

File No. 181162

Committee Item No. 14

Board Item No. 21

### COMMITTEE/BOARD OF SUPERVISORS

#### AGENDA PACKET CONTENTS LIST

Committee: Budget & Finance Committee

Date February 27, 2019

Board of Supervisors Meeting

Date March 5, 2019

#### Cmte Board

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|-------------------------------------|-------------------------------------|--|
| <input type="checkbox"/>            | <input type="checkbox"/>            | Motion                                       |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Resolution                                   |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Ordinance                                    |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Legislative Digest                           |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Budget and Legislative Analyst Report        |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Youth Commission Report                      |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Introduction Form                            |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Department/Agency Cover Letter and/or Report |
| <input type="checkbox"/>            | <input type="checkbox"/>            | MOU  |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Grant Information Form                       |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Grant Budget                                 |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Subcontract Budget                           |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Contract/Agreement                           |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Form 126 – Ethics Commission                 |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Award Letter                                 |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Application                                  |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Public Correspondence                        |

#### OTHER

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Completed by: Linda Wong

Date February 22, 2019

Completed by: Linda Wong

Date February 27, 2019

1 [Accept and Expend Grant - Humboldt State University Program Foundation - Small Business  
2 Technical Assistance Expansion Program - \$203,917.50]

3 **Resolution retroactively authorizing the Office of Economic and Workforce**  
4 **Development to accept and expend a grant in the amount of \$203,917.50 from the**  
5 **Humboldt State University Program Foundation to expand the capacity of the San**  
6 **Francisco Small Business Development Center for the period of October 1, 2018, to**  
7 **September 30, 2019.**

8  
9 WHEREAS, The San Francisco Small Business Development Center provides one-on-  
10 one, confidential consulting and training to help small businesses and entrepreneurs start,  
11 expand, facilitate investment and create jobs in the City and County of San Francisco; and

12 WHEREAS, The California Small Business Technical Assistance Expansion Program  
13 provides state grant funding to expand consulting and training services provided by the San  
14 Francisco Small Business Development Center; and

15 WHEREAS, Eligible consulting and training services covered by the Program's grant  
16 funding include capital access, commercialization, business plans and strategy, export  
17 assistance, sales, operations, financial management, marketing, cybersecurity, procurement,  
18 manufacturing assistance, emergency preparedness, business continuity, disaster recovery,  
19 increase productivity and innovation, among other areas; and

20 WHEREAS, The full project period of the grant starts on October 1, 2018, and ends on  
21 September 30, 2019; and

22 WHEREAS, The grant includes a required match of 100% of the project budget or  
23 \$203,917.50; the source of match is through Small Business Administration federal funds; and

24 WHEREAS, The grant terms prohibit including indirect costs in the grant budget; now,  
25 therefore, be it

1 RESOLVED, That the Office of Economic and Workforce Development is hereby  
2 authorized to accept and expend a grant in the amount of \$203,917.50 from Humboldt State  
3 University Program Foundation; and, be it


4 FURTHER RESOLVED, That the Board of Supervisors hereby waives inclusion of  
5 indirect costs in the grant budget; and, be it

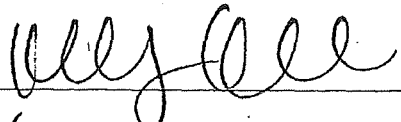
6 FURTHER RESOLVED, That funds may be used for direct technical assistance for  
7 small businesses, direct technical training for small businesses, research, and marketing; and,  
8 be it

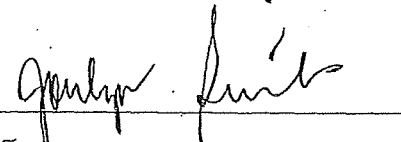
9 FURTHER RESOLVED, That the Director of the Office of Economic and Workforce  
10 Development is authorized to enter into the Agreement on behalf of the City.

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Recommended:

  
\_\_\_\_\_  
Department Head

Approved:   
\_\_\_\_\_  
for Mayor

Approved:   
\_\_\_\_\_  
for Controller

File Number: 181162  
(Provided by Clerk of Board of Supervisors)

**Grant Resolution Information Form**  
(Effective July 2011)

Purpose: Accompanies proposed Board of Supervisors resolutions authorizing a Department to accept and expend grant funds.

