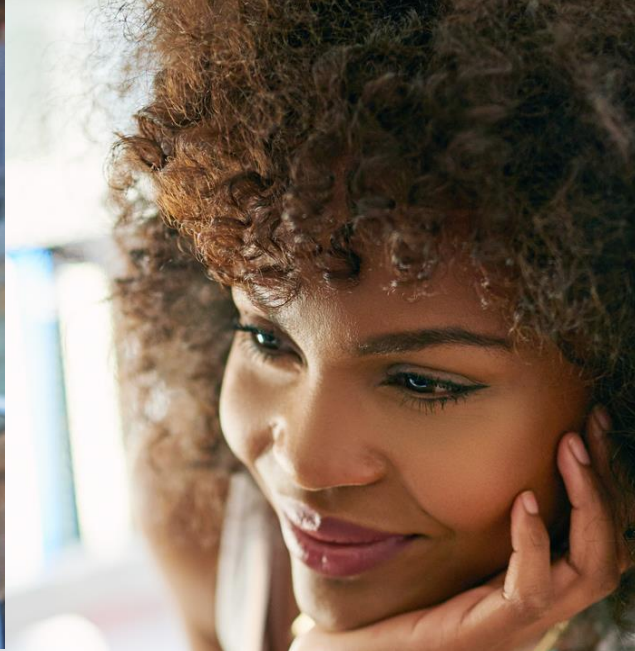# Technical Assistance Program (TAP) 2025/2026
Pre-Bid Webinar

California Office of The Small Business Advocate

Governor's Office Of Business And Economic Development

Presentations: July 16 & July 23, 2025

Application Deadline:
August 8, 2025 At 4:59:59 PM PDT

@CaliforniaOSBA on Twitter, LinkedIn, Facebook
Email: SBTAEP@gobiz.ca.gov

AGENDA

1. Welcome & Housekeeping

2. CalOSBA Mission

3. Program Background
   1. Priorities
   2. Eligibility
   3. Expenditures

4. Proposal Requirements
   1. Application Types
   2. Required Documents
   3. Optional Documents
   4. TAP Data Model

5. Timeline & Award Process

6. Wrap Up

HOUSEKEEPING

Both pre-bid webinars are recorded and will be shared with those registered within four (4) business days.

Please use the Q&A box or email SBTAEP@gobiz.ca.gov to submit your questions.

If we are unable to address your question during the webinar, a list of FAQs will be published online at:

https://calosba.ca.gov/for-calosba-partners/funding-opportunities-for-partners/

CALOSBA MISSION & OBJECTIVES

Mission: CalOSBA supports economic growth and innovation and ensures that ALL California small businesses and innovative startups have the information and direct support they need to better navigate resources, programs and regulations.

CalOSBA serves as the voice of small business, representing their views and interests across the state and advocating for equitable access to capital, markets, and networks so that all California small businesses successfully start, manage, grow and become more resilient.

Objective: Information and Resources | Advocacy | Resilience

PROGAM BACKGROUND

TECHNICAL ASSISTANCE PROGRAM (TAP) PRIORITIES

This is a program for experienced Technical Assistance providers with a strong track record that are ready to expand on existing work with small businesses.

Focuses:

Support new or enhanced services to underserved business groups, including women, minority, and veteran-owned businesses, and businesses in low-wealth, rural, and disaster-impacted communities included in a state or federal emergency declaration or proclamation.

Service Areas Include: Business Plans and Strategy, Capital Readiness and Capital Access, Market Access (E-Commerce, Exports, and Procurement), Disaster Readiness and Resilience, Economic Mobility, Marketing, Operations, Financial Management, Cybersecurity, Manufacturing, Innovation, Succession Planning, Youth Entrepreneurship, etc.

TAP ELIGIBILITY

Applicants must:

1. **Be a federally designated technical assistance center or a registered 501(c)(3) or 501(c)(6) nonprofit.**

2. **Provide existing services to small businesses and entrepreneurs in the State of California.** This is a program for experienced Technical Assistance providers with a strong track record that are ready to expand on existing work.

