



California Office of the Small Business Advocate

Governor Gavin Newsom's Office of Business and Economic Development

2024/25 Technical Assistance Program

A grant program for small businesses technical assistance programs

Program Announcement

Opportunity Number: SBTAP2024

Total Program Funding: \$23 Million

Released: July 5, 2024

Revised July 1, 2024¹

Revised July 16, 2024²

Proposals Due: By 4:59:59 PM PDT on August 12, 2024

Online Application Platform: <https://startup.space.app/v2/dynamic-survey/view/374/1245>

Proposals submitted after the stipulated deadline will be rejected without being evaluated with no exceptions. Please make every effort to submit at least 48 hours in advance in case you experience technical difficulties.

¹ Deadline extended to August 12, 2024 and Personal Disclosure Form PDF template added ([page 19](#))

² Personal Disclosure Form PDF template has been removed from page 19 and no longer required

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About the Program

Overview

The California Small Business Technical Assistance Program (SB TAP or Program) provides approximately \$23 million in annual funding to improve the state's business and technical resources and networks for entrepreneurs and micro and small business owners. Funding is provided to support consulting and training services to small businesses and prospective small businesses. The Program prioritizes scopes of work intended to help underserved businesses across the State. This Program Announcement provides Centers with the application, instructions and details about the annual funding, eligibility, evaluation criteria and performance requirements. This document serves as the Program Announcement for SB TAP funding available during the 2024/25 fiscal year.

The Technical Assistance Expansion Program (TAEP) was created in 2018 through Government Code Sections 12100-12100.69 to expand the services of federally awarded small business technical assistance programs in California that provide one-on-one confidential free or low-cost consulting and training to small businesses and entrepreneurs in this state.

In 2022, Government Code Section 12100.60 established the California Small Business Development Technical Assistance Act of 2022, which re-named the Program as the Technical Assistance Program (TAP) and established it as a long-term program to provide technical assistance resources including training and consulting services to small businesses and entrepreneurs. The Program was expanded to include small business technical assistance centers funded through private and philanthropic sources that meet the criteria defined in subdivision (e) and (f) of Section 12100.63.

The Office of the Small Business Advocate (CalOSBA) at the Governor's Office of Business and Economic Development (GO-Biz) is charged with administering and providing oversight for the Program.

Purpose

California is home to a range of small business technical assistance centers ("Centers") that provide free or low-cost one-on-one, confidential consulting and training to help small businesses and entrepreneurs start, grow and expand, and create jobs in California. These Centers are funded in part by federal and private funding sources and are a crucial aspect of the support system for small business growth and entrepreneurship across the state. The SB TAP provides state grant funding to support direct services to small businesses and entrepreneurs including through expansion of services to underserved businesses and regions. The Program is intended for established Centers with a track record of high-quality technical assistance work. In addition, the Program is intended for Centers with the capacity to build on existing work, expand to serve California's underserved business groups, and ensure equitable access and opportunity for all California small businesses.

Priorities

CalOSBA will prioritize funding for applications that best meet the factors listed in Government Code Sections 12100.60-12100.65 and give priority to applications that build on existing work with a strong track record of success and/or propose new or enhanced services to reach underserved small business owners, including women, people of color, and veteran-owned businesses, and businesses in low-wealth, rural, and disaster-impacted communities included in a state or federal emergency declaration or proclamation. It is CalOSBA's aim to use TAP to respond to Executive Order N-16-22, which requires state

agencies and departments to take additional actions to embed equity analysis and considerations in their mission, policies and practices.

Eligible consulting and training services covered by the Program's grant funding include: business plans and strategy; capital readiness and fundraising; expansion and revenue growth strategies such as export training, government and private procurement, e-commerce marketplace development and other business development strategies; marketing; management; operations; financial management; cybersecurity; production/manufacturing assistance and increased productivity strategies; innovation and tech transfer; business resilience such as emergency preparedness, disaster economic recovery, succession planning, youth entrepreneurship; among other areas.

CalOSBA seeks proposals that demonstrate collaboration and best practice sharing in the community and across ecosystem partners to build a stronger network of programs, services, and activities that benefit all California small businesses with a focus on reaching underserved business groups.

These may include:

- Research and marketing focused on mapping the continuum of services, identifying any gaps that exist for underserved small businesses, partnering, and ensuring effective outreach to underserved small businesses.
- Identifying and scaling best practices including cross-network and ecosystem wide best practice sharing to ensure a standard level of small business service offerings across the state, especially with underserved small businesses.
- Building programs, partnerships, and collaborations to support underserved small businesses with experts in this area including minority, women, and veterans' business organizations, mission-based lenders serving underserved small businesses, and others that have effective outreach to underserved small businesses.

Definitions

Definitions that pertain to this Program Announcement are provided below.

1. "Authorized Representative" means the principal contact in the proposal and grant agreement.
2. "Client" means the business, if it exists. In the case of a prospective business, the client is the individual (i.e., nascent entrepreneur or pre-venture) receiving services. Each client will be counted only once.
3. "Disaster Impacted" means territories included in an active state or federal emergency declaration or proclamation at the time services were received.
4. "Diversity, Equity, and Inclusion Action Plan" means a distinct and actionable strategy to provide technical assistance services to underrepresented individuals and business groups. Strategies should include achievable and measurable goals to reach desired markets.
5. "Federal funding partners" means the federal agencies that fund small business technical assistance Centers such as the U.S. Small Business Administration, U.S. Department of Commerce or U.S. Department of Defense, and other federal agencies with the authority to administer small business technical assistance programs in the state of California.
6. "Fiscal agent" means the entity with which a federal funding partner is administering the specified federal small business technical assistance program for all aspects of the program

requirements, which may include staffing, programming, outreach, securing any required match to draw down federal funds, and reporting performance outcomes to operate the program in this fiscal agent's area of responsibility.

