Southwestern Community College District

RFP No. 1617 -154 Host Services for SD Technology
Small Business Development Center

Addendum No. Two (2)
March 3, 2017

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Director of Procurement, Central Services
& Risk Management

Note

All documents remain unchanged except section or parts added to, revised, deleted and clarified by this Addendum. This Addendum consists of the following changes/clarifications to the RFP document.

- **Presentation Material is attached for the RFP 1617 -154 Host Services for SD Technology Small Business Development Center WORKSHOP "How to Submit Responses to RFP" which Will be held today, <u>Friday, March 3, 2017 at 2:00PM</u> in Room 1620A.**

END OF ADDENDUM 2

RFP No. 1617-154
Host Services for the
San Diego Technology Small Business Development Center
for the Southwestern Community College District

Informational Workshop

Marquise Jackson, SDI SBDC Regional Director

Daniel Fitzgerald, SDI SBDC Associate Regional Director

Priya Jerome, Director of Procurement, Central Services & Risk Management

SBDC Overview

- U.S. Small Business Administration's (SBA's) largest matching grant-funded program

- SBDC program has 63 Recipient Organizations

- San Diego and imperial SBDC Network - serves San Diego and Imperial counties
  - The Lead Center hosted by Southwestern Community College District
  - Oversees operations of the:
    - North San Diego SBDC (NSD SBDC) – Hosted by MiraCosta Community College
    - Imperial Valley SBDC (IV SBDC) – Hosted by Imperial Regional Alliance
    - South San Diego SBDC (SD SBDC) – Hosted by Southwestern Community College

Roles and Responsibilities

- **Lead – The Lead Office is responsible for establishing an SBDC network for a defined area.**
    - Overall program development, service coordination, financial management, reporting, and internal quality control over network services.

- **SBA Involvement and Oversight – The SBDC program is managed by the Associate Administrator (AA) for the Office of Small Business Development Centers (OSBDC) at SBA headquarters.**

- **OSBDC** is responsible for: Oversight for SBDC Network, approving the proposal and issuing the Notice of Award, conducting programmatic and financial reviews.

- **SBA District Office** is responsible for: Negotiating the proposal with the SBDC Lead Office and submitting a letter of approval of the proposal.

Mission of SBDC (Statutorily Required Services)

- **SBDC's are required to provide the following services:**
  - On a non-fee basis, one-on-one confidential counseling.
  - Training for existing and prospective small business owners.
- **Specialized Services of San Diego Technology SBDC:**
  - **Technology Commercialization Assistance** - business counseling and advice to small business owners, university researchers, and entrepreneurs looking to accelerate the growth or development of their early stage high growth business.
  - **Technology Transfer Assistance** -- assisting in technology transfer through connecting public and private sector research to small business.

SBDC Performance Metrics

- **SBA and the SBDCs have jointly identified the following performance goals for the SBDC program:**
  - Number of Single-year, Long-Term Clients (5 hours or more of counseling, contact and prep time)
  - Number of new businesses created
  - Dollar Amount of Capital Infusion
- **Additional performance measures that will be reported to SBA but not goaled**:
  - Number of jobs created
  - Number of jobs retained

SBDC Budget

- Use the included template
- Use 8 months of total annual funding for federal ($66,667)
  - Total of Federal to be that amount exactly
- SBA v Cash Match v In-Kind Match
  - Cash Match to be equal to or greater than $33,334
  - In-kind and Cash Match must total at least $66,667
  - In-kind from host institution can include waived indirect charges

Cash Match v In-Kind Match

- **All SBA Funds must be match $1:$1, at least 50 % of which must be actual "Cash Match" and up to 50 % can be "In-Kind Match."**

- **Cash Match**
  - Cash Match to be equal to or greater than $33,334
  - Sources included: (1) host organization (e.g. payment towards personnel), (2) state and local public funds, (3) private funds
  - Cannot be other federal funds, except for Community Development Block Grant (CDBG) funds
  - Application should demonstrate secured funds (grant agreement, signed commitment letters, bank statement, etc.)

- **In-Kind Match**
  - Host Organization can waive all or a portion of indirect charges, which count as in-kind
  - Other 3rd party donations include volunteer trainers time, donated software, donated space, etc.

SBDC Staffing

- Staffing should be sufficient to meet the mission of the new center.
- Hiring should follow the host organization's human resource policy and procedure.
- If personnel are identified and currently employed, include resumes and positions.
- If they are to be hired, indicate basic job duties and hiring qualifications.
- Center Director to be a 1.0 FTE, have control over SBDC budget, and final hire to be approved by Lead Center.

Institutional Oversight

- **SBDC Director – provides programmatic and fiscal oversight to the SBDC**
  - Must report to the school or college dean or an equivalent or higher level administrator.
  - In a non-educational organization, the SBDC Director must report to an individual who is no lower than the third level of management.
- **Host Institution is Required to - provide fiscal oversight to SBDC**
  - maintain documentation for financial reporting as required by SDIV SBDC, OMB Circulars and SBA Regulations.
  - maintain separate ledgers and transaction journals for the SBDC financial activity
  - maintain support for all charges to the contract.
  - Maintain salary and wage records for SBDC employees charged to the contract to document costs for full-time and part-time personnel allocated to the program.
  - Maintain support for in-kind costs.

QUESTIONS?