



NORTHERN CALIFORNIA
**Small Business
Development Center**

REQUEST FOR PROPOSALS (RFP) – NO. 2026-SBDC-01

Small Business Development Center (SBDC) Area Host

ISSUED BY

Northern California SBDC Lead Center

a program of

**California State Polytechnic University, Humboldt
Sponsored Programs Foundation**

Questions about this RFP should be directed to:

Kristin Johnson, NorCal SBDC Executive Director

707-496-7079 or partnerships@norcalsbdc.org

IMPORTANT DATES:

July 17, 2026	RFP Issuance Date
July 23, 2026 3:00-4:30 PM PT	Optional Bidders Conference #1 (ONLINE) REGISTER HERE
July 24, 2026 12:00-1:30 PM PT	Optional Bidders Conference #2 (ONLINE) REGISTER HERE
August 3, 2026 10:00 AM–12:00 PM PT	Optional Bidders Conference #3 (IN PERSON) <i>Courtyard by Marriott Palo Alto-Los Altos 4320 El Camino Real, Los Altos, CA</i>
August 4, 2026 10:00 AM–12:00 PM PT	Optional Bidders Conference #4 (IN PERSON) <i>Sheraton Grand Sacramento 1230 J Street, Sacramento, CA</i>
August 18, 2026 5:00 PM PT	DEADLINE: Letter of Intent Submission
September 18, 2026 11:59 PM PT	DEADLINE: Proposal Submission
November 13, 2026	Partner Selections Announced
January 1, 2027	Contract Start Date, Work Commences

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Section 1. Program Evolution

Beginning January 2027, the Northern California Small Business Development Center program (NorCal SBDC) will implement a revised service delivery model designed to meet the evolving demands of entrepreneurs and small business owners. Upcoming changes described below and throughout this document are in response to a number of economic factors, and aim to make NorCal SBDC a more sustainable and impactful program.

Through a combination of regional coordination, expanded neighborhood-based access points, and streamlined administrative support, NorCal SBDC aims to make it easier for businesses to connect with the right advisor, receive timely assistance, and access the full range of resources available throughout the network. At the same time, local communities will continue to benefit from dedicated support tailored to their unique economic and entrepreneurial needs.

The changes described below are intended to strengthen service delivery, expand collaboration, improve operational efficiency, and strategically position NorCal SBDC to be relevant and effective for years to come.

Summary of Changes from Existing SBDC Infrastructure

Eight (8) SBDC Centers with Larger Territories	Each SBDC Center will oversee all SBDC services conducted within one of eight multi-county areas. The eight areas and a map are included below, on page 8.
Introduction of SBDC Neighborhood Branches	Neighborhood Branches will exist throughout the 36-county area, and report into the eight SBDC Centers. Each Neighborhood Branch will focus specifically on services to one city or community grouping. A separate RFP process to host an SBDC Neighborhood Branch is underway. Please see RFP NO. 2026-SBDC-02 for additional details.
All Fiscal Hosting by Cal Poly Humboldt Sponsored Programs Foundation (CPHSPF)	CPHSPF will be responsible for all budgeting, accounting, and will take on the burden of full cashflow needs for all eight centers. Local hosts to the eight centers will not be responsible for TAP, CIP or SBA accounting, fiscal reporting, or fiscal reviews/audits moving forward.
All Key Staff Employed by CPHSPF	Each of the eight centers will have a locally-stationed Area Director and Associate Director, and there will be a pool of Program Assistants to coordinate activities in each area. Program Assistants may be remotely located. All of these positions will be posted by CPHSPF, and all employees will report directly to the Lead Center of the NorCal SBDC.
All Business Advisors	All business advisors in the NorCal SBDC program will become

Contracted through CPHSPF	contractors of CPHSPF. The contracted business advisors will be located throughout the 36-county region. The eight SBDC Centers will oversee the advisors. A solicitation for Business Advisors will be released on July 24, 2026. Please see RFQ NO. 2026-SBDC-03 for additional details.
Increased focus on Innovation, Technology and AI	Norcal SBDC will move towards offering tech and innovation assistance throughout the network– not solely from the Tech Futures Group SBDC. Each Norcal SBDC Center will actively make connections with incubators, accelerators and other technology-focused organizations. Norcal SBDC will continue and increase integration of artificial intelligence (AI) as a topic of business assistance, as well as increase utilization of AI for network efficiency in operations.