7. "Grant Period" means October 1, 2024 through September 30, 2025.
8. "Lead Center" means a Small Business Development Center (SBDC) Lead Center.
9. "Local cash match" means nonfederal cash that is spent on eligible small business technical assistance program costs. Local cash match may include funding obtained from sources such as state and local funding, as well as private sources such as corporations, foundations, individuals, local businesses, and nonprofit organizations; and may include in-kind resources.
10. "Low-wealth areas" means a city and/or county within California with a poverty rate of at least 150% of the California statewide poverty rate per the most recently updated data available from the U.S. Census Bureau's American Community Survey 5-Year Estimates at most thirty days prior to the first day of the applicable application period.
11. "Minority-Owned Small Business" and "Diverse-Owned Small Business" means a small business in which the majority (at least 51%) of the company is owned and run on a daily basis by a person of color (or people of color) of the following racial or ethnic groups: African American/Black, Asian, Native American or Alaska Native, or Native Hawaiian or Pacific Islander, or Latino/Hispanic.
12. "New Businesses Started" means substantive counseling attributed to assisting an individual(s) with exploring the establishment of new business, who achieved one or more of the following verified results: the client makes their initial sale while receiving assistance; the client has made a sale, but comes to the Center without the necessary licenses and permits and obtains them with help from the Center; or the client obtains funding for the business.
13. "New Client Served" means new clients counseled and/or trained that have never received services from the Center.
14. "Private funding source" means any entity that makes grants and includes corporate or private philanthropy or similarly established nongovernmental entities. Private funding source does not include California State or local funding.
15. "Rural areas" means all territory, population, and housing units that are not defined as urban. To qualify as an urban area, the territory must encompass at least 2,000 housing units or at least 5,000 persons. The term "rural" encompasses all population, housing, and territory not included within an urban area. Rural areas can be identified with the U.S. Census Bureau's [TIGERweb Decennial \(census.gov\)](https://tigerweb.census.gov/) online map.
16. "Small Business Development Center," or SBDC, means an entity or physical location, recognized by the federal Small Business Administration, from which a small business owner or an aspiring entrepreneur may receive free one-on-one consulting and low-cost training on a variety of topics, including starting, operating, and expanding a small business.
17. "Small business technical assistance center" includes a federal small business technical assistance center or any established 501(c)(3) nonprofit community-based organization the mission of which includes economic empowerment of underserved microbusinesses or small businesses and entrepreneurs and that operates entrepreneurial or small business development programs which provide free or low-cost services to California's underserved businesses and entrepreneurs to enable their launch and sustained growth.

18. “Small business” means a business or nonprofit with 500 employees or fewer for most manufacturing and mining industries and \$7.5 million or less in average annual receipts for nonmanufacturing industries, includes for profit and non-profit entities.
19. “Underserved business groups” means women, minorities (people of color), veteran-owned businesses, and businesses in low wealth, rural, and disaster-impacted communities included in an active state or federal emergency declaration or proclamation at the time services were received.
20. “Unique Client Served” means the number of unduplicated clients that have been counseled and/or trained. Each client can be counted once per year as part of programmatic reporting. Under metrics asking for “unique client” no duplication of clients is allowed even if the client has been served numerous times.
21. “Veteran” means the individual served on active duty with the Army, Air Force, Navy, Marine Corps, or Coast Guard for any length of time and didn’t receive dishonorable discharge, or served as a Reservist member of the National Guard and was called to federal activity duty or disabled from a disease or injury that started or got worse in the line of duty or while in training status.
22. “Veteran-Owned Small Business” means a small business that is 51% or more owned and controlled by an individual or individuals in one or more of the following groups: Veterans (other than dishonorably discharged); Service-Disabled Veterans; Active Duty Military service member participating in the military’s Transition Assistance Program (TAP); Reservists and National Guard members; current spouse of any Veteran, Active Duty service member, or any Reservist or National Guard member; or widowed spouse of a service member who died while in service or of a service-connected disability.
23. “Women-Owned Small Business” means a small business that is 51% or more owned and controlled by an individual or individuals who identify as women.
24. “Youth entrepreneurship program” means programs, workshops, counseling, or curriculum intended for individuals currently enrolled in high school, or an institution of higher education.

Funding and Duration

The 2024/25 grant period will commence on October 1, 2024 and end on September 30, 2025.

Up to \$23 million is available for the Program, which will be awarded by CalOSBA using a merit-based review process. Centers are expected to spend their 2024/25 award in full during the grant period. On a case-by-case basis, upon written approval from CalOSBA, Centers may receive an extension of up to three quarters to spend down 2024/25 grant awards. Centers should ensure that grant funding requests and proposed scopes of work align with the grant period timeline.

Funding Amount and Match Agreement

Centers must apply with a match agreement to conduct technical assistance to small businesses. The match agreement must be from a federal or private funding partner. The requested funding amount may not exceed the total federal or private award to provide technical assistance to small businesses specified in a Center’s agreement with a federal or private funding partner. The requested funding amount may not be less than twenty-five thousand dollars (\$25,000) per year. The Center’s match agreement must extend through the end of the performance period (September 30, 2025) or the Center must have a clear path to renew the agreement or provide a funding source for the same work that extends through the performance period. Centers applying as a group under an Authorized Representative may combine

federal award dollar amounts. Additionally, if the group is proposing a network-wide program offering, the requested funding amount may not exceed the combined total federal or private award.

Funding Categories

Allowable Activities and Expenditures

Centers may spend 100% of their grant award on Direct Technical Assistance (TA) (one-on-one consulting and/or training with small business or nascent entrepreneurs). However, only up to 20% of the total award may be used for Program Administration, Supplies, Research & Marketing (combined). All spending must be justified and approved in the grant application.

All costs incurred under the Program must meet the tests of reasonableness, allowability, and allocability. Recipients are responsible for ensuring proper management and financial accountability of state funds to preclude future cost disallowances. All costs invoiced under the Program are subject to audit. CalOSBA has discretion to make these determinations or make any changes to the [cost policies](#) under the terms of the agreement.

Direct TA

1. **Personnel** costs include an employee's time and effort to conduct direct technical assistance to small businesses (one-on-one consulting and/or training with small business or startup). This cost does not include staff time for marketing, research, or program administration. These costs should be billed under Personnel and Fringe.
2. **Contractual** costs include a consultant's time and effort to conduct direct technical training and/or consulting to small businesses (workshops and classes for business owners or startups). This cost does not include contractor time for marketing, research, or program administration. These costs should be billed under Contractual.
 - a. Consultant cost policy: CalOSBA will reimburse consultant and staff time at a rate of no more than \$100 per hour. In *very rare* cases, CalOSBA will consider a rate that exceeds \$100 per hour. These rates must be pre-approved by CalOSBA and include a strong justification outlining why the Center is unable to procure a consultant at the rate of \$100 per hour or less. CalOSBA may request quotes from alternative consultants as part of this evaluation.
3. **Supply** costs include products or technology to conduct direct consulting/trainings or webinars. Examples include post its, pens, paper, training printouts and materials, training booklets, folders. In pre-approved cases supplies may include supplies for a workstation for entrepreneurs who do not have access to a tablet, computer, or the internet. Unallowed supplies include but are not limited to staff laptops for everyday use, administrative supplies, awards/trophies, gift cards for programs, clothing for staff, and furniture.

