in the proposal. Further, the oral interview will allow finalists to demonstrate their understanding of the project objectives, and to articulate their capability to meet or exceed the requirements of this RFP. Proposers DO NOT have the right to an Oral interview as a respondent to this RFP. Oral Interviews will be conducted solely at the discretion of the Central CA SBDC Regional Director in concurrence with UC Merced Procurement and Contracting.
4. The evaluation committee reserves the right to designate one or more members of the committee to perform in-person site visits with one or more finalist. The site visits will confirm information presented in the proposal and oral interviews.
5. A contract shall be awarded to the applicant with a highly scored proposal, a high level of cost-effectiveness of proposed services to be offered, a demonstrated ability to provide sufficient fiscal and programmatic oversight of a federally funded program, and any additional information gathered from oral interviews and/or site visits deemed necessary.
6. Central CA SBDC Regional Director reserves the right not to award a contract under this RFP.
7. The chosen proposer shall be notified in writing as to their selection as the proposed contract awardee.

8. Unsuccessful applicants will be notified in writing.
9. **Once a contract is fully executed, the successful applicant will participate in the Central CA SBDC “onboarding” process.** Onboarding includes orientation of the new host, mandatory training of key programmatic and fiscal personnel, host participation in the annual all-region/all-staff meeting, and a series of startup checkpoints, which must be accomplished by the new SBDC during its first six months of operation. Dates of onboarding activities will be negotiated with the successful applicant after the Notice of Intent to Award is posted. Onboarding activities will be included in the contract.

B. Proposal Evaluation Criteria

Proposals will be reviewed and scored by an evaluation committee. Evaluation of proposals will be based on the criteria shown. **While criteria headings align with narrative sections, the entire proposal’s content will inform scoring in each of these areas.**

Criteria	Points
HOST ORGANIZATION Host organization’s focus, history and success in economic development activities; organization’s alignment with SBDC program; extent to which the organization has demonstrated success of its ongoing related business assistance programs.	Up to 25
PROPOSED SBDC STRUCTURE AND MANAGEMENT Adequacy of proposed SBDC structure, program management and qualifications of programmatic personnel; knowledge and expertise of proposed staff, subcontractors and consultants in operating a small business assistance program.	Up to 20
FISCAL COMPLIANCE Organization’s accounting and grant compliance systems; prior experience with federally funded programs; accounting department’s background in fund accounting; prior successful experience tracking cash match, in-kind match and program income.	Up to 25
FINANCIAL STABILITY Organization is well positioned to provide or raise matching funds for SBDC; capacity for growth; long-term sustainability of the organization to operate as SBDC Host is not in question.	Up to 20
SBDC SERVICE DELIVERY Quality and thoroughness of SBDC Service Delivery plan; variety and appropriateness of topics to local business needs; effective use of resources; focus on services producing measurable economic results; appropriate partnerships that will specifically enhance the SBDC service offering; special expertise; expertise serving underserved subsets of the general business population; ability to start up SBDC in reasonable timeframe.	Up to 30
Subtotal	Up to 120
Additional points for cash match above 50%. <ul style="list-style-type: none"> Cash Match at 51-75% = 5 extra points Cash Match at 76-100% = 10 extra points Cash Match at 101-125% = 15 extra points 	Up to 20

• Cash Match above 125% = 20 extra points	
Total Points Possible (including Bonus)	Up to 140

C. Oral Interview Evaluation Criteria

The evaluation committee may conduct oral interviews with one or more proposer finalists. The evaluation committee reserves the option of conducting the interview via teleconference or at the finalist's location. The following criteria will be used for assessing oral interview(s).

Criteria	Points
Quality and completeness of answers to questions regarding the proposed work plan.	Up to 10
Proposer's awareness of and ability to comfortably discuss concepts and approaches to small business development, economic development and measurement of economic impact. Understanding of the local business community, prominent growth industries and key partners/stakeholders in the economic development field, local growth industries and partnership opportunities.	Up to 20
Proposer's ability to tie ideas presented in the work plan to overall program objectives for the Central California SBDC Network. Proposer's ability to tie ideas presented in the work plan to the mission, vision and purpose of the larger host organization.	Up to 10
Proposer's ability to articulate host's background in grant management and fiscal management of federally funded programs. Understanding of fund accounting and core OMB cost principles.	Up to 10
Total Points Possible	Up to 50

D. Grounds for Rejection

The Central CA SBDC Network reserves the right to waive any immaterial deviation in a proposal; however, the waiver of an immaterial deviation in a proposal shall in no way modify the document or excuse the proposer from full compliance with the proposal requirements after the proposer is awarded the contract.

A proposal shall be rejected if:

- The proposal package is received after the exact time and date set for receipt of proposals.
- The proposal does not meet the requirements and is not prepared as required in SECTION V PROPOSAL FORMAT AND CONTENT.
- The proposal contains false or misleading statements or references, which do not support an attribute or condition, contended by the proposer; and if, in the opinion of the University, such information was intended to erroneously mislead the University in its evaluation of the proposal.
- The proposal is submitted as "confidential" (excluding proposers' financial information), conditional, incomplete or if it contains any irregularities.
- The SBA portion of the proposer's Budget exceeds \$175,000.
- The proposer does not meet the required cash match, total match, direct services requirement and/or ATTACHMENT 2: CERTIFICATION OF CASH AND IN-KIND MATCH forms are incomplete.

E. Debriefings

Written debriefings of the evaluation results will not be provided to unsuccessful proposals. Oral debriefings may be provided at the University's discretion.

SECTION VII. TERMS AND CONDITIONS

A. Addenda

The Central CA SBDC Network reserves the right to amend, alter or change the rules and conditions contained in this RFP prior to the deadline for submission of proposals.

The Central CA SBDC Network reserves the right to negotiate with any qualified proposer, or to modify or cancel in part or in its entirety contract provisions if it is in the best interest of the Central CA SBDC Network to do so.

The Central CA SBDC Network reserves the right to extend the submission deadline should this be in the best interest of the Central CA SBDC Network. Proposing organizations will have the right to revise their proposals in the event that the deadline is extended.

##RFP END##