California Office of the Small Business Advocate

Governor Gavin Newsom's Office of Business and Economic Development

2026/27 Technical Assistance Program

A grant program for small businesses technical assistance programs

Program Announcement

Opportunity Number: SBTAP2026

Total Program Funding: $23 Million

Released: July 17, 2026

Proposals Due: 4:59:59 PM PDT on August 17, 2026

The online letter of intent to apply and application portal will be made available by July 24, 2026.

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.

Table of Contents

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 advising 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 2026/27 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 advising 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 advising 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) within 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 advising 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 Program is intended for Centers with the demonstrated capacity to build on existing work, target services to California's underserved business groups, and ensure equitable access and opportunity for all California small businesses. For this reason, SB TAP provides state grant funding to established Centers with a track record of high-quality technical assistance work. CalOSBA also implements this Program in alignment with 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.

Priorities

Eligible advising 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, employer ownership transitions and succession planning; youth entrepreneurship; and other areas identified in this proposal.

CalOSBA seeks proposals that meet any or all of the following conditions:

- best meet the factors listed in Government Code Sections 12100.60-12100.65
- build on existing work with a strong track record of success
- propose new or enhanced services to reach underserved small business owners, including women, 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.

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. "CalOSBA Technical Assistance Online Portal" means the official online grant management platform utilized by CalOSBA and its recipients for all administrative, reporting, and compliance activities related to the Technical Assistance Program (TAP).
3. "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.
4. "Data Dictionary" means the comprehensive document that defines the specific data elements, attributes, and metrics required for program reporting, ensuring all partners collect, measure, and report information uniformly.
5. "Disaster Impacted" means territories included in an active state or federal emergency declaration or proclamation at the time services were received.
6. "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.

7. "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.
8. "Grant Period" means October 1, 2026 through September 30, 2027.
9. "Recipient" means the organization that has been selected as a Technical Assistance Program grant recipient.
10. "Lead Center" means a Small Business Development Center (SBDC) Lead Center.
11. "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.
12. "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 government? funding.
13. "Program Lead Organization" means the entity designated to represent a network-based program, serving as the single point of contact and primary liaison between CalOSBA and all network subrecipients.
14. "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) online map.
15. "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 advising and low-cost training on a variety of topics, including starting, operating, and expanding a small business.
16. "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.
17. "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.
18. "Technical Assistance Data Model" means the .xlsx file and accompanying data point descriptions that define allowed metrics for submission of performance program goals and subsequent performance against submitted goals.
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. “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 did not 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.
21. “Veteran-Owned 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.
22. “Employer Ownership Transitions and Succession Planning” means programs, workshops, and counseling for businesses seeking to consider ways of exiting ownership including transitions to business models that grant equity ownership to employees.
23. “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 2026/27 grant period will commence on October 1, 2026 and end on September 30, 2027.

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 2026/27 award in full during the grant period. Centers should ensure that grant funding requests and proposed scopes of work align with the grant period timeline. On a case-by-case basis, upon written approval from CalOSBA, Centers may receive an extension of up to one quarter to spend down 2026/27 grant awards. Centers must spend down funding in the order it is awarded; new contract funding cannot be spent until all extensions are complete. Taking an extension will result in a one-point deduction in the following year's application.

Funding Amount and Match Agreement

Centers must apply with a matching funding agreement from a federal or private funding partner to conduct technical assistance to small businesses. The requested funding amount may not be less than twenty-five thousand dollars ($25,000) per year and cannot exceed the total annual value of the match agreement(s). Centers may combine a maximum of two match agreements. These funding sources can consist of two federal awards, two private contracts, or one federal award and one private funding contract.

The match agreement(s) must extend through the end of the performance period (September 30, 2027). If an agreement ends earlier than this date, the Center must demonstrate a clear path to renew the agreement or secure a replacement funding source for the same work for the remainder of the performance period. Failure to maintain an eligible match agreement may result in reduction or termination of the award.

Centers applying as a group under an Authorized Representative may combine federal award dollar amounts to match the total funding request for the group. 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.

If any part of the match funding is revoked, cancelled, rescinded, or otherwise becomes unavailable, Centers must notify CalOSBA in writing within 48 hours.