Research & Marketing

4. **Research** costs include employee or consultant's time and effort to assess small business service needs in a Center's geographical service area or to research and develop a pilot project or other planned service expansion. Research may not include the cost of research tools, software, or reports for the Center or for individual client consulting. We encourage the use of partnerships and existing best practices for any large research expenditures. Research expenditures must be justified in the grant application. Any additional research over \$5,000 planned after the original

proposal was approved must be submitted with justification to CalOSBA for pre-approval. All research costs should be billed under “Research and Marketing.”

5. **Marketing** costs include employee or consultants’ time and effort, and the associated Fringe benefits, to conduct targeted Center marketing initiatives to underserved small businesses such as, print media (e.g., flyers, brochures, and pull-up banners), digital media (e.g., social media ads), and purchases/subscriptions to databases, marketing services and other technology tools to support outreach, client development and expansion activities (e.g., MailChimp, Constant Contact, Hootsuite). We encourage the use of partnerships and research-driven approaches for any large marketing expenditures. Marketing expenditures must be justified in the grant application and pre-approved prior to invoicing CalOSBA. Any additional marketing (non-labor marketing costs over \$5,000) planned after the original proposal was approved must be submitted with justification to CalOSBA for pre-approval. All marketing costs should be billed under “Research and Marketing”.

Program Administration

6. **Program Administration** costs must be directly associated with the administration of the approved Scope of Work (SOW). Administrative costs must be fully justified and may not be indirect or overhead. Examples of allowable program administrative costs include staff or contractor time to conduct monitoring and evaluation, staff time to coordinate and oversee the Program, staff or contractor time to develop a new program or curriculum, staff or contractor time to travel to rural areas. Pre-approved technology tools to support monitoring and evaluation are also allowable if justified in the grant application and SOW. Technology tool cost shall not exceed \$1,000. Limited and clearly justified travel expenses related to serving clients in very rural areas may be allowed with clear justification as part of the Center’s general SOW. Funds may only be used for the above allowable transportation expenses. Funds are not available for the payment of per diem, lodging, meals, or subsistence expenses. Travel costs should be billed under “Program Administration.” Program administration **does not** include indirect or overhead costs, travel unrelated to serving rural clients, or time on activities such as applying for CalOSBA or other grants. All Program-related administrative costs must be thoroughly justified in the pre-approved SOW and pre-approved budget. All costs must be easily identifiable and itemizable with a clear connection to the administration and oversight of TAP.

All costs, no matter which funding category, must be specifically named and described in the budget proposal. If staff or contractor time and effort overlap across categories, the total of hours will be broken out by their corresponding category. This includes Fringe as well.

Per Government Code Section 12100.63, State funds provided pursuant to the **Program shall not supplant local cash match dollars** included in a federal small business technical assistance Center’s plan described in subparagraph (A) of paragraph (2) of subdivision (f) or in any nonfederal small business technical assistance Center’s plan.

Unallowable Activities and Expenditures

Unallowable Activities and Expenditures under the Program include, but are not limited to:

- Salary bonuses or contract bonuses
- Travel expenses for per diem, lodging, meals or subsistence expenses

- Travel expenses for transportation (e.g., mileage, car rental, rail or air) unless as noted above for serving rural clients
- Food and beverage
- Supplies not directly related to consulting, training, allowable research, or allowable marketing
- Indirect or overhead costs (The grant agreements in this Program are not subject to the model agreement provisions developed pursuant to Chapter 14.27 (commencing with Section 67325) of Part 40 of Division 5 of Title 3 of the Education Code). Unallowable indirect and overhead costs include rent, insurance, indirect administrative costs that are not directly related to program administration, for example, indirect costs to a Center host organization.
- Other activities or items that are banned by the State of California, or CalOSBA deems inappropriate or inconsistent with statutory or programmatic requirements of TAP

Funding Method

CalOSBA will process grant payments quarterly on a cost-reimbursement basis. CalOSBA will issue payments within forty-five (45) calendar days of receiving a complete, valid, and undisputed invoice with all required documentation and reporting requirements.

CalOSBA will determine final funding amounts based on evaluation of scores and budget reasonableness as defined in Funding Categories.

Eligibility

At the time of applying for funds, Centers must meet the requirements below.

1. Be designated by a federal entity to provide small business technical assistance services (including federal pass-through funds to state and local entities (e.g., ARPA, MBDA SSBCI funds if proof of source is provided) or a registered 501(c)(3) or 501(c)(6) with a mission to promote the economic empowerment of underserved microbusinesses, small businesses, entrepreneurs, and small nonprofits. State funds are not eligible matches for this Program. Federal funds passed through CalOSBA are not eligible for use as TAP match (e.g., SSBCI-TA). Local agreements are an eligible primary match source for this Program only if derived from federal pass-through funds.
2. Have an established entrepreneurial or small business development technical assistance program that provides free or low-cost services to California's underserved businesses and entrepreneurs to enable their launch and sustained growth.
3. Applicants must submit an active grant or contract designated by a federal entity or private funding source to administer a small business technical assistance program in California OR a Letter of Intent/Funding Announcement from a funding source stating the Applicant will administer a small business technical assistance program in California by or starting on October 1, 2024. The agreement must extend through the end of the performance period, or the applicant must have a clear plan to spend all funds by the end of their active grant. Extensions or renewals of active grants may be included in the plan to fully exhaust funds. Federal pass-through funding is accepted as long as the applicant can demonstrate through an active contract or letter from the funding entity that the funds are from a federal source. State and local funding is not an acceptable form of match, per statute.

4. Applicants must have a fiscal agent that is able to receive nonfederal funds and be authorized by a federal entity, or a registered 501(c)(3) or 501(c)(6) with a TAP-aligned mission, to provide small business technical assistance.
5. SBTAP funds shall not supplant a Center's local cash match that is required by their funding partner. However, funding from other state programs may be used for this type of local cash match.
6. Applicants must have a plan of action and commitment to fully draw down all funds in their primary agreement with a federal or private funding source during the grant period using local cash match, if required by the agreement.
7. Applicants must generate and provide documentation of the local cash match required by the funding partner.

