



Technical Assistance Program (TAP) 2026/2027 Pre-Bid Webinar

California Office of The Small Business Advocate
Governor's Office Of Business And Economic
Development

Presentations: July 27, 2026

Application Deadline:
August 17, 2026 At 4:59:59 PM PT

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



HOUSEKEEPING

The pre-bid webinar is 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, FAQs will be published at:

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

AGENDA

1. Welcome & Housekeeping
2. CalOSBA Mission
3. Program Background
 1. Priorities
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4. Proposal Requirements
 1. Application Types
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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





PROGRAM BACKGROUND

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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, 2026.
- 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 directly 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 directly to small businesses (such as through 1:1 advising time or conducting a workshop or class).

Supplies

Materials used to conduct direct 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, at most, 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, but is 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), 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

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TAP APPLICATION TYPES

Individual & Group

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 two 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 two 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 an APEX Accelerator and is funded by the U.S. Department of War. Center #2 has a Rural Business Development Grant funded by the U.S. Dept. of Agriculture.

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

TAP APPLICATION TYPES

Networks

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

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

Integrated Network

All centers within an Integrated Network must have a shared match agreement that covers the network rather than a specific center.

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

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.

Portfolio Network

Centers within a Portfolio Network have individual match agreements that cover the center, but are all funded by the **same federal or private organization**.

A maximum of two primary funding agreements that covers each center may be combined to use as matching funds.

Example: The Women's Business Center (WBC) Network has centers across the State of California. All centers are covered by separate match agreements that are all funded through the U.S. Small Business Administration.

TAP REQUIRED INFORMATION

Letter of Intent to Apply

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 tied** to the information provided in the letter of intent, but please provide information as close as possible to the intended application.

The link to this online form is available in the Program Announcement.

TAP REQUIRED DOCUMENTS

Narrative

Narrative Proposal

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

Formatting Requirements

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

Page Limitations

- Individual Center Applications – 14-page maximum
- Group Center Applications – 14-page maximum per center
- Network Application – 19-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

Narrative

Use of Generative AI

Generative artificial intelligence (GenAI) refers to AI models, particularly those that use machine learning and are trained on large volumes of data, that can generate new content.

Applicants must notify CalOSBA if it:

- (1) Intends to provide GenAI as a deliverable to the State;
- (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.

Example: Using GenAI to draft the proposal narrative, reporting, or other deliverables to CalOSBA.

The online application includes a required prompt to indicate whether GenAI was utilized to prepare the Proposal Narrative.

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.
- Local agreements with a city or county are eligible primary match sources but only if derived from federal pass-through funds.
- The match agreement must cover the performance period from October 1, 2026 to September 30, 2027.
- The requested funding amount may not exceed the total of the federal or private match award(s).
- Centers may combine **up to 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

Client Intake Form

Upload a copy of the intake form your organization currently uses. Explanation of this process is required in the Proposal Narrative.

- **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 two-weeks 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: 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.*

- **Allowed File Upload Types:** PDF

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

Document required for state contracting/grant awarding.

- **Allowed File Upload Types:** PDF

TAP OPTIONAL 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 (new applicants only)

Must be for work related to small business technical assistance from a previous funder within the last 5 years. Letter must speak to the Center's past performance and ability to spend down award. Minimum of 3 letters per Center are **required**, but a total of 5 may be provided. One bonus point will be added to the score for new applicants that submit more than 3 letters of support.

Please use template and submit letters as one combined PDF saved as:
“Your Center Name_Letters of Support”.

- **Allowed File Upload Types:** PDF

CALOSBA TECHNICAL ASSISTANCE PORTAL

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:** Catalyzer 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, SSBCI-TA, and SSBCI-SBOP.

The How

- All **partners** are required to use the approved Technical Assistance Data Model for 2026-27 TAP contracts.
- You can **enter technical assistance data** into Catalyzer or **upload** a batch file. But not both.
- CalOSBA will provide a **.CSV file** that you can use to submit your activity and demographic data; the model will calculate your economic outcome data.
- The model requires **client-level data**, which can be **anonymized**.
- Partners in contract on multiple programs will submit one file per program.



