



California Office of the Small Business Advocate
Governor's Office of Business and Economic Development

Technical Assistance Program Special Project Grant
A grant program for small business technical assistance centers in the California Technical Assistance Program Network

Program Announcement

Opportunity Number: TAP2022SpecialProject
Total Program Funding: \$543,000.00
Number of Awards: 1 minimum / 5 maximum

Released:
May 9, 2025

Proposals Due:
By 12:00:00 PM PDT on May 30, 2025

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.

Contents

About the Program	3
Overview	3
Purpose	4
Priorities	5
Definitions	5
Funding Categories and Duration	7
Allowable and Unallowable Activities	8
Funding Method	9
Eligibility	9
Authorized Representatives	9
Applicant and Agreement Responsibilities	10
Grant Period Responsibilities	10
Notice of Award	10
Agreement	10
Termination	11
Amendments	11
Reporting	11
Narrative Report Formatting	12
Financial Report	12
Performance Reporting	13
Documentation and Record Keeping	13
Program Monitoring and Reviews	14
Request for Proposals Timeline	14
Application Instructions and Submission	15
Required Documents	16
Application Review and Scoring Criteria	16
Application Review	16
Scoring Criteria	17
Proposal Narrative	17
Section I: Applicant Information	17
Section II: Project Coverage Area(s) (Not Scored)	19
Section III: Proposed Scope of Work	19
Section IV: Financial Management Capability	20

About the Program

Overview

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. 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.

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 or “the Program”) and established it as a long-term program to provide technical assistance resources including training and consulting services to small businesses and entrepreneurs.

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.

This is a one-time Special Projects Announcement for the disbursement of a total of \$543,000.00 in additional TAP funding.

This announcement details four separate projects; applicants may apply for more than one funding category.

This opportunity is open only to current TAP 2024-2025 grantees who also received an award during the TAP 2022-2023 award cycle.

Existing TAP grantees may partner on this project with other entities; however, the proposal should come from one designated authorized representative of a TAP award.

For this opportunity, CalOSBA is seeking proposals that will provide recommendations to CalOSBA for future implementations of technical assistance programming. These recommendations will address any of the following:

- gaps in service in the State of California, including gaps for underserved communities
- programming designed to reduce known disparities
- new approaches to accessing markets and capital
- new approaches to increasing utilization of existing technical assistance and capital readiness programs

This Announcement details four funding categories:

- Zero Emissions Vehicles (ZEV) and ZEV Infrastructure

- Creative Economy
- Underserved business groups who have experienced difficulties in obtaining capital
- Neurodivergent youth (18-28) and adults

See [Special Projects Priority Categories](#) for further detail.

Purpose

California is home to a broad network 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.

For the purposes of this one-time Special Project announcement, allowable activities for any of the four projects include:

- Research focused on mapping the continuum of services, identifying any gaps that exist for California small businesses and nonprofits, including underserved, very small, and socially, economically disadvantaged individuals (SEDI). Research should map current challenges, best practices in small business technical assistance, and pathways forward for the California small business community and supporting ecosystem. Research should disaggregate data by underserved businesses and include specific strategies to ensure challenges, best practices, and pathways forward adequately speak to all small businesses in the State.
- Data collection, visualization, and interpretation of data on small businesses in California including underserved small businesses in California. Topics may include but not be limited to:
 - Small businesses, especially underserved small businesses in the context of equity as prescribed by AB2019 and the Governor’s Executive Order N-16-22 access to opportunity
 - Access to new markets and infrastructure opportunities
 - Trends, statistics, and issues facing small business starts
 - Technical assistance offerings and gaps in service
 - Capital access including angel investment, venture capital, access to grants, loans, and other sources of capital
- Possible marketing and outreach of the report or reports created as part of this Special Project

Priorities

Applications must propose a strong, feasible, and rigorous marketing and/or research report and that best meet the factors listed in Government Code Section 12100.60-12100.67.

Strong proposals should relate research and marketing proposals to the instructions of [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.

Priority will be given to applicants that demonstrate a capacity, track record, and vision to implement a rigorous marketing and/or research report.

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 client is 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 all territories included in a state or federal emergency declaration or proclamation.
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 administering the specified federal small business technical assistance program for all aspects of the program requirements, which may include staffing, program, outreach and securing the 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 July 1, 2025, through June 30, 2026, for 12-month projects and July 1, 2025, through December 31, 2026, for 18-month projects.
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.
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 thirty days prior to the first day of the applicable application period.