Applicants may only combine funding from multiple awards if the awards are of the same type (federal awards OR private awards), and if the awards are for the same eligible program (e.g., two federal awards for the same Women's Business Center, or two private awards explicitly for the same small business technical assistance program). Federal and private awards **may not** be combined. Centers may not combine more than two funding sources.

Application Types and Authorized Representatives

Applicants may include Centers that operate individually or as a network or group (e.g., regional or statewide networks). All applicants must designate an Authorized Representative. Authorized Representatives will carry out a variety of responsibilities during the application process and grant period.

Individual Programs

Individual Center applications are appropriate for applicants that operate one Center under a single organization and fiscal authority with shared match agreement(s). The Authorized Representative is the Center itself. Please note that SBDCs must apply as network-based programs.

Group-Based Programs

Group-based programs consist of multiple Centers organized under a coordinating administrative or fiscal entity that serves as the Authorized Representative. Group-based programs consist of independent Centers organizing voluntarily. Each Center applies with its own match agreement(s), proposal and budget. Centers within group agreements each implement unique programs that are distinct from other Centers within the group. Applications that are identical, highly similar to each other, or plagiarized will be rejected.

Network-Based Programs

Network-based programs consist of a group of Centers that operate under a single Fiscal Authority in a single match agreement. An example of a network program would be programs with a lead Center and multiple satellite Centers, and/or programs operated by the five Small Business Development Center Networks. The Authorized Representative will be the coordinating administrative entity defined by the match agreement funder, for example the Small Business Administration (SBA). Network applications must also submit services offered by each of their proposed centers in this [required Network Information Survey](#).

All applications must be unique in their scope. If applications with duplicative scopes of work are received, only the application with the largest requested budget will be eligible for consideration. All other applications will be declined. If the applicant is uncertain which type of application they should submit, it is strongly recommended they speak with the CalOSBA Programs Team before submitting their application. Emails may be sent to SBTAEP@gobiz.ca.gov. Multiple individual applications received utilizing the same Fi\$Cal Authority may be combined by CalOSBA into a single group-based application, when deemed appropriate by the CalOSBA Programs Team. Final funding amounts are determined by CalOSBA, not the Authorized Representative.

Applicant and Agreement Responsibilities

The Authorized Representative will submit the Program application to CalOSBA, receive the Notice of Award, and enter into the 2024/25 agreement with CalOSBA. The Authorized Representative will also be responsible for communicating with CalOSBA prior to execution of the agreement to clarify, modify, and finalize components of the application, if necessary. For group-based applications and agreements, the Authorized Representative will enter into separate sub-agreements with the Centers in their group agreement.

Grant Period Responsibilities

During the grant period, the Authorized Representative will submit performance and financial reports to CalOSBA after reviewing each Center for accuracy and completeness. The Authorized Representative will also receive and distribute CalOSBA's quarterly reimbursements to Centers in group and network agreements.

In addition, the Authorized Representative will serve as the principal contact with CalOSBA. Any programmatic or agreement-related issues will flow through the Authorized Representative to the Centers in their agreement. When programmatic issues and questions arise, Centers are expected to contact their Authorized Representative, who will engage CalOSBA if necessary. Likewise, CalOSBA will communicate to Authorized Representatives on program-related information. If an Authorized Representative designates staff for a portion of these responsibilities, the Authorized Representative must provide CalOSBA with a written statement confirming they are acting on behalf of the Authorized Representative.

Notice of Intent to Award and Grant Agreement

Final award amounts for all grantees will be determined by [the application review process](#).

Once scores for all recipients have been determined, CalOSBA will email the Authorized Representative a Notice of Intent to Award ("Notice"). The Notice will acknowledge the Center or Network, along with instructions about next steps. CalOSBA may conduct follow up calls, if deemed necessary, to discuss the proposal and requested amounts. If a Center's award amount is different than the amount requested, the Center will be required to revise its scope of work and proposed milestones based on the final award amount. Centers must submit the requested information within five business days of receiving the Notice. For Group-Based Programs, the Authorized Representative will be provided with guidance from CalOSBA to determine final award amounts for subgrantees.

Once milestones are finalized, the Program's funding will be awarded in an agreement between CalOSBA and the Authorized Representative. The agreement will contain standard terms and conditions and

specify the award amount, the reporting and invoicing requirements, scope of work and milestones that will be used to evaluate recipient progress during the year of the agreement. In the case of group submissions, the Authorized Representative will enter into separate sub-agreements with each of the Centers in their group.

Termination

CalOSBA will assess each Center based on achievements against Program goals and each Center's respective scope of work. CalOSBA reserves the right to terminate the agreement in the case of a material breach. A material breach for the purposes of the Program may include, but shall not be limited to:

- Failure to comply with established Program deadlines including failure to file timely reports.
- Failure to substantially comply with metric reporting requirements.
- Failure to substantially comply with narrative reporting requirements.
- Failure to substantially comply with financial reporting or record-keeping requirements.
- Failure to substantially comply with carrying out the scope of work established in the agreement.
- Failure to communicate with CalOSBA in a timely manner.
- Failure to spend funds in a timely manner, in accordance with the grant agreement.
- Termination of the Center's match agreement or other factors that lead to an inability to receive federal or private funds.
- Closure of the small business technical assistance Center or closure of the program utilized as match for the Program. Inability to receive federal or private match funds for any reason.
- Closure or cessation of operations by the small business technical assistance Center for any reason including, but not limited to the termination of its cooperative agreement with a federal or private funding source.

In the event of termination, the state will compensate the Center only for all allowable and unavoidable expenses reasonably incurred by the Center in the performance of its work under the agreement as of the effective date of the terminating event or other period to allow project closeout activities, as determined appropriate by CalOSBA. In addition, if a Center has received notification from its federal or private funding source that its cooperative agreement is scheduled for termination or that its operations are placed under a probationary status, the Authorized Representative must notify the Office of Small Business Advocate via email at SBTAEP@gobiz.ca.gov within 48 hours. Failure to notify the Office of Small Business Advocate may impact future eligibility.

Reporting

Authorized Representatives are responsible for collecting accurate and complete performance reports and financial reports from sub-recipients. The Authorized Representative is responsible for submitting all final reports in the online portal to CalOSBA once reviewed and approved. Reports will be submitted electronically through the online portal to CalOSBA Programs Team.