3. **Have an active agreement with a federal agency or philanthropic organization to provide technical assistance to small businesses in California.** The agreement must start no later than October 1, 2025.

4. **Be able to receive funds from the State of California.**

5. **Have an action plan and commitment to fully draw down all funds in their primary agreement with their federal or private funding partner during the grant period.** If their primary agreement requires local cash match, the applicant must be able to meet that requirement.
   State funds for TAP shall not supplant local cash match dollars.

TAP ELIGIBLE EXPENDITURES
Direct Technical Assistance (Advising & Training)

Personnel & Fringe

Employee's time providing advising or training services <u>directly</u> to small businesses (such as through 1:1 advising time or conducting a workshop or class).

Contractual

Contractor's time providing advising or training services <u>directly</u> to small businesses (such as through 1:1 advising time or conducting a workshop or class).

Supplies

Materials used to conduct <u>direct</u> technical assistance. This may include workbooks and curriculum, note taking materials for clients, printing services for class materials, etc.

TAP ELIGIBLE EXPENDITURES
Research & Marketing

Research

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.

Marketing

Employee or consultants' time and effort to conduct targeted Center marketing initiatives to underserved small businesses.

Materials used for marketing can be included if they support outreach, client development & expansion activities.

These include items such as:
- print media (e.g., flyers, brochures, and pull-up banners)
- digital media (e.g., Facebook or Google ads)
- purchases or subscriptions to databases, marketing services and other technology tools (e.g., MailChimp, Constant Contact, Hootsuite).

TAP ELIGIBLE EXPENDITURES
Program Administration

Costs must be **directly associated** with the administration of the approved Scope of Work. All program related administrative costs must be fully justified in the Scope of Work and pre-approved budget. All costs must be easily identifiable and itemizable with a clear connection to the administration and oversight of TAP.

Program administration does not include indirect or overhead costs, travel unrelated to serving rural clients, or time spent on activities such as applying for grants from CalOSBA or other entities.

Examples of allowable program administration costs:
- Staff time to coordinate and oversee the program
- Staff or contractor time to conduct monitoring and evaluation
- Staff or contractor time to develop a new program or curriculum
- Staff or contractor time to travel to rural areas
- Technology tools to support monitoring and evaluation (shall not exceed $1,000).

TAP BUDGET ALLOCATION

An unlimited portion (up to 100%) of the grant award may be used for **direct business advising and training**. In other words, Centers may spend the full award on business advising and training.

Program Administration, Supplies, Research & Marketing are limited to a combined maximum of 20% of the total budget.

Example:

An applicant that requests $50,000 in funding, <u>at most</u>, should have a combined Program Administration, Supplies, and Research & Marketing budget that does not exceed $10,000 (20% of $50k)

TAP INELIGIBLE EXPENDITURES

- Indirect and overhead costs. This includes rent, insurance, indirect administrative costs that are not directly related to program administration (for example, indirect costs to a center host organization), etc.

- Salary bonuses or contract bonuses

- Travel expenses for per diem, lodging, meals or subsistence

- Travel expenses for transportation (e.g., mileage, car rental, rail or air) unless serving rural clients.

- Food and beverage

- Supplies not directly related to advising, training, allowable research, or allowable marketing

- Other items that are banned by the State of California, or CalOSBA deems inappropriate or inconsistent with statutory or programmatic requirements of TAP

PROPOSAL REQUIREMENTS

TAP APPLICATION TYPES
Individual, Group, & Network

Individual Application

A single center that applies on behalf of itself, with a single Scope of Work Narrative, Budget, and Metric Goals.

An Individual center applicant may combine up to <u>two</u> primary funding agreements to use as matching funds.*

Group Application

A consortium of centers that apply together under a shared Administrative/Fiscal Agent.

Each center within a Group must have matching funds dedicated to their center and may combine up to <u>two</u> primary funding agreements to use as matching funds.

