

Technical Assistance Program 2026/2027

Frequently Asked Questions

Updated 7/27/2026 | Please submit questions to SBTAEP@gobiz.ca.gov.

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- 19) For the matching requirement, if we have a signed two-year grant agreement with a second-year payment due by September 1, 2026, does that satisfy the requirement that matching funds extend beyond the October 1, 2026–September 30, 2027 performance period, or is additional documentation needed?
- 20) Can TBID funds count as a cash match?

Program Basics and Eligibility

Question	Answer
What application type is appropriate for my organization?	This depends on two factors: 1) the match agreement(s) being used, and 2) the number of centers on the agreement. Please see the table below for more information.

Application Type	Number of Centers	Number of Match Agreements
Individual	One (1)	One-Two (1-2)
Individual centers may combine <u>up to two</u> separate match agreements of the <u>same type</u> (federal or private).		
Group	Two or More (2+)	One-Two (1-2) <u>per center</u>
Group applications include multiple centers with separate match agreements. Each center in a Group-based application must have a unique scope of work and metrics that will be reported individually throughout the program year, if awarded.		
Network	Two or More (2+)	Integrated: One-two (1-2) that cover entire network
		Portfolio: One-two (1-2) that cover each individual center.
Networks are consortiums of centers that apply together under a shared Admin/Fiscal Agent. Network centers will apply jointly with a single aggregated Narrative, Budget, and Metric Goals., and will report in aggregate throughout the program year. A network can be either: 1) An Integrated Network : Has a single/shared match agreement that covers all centers. A maximum of two primary funding agreements that covers the entire network may be combined to use as matching funds. 2) A Portfolio Network : Has individual match agreements that cover each center, but are all funded by the <u>same</u> federal or private organization. A maximum of two primary funding agreements that covers each center may be combined to use as matching funds.		

Question	Answer
Where do we submit our application?	Applications must be submitted in the online application platform: Technical Assistance Program (TAP) Application 2026-27
Who do I contact if I'm having trouble submitting the application?	For technical support with the Catalyzer portal, please email calosbasupport@eicatalyst.com .
Are letters of intent required? Are we tied to the information submitted in the letter of intent?	A letter of intent is required and must be submitted here by 5PM on July 31. We ask that the letter of intent be as close to what your organization intends to apply for, but understand some changes may occur prior to submitting your application.

Matching Funds

Question	Answer
What is the percentage of required match? Is there a formula?	Match of 100% the requested budget is required.
Are in-kind contributions eligible for the match?	The match must be cash match from a grant, contract, or cooperative agreement.
My organization has a federal contract and a private contract; can we combine the contract amounts to request a larger budget?	Yes. Applicants can combine up to two separate contracts (federal and/or private).
If our existing federal or private contract is for technical assistance (TA) in one geography, can the TAP grant be used to do TA in that geography and other geographies nearby?	Yes, this is an example of using TAP funding to expand existing technical assistance services to provide resources to other nearby and underserved communities. Please note that the match funding agreement must be specific to providing services within the State of California.
Can general support grants be considered as "match"?	No, the federal or private funds used for TAP matching funds must be specifically to provide small businesses with technical assistance.

Question	Answer
If we have a match eligible grant that ends prior to the end of the program year, and we do not expect a renewal (because it's not that type of grant), can we request TAP funds just through that date?	All TAP contracts are set with the same period of performance (10/01/2026 – 09/30/2027) and the match agreement must begin on or before the start date (10/01/2026). If the match agreement expires before the program year concludes, the organization will need to provide CalOSBA proof of continuing matching funds prior to the match expiration to carry out the term of the TAP agreement. Otherwise, the contract will be terminated, and remaining unutilized funds will be returned to the state. An early terminated TAP award is marked as poor performance against future funding opportunities.
Do TAP matching funds have to be new funds?	If a federal or private award has already been used as match for a previous year of TAP, it cannot be used again. The exception would be a multi-year agreement where the full federal or private award amount dedicated to technical assistance was not utilized as match in a previous year.

Budget Requirements

Question	Answer
What information should we include in our budget justification spreadsheet?	The budget must itemize all anticipated expenditures that will be made utilizing TAP funds. Costs must be itemized and include specific descriptions. <u>Do not include costs that will be covered by other funding sources.</u> ✓ Good Description: “Mailchimp Standard 1,500 contacts - monthly subscription (\$45/month).” X Poor Description: “Marketing subscription.” Vague descriptions will be rejected.
Should the itemized budget include individual staff or general personnel?	To the extent possible, include individual staff information (i.e., name, title, hourly rate). If the positions have not yet been filled, you may list them as “Vacant”. The hourly rate being proposed by personnel staff and contractors should be clearly identified.
Are administrative staff for program management eligible within the budget?	Program Administrative costs can be included and must be categorized as Program Admin.

Question	Answer
How much TAP funds can be set for program admin, research & marketing, and supplies?	A <u>combined maximum of 20% of the total requested budget</u> can be allocated toward Supplies, Research and Marketing, and Program Administration. For Example: A budget request of \$50,000.00 can include a combined maximum of \$10,000.00 for those three categories.
Can 100% of an employee's time be charged to TAP?	While these cases are rare, an employee that is 100% TAP dedicated can be fully budgeted within the proposal. This must be thoroughly described and justified within the itemized budget and narrative budget justification. If approved, CalOSBA may request backup documents throughout the program performance year to backup and support the work conducted by fully funded staff.
Can indirect costs be included in the budget?	No. Indirect and overhead costs are not allowable.