Authorized Representatives will receive separate email instructions for the online portal. A mandatory webinar training will be held no later than January 17, 2025.

The reports or portions thereof provided by Authorized Representatives may be made public.

Authorized Representatives will be required to submit quarterly performance and financial reports to the Grantee Portal within forty-five (45) calendar days of the completion of each quarter of the grant period. Performance reports (including narrative and metrics) are required even if the Authorized Representative will not be submitting an invoice for the reporting period.

CalOSBA may withhold payment if reports are not received or are deemed incomplete or inadequate. Any invoice submitted after the reporting deadline, without an authorized extension, will be rejected. Failure to report in a timely manner may impact future eligibility for grant funding from CalOSBA.

CalOSBA reserves the right to audit information submitted in a performance report by requesting additional documentation, performing on-site visits, contacting clients served, or verifying other information as necessary to verify the information contained in the performance report.

The Center, not GO-Biz or CalOSBA, will retain possession and control of any and all reporting materials and backup documentation and will make them available to CalOSBA for inspection and audit upon request so that CalOSBA may verify that both the Center and any subrecipients have complied with the grant Program's terms and conditions, and have executed the contracts and effectuated the Program consistent with the statutory goals of the Program.

Performance Reports

Grantees will submit performance reports quarterly during the performance period.

The performance reports will include but not be limited to the following information:

- Actual funding expended
- Number of partnerships / collaborations
- Quarterly outcomes from the assistance provided including (* includes sub-categories for Demographic Data):
 - Number of Training Events
 - Number of Unique Clients Trained
 - Number of New Clients Trained
 - Number of Training Hours
 - Number of Unique Clients Counseled*
 - Number of New Clients Counseled*
 - Number of Counseling Hours*
 - Number of New Businesses Started*
 - Number of Jobs Created (full and part-time)*
 - Number of Jobs Retained (full and part-time)*
 - Dollar Amount of Increase in Sales*
 - Number of Contracts*
 - Dollar Amount of Contracts*
 - Number of Loans*
 - Dollar Amount of Loans (SBA loans and non-SBA loans)*
 - Dollar Amount of Equity Capital (to include private investment)*
 - Additional Funds Raised (non-dilutive funding, grants, etc.)*
- Demographic Data reported in aggregated amounts for each category based on voluntarily provided data from small businesses:

- Women-Owned Businesses
- Minority-Owned Businesses including:
 - Black/African-American
 - Asian
 - Native American or Alaska Native
 - Native Hawaiian or Pacific Islander
 - Hispanic/LatinX
- Veteran-Owned Businesses
- Businesses in Rural Communities
- Businesses in Low-Wealth Communities
- Businesses in Disaster-Impacted Communities

Financial Report

Financial Report documentation should reflect itemized expenditures from the invoice and include the following information, as applicable:

- General ledger and payroll records (required)
- Business consultant names (including affiliated organizations if it's a partnership with another local technical assistance provider, chamber, accelerator, incubator, institution, government entity, etc.) and hourly rates
- Description of non-labor expenditures
- Cost for client consulting, including hourly rates, benefit rates and number of hours worked
- Cost for client trainings
- Cost for supplies
- Cost for travel
- Cost for research
- Cost for marketing
- Cost for program administration

Upon submission of the invoice in the online portal, the Authorized Representative will provide a digital certification affirming that the information is accurate.

Performance and/or Underperformance Reporting

Underperformance statements will be required based on the thresholds below:

- Q1 (Oct-Dec): Year-to-date (YTD) results less than 10% of the annual award or goals
- Q2 (Jan-Mar): YTD results less than 35% of the annual award or goals
- Q3 (Apr-Jun): YTD results less than 60% of the annual award or goals
- Q4 (Jul-Sept): YTD results less than 100% of the annual award or goals

The performance narrative must describe the work performed, outcomes achieved, progress made against full grant proposal plan, and justify the cost categories invoiced. For instance, if 200 hours were charged to training, we would expect the work associated with those costs to be broadly described (e.g., did staff develop curriculum, plan and host training events for underserved businesses, deliver consulting services, acquire supplies or webinar subscriptions?). If travel costs were expensed, describe how the

travel was critical to the Center's proposed geographic expansion to rural clients. If research costs were expensed, describe the type of research conducted and outcomes. In addition, describe how the Center was able to target outreach and marketing to underserved businesses to meet metric goals.

The underperformance narrative must include challenges and an action plan for improvement. The Center will describe the action plan to spend awarded funds and meet metric goals (e.g., Center's marketing efforts will generate new client consultations, X number of trainings will be conducted in Q2, etc.) The Center must also provide confirmation that they are still on track to meet annual goals and spend the funds by the end of the performance period.

Statements deemed inadequate by CalOSBA result in an incomplete report.

Final Year-End Report

The final year-end report will be a detailed narrative description of how the funds awarded were used to expand services to underserved businesses, including women, people of color and veteran-owned businesses, and to help businesses and entrepreneurs to start, expand, raise funds, and create jobs in all areas of California, including low-wealth, rural, and disaster-impacted communities included in a state or federal emergency declaration or proclamation.

Grantees should address the following:

- Actual metric outcomes compared to proposed.
- Client demographics:
 - The number of businesses assisted that were pre-launch, part-time only, and/or operating full-time.
 - The employee size of businesses assisted; based on the number at the time assisted, as reported by the assisted business.
 - The revenue size of businesses assisted; based on the amount at the time assisted, as reported by the assisted business. Reporting shall be in categories of business size, as determined by CalOSBA.
 - The city and county in which the businesses assisted were located.
 - Industry sectors of the businesses assisted, as reported by the assisted businesses.
 - The number of business owners assisted based on gender.*
 - The number of business owners assisted based on race.*
 - The number of business owners assisted that are Veteran/Non-Veteran.*
 - The number of business owners assisted in low-wealth areas.
 - The number of businesses/owners assisted in rural areas.
 - The number of businesses assisted in disaster areas (state or federally declared disasters).

*Items denoted with an asterisk are Demographic Data, which must be reported in aggregated amounts for each category based on voluntarily provided data.

- Collaboration and best practice sharing to build a seamless network of programs, services and activities that benefit small business and especially underserved business groups.