Funding Categories

Allowable Activities and Expenditures

Centers may spend 100% of their grant award on Direct Technical Assistance (TA) (one-on-one advising and/or training for small business or nascent entrepreneurs). However, up to 20% of the total award may be used for Program Administration, Supplies, and/or 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 at any time 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 advising 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 advising 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. Out-of-state contractors are not allowable unless recipients receive prior approval from CalOSBA. Approval requires substantial justification demonstrating that the services cannot reasonably be provided by a California-based contractor and must be outsourced outside of California.
    a. Consultant cost policy: CalOSBA will reimburse consultant and staff time at a rate of no more than $100 per hour except in *very rare* cases. 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 advising/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 advising. 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". CalOSBA may re-evaluate the allowable percentage of marketing costs – but not the total award amount -- in case of a disaster event declared by the Governor of California or the President of the United States in the course of the grant year. Any such deviations from the original budget must be approved by CalOSBA in writing in advance of performance report submission.

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.

State funds provided pursuant to the Program shall not supplant nonstate 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.

(Cal. Gov't Code § 12100.63(i))

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 advising, 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, but are not limited to, Customer Relationship Management (CRM) software, 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 and availability of funds.

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 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 from any agency or funding source are not eligible matches for this Program. Federal funds passed through CalOSBA are not eligible for use as TAP match (e.g. SSBCI-TA, SSBCI-SBOP). Local agreements are an eligible primary match source for this Program only if derived from federal pass-through funds.
2. Be a Small Business Technical Assistance Center 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,

2026. 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. TAP funds cannot be used to meet a Center's local cash match requirement as specified in any match agreement with a funding partner. However, funding from other state programs may be used to fulfill this 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.

Renewal Process

Renewal Eligibility

CalOSBA may, at its sole discretion, offer performance-based renewals for future program cycles. Renewal eligibility and funding decisions will be based on the following criteria:

1. The organization must have received an award and participated in the Technical Assistance Program for the last three (3) consecutive program years.
2. Demonstrated impact on program goals and strategic outcomes. CalOSBA will internally assess each awardee's impact by calculating their percentage share of total programmatic outcomes achieved during the most recent full program year.
3. Administrative performance and compliance for the last three (3) program years, including:
    a. Reporting Timeliness
    b. Spenddown Performance
    c. Metric Performance

To be eligible for renewal consideration, an organization must:

- Request no more than a 20% increase over its previous program year's funding award.
- Continue to meet all required matching fund requirements.
- Submit the required renewal documentation by the deadline established by CalOSBA.

To maintain a competitive funding process, performance-based renewals are capped at a maximum of two (2) consecutive program years. All participating organizations must reapply through the open, competitive RFP process at least once every three (3) program funding years.

CalOSBA reserves the right to modify the renewal criteria, determine renewal eligibility, and make all final renewal and funding decisions at its sole discretion.

Renewal Communication

CalOSBA will adhere to the following communication protocol for all renewal-eligible organizations.

1. Performance Evaluation and Compliance Review. Following the Quarter 2 reporting deadline of the current program year, CalOSBA will conduct an internal audit of the grantee's performance metrics, administrative compliance, and financial drawdown rate.
2. Renewal Eligibility Notification. CalOSBA will issue an official Written Notification of Renewal Eligibility to qualifying organizations. This communication will include:
    a. Detailed performance evaluation feedback.
    b. Instructions for submitting the required renewal documentation.
3. Intent to Renew Response. Renewal-eligible organizations must provide written confirmation to CalOSBA of their intent to submit renewal documentation or to participate in the competitive Request for Proposals (RFP).
4. Grantee Proposal Submission. Renewal-eligible organizations must submit their completed renewal package, including updated budget, proof of matching fund commitments, and scope of work modifications by the deadline established in the renewal eligibility notification. Proposed changes are subject to CalOSBA approval.
5. Final Determination and Award Letter. CalOSBA will review the submitted package and issue a Notice of Award Renewal.

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. To ensure an equitable use of funds and avoid conflicts of interest, applicants may not apply or participate as both a stand-alone recipient and as a network-based program lead organization and/or a sub-contractor to another applicant. Individual contractors may work as advisors or trainers for more than one Center as long as each Center can independently document work performed.

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. A group may apply as a Portfolio Network if there is an agreement in place between the organizations within the group and it is supported by contracts for the same program under the same funding authority.