Centers within a Group must implement **unique programs that are distinct from other centers within the group**. Narrative proposals that are identical or nearly identical may be disqualified for plagiarism.

Example: A nonprofit operates two centers. Center #1 is a Minority Business Development Agency (MBDA) Business Center and is funded by the U.S. Dept. of Commerce. Center #2 has a Rural Business Development Grant funded by the U.S. Dept. of Agriculture.

Despite both centers being managed by the <u>same nonprofit</u>, EACH are expected to have their own unique proposals (i.e., narrative, budget, metrics) on the shared Group application.

Network Application

A consortium of centers that apply together under a shared Administrative/Fiscal Agent.

All centers within a Network must have a shared match agreement that covers the <u>network</u> rather than a specific center.

A maximum of <u>two</u> primary funding agreements that covers the entire network may be combined to use as matching funds.

The Network will apply jointly with a single aggregated Narrative, Budget, and Metric Goals.

Example: A Small Business Development Center (SBDC) Network has several centers across its geographical region. All centers are covered by a single match agreement from the U.S. Small Business Administration.

TAP REQUIRED DOCUMENTS

Match Agreement or Letter of Intent to Fund
Federal or Private Award specifically for direct technical assistance to small businesses (Fully Executed award with scope of work or Letter of Intent with scope of work)

- **Allowed File Upload Types:**. PDF

Letter of Intent
Online form submission indicating the applying organization, intended application type (individual, group, network) and the amount of funds intended to apply for.

You are not <u>tied</u> to the information provided in the letter of intent, but please provide information as close as possible to the intended application.

TAP REQUIRED DOCUMENTS
Narrative

Narrative Proposal

Template must be utilized and submitted in .doc/.docx format

Formatting Requirements

- 1.5 line spacing
- 12-point font
- 1-inch margins

Page Limitations

- Individual Center Applications – 13-page maximum
- Group Center Applications – 13-page maximum per center
- Network Application – 18-page maximum

The total page limit does not need to be utilized.

Points are awarded based on the applicant's ability to provide a thoughtful and concise response to the questions as written.

Do not delete the questions in the template. The answers must follow the corresponding question or risk a point deduction.

TAP REQUIRED DOCUMENTS
Supplemental Activities

Supplemental Activities provide new or expanded activities or services that fulfill a previously unmet and significant need of a specific business community within the Service Area. These proposals should not duplicate programming described in the Scope of Work.

Choose no more than 2 focus areas:

- Technical Assistance for Underserved Rural Areas

- Technical Assistance for Non-Profits

- Technical Assistance for LGBTQ+-Owned Businesses

- Technical Assistance for Immigrant Entrepreneurs

Formatting Requirements

- 1.5 line spacing

- 12-point font

- 1-inch margins

- 5-page maximum for 2 total categories.

- The total page limit does not need to be utilized.

Template must be utilized and submitted in .doc/.docx format

TAP REQUIRED DOCUMENTS
Community Access Plan

Requirements

- Template must be utilized and submitted in .XLS / .XLSX format.

- Follow the guidelines listed in the template.

- Complete cells highlighted in yellow.

- If the Service Area is statewide, provide the data profile for the State. For centers who serve multiple counties, please copy this sheet as many times as necessary.

TAP REQUIRED DOCUMENTS
Budget

Budget Proposal

Template must be utilized and submitted in .XLS / .XLSX format

- Refer to the **'Instructions'** tab in the Budget Template for details on the expectations of a complete budget.

- Pre-filled formulas must not be altered or changed in any way. Budgets that have altered formulas will be rejected and will require complete revision.

- All columns in the itemized budget must have a selection and be appropriately categorized.

Expenditure Descriptions must be thorough and specific. Be detailed in your descriptions.