- Describe or share any mapping of the continuum of services and any gaps that exist for small businesses (e.g., work product such as research studies, strategic regional plans, or databases, diagrams, technology tools, etc.).
- Describe efforts to develop best-practices to fill identified capital, revenue, or opportunity gaps.
- Describe efforts to build or strengthen partnerships, collaborations and/or share best practices, especially to underserved business groups.
- Share metrics on partnerships established as a result of expansion, especially with organizations with strong memberships bases across underserved business groups.
- Regional and economic shifts (e.g., regional strategies or priorities informing focus, natural disasters, emerging industries, etc.).
- A minimum of four unique success stories per Center during the performance period. Success stories must be submitted quarterly unless well-justified to and approved by CalOSBA staff. Success stories must be reported through the CalOSBA success story portal.

Documentation and Record Keeping

Grantees must maintain complete and accurate records and supporting documentation of sufficient detail, for up to five fiscal years, to receive quarterly reimbursements, and to facilitate a thorough financial and/or programmatic and/or legal compliance audit or examination of performance in the Program. In addition, funds must be identifiable to the program year for which they were provided. Funds that were approved as a “carryover” from a previous program year also must be maintained and reported separately. Upon request, grantees must make these records available to CalOSBA.

- A spreadsheet that reconciles the financial invoices and the disbursement journals at the Host organization and subrecipient organizations (i.e., subcontracted Service Center(s)).
- Support for all charges to the grant agreement, but not limited to the disbursement ledger, vendor invoices, canceled checks, and journal entries.
- The expense reimbursement invoices submitted from the subcontracted Service Centers and any relating supporting documentation (i.e., disbursement ledgers, comparison of actual to budget expenditures).
- Salary and wage records for employees charged to the grant agreement (both recipients and subrecipients must maintain the appropriate standard to document for full-time and part-time personnel allocated to the Program). This may include, but is not limited to, time and effort certification, appointment letters or contracts, performance reviews, payroll journals and/or activity reports.
- Backup timesheet with time and attendance of employees or consultants who are charged to this Program, with sufficient detail to substantiate the claimed work hours performed in support of the Program.
- Copies of receipts, invoices, contracts and other supporting documentation for all expenses paid with Program funds.
- Client or database records to substantiate metrics submitted in a Performance Report.
- Copies of judicial and administrative decisions and compliance reviews (as applicable) and other supporting documentation demonstrating adherence to the legal requirements of this Program and the requirements established by the federal funding partner.

Program Monitoring and Reviews

CalOSBA will monitor grantees' performance. This monitoring will include regular review of Performance and Financial Report Data. CalOSBA may also make inquiries and conduct program reviews to verify performance, including but not limited to a review of client files, client fees, training, marketing and administration invoices, cost share requirements, and overall operations. Program reviews may be conducted remotely or onsite. CalOSBA may also review reported business assistance by interviewing the clients assisted by a Center. Staff will inform Centers by email about their selection for a program review and email instructions no later than five (5) business days before the program review.

CalOSBA reserves the right to conduct a minimum of one (1) site visit per grant award year for grantees under the Technical Assistance Program. The purpose of a site visit will ensure effective implementation and compliance of the Program. There are three key aspects that CalOSBA should inspect and observe which will include, but is not limited to, the following:

- Evaluation of the grantee's progress in achieving the stated objectives and outcomes outlined in their grant proposal. This includes assessing whether the technical assistance provided aligns with the identified needs and if it has resulted in tangible improvements or advancements.
- Examination of the grantee's financial management practices, ensuring that funds are being used appropriately and in accordance with the grant's guidelines. This involves reviewing financial records, expense reports, and receipts to verify compliance with budgetary restrictions. Moreover, CalOSBA will observe the grantee's documentation and reporting procedures to assess their ability to provide accurate and timely updates on the progress of their technical assistance efforts. This includes reviewing data, reports, and other relevant documentation to determine if the grantee is effectively tracking and measuring the impact of their activities.
- CalOSBA's site visit provides an opportunity for the analyst to engage with the grantee's staff and stakeholders, gaining insights into their perspectives on the effectiveness of the technical assistance received and identifying any challenges or barriers faced during implementation. By inspecting and observing these crucial elements, the grant program analyst can ensure accountability, transparency, and successful outcomes for the grantee and the Program.

CalOSBA is not responsible for providing oversight of a Center's performance between program reviews. Moreover, CalOSBA does not accept liability for information not submitted in good faith by a Center for a program review.

Webinars

- Friday, July 12, 2024 from 10:30 AM to 11:30 AM
 - [Register for the webinar here](#)
- Friday, July 26, 2024 from 1:30 PM to 2:30 PM
 - [Register for the webinar here](#)

Timeline

July 5, 2024	Program Announcement Release and RFP period begins
July 12, 2024	Pre-Bid Webinar at 10:30 AM PDT Submit questions in advance to SBTAEP@gobiz.ca.gov Subject: "TAP 2024/25 RFP Questions"
July 26, 2024	Pre-Bid Webinar at 1:30 PM PDT Submit questions in advance to SBTAEP@gobiz.ca.gov Subject: "TAP 2024/25 RFP Questions"
July 31, 2024	Deadline to submit required Letter of Intent to apply. Submission is made online here no later than 4:59:59 PM PDT.
August 12, 2024	Grant application deadline Must submit in the online application portal by 4:59:59 PM PDT
August 8 – August 30, 2024	Proposal review
September 2, 2024	Notice of Intent to Award will begin via email. Notice of Intent is not guaranteed to be received on this date and will be sent on a rolling basis.
September 3 – 9, 2024	Follow up calls to Awardees (if needed)
September 3 – 20, 2024	Grant Agreements sent to Awardees
October 1, 2024	Grant program begins
September 30, 2025	Grant program ends

Application Instructions and Submission

All applications, with required attachments, must be submitted electronically using the CalOSBA online application portal. The online application portal can be accessed [here](#). Applications submitted via email or facsimile will not be reviewed or scored.

All applications must be submitted by the deadline (August 12, 2024 by 4:59:59 PM PDT). The application will close once the deadline has passed. There are no exceptions or extensions of this deadline. Any technology challenges or inability of an applicant to submit an application by the deadline for any reason shall not be grounds for an extension of the deadline. Applicants are encouraged to submit their application two days before the deadline in the event technical assistance is required. For help applying, please send an email to SBTAEP@gobiz.ca.gov and copy Joy Nordby, Program Manager, joy.nordby@gobiz.ca.gov with the subject line: Technical Assistance Program 2024 Help.