Network-Based Programs

Network-based programs consist of a group of Centers operating under a single Fiscal Authority, either under a unified match agreement (Integrated Network) or through individual match agreements for each

Center (Portfolio Network). An example of an Integrated Network program includes a lead Center with multiple satellite Centers, or programs operated by the five Small Business Development Center Networks, where the Authorized Representative is the coordinating administrative entity defined by the match agreement funder (e.g., the Small Business Administration). An example of a Portfolio Network program includes a group of Centers operating under a single Fiscal Authority with individual match agreements from the same funding authority, such as the Women's Business Center Network. For Portfolio Network applications, the Fiscal Authority is strictly prohibited from allocating more funds to any single Center than the defined value of that Center's specific match agreement. All network-based applications must propose services that are coordinated across the participating Centers and provide measurable regional or statewide benefit.

Network applications must also submit services offered by each of their proposed centers in the 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 Fiscal Authority may be combined by CalOSBA into a single network-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 2026/27 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 the 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 recipients will be determined by the application review process.

Once scores for all applicants 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 subrecipients.

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

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 appropriately 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 CalOSBA via email at SBTAEP@gobiz.ca.gov within 48 hours. CalOSBA may consider a failure to provide notification as grounds for revoking the contract; CalOSBA may also request proof of a substitute match agreement for the remainder of the year.

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 through the CalOSBA Technical Assistance Online Portal to CalOSBA for review and approval.

Reports will be submitted electronically through the CalOSBA Technical Assistance Online Portal. All recipients are required to use this portal for the following activities:

- To create an online profile viewable to the public
- To accept client referrals from the CalOSBA website and from other TAP recipients
- To report performance data at least once per quarter

Authorized Representatives who use existing reporting technical assistance platforms (e.g. Neoserra, SalesForce, etc.) will be able to upload their TAP performance data as a .xlsx file. Authorized Representatives may alternatively choose to use the CalOSBA Technical Assistance Portal for recording and managing technical assistance activities in real time.

Each Authorized Representative must inform CalOSBA of the Center's intent for use of the CalOSBA Technical Assistance Online Portal for reporting, either to upload performance data from a separate technical assistance platform or use the CalOSBA platform as the Center's primary technical assistance platform for reporting, when the contract is executed. This decision cannot be changed during the course of the program year.

Authorized Representatives will receive separate email instructions and guidelines for the CalOSBA Technical Assistance Online Portal. A mandatory webinar training will be held no later than November 13, 2026.

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 CalOSBA Technical Assistance 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 will withhold payment if reports are not received or are deemed incomplete or inadequate. Any invoice submitted after the report 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

Recipients will submit performance reports quarterly during the performance period through their Authorized Representative. Such reports must correspond to the performance goals submitted with the application and must be submitted using the approved Technical Assistance Data Model .xlsx file. CalOSBA will provide instruction and training for the Technical Assistance Data Model.

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 advising, 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

The performance report must describe the work performed, outcomes achieved, progress made against full grant proposal plan to date 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 advising 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.

Any Center's performance not meeting the thresholds outlined below must include a narrative addressing the area of underperformance, including 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.

Underperformance Thresholds:

- 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

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.

Recipients should address the following:

- Actual metric outcomes compared to proposed goals
- Client demographics as defined in the Technical Assistance Data Model.
- 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.).
- Building resilient small businesses is a priority. As such recipients must engage in disaster preparedness and resiliency programming utilizing their own program or the CalOSBA Outsmart Disaster Training
    - Provide a minimum of 2 Disaster resiliency or Outsmart Disaster Training events to small businesses per performance period.
    - Recipients are expected to report quarterly on the Disaster training outcomes. Prompt will be provided by CalOSBA.
- 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.
    - CalOSBA may also solicit additional success stories from a specific Center during the course of the year.

Documentation and Record Keeping

Recipients must maintain complete and accurate records and support documentation of sufficient detail, for at least 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, recipients must make these records available to CalOSBA:

- A spreadsheet that reconciles the financial invoices and the disbursement journals at the Center organization and subrecipient organizations (i.e., subcontracted Service Center(s)).
- Documentation 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.
- Electronic or paper attendance records for workshops or trainings.
- Client files include client intake documentation, counseling session notes and other forms associated with the administering of technical assistance.

