



## **SBOP Roadmap2Success – Consolidated Q&A**

**Release Date:** 2025-12-22

**Applies to:** All organizations reviewing or responding to the SBOP Roadmap2Success RFI

**RFI Deadline:** January 9, 2026

**Q&A Period End Date:** December 19, 2025

*This Q&A applies uniformly to all potential respondents. No individual guidance or interpretations have been provided outside this written process.*

### **1. Is this RFI a funding opportunity or procurement?**

No. This RFI is for planning and information-gathering purposes only. It does not request budgets, pricing, or proposals, and it does not create eligibility, preference, or commitments for future contracting.

Any future procurement or contracting activities, if pursued, will be conducted separately and in accordance with applicable state and federal requirements.

### **2. Which SOW should my organization respond to?**

Organizations may respond to any Statement of Work (SOW) that aligns with the services they provide. You may respond to one, multiple, or none of the SOWs.

There is no penalty for selecting multiple SOWs. Respondents should choose based on their own assessment of service alignment as described in the RFI Guide and SOWs. OCAST cannot advise organizations privately on classification or fit.

### **3. How should organizations that do not provide Legal, Accounting, or Financial (LAF) services participate?**

Organizations that do not provide LAF services may:

- Skip the Intake Forms and
- Submit a short narrative (up to 3 pages) as described in Step 4 of the RFI Guide.

Non-LAF submissions help OCAST understand:

- how specialized services (e.g., cybersecurity, AI training, broadband support, industry-specific expertise) contribute to the statewide ecosystem
- potential referral pathways
- alignment with the federated service model

These submissions support ecosystem mapping and planning but do not constitute eligibility for SBOP-funded services. Non-LAF participation does not constitute eligibility for SBOP-funded reimbursement.

#### **4. What counts as Legal, Accounting, and Financial (LAF) technical assistance under SBOP?**

LAF services under SBOP refer specifically to the types of technical assistance described in the SOWs, such as:

- bookkeeping and accounting system setup
- budgeting, forecasting, and documentation preparation
- legal structure and compliance education
- internal controls development
- record-keeping and documentation readiness

LAF services under SBOP do not include:

- investment advising
- lending or underwriting
- capital raising
- general business coaching
- unrelated technical training

Organizations should review the SOWs to determine alignment.

#### **5. As an SSBCI-TA provider, are we considered a LAF provider under SBOP?**

OCAST cannot classify organizations on their behalf. Organizations should determine whether their services match LAF functions as defined in the RFI Guide and SOWs.

Respondents should:

- review the LAF service descriptions in the SOWs
- determine whether their services align
- choose the SOW(s) that best reflect their capabilities

Organizations unsure whether they fall under LAF may submit:

1. Intake Form(s) for SOWs they believe may apply, and/or
2. A non-LAF narrative, if appropriate.

#### **6. What is the goal of this RFI? How will the information be used?**

The RFI aims to:

- understand statewide LAF and non-LAF technical assistance capacity
- identify organizations that may contribute to the Roadmap2Success service model
- refine the four SOWs and program structure
- build a more coordinated, interoperable statewide support network

The RFI is not used to score, rank, prequalify, or select contractors.

**7. Is the goal of the RFI to gather a large list of potential mentors, experts, or workshop presenters?**

The purpose of the RFI is to understand and map statewide technical assistance capacity, including organizations that may contribute sector-specific expertise such as mentoring, subject-matter support, or workshop facilitation.

Organizations may share the RFI with others who could contribute to the broader ecosystem.

All respondents must follow the same submission steps in the RFI Guide to ensure information is collected in a consistent, equitable, and auditable format.

**8. Is participation in the RFI used to select organizations for contracting?**

No. OCAST will not select contractors directly from RFI responses.

The RFI is for planning and information-gathering only. RFI responses will not be used to select or pre-qualify contractors. Responses will help OCAST refine the Roadmap2Success program model and better understand statewide technical assistance capacity.

The RFI is used solely for market research and program design. Any future contracting will be conducted through separate, state-authorized procurement methods that do not rely on RFI participation and comply with applicable state and federal requirements.

**9. What is meant by the “federated model”?**

The federated model is a coordinated statewide approach in which multiple independent providers each play a different role (JR, AM, LRC, SN) while operating within a shared SBOP framework:

Under this model, SBOP service providers:

- use shared terminology
- follow common data standards
- exchange information using consistent data formats
- make referrals within the same structured pathway
- use consistent milestones
- use interoperable reporting structures

This approach does not centralize services or reduce provider independence. Instead, it ensures businesses receive consistent, coordinated support across the state, no matter where they enter the SBOP network.