SCORING CRITERIA

SCORING CRITERIA & BONUS POINTS

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)

POTENTIAL POINT DEDUCTIONS

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 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

POTENTIAL 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



RENEWAL PROCESS

TAP RENEWAL ELIGIBILITY & PROCESS

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.



TIMELINE & AWARD PROCESS

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TECHNICAL ASSISTANCE PROGRAM (TAP)

TIMELINE

July 31, 2026	Letter of Intent to Apply Deadline at 4:59:59 PM
August 17, 2026	Grant Application Deadline at 4:59:59 PM
August 18-September 11, 2026	Proposal Review Period
September 16, 2026	Notices of Intent to Award Begins
September 21, 2026	Grant Agreement Processing
October 1, 2026	Program Period Begins
September 30, 2027	Program Period Ends

TAP AWARD PROCESS

Notice of Intent to Award email notifications will begin the week of September 16.

- Notices will include instructions for any required revisions. Revisions must be submitted within **five (5) business days** 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.
- For Group-Based Applications, communication about the application will be direct with the Authorized Representative for the group.

Frequently Asked TAP Questions:

Q: My organization is not currently funded to provide technical assistance to small businesses, but we work in Economic Development and would like to start providing advising services. Can we apply for TAP?

A: To be eligible for TAP you must have an active match agreement to conduct small business technical assistance to small businesses. This means a grant from a federal agency or a philanthropic organization to provide free training and advising to small businesses. The agreement (or letter of intent to award) must be current and run through the duration of the TAP program, or you must have a clear plan to renew the agreement. If you do not have a current funding source, we encourage you to develop one and consider TAP in future years.

Q: What types of funding agreements qualify for the match requirement?

A: A funding partner may be a federal funding partner (e.g., SBA) or private funding source (e.g., JP Morgan Chase grant to do small business technical assistance). If the agreement is with a local entity (e.g., county or city) but the funds are sourced from federal pass-through, this agreement can also satisfy the match requirement. To be eligible for to apply for TAP funding, an applicant must be able to accept funds through a nonprofit or federal center. The applicant must also have an active match award to conduct small business technical assistance in a center-like capacity. The funding agreement or letter of intent to award must state that the funds are to be used for small business technical assistance. An applicant cannot use their own funds for match.

Q: I do not have a letter of intent to award from a funding partner, but expect it soon, can I still apply?

A: No. You must have a letter of intent to award from a funding partner for eligible programs (small business technical assistance center programs) at the time of application. Further, the letter of intent to award must state that the applicant will administer a small business technical assistance program in California no later than October 1, 2026.

Frequently Asked TAP Questions:

Q: Are local governments (e.g., cities) eligible to apply for TAP funding?

A: To be eligible for to apply for TAP funding, an applicant must be able to accept funds through a nonprofit or federal center. The applicant must also have an active federal or private award to conduct small business technical assistance in a center-like capacity. Should a local government meet these criteria, they would be eligible to apply for TAP funding.

Q: Can an organization receive two or more separate contracts? For example, if an organization has a contract with a private partner (e.g., Bank of X) and a federal contract (e.g., with the USDA) can they have two applications and awards?

A: This is only allowed when the center is part of an Integrated Network but also has a separate eligible match agreement. The applications must be **unique and completely distinct in scope and nature**. The narrative and metrics must reflect a completely unique scope of work. Applications submitted without clearly unique scopes of work will be considered duplicative and CalOSBA reserves the right to disqualify duplicate applications. Applicants must be able to demonstrate separation of the funds and expenditures between the awards.

Q: Can you combine multiple awards to apply for a higher funding amount?

A: Applicants may only combine funding from a maximum of two awards if the awards are for the same eligible program (i.e., two awards for the same Women's Business Center, or two awards explicitly for the same small business technical assistance program).

Frequently Asked TAP Questions:

Q: Can you provide a list of cities and counties considered to be 'low wealth area' for FY26?

A: Yes, a list is posted to <https://calosba.ca.gov/for-calosba-partners/funding-opportunities-for-partners/>

Q: How is funding provided to grantees?

A: TAP funding is provided on a cost-reimbursement basis following the receipt and approval of quarterly performance reporting and invoicing.

Q: How long does it take to receive reimbursement?

A: Payments are issued within forty-five (45) calendar days of receiving a complete, valid and undisputed invoice with all required documentation and reporting requirements.

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