Section 2. Introduction

1. Quick Facts

- Issuing Entity– California State Polytechnic University, Humboldt – Sponsored Programs Foundation (CPHSPF)
- Prime Funders – U.S. Small Business Administration (SBA), California Governor’s Office of Business and Economic Development (GO-Biz)
- Announcement Type: Initial – Open
- RFP Number: 2026-SBDC-01
- Closing date for submissions: Proposals are due by 5 PM PST on September 18, 2026. Entities planning to submit a proposal are strongly encouraged to first submit a letter of intent, no later than 5 PM PST on August 18, 2026.
- Funding Amount: \$7,100,000 is available for SBDC territories. Individual areas will be allocated between \$500,000 and \$1,200,000.
- Number of Awards: Eight (8) individual agreements will be funded.
- Funding Cycle: Funding is on an annual cycle of January to December; contracts will be eligible for annual renewal for up to six (6) years.

2. Purpose

This Request for Proposals (RFP) is being issued from the Northern California Small Business Development Center Program (NorCal SBDC) hosted by California State Polytechnic University, Humboldt Sponsored Programs Foundation (CPHSPF) which, through a shared cooperative agreement with the United States Small Business Administration (SBA), serves as host to the NorCal SBDC. This RFP is intended to identify local partners to host the

delivery of high-quality services to small businesses and new 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 achieve the greatest outcomes for the small business community in Northern California while ensuring accountability, transparency, and impact for the state and federal taxpayer dollars used to fund the program.

3. Reasons for Considering this Solicitation

Small Business Development Centers provide direct and measurable economic benefits to the communities they serve. Established during the Carter administration, SBDCs are designed to stimulate business formation and contribute to long-term business success and survivability. The SBDC program is the largest federally designated technical assistance program focused on supporting startup and growing small businesses in all 50 states and U.S. territories. SBDC host organizations join a collaborative network that shares expertise, resources, and connections to strengthen economic development efforts and achieve shared goals.

Hosting an SBDC Center enables organizations to advance their own mission while expanding support for entrepreneurs and small businesses. Additional benefits include:

- An opportunity to leverage significant SBDC funding from federal, state, foundation, and corporate resources for mutually beneficial programming.
- A vehicle for providing services directly to the business community;
- Access to quantitative and qualitative data on client service levels and business success outcomes for reporting, strategic planning, and stakeholder communications;
- Increased visibility for the organization within the region and state;
- A deeper understanding of business community needs;
- Expanded partnership opportunities with institutions of higher education and other economic development organizations in the region and state;
- Collaborative opportunities with strategic public and private sector partners;
- Enhanced digital presence for the organization through websites and social media;
- Professional development opportunities.

This opportunity positions host organizations to leverage significant resources, demonstrate measurable impact, strengthen regional partnerships, and become part of one of the nation's largest economic development networks.

4. Background Information

The NorCal SBDC Network is the collaborative partnership between the SBA, GO-Biz and CPHSPF, supporting businesses in the northernmost 36 counties in California, stretching from Santa Cruz to Crescent City, and from Stockton to Alturas, including the San Francisco Bay Area, Silicon Valley, and the Sacramento metro region. The NorCal SBDC Network provides technical services (advising and training) to existing and emerging small businesses with a focus on growth industries in the region. Each host organization for a local service location becomes a partner in the NorCal SBDC Network via a contract with CPHSPF.

The administrative headquarters for NorCal SBDC is called the Lead Center. The Lead Center is the entity that is engaged via a Cooperative Agreement with the SBA, and via contract with GO-Biz to administer the network. The Lead Center for the NorCal SBDC Network is hosted by the Sponsored Programs Foundation of California State Polytechnic University, Humboldt, the northernmost university in the CSU system. The offices of the NorCal SBDC Lead Center are located in Arcata, California, and Kristin Johnson is the Northern CA SBDC Executive Director.

Per federal regulation, the NorCal SBDC Executive Director is granted the authority and is directly responsible for assigning and achieving the goals and objectives of the program. The Executive Director is the primary contact for strategic direction and for monitoring and overseeing the investments and outcomes of the program.