TAP: Budget Examples

Budget Proposal | Personnel & Fringe

Rejected Description:

Expenditure Type	Expenditure Description / Narrative (characters: 25 min. / 250 max.)	Quantity	Unit	Cost	Funds Requested
Personnel	Business advisors including fringe benefits	2	EA	$41,236.00	$82,472.00

Approved Descriptions:

Expenditure Type	Expenditure Description / Narrative (characters: 25 min. / 250 max.)	Quantity	Unit	Cost	Funds Requested
Personnel	Jane Doe, Business Advisor (50% FTE)	1,040	HR	$35.00	$36,400.00
Fringe	Jane Doe, Business Advisor Fringe Benefits (22% of rate, includes PTO, Retirement, Health Care)	1,040	HR	$7.70	$8,008.00
Personnel	Vacant, Business Advisor (50% FTE)	1,040	HR	$30.00	$31,200.00
Fringe	Vacant, Business Advisor Fringe Benefits (22% of rate, includes PTO, Retirement, Health Care)	1,040	HR	$6.60	$6,864.00

TAP Budget Examples

Budget Proposal | Contractual

Rejected Description:

Expenditure Type	Expenditure Description / Narrative (characters: 25 min. / 250 max.)	Quantity	Unit	Cost	Funds Requested
Contractual	Contractors to provide webinars on marketing strategies, business plans, etc.	2	EA	$4,687.50	$9,375.00

Approved Descriptions:

Expenditure Type	Expenditure Description / Narrative (characters: 25 min. / 250 max.)	Quantity	Unit	Cost	Funds Requested
Contractual	ABC Marketing Agency	25	HR	$75.00	$1,875.00
Contractual	Business Experts LLC (provides training on business plan creation)	100	HR	$75.00	$7,500.00

TAP Budget Examples

Budget Proposal | Supplies

Rejected Description:

Expenditure Type	Expenditure Description / Narrative (characters: 25 min. / 250 max.)	Quantity	Unit	Cost	Funds Requested
Supplies	Equip & supplies directly related to programming. Incl supplies for virtual training counseling and meetings, intake forms, photocopy papers, file folders and other misc items for training material for clients.	1.00		$8,550.00	$8,550.00

Approved Descriptions:

Expenditure Type	Expenditure Description / Narrative (characters: 25 min. / 250 max.)	Quantity	Unit	Cost	Funds Requested
Supplies	Printing services for client workbooks and intake forms (~25/month)	300.00	EA	$25.00	$7,500.00
Supplies	File folders and binders for clients (~25/month)	300.00	EA	$3.50	$1,050.00

TAP Budget Examples

Budget Proposal | Research & Marketing, Program Admin

Rejected Description:

Expenditure Type	Expenditure Description / Narrative (characters: 25 min. / 250 max.)	Quantity	Unit	Cost	Funds Requested
Supplies	Digital media, Subscription to marketing service and scheduling tools	12.00	EA	$239.00	$2,868.00

Approved Descriptions:

Expenditure Type	Expenditure Description / Narrative (characters: 25 min. / 250 max.)	Quantity	Unit	Cost	Funds Requested
R&M	Mail Chimp Subscription, Standard Plan 5000 Contacts	12.00	EA	$85.00	$1,020.00
Program Admin	Loom Business Subscription for Webinar Recording and Storage	12.00	EA	$10.00	$120.00
Program Admin	Calendly Professional Yearly subscription for client booking	1.00	EA	$144.00	$144.00

TAP REQUIRED DOCUMENTS

Match Agreement

- Applicants must submit an active grant or contract designated by a federal entity or private funding source OR a Letter of Intent/Funding Announcement

- The match agreement must cover the performance period from October 1, 2025 to September 30, 2026.

- The requested funding amount may not exceed the total of the federal or private match award(s).

- Centers may not combine more than two funding sources. Federal and private awards may be combined but the match agreements must be for the same eligible program.

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

- **Allowed File Upload Types:** PDF

TAP REQUIRED DOCUMENTS

Organizational Chart
Demonstration of leadership structure and program management as proposed in the Scope of Work.

- **Allowed File Upload Types:** PDF

Only for Network Applicants: Proposed Center Services Survey
Network applicants must complete the Proposed Center Services survey to describe the services offered by each center in the network.

- The link to the survey is in the Program Announcement.