The following describes the grant referred to in the accompanying resolution:

1. Grant Title: Small Business Technical Assistance Expansion Program
2. Department: Office of Economic and Workforce Development
3. Contact Person: Lisa Pagan Telephone: 415-554-6936
4. Grant Approval Status (check one):  
 Approved by funding agency       Not yet approved
5. Amount of Grant Funding Approved or Applied for: \$203,917.50
6. a. Matching Funds Required: \$203,917.50  
b. Source(s) of matching funds (if applicable): Small Business Administration (SBA)
7. a. Grant Source Agency: Governor's Office of Business and Economic Development  
b. Grant Pass-Through Agency (if applicable): Humboldt State University Program Foundation
8. Proposed Grant Project Summary:  
The San Francisco Small Business Development Center (SFSBDC) provides one-on-one, confidential consulting and training to help small businesses and entrepreneurs start, expand, facilitate investment and create jobs in the City and County of San Francisco. The Small Business Technical Assistance Expansion Program (SB TAEP) provides state grant funding to expand consulting and training services provided by SFSBDC.
9. Grant Project Schedule, as allowed in approval documents, or as proposed:  
Start-Date: 10/1/2018      End-Date: 9/30/2019
10. a. Amount budgeted for contractual services: \$60,225.50  
b. Will contractual services be put out to bid? Yes, via a Request for Qualifications (RFQ)  
c. If so, will contract services help to further the goals of the Department's Local Business Enterprise (LBE) requirements? Yes  
d. Is this likely to be a one-time or ongoing request for contracting out? Ongoing
11. a. Does the budget include indirect costs?  
 Yes       No  
b. 1. If yes, how much? N/A  
b. 2. How was the amount calculated? N/A  
c. 1. If no, why are indirect costs not included?  
 Not allowed by granting agency       To maximize use of grant funds on direct services  
 Other (please explain):

c. 2. If no indirect costs are included, what would have been the indirect costs?

\$25,673.21 (12.59%)

12. Any other significant grant requirements or comments:

None

**\*\*Disability Access Checklist\*\*\*(Department must forward a copy of all completed Grant Information Forms to the Mayor's Office of Disability)**

13. This Grant is intended for activities at (check all that apply):

- |  |   |   |
|--|---|---|
| <input checked="" type="checkbox"/> Existing Site(s) | <input checked="" type="checkbox"/> Existing Structure(s) | <input checked="" type="checkbox"/> Existing Program(s) or Service(s) |
| <input type="checkbox"/> Rehabilitated Site(s)       | <input type="checkbox"/> Rehabilitated Structure(s)       | <input type="checkbox"/> New Program(s) or Service(s)                 |
| <input type="checkbox"/> New Site(s)                 | <input type="checkbox"/> New Structure(s)                 |   |

14. The Departmental ADA Coordinator or the Mayor's Office on Disability have reviewed the proposal and concluded that the project as proposed will be in compliance with the Americans with Disabilities Act and all other Federal, State and local disability rights laws and regulations and will allow the full inclusion of persons with disabilities. These requirements include, but are not limited to:

1. Having staff trained in how to provide reasonable modifications in policies, practices and procedures;
2. Having auxiliary aids and services available in a timely manner in order to ensure communication access;
3. Ensuring that any service areas and related facilities open to the public are architecturally accessible and have been inspected and approved by the DPW Access Compliance Officer or the Mayor's Office on Disability Compliance Officers.

If such access would be technically infeasible, this is described in the comments section below:

Comments:


N/A

Departmental ADA Coordinator or Mayor's Office of Disability Reviewer:

Dylan Smith  
(Name)

Special Assistant to the Director  
(Title)

Date Reviewed: 10/29/18

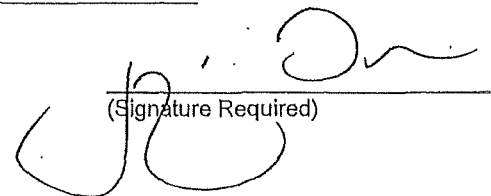
  
(Signature Required)

**Department Head or Designee Approval of Grant Information Form:**

Joaquin Torres  
(Name)

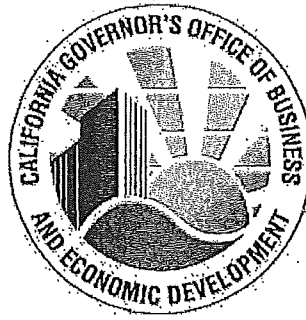
Director  
(Title)