5. SBDC Services

Per its mandate, the SBDC program is designed to provide high-quality business and economic development assistance to small businesses and entrepreneurs to promote business start-up, growth, expansion, innovation, profitability, management improvement, and job creation. Each local service location provides in-depth, high-quality assistance to small businesses 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, operations, economic and business data analysis, engineering, technology transfer, innovation and research, artificial intelligence (AI) integration, new product development or commercialization, product analysis, plant layout and design, agriculture, business law and referral, exporting, office automation, site selection, or any other areas of assistance required to promote small business growth, expansion and productivity. In addition to advising, the NorCal SBDC Network provides training, conducts special projects and provides business-specific research and referral services.

6. Partnership Model

The Northern California SBDC Network is a shared partnership among its various vested partners. The partnership concept stresses the participation of each partner in the strategic direction, operation, and service delivery of the network. Shared financial partnering is specifically defined as an SBDC characteristic. Local host partners are encouraged to contribute funding to support SBDC services and create lasting positive economic impact in their communities. Note that the term “partnership” does not mean the creation of a legal entity partnership, but rather the creation of a relationship that is characterized by mutual cooperation and responsibility for the achievement of common goals.

7. Authorizing Legislation and Funding Sources

The SBDC Program is authorized through Congress and partially funded by the U.S. SBA and by GO-Biz. The NorCal SBDC is governed by Section 21 of the Small Business Act (15 U.S.C. §

648), federal regulations 13 C.F.R. Part 130, and California Government Code Section 12100-12100.69. Although the Lead Center is responsible for the general management and oversight of the NorCal SBDC program, a partnership exists between SBA, GO-Biz, the Lead Center, and the local host partners for the delivery of assistance to the small business community in the region. SBDCs, under Section 21 of the Small Business Act (15 U.S.C. § 648), are required to provide advising and training to small businesses, including working with the SBA to develop and provide informational tools to support business start-ups and existing business expansion. In addition, pursuant to 13 CFR Part 130.330(c), SBA may, from time to time, identify certain Special Emphasis Initiatives to be targeted for assistance by SBDCs. The NorCal SBDC Network maintains a strong working relationship with the SBA District Offices located in San Francisco and Sacramento, California.

All SBDC services are provided pursuant to the NorCal SBDC Network Cooperative Agreement with the U.S. SBA; Federal OMB circulars; U.S. SBA Guidelines and Regulations; Grant Agreements between GO-Biz and CPHSPF; and the CPHSPF Policy and Procedures Manual.

8. Applicant Eligibility

Eligible host organizations include:

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

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; and
- Have **not** been debarred or had contracts terminated by the federal government, State of California or local government.
- Are **not** a for-profit business.

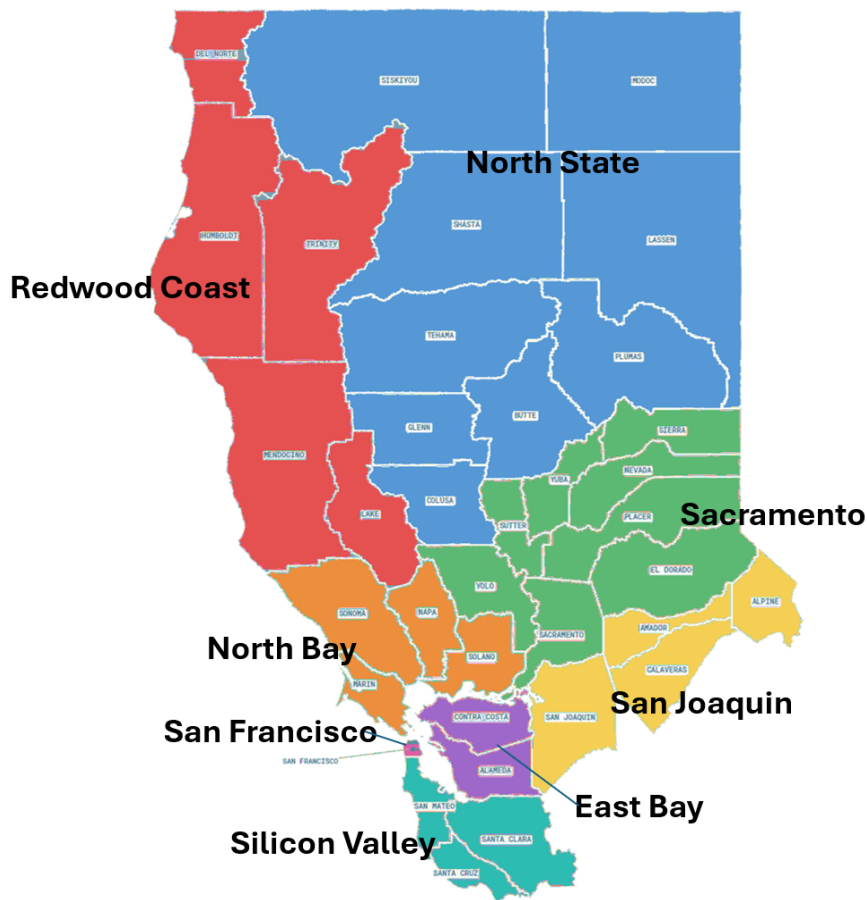
9. Service Territory and Funding Available

