

REQUEST FOR PROPOSALS (RFP)

Capital Pathways Business Advisor Pool – Webinars, Training Materials, and In-Person Support

Virginia SBDC Network | Mason Enterprise Center | George Mason University

1. Background

Capital Pathways is a specialized program within the Virginia Small Business Development Center (SBDC) network that empowers Virginia small businesses to secure the capital they need to grow. It is designed for very small (fewer than 10 employees) and emerging and growth-ready for-profit and nonprofit businesses that face challenges accessing traditional financing. The program offers an immersive, hands-on experience focused on financial and legal readiness.

To expand the delivery of financial education and one-on-one technical assistance in Southwest Virginia, Capital Pathways is seeking qualified individuals or firms to join a contractor pool supporting businesses in the service areas for the regions of Virginia Highlands, Blue Ridge Crossroads, Mountain Empire and Southwest Virginia.

2. Objective

This RFP seeks experienced business advisors or trainers to:

1. Deliver live virtual webinars on financial readiness topics.
2. Create training recordings and resource guides for on-demand client use.
3. Provide in-person one-on-one business advising in Southwest Virginia on financial topics.

Each contractor may be awarded work under one or more categories and may cover one or more regions. We aim to have at least one contractor per region and expect to make between 4 and 8 awards.

3. Scope of Work and Service Menu

3.1. Webinars (Live Virtual Delivery)

- Deliver live 1 to 2-hour virtual webinars on topics such as:
 - o Financial Basics

- Nonprofit Basics
- Grant Writing
- QuickBooks 101 & 201
- Understanding Financial Statements
- POS System Selection & Integration
- Small Business Tax Compliance
- Total of 2–3 webinars per month, suggested slots on Tuesdays and Thursdays between 11:30 AM–1:30 PM (negotiable).
- Include slide deck, session recording, and post-session Q&A.

3.2 Training Recordings & Resources

- Develop on-demand training content for the Virginia SBDC.
 - May include narrated slides, how-to screen recordings, and PDF guides.
- Topics can mirror webinars or be tailored to specific tools (e.g., reconciling bank accounts in QuickBooks, calculating quarterly payroll taxes).
- All materials must be Capital Pathways-branded and suitable for small businesses with no prior financial systems.

3.3 One-on-One Business Advising (In-Person)

- Offer personalized, in-person technical assistance on any of the five main topics in one or more of the 4 Virginia Southwest regions.
- Support may include:
 - Software setup and troubleshooting (e.g., QuickBooks, POS)
 - Financial review and projections
 - Tax account registration and compliance
 - Hands-on reconciliation or reporting help
- Must offer minimum of 10–14 hours per month per assigned region, either solo or shared with another advisor.

4. Deliverables

The services outlined below represent the types of support the Virginia SBDC may request through this engagement. This will be a flexible, menu-based engagement. We are not seeking a bundled proposal, but instead request individual pricing and time estimates for each package. These services will be selected on an as-needed basis based on client fit.

Package	Description	Required Evidence for Payment
---------	-------------	-------------------------------

Webinar Session	1 to 2-hour virtual live webinar	Slide deck, session recording, attendance report
On-Demand Training	5–30 minute recorded tutorial and companion PDF guide	Video link, training document
In-Person Advising	Technical assistance for individual businesses	Entry of information (client info, meeting notes, purpose of meeting, prep/contact time) in our CRM system.

5. Period of Performance

From contract execution through December 31, 2025, with possible extension through November 30, 2026.

6. Contractor Qualifications

- Demonstrated expertise in one or more of the following:
 - Financial literacy and bookkeeping
 - QuickBooks or comparable accounting software
 - Financial statement analysis
 - POS system setup
 - Small business tax compliance
 - Nonprofit basics
 - Grant writing
- Experience advising or training very small, capital-seeking businesses
- Must reside in and have deep familiarity with Southwest Virginia, including an understanding of local small business challenges and the region's disaster recovery efforts, such as Hurricane Helene-related grants and funding opportunities.
- SWaM-certified vendors are strongly encouraged to apply.

7. Proposal Instructions

Submit a brief proposal including:

- Relevant qualifications and experience
- List of topic areas you can support
- Region(s) you can serve in person
- Sample materials or recordings (if available)

- Proposed approach to each deliverable
- Unit proposed cost in a separate Excel file, with a cost breakdown with related assumptions by deliverable (i.e., breakdown of # of labor hours, travel, materials, etc.)

Please note: Final quantities are unknown and will be determined based on client referrals. Pricing should reflect a per-unit cost for each deliverable.

Send proposals to:

Lina Kastanos
Capital Pathways Program Manager
Email: lkastano@gmu.edu

Deadline: August 25, 2025, at 5:00 PM EST

7. Evaluation Criteria

Proposals will be evaluated based on the following criteria:

Criteria	Weight
Subject matter expertise and approach	50%
Experience working with very small businesses	25%
Cost effectiveness and clarity of pricing	25%