11. "Minority-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, LatinX/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 the number of new clients counseled and/or trained that has 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.
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 less 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 a state or federal emergency declaration or proclamation.
20. "Socially and economically disadvantaged individual" (SEDI) means Socially and economically disadvantaged individuals is defined by reference to section 8 of the Small Business Act (15 U.S.C. 637) and the regulations thereunder. This definition includes the following: Socially disadvantaged individuals are those who have been subjected to racial or ethnic prejudice or cultural bias because of their identity as a member of a group without regard to their individual qualities. Economically disadvantaged individuals are those socially disadvantaged individuals whose ability to compete in the free enterprise

system has been impaired due to diminished capital and credit opportunities as compared to others in the same business area who are not socially disadvantaged.

21. “Unique Client Served” means the number of clients counseled and/or trained. Each client can be counted once per year as part of program reporting.
22. “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.
23. “Very Small Business” means Very Small Business is defined as a business with fewer than 10 employees; and may include independent contractors and sole proprietors.
24. “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.
25. “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.

Funding Categories and Duration

- Total Available Funds: \$543,000.00
- Funding Categories:
 - Zero Emissions Vehicles (ZEV) and ZEV Infrastructure: \$240,000.00
 - Creative Economy: \$100,000.00
 - Lending to Underserved Communities and Individuals: \$153,000.00
 - Entrepreneurship & Job Creation for Neurodivergent Individuals: \$50,000.00
- Number of Awards: 1 minimum / 5 maximum (More than one award may be granted in the ZEV category)
- Grant period:
 - 12-month projects: July 1, 2025 – June 3, 2026
 - The final invoice submission must be made no later than May 31, 2026.
 - 18-month project: July 1, 2025, through December 31, 2026
 - The final invoice submission must be made no later than November 30, 2026.

The award must be spent in full according to the approved budget and during the grant period.

Applicants may apply for more than one funding category. See [Special Projects Priority Categories](#) for further detail.

Allowable and Unallowable Activities

Allowable activities and expenditures under the Special Projects Program are listed below. All costs must be allowable per the existing TAP agreement. CalOSBA has discretion to make these determinations or make any changes to the [cost policies](#) under the terms of the agreement

1. **Research** includes 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. Priority will be given to projects that propose research on the status of California small businesses and especially underserved small businesses in the context of the **creative economy, zero emissions vehicles and infrastructure, neuro-diverse, and undercapitalization of underserved, very small, socially, economically disadvantaged individuals (SEDI)**. Clearly define underserved small business community and potential for expansion and/or growth.
2. **Marketing** includes employee or consultants' time and effort to conduct targeted Center marketing initiatives to underserved small businesses and nonprofits such as, print media (i.e., flyers, brochures, and pull-up banners), digital media (i.e., social media ads), and purchases/subscriptions to database, marketing services and other technology tools to support outreach, client development and expansion activities (i.e., MailChimp, Constant Contact, Hootsuite, etc.). We encourage the use of partnerships, convenings, and research-driven approaches for any large marketing expenditures. Priority will be given to projects that propose marketing of research and information on California small businesses and especially underserved small businesses in the context of the **creative economy, zero emissions vehicles and infrastructure, neuro-diverse, and undercapitalization of underserved, very small, socially, economically disadvantaged individuals (SEDI)**.
3. **Personnel, Contractual, Supplies:** Funding may be used to support the research and marketing project that is proposed. Costs should be directly related to the proposed research and/or marketing project and may not be unallowable costs.

For the purposes of this Special Project, an unlimited portion of the grant award may be used for research and marketing.

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 (i.e., mileage, car rental, rail or air) unless noted above for geographic expansion)
- Food and beverage

- Supplies not related to research, marketing, personnel and contractual
- 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 items that are banned by the State of California, or CalOSBA deems inappropriate or inconsistent with statutory or programmatic requirements of TAP

All costs incurred under the Program must meet the tests of reasonableness, allowability and allocability in accordance with the Program's allowable costs and grant agreement terms. All costs charged under the Program are subject to audit. Grantees are responsible for ensuring proper management and financial accountability of state funds to preclude future cost disallowances.

Funding Method

CalOSBA will process grant payments 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 award between one and five applicants a combined total of \$543,000.00 based on evaluation of scores, feasibility and budget reasonableness as defined in the Program Announcement and in the application questions.