The 36-county region is split into eight service territories. Funding is allocated based on the core costs necessary to run a territory plus a distribution by population. See below for allocations. In the proposal, each applicant must demonstrate a plan to provide full coverage to their requested service territory – keeping in mind the importance of accessibility and availability to the businesses they propose to serve. The Lead Center reserves the right to reallocate funding to best meet the needs of the business community. All funding amounts are projected and are subject to change based on availability of federal and state funds. Cash match is not required. However, organizations able to commit financial support toward SBDC services are encouraged to do so. While proposals without a cash match will be considered, a financial commitment of 5% or more, or in-kind contributions beyond the

required facilities, may make a proposal more competitive.

SBDC Service Territory	Counties	Estimated Base Funding from CPHSPF	Suggested Cash Match from Applicant Host
1	REDWOOD COAST: Del Norte - Humboldt - Lake - Mendocino - Trinity	\$500,000	\$25,000
2	NORTH STATE: Butte - Colusa - Glenn - Lassen - Modoc - Plumas - Shasta - Siskiyou - Tehama	\$600,000	\$30,000
3	NORTH BAY: Marin - Napa - Solano - Sonoma	\$1,000,000	\$50,000
4	SACRAMENTO: El Dorado - Nevada - Placer - Sacramento - Sierra - Sutter - Yolo - Yuba	\$1,200,000	\$60,000
5	SAN FRANCISCO: San Francisco	\$700,000	\$35,000
6	EAST BAY: Alameda - Contra Costa	\$1,200,000	\$60,000
7	SILICON VALLEY: San Mateo - Santa Clara - Santa Cruz	\$1,200,000	\$60,000
8	SAN JOAQUIN: Alpine - Amador - Calaveras - San Joaquin	\$700,000	\$35,000

Map of Service Territories



10. General Information

This RFP is for proposals to serve as SBDC hosts for a six-year period commencing January 1, 2027 and ending December 31, 2032. Contracts will be issued annually. The first contracts between CPHSPF and the successful bidders are expected to begin on January 1, 2027. SBDC host partners demonstrating satisfactory collaboration will have their contracts renewed annually for up to five additional years, provided funding to do so is appropriated for this purpose in subsequent federal, state, and CPHSPF budgets. The Network anticipates issuing an RFP prior to awarding of contracts in 2033. The Lead Center reserves the right to terminate the contracts of organizations for noncompliance according to the terms of the contracts issued, as well as to add organizations prior to 2033 as needed to meet service delivery goals.

The bidding process for this procurement 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 3, SBDC Program Overview and Host Requirements and Section 4, Proposal Submission Process. Only those proposals that meet these requirements will be evaluated according to the criteria in Section 5, Selection Process and Evaluation Criteria. Further review may occur through interviews and/or site visits to one or more applicants. Oral communications with CPHSPF officers and employees shall be non-binding on CPHSPF and shall in no way exclude the bidder of obligations as set forth in this package.