**10. Will there be a webinar, meeting, or live session to review the RFI?**

No, OCAST will not host live, individual, or interactive sessions related to this RFI.

To ensure fairness and equal access to information, all questions must be submitted in writing through the Q&A process, and responses will be shared publicly with all potential respondents at the same time.

To prevent selective communication or interpretation, OCAST cannot provide verbal guidance or individualized clarification. OCAST may publish a non-interpretive recorded overview that summarizes information already contained in the RFI and does not introduce new requirements or guidance.

**11. Can organizations update or replace their submissions after the Q&A responses are published?**

Yes. Organizations may submit updated or revised materials any time prior to the RFI deadline. Any resubmissions must follow the required submission format and subject line.

If multiple submissions are received from the same organization, only the most recent complete submission received by the deadline will be reviewed.

**12. The RFI feels long or complex. Can OCAST provide a simplified version for smaller providers or mentors?**

OCAST cannot modify or issue a simplified version of the RFI during the open period.

However, respondents may:

- choose only the sections relevant to their services or expertise
- submit a short narrative response in place of a detailed scope of work where permitted, and
- collaborate internally to determine the most appropriate way to respond

The RFI is intentionally structured to ensure consistency, interoperability, and clarity for future statewide implementation. While detailed, it is designed to provide a clear and equitable foundation for a system that must operate reliably across multiple organizations, and technical assistance providers.

**13. What happens after we submit our materials?**

After submission, OCAST will:

1. Send a confirmation of receipt
2. Log the submission for tracking purposes, and
3. Review all materials after the RFI deadline

Information submitted through the RFI will be used to refine the Roadmap2Success program structure, scopes of work, and broader ecosystem planning.

To ensure accurate tracking and a consistent audit trail, respondents must use the required subject line format when submitting materials: **SBOP Intake – [Your Organization Name]**

If a submission is received without the correct subject line, OCAST will request that it be resent with the proper formatting so it can be logged correctly. This does not affect the substance or timing of the submission.

The RFI will not result in funding or selection. OCAST may, but is not obligated to, contact respondents later in the future if separate opportunities arise.

**14. Will OCAST tell organizations privately how they should classify themselves or which SOW to choose?**

No. To ensure fairness and avoid selective communication, OCAST cannot provide individualized guidance or advise organizations on their classification, alignment, or interpretation of SOWs. Respondents are responsible for determining their own best fit based on the information provided in the RFI.

**15. How will Q&A responses be shared?**

All Q&A responses will be consolidated and distributed to all organizations at the same time, regardless of who asked the question. OCAST will not provide individual or private guidance

**16. Do respondents need to complete all four Intake Forms?**

No. Respondents should complete only the Intake Form(s) corresponding to the SOW(s) they intend to respond to. Organizations that are not applying as a LAF should skip the Intake Forms entirely.

**17. Should small organizations, mentors, or workshop providers respond to the RFI?**

Any organization may respond to the RFI. However, depending on scope and capacity, some smaller organizations, mentors, or workshop providers may be more appropriately engaged later as subcontractors or collaborators under future SBOP providers.

Such organizations may still submit:

- a non-LAF narrative ( up to three pages) describing their role within the small business support ecosystem
- referrals to organizations that may be better positioned to serve as primary SBOP providers

**18. If an organization is already part of another SSBCI or ARPA program, should it still respond?**

Participation in other SSBCI or ARPA programs does not exclude organizations from responding to this RFI.

Organizations should independently assess whether their services align with the roles and functions defined in the RFI Guide.

**19. Can respondents request a meeting with OCAST to discuss the RFI?**

No. OCAST will not hold meetings to discuss the RFI. All questions must be submitted through the written Q&A process, and responses will be shared publicly with all respondents at the same time.

**20. Can organizations submit materials after the deadline?**

No. All responses must be received by the date and time specified in the RFI Guide.

Late submissions cannot be accepted in order to maintain fairness, consistency, and proper documentation.

**21. What is the purpose of the Support Network (SN) category?**

The SN category is intended for organizations that provide advanced or specialized LAF technical assistance aligned with the Journey Roadmap outcomes.

Examples may include organizations with expertise in areas such as:

- Biotechnology,
- Aerospace,
- Mobility,
- Cybersecurity,
- Broadband or digital infrastructure, and
- Other regulated or highly specialized sectors

SN is not intended to function as a general mentor directory or an open roster of workshop speakers. Respondents should review the SN SOW and independently determine whether their services align.