Eligibility

At the time of applying for funds, the Applicant must:

1. Have received an award under the SB TAP 2022-2023 grant cycle and is a current SB TAP 2024-2025 grantee.
2. Have a fiscal agent that is able to receive nonfederal funds.
3. Have a plan of action and commitment to fully draw down all the federal or private match funds in their primary agreement with a federal or private funding partner during their grant period, where applicable.
4. For proposals using federal matching funds: Generate and provide documentation of the local cash match required by their federal funding partner and demonstrate a plan of action and commitment to meet the local match requirement.
5. Be able to fully execute a contract by June 30, 2026 for 12-month projects or December 31, 2026 for 18-month projects.

Authorized Representatives

Applicants may include Centers that already operate as a group for the purposes of TAP (e.g., regional or statewide networks like the WBC network) or individually. Group-Based Programs are those that are previously structured as a group for TAP and Individual Centers are those that are

currently structured as individual grantees for TAP. All applicants must designate an Authorized Representative. Authorized Representatives will carry out a variety of responsibilities during the application process and grant period. Existing grantees, including individual centers, may partner for the Special Projects opportunity, however one individual grantee must be the Authorized representative that submits the application on the partnership's behalf.

Applicant and Agreement Responsibilities

The Authorized Representative will submit the Program application to CalOSBA, receive the Notice of Award and enter into the Special Program agreement with CalOSBA. If applicable 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

Following 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 reimbursements to Centers in group agreements (if applicable).

In addition, the Authorized Representative will serve as the principal contact for CalOSBA and the Centers in a group agreement. 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, they must provide CalOSBA with a written statement confirming they are acting on behalf of the Authorized Representative.

Notice of Award

Award(s) will be determined by the competitive score received. Once scores for all applicants have been determined, CalOSBA will email the Authorized Representative a Notice of Award. The Notice of Award will include instructions about next steps. CalOSBA may conduct follow up calls, if deemed necessary, to discuss the proposal and requested amounts.

Applicants must submit the requested information within 24 hours of receiving the Notice of Award.

Agreement

Once milestones are finalized, funds will be awarded in an agreement between CalOSBA and the Authorized Representative. The agreement will contain standard terms and conditions, the award amount, the reporting and invoicing requirements, scope of work and milestones that will be used to evaluate grantee progress during the performance period 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 (if applicable).

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.
- Noncompliance with metric reporting requirements.
- Noncompliance with narrative reporting requirements.
- Noncompliance financial reporting or record-keeping requirements.
- Noncompliance in 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 cease of operations 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.

In the event of termination, the state is obligated to compensate the grantee only for all allowable and unavoidable expenses reasonably incurred by the grantee in the performance of its work under the agreement as of the effective date of the terminating event or otherwise agreed period to allow project closeout activities, as determined appropriately by CalOSBA. In addition, if a grantee has received notification from its federal or private funding partner that its cooperative agreement is scheduled for termination or that its operations are placed under a probationary status, the grantee 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.

Amendments

No amendments will be allowed under this one-time Special Projects Announcement. No extensions will be allowed under this one-time Special Projects Announcement.

Reporting

Authorized Representatives are responsible for submitting accurate and complete performance reports and financial reports. Where applicable, Authorized Representatives are responsible for collecting accurate and complete performance reports from sub-recipients. The Authorized Representative is responsible for submitting all required reports to CalOSBA once reviewed and

approved. Reports will be submitted via e-mail to CalOSBA at sbtaep@gobiz.ca.gov and cassie.fortes@gobiz.ca.gov.

The reports or portions thereof provided by grantees may be made public. The Authorized Representative will be required to submit a project workplan to CalOSBA no later than **June 30, 2025**. Authorized Representatives will be required to submit quarterly performance and financial reports via email within forty-five (45) calendar days of the completion of each quarter of the grant period. Performance reports are required even if the Authorized Representative does not submit an invoice for the reporting period. The Authorized Representative is expected to send CalOSBA a final report including research findings as well as any associated marketing collateral. Templates shall be provided to the Authorized Representative following grant agreement execution.

Authorized Representatives shall propose additional reporting milestones, to include interim reports and/or updates to CalOSBA as part of the application. The final and complete reporting schedule will be determined by CalOSBA and shared with the Grantee.

CalOSBA may withhold payment if reports are not received or are deemed incomplete or inadequate. 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.

Narrative Report Formatting

The narrative report shall be developed in Microsoft Word – 1.5 spaced, in 12-point font, and with one-inch margins. Additionally, a supplemental report must be developed in PowerPoint format summarizing the contents of the narrative report.