CPHSPF reserves the right to amend, alter or change the rules and conditions contained in this RFP prior to the deadline for submission of proposals.

CPHSPF reserves the right to negotiate with any qualified applicant, or to modify or cancel in part or in its entirety contract provisions if it is in the best interest of CPHSPF to do so.

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

Upon award of contracts to the successful bidders, the contract will be between CPHSPF and the applicant organization.

11. Bidder's Costs

Costs for developing proposals are entirely the responsibility of the bidder and shall not be reimbursed by CPHSPF.

Section 3. SBDC Program Overview and Host Requirements

1. 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 (quantifiable successes) produced by its services. All SBDC advising aims at creating measurable outcomes with each client business, including: business startups, increases in sales, obtaining loan financing or equity investment (capital infusion), job creation and job retention. Annually, more than 40% of NorCal SBDC business clients should achieve one of these measurable results.

Applicants should 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 both startup and existing businesses. **The primary focus of the NorCal SBDC Network is on existing (in business) companies.** Sixty-five percent (65%) of all clients receiving services from the NorCal SBDC are small businesses that are beyond the startup phase of operations and are specifically looking for help growing their enterprises and responding to challenges and opportunities in their industries. The local SBDC must deliver in-depth and high-quality confidential business advising and assistance with access to capital.

2. Core SBDC Services

a. Advising

The core service provided through SBDC is advising. The SBDC shall design and provide quality advising services to improve the skills and knowledge of existing and prospective small business owners. All advising shall have an identified and measurable goal that is agreed upon by an advisor and a client. Advising is a process of in-depth, two-way communication between client and advisor. This process includes identifying and analyzing the client's needs and problems.

The SBDC shall assist small businesses in solving problems concerning: operations, manufacturing, engineering, evaluation and adoption of new technology solutions, artificial intelligence, 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/or management improvement.

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

b. Capital Access Assistance

The SBDC will assist small businesses in obtaining 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. The SBDC will also 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 events (in person or virtual) that link lenders and equity investors with business owners are mandatory.

c. Assistance to Innovation and Technology Companies

The SBDC shall provide specialized advising and commercialization assistance to innovation-driven and technology-based companies seeking to develop, launch, commercialize, and scale new products, services, and technologies. Services shall be delivered by advisors with demonstrated expertise in technology commercialization, venture-backed startups, and innovation ecosystems. Assistance shall include, but not be limited to, business model development, go-to-market strategy, financial modeling, investor readiness, venture capital and angel fundraising, SBIR/STTR assistance, intellectual property strategy, artificial intelligence, product commercialization, strategic partnerships, regulatory guidance, and operational scaling.

The SBDC shall maintain relationships with universities, research institutions, incubators, accelerators, venture capital firms, angel investor groups, corporate innovation programs, and other technology ecosystem partners to connect clients with specialized resources and funding opportunities.

d. Training

In partnership with their Neighborhood Branches, each SBDC may offer local trainings/workshops that are relevant to groups of business owners and/or entrepreneurs in their proposed service area. Trainings can and should also be a good way to generate new advising leads. All local trainings should be co-sponsored with the private sector and other organizations, to extend outreach and productivity.

While local trainings provide education on topics that many small businesses have in common, trainings should be viewed as a secondary service of the SBDC, behind advising, capital access assistance, and assistance to innovation companies. Costs of local training should primarily be covered from Neighborhood Branch sponsorships or other co-hosting partners. **Local trainings may not be a primary cost for which CPHSPF funding is used.**

Regional online trainings presented by the Lead Center support businesses throughout the 36-county footprint of NorCal SBDC and should not be duplicated at the local level, unless expressly requested by a partner organization.

e. Client Activity and Performance Tracking

The ability of the NorCal SBDC to measure and report client impact is essential to demonstrating program effectiveness. Client advising activity and economic outcomes are tracked on an ongoing basis to evaluate program performance and report the impact of services delivered throughout the network.

The NorCal SBDC utilizes NeoSerra, its proprietary client management and reporting system, to document client engagement, advising activity, and economic outcomes. The NorCal SBDC workforce is responsible for the collection, maintenance, and reporting of program performance data.

Program performance and client outcomes are regularly reviewed by Leadership and shared with Area Host to evaluate service delivery and overall program impact.