CalOSBA’s determination as to eligibility for grant funding or the amount of grant funding awarded is final and not subject to appeal or protest. The determination of rejection for grant funding is final and not subject to appeal or protest.

CalOSBA reserves the ability to modify applicant budgets if included costs are deemed ineligible. A Center and its fiscal host (if different from the Center) will be required to comply with the Drug-Free Workplace Certification and Nondiscrimination Compliance Statement as required by state law.

Required/Supporting Documents

All applicants must upload the following documents to their application:

- Letter of Intent – [Online Submission](#)
- Federal or Private Award specifically for direct technical assistance to small businesses (Fully Executed award with scope of work or Letter of Intent with scope of work). The agreement and/or contract number of the match award must be clearly indicated. A Match Agreement Cover Page must be provided alongside the match agreement or letter of intent. [Download Template](#)
- Proposal Narrative. The Proposal Narrative responses must use the template provided below, follow the formatting instructions and page limits described in the template, and must be submitted as a .doc/.docx file. Each Center within a group application must complete a separate and unique proposal narrative that is, in total, subject to the page limitations of an individual applicant. Narratives that exceed the allowed page count will not be reviewed beyond the maximum page limitation for that application type. It is not required that applicants utilize the maximum pages allowed. – [Download Template](#)
- Proposed Center Services survey (Network Applicants only) – [Online Submission](#)
- Budget Justification Spreadsheet. All costs must be directly related to Program activities and be itemized and explained within the template – [Download Template](#)
- Organizational Chart
- Local Cash Match Form – [Download Template](#)
- STD.204 Payee Data Record Form – download this form at <https://cdn.calosba.ca.gov/wp-content/uploads/std204-SBTAEP.pdf>
- STD.21 Drug-Free Workplace Certification – download this form at <https://www.documents.dgs.ca.gov/dgs/fmc/pdf/std021.pdf>
 - *The STD.204 and STD.21 forms must be signed within two-weeks of each other.*

The following documents are optional:

- Resumes of key personnel, submitted as one combined PDF saved as “Resumes_Center Name”
- For new applicants **only**: Letters of Support (3-5 per Center, for work related to small business technical assistance within the last 5 years. Please use template and submit letters as one combined PDF saved as “Letters of Support_Center Name”). – [Download Template](#)

Application Review

CalOSBA will utilize the following application review process:

1. Technical Review – Application will be verified for eligibility and completeness, including any required documents uploaded to the application.

2. Disqualifications – CalOSBA may disqualify applications or deny applications for the following reasons:
 - a. Incomplete applications
 - b. Ineligible applicant
 - c. Ineligible services
 - d. Contains false or misleading statements or references which do not support an attribute or conditions contended by the applicant; and if, in the opinion of CalOSBA or GO-Biz, such information was intended to mislead the Review Committee in its evaluation of the proposal
 - e. Plagiarism, including but not limited to failure to cite one’s own work or third-party work, duplicate applications, etc. Using Artificial Intelligence (AI) tools to complete an application is prohibited. The use of AI shall be treated as plagiarism.
 - f. Failure to comply with guidance as set forth in this Announcement, including failure to use required attachment templates
 - g. Late application
3. Application evaluation and scoring by a Review Committee comprised of GO-Biz and CalOSBA panelists based on the Scoring Criteria (see below) and statutory criteria.
4. Final award amounts will be determined based on Scoring Criteria (see below), statutory criteria, funding availability, and CalOSBA determinations.

CalOSBA reserves the right to request additional information and request a revised scope of work and metrics. The determination of rejection for grant funding is not subject to appeal.

Debriefings

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

Scoring Criteria

This section provides the application questions and scoring point scale.

Application Section	Points Possible
Past Performance	5
Scope of Work	30
Match Agreement Activities & Drawdown	5
Center Strategies & Organizational Capacity	10
Diversity, Equity and Inclusion Action Plan	25
Financial Management Capability	20
Center Performance*	5
Bonus Points	17

Total Points Available: 117 points

*Up to 15 points may be deducted for poor past performance on a previous CalOSBA administered grant. Poor performance includes such things as inability to spend previously awarded funding, return of previously awarded funding, underperformance against multiple “total” metric categories, noncompliance with grant agreement terms, communication deficiencies, late reporting submissions, inadequate reports with delinquent revisions.

Service Areas (Not Scored)

Upload into application portal

1. Geographic Area of Service (counties)
2. Assembly District(s)
3. Senate District(s)

Proposed Centers, Services, and Language Access

This information is collected in the online application and will request physical location information, geographical service areas, services offered, languages served, communities served, and industry focuses (if applicable).

Proposed Metrics

Must be uploaded into the application portal.

For 2023/24 grantees: proposed “totals” for any metric category should be double (2x) your six-month 2023/24 YTD (Q1+Q2) totals or higher. Any proposed metrics that do not meet this requirement must be thoroughly justified in the proposed scope of work.

1. Number of Training Events
2. Number of Unique Clients Trained
3. Number of New Clients Trained
4. Number of Training Hours
5. Number of Unique Clients Counseled*
6. Number of New Clients Counseled*
7. Number of Counseling Hours*
8. Number of New Businesses Started*

9. Number of Jobs Created (full and part-time)*
10. Number of Jobs Retained (full and part-time)*
11. Dollar Amount of Increase in Sales*
12. Number of Contracts*
13. Dollar Amount of Contracts*
14. Number of Loans*
15. Dollar Amount of Loans (SBA loans and non-SBA loans)*
16. Dollar Amount of Equity Capital (to include private investment)*
17. Additional Funds Raised (non-dilutive funding, grants, etc.)*

*Metric requires a goal/estimated number of businesses that will be served for each of the following underserved business groups:

- Number of Women-Owned Businesses Served
- Number of Minority-Owned Businesses Served
- Number of Veteran-Owned Businesses Served
- Number of Businesses Served in Rural Communities
- Number of Businesses in Low-Wealth Communities
- Number of Businesses Served in Disaster-Impacted Communities

Narrative Proposal Questions

The Proposal Narrative responses must use the template linked in the section '[Required/Supporting Documents](#)'. Narratives will be uploaded as an attachment in the online application portal.