Financial Report

The Financial Report Template will contain the invoice template and not be limited to the following information:

- Description of non-labor expenditures
- Cost for research
- Cost for marketing
- Reimbursement period
- Signature from Authorized Representative affirming that the information is accurate

Backup documentation is required for all expenditures made using funds from this opportunity.

Performance Reporting

The performance narrative must describe the work performed, outcomes achieved, progress made against Special Project grant proposal plan and justify the cost categories invoiced. For instance, if 80 hours were charged to marketing, we would expect the work associated with those costs to be broadly described (e.g., did staff develop a marketing plan, execute a social media campaign targeted to underserved businesses?) If research costs were expensed, please indicate the type of research conducted and any relevant outcomes and impact. In addition, please describe how the Center was able to target outreach and marketing to underserved businesses to meet goals.

Proposed research should be conducted by a lead researcher identified in the letter of intent and proposal. Background information on the researcher's education, capabilities, past publications and body of knowledge should be included.

Proposed research should include both qualitative and quantitative analysis, clearly define the small business community under study, the problem, and potential for expansion and/or job growth.

Research should include analysis of effects as they pertain to underserved groups and represent a thorough understanding of the challenges and opportunities.

Research should include analysis of effects as they pertain to underserved groups, including disaggregated data for the following underserved small business groups:

- 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
- Very Small Businesses
- Businesses in Disaster-Impacted Communities

Statements deemed inadequate by CalOSBA result in an incomplete report. CalOSBA may request revisions if necessary.

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 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 for which they were provided. Upon requested, 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 Grantees 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 consultant 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
- Copies of judicial and administrative decisions and compliance reviews (as applicable) and other supporting documentation demonstrating your adherence to the legal requirements of this Program and the requirements established by your 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 business (5) days before the program review.

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.

Request for Proposals Timeline

May 9, 2025	Program Announcement Release
-------------	------------------------------

May 20, 2025	Letter of intent to apply due (REQUIRED) via email to sbtaep@gobiz.ca.gov
May 30, 2025	Grant application deadline Must submit by e-mail to sbtaep@gobiz.ca.gov and cassie.fortes@gobiz.ca.gov no later than 12:00:00 PM PDT
June 6, 2025	Notice(s) of Award and revision requests (if applicable) sent via email
June 6-9, 2025	Follow up calls to Awardee(s) (if necessary)
June 13-20, 2025	Grant Agreement(s) Execution
July 1, 2025	Program period begins
June 30, 2026	Program period ends for 12-month projects. Final invoice due to sbtaep@gobiz.ca.gov and cassie.fortes@gobiz.ca.gov
December 31, 2026	Program period ends for 18-month projects. Final invoice due to sbtaep@gobiz.ca.gov and cassie.fortes@gobiz.ca.gov

Application Instructions and Submission

All applications, with required attachments, must be submitted by e-mail to sbtaep@gobiz.ca.gov and copy cassie.fortes@gobiz.ca.gov.

Applications must be 1.5 spaced, in 12-point font, Times New Roman, and with one-inch margins. Do NOT remove the number prompts from your Proposal Narrative.

Applicants may apply for multiple funding categories. However, a separate Proposed Scope of Work must be provided for each category included. All four prompts in Section III: Proposed Scope of Work must be fully addressed for each submission.

All applications must be submitted by the deadline, May 30, 2025, by 12:00:00 PM PDT. 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 before the deadline in the event technical assistance is required.

For help applying, please send an email to sbtaep@gobiz.ca.gov and cassie.fortes@gobiz.ca.gov with the subject line: Technical Assistance Special Project Grant Online Help.

CalOSBA's determination as to eligibility for grant funding, or the amount of grant funding awarded, is final and is not subject to appeal.

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

- Group-based programs will apply as a group (i.e., SBDCs with Lead Center structure and others who voluntarily organize as a group). The group's Authorized Representative will submit a single consolidated application to CalOSBA that contains all the applications from the Centers in their group. Additionally, if the group is proposing a network-wide program offering, the Authorized Representative may submit an additional application for funding under the same account application.
- Centers that operate individually at the federal level may apply individually or submit a group application under a single designated Authorized Representative. For instance, a Northern California technical assistance provider may submit a consolidated application with the Northern California SBDC network.