3. SBDC Workforce

- a. CPHSPF will directly employ an Area Director and an Associate Director who will work onsite at the Area Host location, or at an agreed-upon Neighborhood Branch. Program Coordinators employed by CPHSPF will work remotely from the Lead Center headquarters, or from another agreed-upon location. All personnel, including Area Directors, Associate Directors, and Program Coordinators, will be recruited and selected following the Lead Center's established hiring processes. All will be 100% focused on SBDC-related activities.

Business Advisors providing 1-on-1 advising and training above and beyond services conducted by staff will all be CPHSPF contractors. Work of the contract advisors will be overseen by the Area Director and Associate Director.

4. Host Requirements

a. Facilities

The Area Host will provide the SBDC with one or more visible, professional, fully-equipped office location(s) that comply with Americans with Disabilities Act (ADA) requirements. There must be a dedicated office location appropriate for the SBDC Area Director and Associate Director. A dedicated and secured area must also be provided for client meetings, and must be adequate to protect client confidentiality. Each SBDC must have access to adequate conference room facilities to accommodate group training sessions. Conference rooms may be at a different physical address from the office location(s). Each SBDC facility shall have access to parking for business clients and employees, and signage should be compliant with NorCal SBDC branding guidelines. All indoor and outdoor signage must be professionally produced and is subject to Lead Center review.

b. Position inside host organization

A special note for institutions of higher education: There are many different ways to

situate an SBDC within a university or college. SBDC services can fall under business or other academic units; other SBDCs are hosted within the President's Office, or the office on a campus focused on community relations; special institutes and centers focused on entrepreneurship, technology commercialization, economic research, or international trade are also potential places where SBDC services can be located and complement activities.

A special note for counties and municipalities: When a county or municipality is the host organization for an SBDC, services are usually managed within the unit of the county or municipality that is responsible for economic development, community development, and business permitting and/or workforce development. If a city or municipality is applying to host an SBDC that delivers services beyond its geographic borders, the bidder must have the authority to work outside these boundaries. *Alternatively, please see the separate RFP (NO. 2026-SBDC-02) for information on Neighborhood Branches.*

c. Strategic Partnerships

The Area Host is expected to leverage its relationships and regional presence to help increase awareness of the NorCal SBDC and facilitate connections with organizations that support entrepreneurship, innovation, and small business development throughout the service area. This may include connecting the NorCal SBDC with financial institutions, capital providers, colleges and universities, research institutions, chambers of commerce, economic development organizations, business support organizations, and other strategic partners.

The Area Host should also help identify opportunities to strengthen the visibility, reach, and long-term impact of the NorCal SBDC throughout the service area.

d. Participation in Lead Center Programs

The NorCal SBDC operates as a coordinated regional network, and the Area Host is expected to collaborate with the NorCal SBDC Lead Center to support consistent, high-quality service delivery throughout the service area.

The NorCal SBDC leads the nation in its utilization of a centralized intake team, where incoming clients are registered by specially trained staff housed at the Lead Center, decreasing administrative burden for centers while providing a high-quality, consistent intake experience for new clients. Participation in Centralized Intake is mandatory for all SBDCs. Once a client has signed up for services, the Centralized Intake team will assign the client to the appropriate Advisor based on the client's needs and geographic location.

SBDCs must follow NorCal SBDC Branding Requirements and participate in regional marketing efforts. Standardized marketing templates will be distributed, and their use is required to provide a consistent and unified brand approach throughout the region.

The Area Host is expected to participate in periodic host meetings with the NorCal SBDC Lead Center and collaborate on strategic initiatives that strengthen regional partnerships, program visibility, and service delivery.

Participation in monthly, quarterly, and annual regional meetings is mandatory for Area Directors. Area Directors and Associate Directors will also participate in monthly programmatic webinars.

Section 4. Proposal Submission Process

1. Letter of Intent

Organizations wishing to submit a proposal in response to this RFP are *strongly encouraged* to submit a Letter of Intent to the NorCal SBDC Lead Center by **5:00 PM PT on August 18, 2026**.

Letters of Intent should be submitted as a Microsoft Word document (.doc or .docx) or PDF, addressed to Kristin Johnson, Executive Director, and emailed to partnerships@norcalsbdc.org.