Program Monitoring and Reviews

CalOSBA will monitor recipients' 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 recipients 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 recipient'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 recipient'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 recipient'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 recipient is effectively tracking and measuring the impact of their activities.
- CalOSBA's site visit provides an opportunity for the analyst to engage with the recipient'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 recipient and the Program.

CalOSBA does not accept liability for information not submitted in good faith by a Center for a program review.

Webinars

Pre-Bid Webinars

- Wednesday, July 27, 2025 from 2:00 PM to 3:00 PM
    - Register for the webinar here

Office Hours

These office hours are fully optional and unstructured. Please note that CalOSBA staff cannot review drafts, provide feedback on your proposal's content, or offer tips for writing your application. Office hours sessions will not be recorded.

- Thursday, August 6, 2026 from 11:00 AM to 12:00 PM
  Register for Office Hours here

- Thursday, August 13, 2026 from 11:00 AM to 12:00 PM
  Register for Office Hours here

Timeline

July 17, 2026	Program Announcement Release and RFP period begins
July 24, 2026	Online application portal opens for submissions *Link to application portal will be available by July 24, 2026*
July 27, 2026	Pre-Bid Webinar at 2:00PM PT Submit questions in advance to SBTAEP@gobiz.ca.gov Subject: "TAP 2026/27 RFP Questions"
July 31, 2026	Deadline to submit required Letter of Intent to Apply. Online submission must be made no later than 4:59:59 PM PDT. *Link to Letter of Intent will be available by July 24, 2026*
August 17, 2026	Deadline to submit required grant application. Online submission must be made no later than 4:59:59 PM PDT. *Link to application portal will be available by July 24, 2026*
August 18 - September 11, 2026	Proposal review
September 16, 2026	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 16 - 30, 2026	Follow up calls to Awardees (if needed)
September 21, 2026	Grant Agreements sent to Awardees
October 1, 2026	Grant program begins
September 30, 2027	Grant program ends

Application Instructions and Submission

All applications, with required attachments, must be submitted electronically using the designated CalOSBA online application portal. Applications submitted via email or facsimile will not be reviewed or scored.

All applications must be submitted by the deadline (August 17, 2026 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 at least two days before the deadline in the event technical assistance is required. For help applying, please send an email to SBTAEP@gobiz.ca.gov with the subject line: Technical Assistance Program 2026 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.

Application Requirements

All Applicants

The following items must be completed and submitted by both new and returning applicants (i.e., those funded in the TAP 2025/2026 program cycle). ***Missing, incomplete, or incorrect documents will result in deductions against your total proposal score.***

1) Letter of Intent to Apply	Available by 07/24/26
2) Online Application: Complete all fields directly within the application.	Available by 07/24/26
3) Proposal Narrative: Upload a completed Proposal Narrative to the online application. For group applications, each center must submit a separate and unique narrative.	Download Template Upload File to Application
4) Proposed Center Services Survey: Complete the online survey form (*applicable to Network Applicants only*).	Link Coming Soon
5) Match Award Documentation: Upload a fully executed federal or private award (including the scope of work) or a Letter of Intent with a scope of work. The award must be specifically for direct technical assistance to small businesses. For fully executed awards, the agreement or contract number must be clearly visible.	Upload File to Application
6) Budget Justification Spreadsheet: Download, complete, and upload the template. All costs must be itemized, explained, and directly related to program activities.	Download Template Upload File to Application
7) Organizational Chart: Upload a current chart for your organization.	Upload File to Application
8) Client Intake Form: Upload a copy of the intake form your organization currently uses. Explanation of this process is required in the Proposal Narrative	Upload File to Application
9) STD.204 Payee Data Record Form	Download Template Upload File to Application
10) STD.21 Drug-Free Workplace Certification *Note: The STD.204 and STD.21 forms must be signed within two weeks of each other.*	Download Template Upload File to Application
11) Resumes of Key Personnel (**Optional**): Combine into a single PDF saved as "Your Center Name_Resumes".	Upload File to Application

New Applicants

If your organization did not receive a TAP award in the previous program year (2025/2026 cycle), include the following with your application.