Required Documents

All applicants must submit the following documents:

- Letter of Intent – [Download Template](#)
- Proposal Narrative – [Download Template](#)
- Proposal PowerPoint Presentation
- Federal Award (Fully Executed Agreement or Letter of Intent)
- Budget Justification Spreadsheet – [Download Template](#)
- Local Cash Match Form – [Download Template](#)

Application Review and Scoring Criteria

Application Review

CalOSBA will utilize the following application review process:

- a. Technical Review – Application will be verified for eligibility and completeness, including any required documents uploaded to the application
- b. Disqualifications – CalOSBA may disqualify applications or deny applications for the following reasons:
 - a. Incomplete applications
 - b. Ineligible applicant
 - c. Ineligible services
 - d. Late submission
 - e. Plagiarism or use of Artificial Intelligence (AI) to generate responses
 - f. Noncompliance with requirements of this Special Projects RFP
- c. Application evaluation and scoring by CalOSBA panel
- d. Feasibility of project and ability to meet all expenditure requirements

CalOSBA reserves the right to request additional information and request for revised scope of work and metrics.

Scoring Criteria

This section provides the application questions and scoring point scale. Total points available are 55 points.

Application Section	Points Possible
Scope of Work	45
Financial Management Capability	10

Proposal Narrative

The following section demonstrates the information that is required in the Proposal Narrative. Do NOT remove the numbered prompts. Use the template linked in '[Required Documents](#)' to prepare your proposal. All four prompts in Section III: Proposed Scope of Work must be fully addressed for each funding category Proposed Scope of Work submission.

Section I: Applicant Information

Legal Name of Applicant:	
Fiscal Authority:	
Employer/Taxpayer Identification Number:	
Organizational DUNS (if available):	
Mailing Address:	
Street 1:	
Street 2:	
City:	
County:	
State:	California Only
Zip Code:	
Physical Address (if different than Mailing Address)	
Street 1:	
Street 2:	
City:	
County:	
State:	California Only
Zip Code:	
Name and Contact Information of person to be contacted regarding this application:	
First and Last Name:	
Title:	
Telephone Number:	
Email:	

Website:	
Name and Contact Information of person as designated as signatory for agreement if awarded:	
First and Last Name:	
Title:	
Email:	

Signature of Contact (E-signature is acceptable)

Date

By signing, I certify that the information in this application is true and correct to the best of my knowledge.

Section II: Project Coverage Area(s) (Not Scored)

Complete the [online form submission linked here](#) to indicate the geographic coverage of the proposed project.

- a. County Coverage Area
- b. Assembly District(s)
- c. Senate District(s)

Section III: Proposed Scope of Work

1. Describe the specific needs facing small businesses in California, with particular attention to challenges experienced by underserved communities. Identify the key issues these businesses face, including systemic barriers and resource limitations. Discuss current gaps in knowledge and best practices that hinder the growth and success of small businesses and nonprofits. **(maximum 250 words / 5 points)**
2. State the project funding category and describe your approach.
 - a. Describe how your Center will implement a targeted research project on the status of small businesses in California in the context of one of the program areas and descriptions.
 - b. Describe how your project will compile, interpret, and present data and information on issues facing small businesses in California, including underserved small businesses.
 - c. Describe how your project will fill gaps in knowledge and build best practices to increase access to new or enhanced services to underserved small businesses, including for women-owned businesses, people of color and veteran-owned businesses and businesses in low-wealth, rural and disaster-impacted communities.
 - d. Describe how this proposal will support a broader framework for future equity and resilience work among the small business technical assistance ecosystem as well as equity and resilience work conducted by the Office of the Small Business Advocate. **(maximum 400 words / 15 points)**
3. Describe your timeline. Ensure your timeline addresses key expectations for each funding category. Include key milestones, proposed interim reporting timeline, and items that will be shared with CalOSBA (for example, initial reports, marketing collateral, etc.) **(No minimum/maximum, 15 points)**
4. Describe your end result. Describe specific strategies, goals and metrics of your proposed marketing and/or research project and what the impact of that research and/or marketing will be.
 - a. Describe how you will track best practices and how you will leverage the State's existing network of technical assistance centers for partnership and collaboration. If applicable, include the local, state, and regional partners as listed in the [Special Projects Priority Categories](#).
 - b. Describe how you will present the final product to a broader audience in order to disseminate knowledge and best practices, including any of the funding that will

be allocated to marketing activities and the marketing collateral you intend to create. **(maximum 400 words / 10 points)**

Section IV: Financial Management Capability

1. Justify the grant funding amount requested in the proposed Budget Justification spreadsheet. Discuss how the funds will be leveraged for maximum impact. **(10 points)**

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