At a minimum, the Letter of Intent should include:

- Organization name and address
- Primary contact name, title, phone number, and email address
- The requested SBDC service territory

2. Proposal Submission

All proposals must be completed and submitted through the StartUpTree application portal: <https://norcalsbdc.startuptree.org/competitions>

The application portal will open on July 17, 2026, at 12:00 AM PT and will close at **5:00 PM PT on September 18, 2026**. Late submissions will not be accepted.

Applicants must first create a StartUpTree user account to access the proposal. Once logged in, complete all required questions and upload all requested documents through the StartUpTree portal. Some questions contain multiple prompts. Carefully review each question and ensure your response addresses all requested information.

Suggested word counts displayed within StartUpTree are provided for guidance only and are not enforced.

For the best experience, applicants are encouraged to draft responses in a separate Word or Google document before entering them into StartUpTree. Although applications may be saved and revisited before submission, applicants are strongly encouraged to maintain a separate copy of their responses.

3. Technical Proposal

Complete the following questions within StartUpTree and upload all requested documentation. Suggested response lengths are provided within the StartUpTree application to help applicants prepare concise, complete responses.

- a. Organization Background
 - Provide a brief overview of your organization, including its mission, the communities it serves, the target customers/clients, and the location(s) in which it operates.
- b. Interest in Hosting an SBDC Center
 - Please explain why your organization is interested in hosting an SBDC Center.
 - Explain how hosting an SBDC Center would fit within your organization and how the SBDC mission aligns with your organization's mission.
- c. Business Assistance Experience
 - Summarize your organization's experience providing business assistance and economic development services. Include the types of services offered and any notable outcomes or accomplishments.
 - If business and economic development is not your primary focus, explain how these activities support your organization's broader mission.
- d. Proposed SBDC Location(s)
 - Describe the proposed SBDC location(s) and facilities, including how they will provide convenient access for the small business community being served.
 - For each proposed facility, indicate whether the space is currently under the control of the applicant or if it must be identified, negotiated, and/or leased.
- e. Facility Requirements
 - Select all facility requirements that can be accommodated at the proposed location(s).
 - i. ☐ Accessible for individuals with disabilities
 - ii. ☐ Ability to display SBDC signage
 - iii. ☐ Private office space for one-on-one advising
 - iv. ☐ Accessible free or low-cost parking
 - v. ☐ Dedicated office space for two SBDC staff members
- f. Organizational Financial Commitment
 - Describe how your organization plans to collaborate with NorCal SBDC to grow and strengthen SBDC services through financial support, shared resources, or other contributions. If applicable, identify anticipated funding source(s), indicate whether funding for 2027 has been secured, and describe your organization's long-term approach to supporting SBDC services through 2032.
- g. Programming
 - Describe specialty or emphasis areas your organization brings to the partnership that could benefit SBDC clients. Include any industry expertise, language capabilities, specialized programs, and innovation/tech training resources developed prior to this RFP.
 - Summarize any special projects or initiatives your organization would implement during the contract year that are not addressed elsewhere in this application.
 - Explain how the SBDC would collaborate with other organizations to deliver coordinated services and reach populations with the greatest need.
- h. Partnerships
 - List your organization's top eight existing partner organizations within the proposed service area's economic development ecosystem.

- Describe the nature of any significant existing relationships your organization has with lenders, venture capital firms, angel investors, or other capital partners that may be leveraged to support SBDC activities.
- Summarize how your organization has partnerships in all counties within the services area. Detail how your organization will build and strengthen local relationships and partnerships to address gaps in service delivery.

4. Certifications and Assurances

Applications submitted without these documents will be considered incomplete.

- OPTIONAL: Complete and upload [Attachment 1 \(“Certification of Host Cash Match”\)](#)
 - The amount and source of each match contribution must be clearly identified. Include support documentation for each match source listed on Attachment 1. Documentation may include grant or contract cover sheets; letters or emails from funding entities that include the funding amount, funding purpose, and funding end date; or letters/emails from the host organization guaranteeing match from general funds. If submitting more than one document, combine all files into a single PDF before uploading.
- Complete and upload [Attachment 2 \(“Certification Regarding Lobbying”\)](#)
- Complete and upload [Attachment 3 \(“Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion”\)](#)

5. Organization Chart

Upload an organization chart showing your organization's reporting structure and how the SBDC Center will fit within that structure. Include the relationship between the proposed host entity, SBDC personnel, and any non-credit business assistance programs or initiatives operated by your organization.