Narrative responses must have 1.5 line spacing and 12-point font. Narratives may not exceed 18 pages for individual program applicants and 25 pages for network-based applicants. Group-based applications must have a unique narrative for each Center included in the application and those narratives are subject to the 18-page limit. It is not required that the total page limit is utilized. Points are awarded based on the applicant's ability to provide a thoughtful and concise response to the questions as written. The question itself must be included in the narrative.

About the Center – not scored

1. Provide a brief (2-3 sentence) description of the Center's mission. This should include the primary focus area(s) of this Center's expertise and technical assistance services. This is required but not scored. If awarded, this statement will be published on CalOSBA's online TA Center Search Tool.

Proposal Abstract – not scored

2. Summarize the activities proposed in the scope of work. This response should be no more than 600 characters. This is required but not scored.

Past Performance – 5 points

3. Describe how the Center has supported small businesses with technical assistance and the impact of previous or ongoing technical assistance programs. (5 points)

Scope of Work – 30 points

4. Describe the Center's geographical service area and provide a data-driven assessment of the service gaps and needs of the Center's small business community. Cite all externally sourced data. (10 points)
5. Explain the Center's overall vision including how the Center will address the above-mentioned gaps. This should include a description of the Center's approach including the programs that will be implemented. For example, describe the small business and/or nonprofit training programs, consulting strategies, etc. (10 points)
6. Provide a timeline of key milestones and measurable objectives. This response must include a description of the strategies that will be utilized to ensure they are achievable. (5 points)
7. Explain the Center's quantitative goals included in the metric proposal. For previous awardees: If any metric goals have been reduced from the previous year's Quarter 2 outcomes, explain why. (5 points)

Match Agreement Activities and Drawdown – 5 points

8. Describe the activities the Center will conduct as part of the scope of work of the federal or private match agreement(s) and how this TAP proposed Scope of Work will build on that existing base programming. Be sure to include:
 - 1) How the Center will draw down all federal or private funds available during the grant period.
 - 2) A plan of action and commitment to fully draw down the funds using local cash match (if applicable to the match agreement).
 - 3) When the Center expects to have proof of continuing award (if the federal or private award term period is set to expire prior to the end of the TAP2024 Program year (September 30, 2025)). As a reminder, all TAP participating organizations must have an active federal or private award. (5 points)

Center Strategies and Organizational Capacity – 10 points

9. Describe the Center's intake methods including details of any strategies to ensure small businesses are appropriately onboarded. Include any strategies to ensure culturally sensitive and language inclusive onboarding approaches. (5 points)
10. Describe the Center's management strategy for service delivery and how the work will be coordinated and monitored. Include details regarding how management ensures service for underserved businesses, including any shifts you will implement through TAP funding. An organizational chart must be uploaded to the application. (5 points)

Diversity, Equity, and Inclusion Action Plan – 25 points

11. Describe the Center's Diversity, Equity, and Inclusion (DEI) Action Plan, which should include strategic steps to legally diversify the client pool, provide culturally competent intake and ongoing support, and provide culturally competent and inclusive technical assistance to

unserved, underserved, disinvested, and disadvantaged business groups. Include target populations and geographies (e.g., rural businesses), in-language services, disparities addressed, and associated data points. (15 points)

12. Describe the Center's outreach strategy to reach underserved businesses including minority, rural, and other hard-to reach business owners. (5 points)
13. Detail the Center's partnerships with community-based organizations and the roles that the partners play in expanding capacity, reach, locations, and in-language capabilities to underserved businesses. Be specific about the nature of the relationships including if there are MOUs or sub-contracts. Please note that a list of partners is not sufficient to receive full points, there must be detail about who the partners are, what they bring in terms of DEI, and the scope of their work under this TAP proposal. (5 points)

Financial Management – 20 points

14. Justify the grant funding amount the Center is applying for. Discuss how the Center will leverage funds for maximum impact. Note that TAP is competitive and there is great need across the state. Be specific about why the Center requires the funding requested. (10 points)
15. Upload the budget template. All costs must be detailed in full and must be justified and allowable per [CalOSBA cost policies](#). (5 points)
16. Describe how the Center will track allowable activities and expenditures. Include details on the mechanisms used to differentiate between multiple funding sources. (5 points)

Center Performance – 5 points

17. Existing Centers Only: Has the Center received special recognition from underserved business groups or for its work serving underserved business group for past performance (e.g., awards, letters of recognition, etc.)? Only include awards received by the Center in the past 5 years. If yes, explain the work performed to achieve the special recognition and who it was given by (e.g., Assembly Member, federal partner, city, county, etc.) (5 points)

Bonus Points

These questions will be scored separately

1. Complete and timely submission of the online [Letter of Intent to Apply](#) (LOI). (2 points)
2. For 2023/24 Awarded Centers: Is the Center currently, at least, 40% spent down as of Quarter 2 of the TAP2023 performance period? (Yes/No) (5 points)

OR

For New Applicants (not a current TAP awardee): Provide a minimum of 3 but no more than 5 letters of support demonstrating the Center's past performance and ability to spend down previously awarded technical assistance funding within the last 5 years. Refer to section ['Required/Supporting Documents'](#) for required letter template. (Yes/No) (5 Points)

3. Supplemental activities in the overall SOW that do not exceed 25% of all counseling and training activities in the program corresponding to one of the following focus areas considered gaps in network services: (10points)
 - a. Training programs for youth entrepreneurs
 - b. Training and consulting to support employee ownership
 - c. Space technology programs

* Please note that there is a very strong preference for training and consulting that is free of charge to participants. Low-cost training and/or consulting must be thoroughly described and justified in your application and there must be a mechanism for participants to participate free of charge. CalOSBA reserves the right to require that low-cost training and/or consulting be made free.

California Public Records Act

By submitting an application, the applicant acknowledges that GO-Biz is subject to the California Public Records Act (PRA) (Government Code sections 7920.000 – 7930.215.). Consequently, materials submitted by an Applicant to GO-Biz may be subject to a PRA request. In such an event, GO-Biz will notify the Applicant, as soon as practicable, that a PRA request for the Applicant’s information has been received, but not less than five (5) business days prior to the release of the requested information to allow the Applicant to seek an injunction. GO-Biz will work in good faith with the Applicant to protect the information to the extent an exemption is provided by law, including but not limited to notes, drafts, proprietary information, financial information, and trade secret information. GO-Biz will also apply the “balancing test” as provided for under Government Code section 7922.000 to the extent applicable.

END