1) All items from the above "All Applicants" list.	
2) Letters of Support: A minimum of 3 letters from previous funders are required. Letters must demonstrate the Center's past performance and ability to spend down previously awarded technical assistance funding within the last 5 years.	Download Template Upload File to Application

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.
    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.
5. For returning awardees, performance issues from the last three TAP program years may result in deductions against your score. Please see Scoring Criteria.

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. Verbal debriefings may be provided at CalOSBA's discretion.

Scoring Criteria

Required application questions and scoring point scale are as follows:

Application Section	Points Possible
Service Areas	0
About the Center	0
Proposed Centers, Services, and Language Access	0
Performance Goals	0
Match Agreement Activities and Drawdown	0
Bonus Points	3
Past Performance	20
Scope of Work	25
Center Strategies & Organizational Capacity	15
Intake Methods	10
Data Integrity	10
Financial Management	20
Total Points Available:	**100 points (3 bonus points)**

Bonus Point Category	Eligibility	Points Possible
Letter of Intent (LOI) – Complete and timely submission of the required online Letter of Intent to Apply.	All applicants	**1**
Letters of Support – Submit up to two additional letters of support beyond the required minimum. Letters must follow the required template and demonstrate the Center's past performance and ability to administer technical assistance funding.	New applicants only	**Up to 2** (1 point per additional letter, maximum 2 points)
Expanded or Innovative Services – Describe how the proposed activities provide new or expanded services that fulfill a previously unmet and significant need. Response must be limited to 3–5 sentences.	Returning (2025/26) TAP awardees only	**2**

Point Deduction Category	Possible Point Deduction
Application Administrative Deficiencies: Each required application document returned for revision due to noncompliance with RFP instructions, incomplete information, missing required fields, or incorrect information.	**-1 point** per document
Past Performance (Current CalOSBA Awardees): within the past two years of program participation, each quarterly report with any of the following deficiencies: (1) submitted late; (2) failure to respond to CalOSBA communications regarding report revisions within five (5) business days; (3) failure to meet the required quarterly spenddown threshold; or (4) failure to meet the required quarterly performance metric threshold.	**-1 point** per deficiency (**up to -4 points** per quarterly report)
Annual Spenddown: Each of the past two (2) program years in which 100% of awarded funds were not expended.	**-1 point** per program year
Extension Spenddown: Failure to fully expend extension funds during the most recent program year.	**-1 point**

Required Questions (not scored)

Service Areas – Required but not Scored

- Geographic Area of Service (counties)
- Assembly District(s)
- Senate District(s)

Proposed Centers, Services, and Language Access – Required but not Scored

This information is collected in the online application; it will request physical location information, services offered; languages served for advising, training and outreach; communities served; and industry focuses (if applicable).

Proposed Metrics – Required but not Scored

The metrics values must be submitted directly into the application portal.

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

Match Agreement Activities and Drawdown – Required but not Scored

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:

- How the Center will draw down all federal or private funds available during the grant period.
- A plan of action and commitment to fully draw down the funds using local cash match (if

applicable to the match agreement).

- 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 TAP2025 Program year (September 30, 2026)). As a reminder, all TAP participating organizations must have an active federal or private award.

** Please note that there is a very strong preference for training and advising that is free of charge to participants. Low-cost training and/or advising 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 advising 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.

GenAI Disclosure

The State of California seeks to realize the potential benefits of GenAI, through the development and deployment of GenAI tools, while balancing the risks of these new technologies. Applicant must notify the State in writing if it: (1) intends to provide GenAI as a deliverable to the State; or (2), intends to utilize GenAI, including GenAI from third parties, to complete all or a portion of any deliverable that materially impacts: (i) functionality of a State system, (ii) risk to the State, or (iii) Contract performance. For avoidance of doubt, the term "materially impacts" shall have the meaning set forth in State Administrative Manual (SAM) § 4986.2 Definitions for GenAI.

Failure to report GenAI to the State may result in disqualification. The State reserves the right to seek any and all relief to which it may be entitled to as a result of such non-disclosure. Upon notification by an applicant of GenAI as required, the State reserves the right to incorporate GenAI Special Provisions into the final contract or reject bids/offers that present an unacceptable level of risk to the State. Government Code 11549.64 defines "Generative Artificial Intelligence (GenAI)" as an artificial intelligence system that can generate derived synthetic content, including text, images, video, and audio that emulates the structure and characteristics of the system's training data.

END