6. Additional Supporting Documents

Upload any additional supporting documents you would like to include with your application, such as letters of support or organizational collateral. If submitting more than one document, combine all files into a single PDF before uploading. Additional attachments are optional.

Section 5. Selection Process and Evaluation Criteria

1. Selection Process

- a. After the period has closed for receipt of proposals, each proposal will be evaluated to determine compliance with the requirements of this RFP. If a proposal does not meet all requirements, it will be considered nonresponsive and rejected from further evaluation.
- b. The evaluation committee will then review all responsive proposals against the evaluation criteria listed below. Proposals will be ranked based upon score.
- c. The evaluation committee reserves the right to designate one or more members of the committee to perform oral interviews with one or more finalists. 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.
- d. 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 finalists. The site visits will confirm information presented in the proposal and oral interviews.
- e. A contract will be awarded to applicants with highly scored proposals, and any additional information gathered from oral interviews and/or site visits, if deemed necessary.
- f. CPHSPF reserves the right not to award any awards.
- g. Upon selection of proposed recipients, a Notice of Intent to Award will be posted for five (5) working days at the NorCal SBDC Lead Center Office, StartUp Humboldt, 876 7th St, Arcata, CA 95521. A Notice of Intent to Award will also be posted online at www.norcalsbdc.org. Winning bidders will be notified verbally or in writing as to their selection as the proposed contract awardee at the time CPHSPF posts the Notice of Intent to Award.
- h. Unsuccessful applicants will be notified in writing on the date CPHSPF posts the Notice of Awards.
- i. Preliminary contract negotiations shall begin on the sixth workday after the date the Notice of Intent to Award is posted.
- j. **The successful applicant will participate in the NorCal SBDC “onboarding” process.** Onboarding includes orientation of the new host, 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 twelve 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.

2. Proposal Evaluation Criteria

Proposals will be reviewed and scored by an evaluation committee. Evaluation of proposals will be based on the criteria shown.

Criteria	Points
HOST ORGANIZATION'S BACKGROUND Host organization's focus, history and success in economic development activities; organization's alignment with SBDC program.	Up to 25
ORGANIZATIONAL STABILITY Host organization demonstrates long-term stability and a willingness to support the success and sustainability of SBDC services through financial support, shared resources, or other meaningful contributions.	Up to 20
SERVICE DELIVERY Host organization's pre-existing small business-related resources that can be leveraged; specific expertise areas and programs that align with SBDC service offerings; solid plan for office location(s).	Up to 20
PARTNERSHIPS Evidence of strong pre-existing partnerships throughout service territory; special relationships with lenders, equity capital firms, or innovation-related organizations.	Up to 35
Subtotal	Up to 100
Cash Match	
Additional points for cash match above 0% • 1% cash match up to 5% cash match: 5 extra points • 6% cash match up to 20% cash match: 10 extra points • 21% cash match up to 40% cash match: 15 extra points • 41% cash match up to 50% cash match: 20 extra points • 51% cash match and above: 25 extra points	Up to 25
Total Points Possible	125 points

3. Grounds for Rejection

- a. CPHSPF 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 bidder from full compliance with the proposal requirements after the bidder is awarded the contract.
- b. A proposal shall be rejected if:
 - 1) The proposal package is received after the time and date set for receipt of proposals.
 - 2) The proposal contains false or misleading statements or references which do not support an attribute or condition contended by the bidder; and if, in the opinion of CPHSPF, such information was intended to erroneously mislead CPHSPF in its evaluation of the proposal.
 - 3) The proposal is confidential, conditional, incomplete, or if it contains any irregularities.
 - 4) The proposal does not include all Certifications and Assurances.
 - 5) All signatures are not provided.

4. Debriefing

Written debriefings of the evaluation results will not be provided to unsuccessful

proposals. Oral debriefings may be provided at CPHSPF's discretion.