Question	Answer
Is travel allowed?	Travel is allowed in limited circumstances, such as to support geographical expansion to a new area or to serve clients in very rural areas. Any travel proposed must be categorized as Program Admin and must be indicated in the itemized budget and thoroughly described in the narrative budget justification.

Narrative Proposals

Question	Answer
If we run low on narrative space, can we remove the prompts or instruction sections in the proposal narrative?	No, do not remove the prompts and instructions for each section.

Pre-Bid Webinar Questions (July 27, 2026)

Question	Answer
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Can you clarify what is meant by philanthropic grant/contract agreement? What would that look like? Any examples?	Having an agreement with a philanthropic partner means that your organization has been awarded by a philanthropic organization (e.g., California Wellness Foundation, James Irvine Foundation, Wells Fargo Foundation, etc.) to provide small business technical assistance in the State of California.
To be eligible to apply, does a non-profit organization have to be both a 501(c)(3) AND have a special designation as a Small Business Technical Assistance Center?	The non-profit does not need to be designated as a Small Business Technical Assistance Center.
We are waiting for the next SBA WBC award. What documentation should be submitted?	Letters of Intent to Award are acceptable documentation.
Does 1:1 match funds need to be external funding?	100% of the requested TAP funds must be matched by a grant agreement, contract, or cooperative agreement.
Will the slides be made available to attendees?	Yes, the slides and a link to the webinar recording will be available on our website .

We have a private donation for our 501(c)3 and may not have federal funding. Can we qualify?	Federal match awards are not required. The match requirement can be from a “private funding source,” which can be any entity that makes grants and includes corporate or private philanthropy or similarly established nongovernmental entities. Private funding source does not include California State or local funding.
Could you provide additional clarification on what types of funding sources qualify as the required match? Specifically, are both public and private funding sources eligible, and are there any restrictions on the types of funds that may be used?	All match awards must indicate the organization will administer a small business technical assistance program in California. Eligible public funding sources are federal grant awards or federal pass-through awards. Private funding sources may be from any corporate or private philanthropic organization, such as the JP Morgan Chase Foundation, California Endowment, or the Bill and Melinda Gates Foundation. Ineligible matches include State funds or federal funds passed through CalOSBA (such as SSBCI-TA or SSBCI-SBOP). Local agreements are an eligible primary match source for this Program only if derived from federal pass-through funds.

For the LOI, is there a requirement of who needs to submit the form on behalf of the organization?	No, there is no requirement for who may submit the LOI on behalf of the organization.
Does the use of Gen AI negatively impact the scoring of the application? How are applications prepared with the help of Gen AI evaluated differently or more stringently?	All applications are scored on the same point scale. The disclosure of GenAI use is intended to identify potential risks, harm, or damage to State operations or prevent material breach of a contract.
Are workforce development boards with multiple service centers in rural communities and/or economic development districts eligible applying entities? This would represent a network according to your presentation?	We encourage all organizations that meet the eligibility criteria to apply. Network applicants include multiple centers who either have 1) a single/shared match agreement that covers all centers or 2) individual match agreements for each center that are from the same federal or private funder.
Contractor details - if we plan for a certain amount for contractor A but more demand for B while in the delivery of the TAP year, is that acceptable?	Yes, due to staffing changes or responses to the current service needs, hours may be reallocated between contractors.

How much room for error is there in the estimated quantity/hours a contractor or personnel in the Budget and Narrative?	The actual expenditures for Personnel, Fringe, and Contractual may not exceed more than 20% of redirection of budgeted funds. There is a budget modification process that is used during the program year to accommodate shifting funds between budget categories, as needed.
How would you upload a digital business service intake form in the portal?	Please provide screenshots or a sample completed intake form. If your digital intake form is on a web browser, you may use the 'Print as PDF' option. Please ensure the intake form is provided in full and readable.
Do we need to complete a LOI if we receive the notice of renewal eligibility?	No, a Letter of Intent to Apply is not needed if the center has received the Notice of Renewal Eligibility unless the organization has decided to opt-out of the renewal process.
Can volunteer hours, in-kind contributions or services, products, and discounted professional rates count toward the match?	No, the match must be cash match as a grant award, contract, or cooperative agreement.

If a 2026/2027 general operating support grant agreement does not specify a grant period but does require annual reporting until the grant is fully expended, and this could extend beyond Sept. 30, 2027, is that sufficient documentation for the TAP matching requirement, or would CalOSBA require a separate letter confirming the grant period?	General operating agreements are not eligible matches. The grant agreement and/or grant proposal must indicate the center will administer a federal small business technical assistance center program in California for the term of the TAP award cycle.
If our org is a 501(c)(3) and has an established technical-assistance program and can provide a private contract from a partner, though not a federal agreement, would that qualify?	A federal agreement is not required. The award contract may be from a private or corporate philanthropy, such as the Wells Fargo Foundation, California Endowment, or Silicon Valley Community Foundation.
For the matching requirement, if we have a signed two-year grant agreement with a second-year payment due by September 1, 2026, does that satisfy the requirement that matching funds extend beyond the October 1, 2026–September 30, 2027 performance period, or is additional documentation needed?	A multi-year grant agreement may be used for the match requirement if it covers the upcoming TAP period and 100% of the match funds have not been applied to a previous TAP award cycle.

Can TBID funds count as a cash match?

Tourism Business Improvement District (TBID) funds are not eligible cash match as they are mandatory assessment fees collected by a local government.