TAP REQUIRED DOCUMENTS
STD 204 & STD 21

These forms must be signed within <u>two-weeks</u> of each other, or they are not valid.

- **STD 204 – Payee Data Record**

    Document required for state contracting/grant awarding. The address provided is where payments will be remitted.

    - *Sections 1 through 5 of this form must be complete before submitting.*
    - *Section 1: PAYEE NAME must match the name on the Federal Employer Identification Number (FEIN).*
    - *Use the form linked in the Program Announcement which has Section 6 pre-filled.*

- **STD 21 – Drug-Free Workplace Certification**

    Document required for state contracting/grant awarding.

    Allowed File Upload Types: PDF

TAP <u>OPTIONAL</u> DOCUMENTS

Resumes of Key Personnel
Resumes of the executive and management team that will be leading the administration of the proposed activities.

- **Allowed File Upload Types:** PDF / DOC / DOCX

Letters of Support (<u>new applicants only</u>)
3-5 per Center, for work related to small business technical assistance within the last 5 years. Please use template and submit letters as one combined PDF saved as "Your Center Name_Letters of Support".

- **Allowed File Upload Types:** PDF

TAP DATA MODEL FOR PERFORMANCE METRICS

The Why

- **Audit-Proof, Comparable Performance Data:** Delivers secure, audit-ready reporting across all CalOSBA technical assistance programs—enabling consistent, apples-to-apples analysis of partner performance to inform contract renewals.

- **Increased Efficiency through Integration with Invoicing Portal:** Eliminates redundant manual processes by linking invoicing with performance reporting—freeing staff to focus on program delivery and driving better participant outcomes.

- **Performance Dashboards & Network-Wide Collaboration:** Startup Space dashboards automatically flag underperformance, while shared visibility across partners enables real-time collaboration, smoother handoffs, and deeper insight into client outcomes.

- **Uniform reporting schedule** between TAP, CIP and SSBCI.

The How

- All **partners** are required to use the approved TAP Data Model for 2025-26 TAP contracts.

- You can **enter TA data directly** into Startup Space or **upload** a batch file. But not both.

- CalOSBA will provide **a .CSV file** with required and optional data fields you use to submit your activity and demographic data; the model will calculate the aggregate outcome and activity metrics.

- The model requires **client-level data**, which should be **anonymized**.

- Partners in group contracts on multiple programs will submit one file per program.

TIMELINE & AWARD PROCESS

TECHNICAL ASSISTANCE PROGRAM (TAP) TIMELINE

July 22, 2025*	TAP Data Model Webinar
July 23, 2025	Pre-Bid Webinar # 2 at 1:30 PM
July 31, 2025	Letter of Intent Deadline at 4:59:59 PM
August 8, 2025	Grant Application Deadline at 4:59:59 PM
August 11- September 12, 2025	Proposal Review Period
September 15, 2025	Notices of Intent to Award Begins
September 22, 2025	Grant Agreement Processing
October 1, 2025	Program Period Begins
September 30, 2026	Program Period Ends

TAP AWARD PROCESS

Notice of Intent to Award email notifications <u>will begin</u> the week of September 15.

- Notices will include instructions for any required revisions. Revisions must be submitted within **<u>five (5) business days</u>** of receiving the notice.

- If the Applicant's award amount is different than the amount requested, the Applicant will be required to revise its Scope of Work and budget based on the final award amount.

- CalOSBA will send a grant agreement to be signed by signatory designated in the application. If multiple signatories are required, please provide this information to CalOSBA along with routing order. Once the grant agreement has been signed by the Awardee, it will be routed back to CalOSBA for final execution.

- <u>For Group-Based Applications,</u> communication about the application will be direct with the Authorized Representative for the group

Wrap-Up

A list of FAQs will be published online at:

https://calosba.ca.gov/for-calosba-partners/funding-opportunities-for-partners/

Questions may be submitted via email to:

sbtaep@gobiz.ca.gov

The webinar recording, slides, and any supplementary links will be shared in a follow-up email to all registrants.

THANK YOU