Date Reviewed: 29 October 2018

  
(Signature Required)

TAEP 18-19 Grant Budget - OEWD Small Business Development Center

Salaries	TAEP	Total
Business Case Manager-Qian Wan	17,368.00	17,368.00
Program Services Coordinator - TBD	45,760.00	45,760.00
Business Case Manager - TBD	26,000.00	26,000.00
<b>Total Salaries</b>	<b>89,128.00</b>	<b>89,128.00</b>
Fringe		
Business Case Manager-Qian Wan	8,684.00	8,684.00
Program Services Coordinator - TBD	22,880.00	22,880.00
Business Case Manager - TBD	13,000.00	13,000.00
<b>Total Fringe</b>	<b>44,564.00</b>	<b>44,564.00</b>
Consultants	35,225.50	35,225.50
Marketing/Outreach (business cards and printing)	5,000.00	5,000.00
Research	25,000.00	25,000.00
Online Training Equipment (video camera, computer, software, microphones)	5,000.00	5,000.00
<b>Total</b>	<b>203,917.50</b>	<b>203,917.50</b>



**Governor's Office of Business and  
Economic Development**

**Office of Small Business Advocate**

**Small Business  
Technical Assistance Expansion Program**

**2018/19 Program Announcement**

The purpose of this Program Announcement is to invite proposals from Federal Small Business Technical Assistance Centers in California for grant funding to expand the capacity of federal small business technical assistance programs throughout the state.

**Opportunity Number: CASBTAEP2018**

**Total Program Funding: \$17 Million**

**Opening Date: Thursday, July 19, 2018**

**Closing Date: Friday, August 24, 2018**



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## Definitions

Definitions that pertain to this Program Announcement are provided below.

- “Federal funding partner” means the United States Small Business Administration, United States Department of Commerce or United States Department of Defense and other federal agencies with the authority to administer small business technical assistance programs in the state of California.
- “Federal small business technical assistance center (Centers)” means an organization that contracts with a federal funding partner to operate a Small Business Development Center, a Women’s Business Center, the Veteran Business Outreach Center, NIST Manufacturing Extension Partnership Centers, Minority Business Development Center, Procurement Technical Assistance Center or similar programs within California to support small businesses.
- “Fiscal agent” means the entity with which a federal funding partner contracts to administer the small business technical assistance programs within a state or district. The fiscal agent is directly accountable to the federal funding partner administering the specified federal small business technical assistance program for all aspects of the program requirements, which may include staffing, program, outreach and securing the required match to draw down federal funds and reporting performance outcomes to operate the program in the fiscal agent’s area of responsibility.
- “Local cash match” means nonfederal cash that is spent on eligible federal small business technical assistance program costs.
- “Small business” means a business with 500 employees or less for most manufacturing and mining industries and \$7.5 million or less in average annual receipts for nonmanufacturing industries.

## Overview

The California Small Business Technical Assistance Expansion Program (SB TAEP or Program) was created in 2018 to expand the capacity of federal small business technical assistance programs in California. The Program was enacted in Government Code Section 12100-12100.69. The Office of Small Business Advocate at the Governor’s Office of Business and Economic Development (GO-Biz) is charged with implementing and administering the Program.

Federal small business technical assistance centers (Centers) are designated by federal funding partners to operate federal small business technical assistance programs throughout the state. These Centers provide one-on-one, confidential consulting and training to help small businesses and entrepreneurs start, expand, facilitate investment and create jobs in California. The SB TAEP provides state grant funding to expand consulting and training services provided by existing and new Centers, including satellite offices. SB TAEP funds shall not supplant a Center’s

local cash match. However, funding from other state programs may be used as local cash match.

The Program provides \$17 million in annual grant funding over a five-year period ending on June 30, 2023. Each fiscal year<sup>1</sup>, GO-Biz will release an annual Program Announcement to provide 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 TAEP funding available during the 18/19 fiscal year.

Eligible consulting and training services covered by the Program's grant funding include capital access, commercialization, business plans and strategy, export assistance, sales, operations, financial management, marketing, cybersecurity, procurement, manufacturing assistance, emergency preparedness, business continuity, disaster recovery, increased productivity and innovation, among other areas.

GO-Biz will give preference to applications that propose 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.

## **18/19 Program Timing, Funding and Allowable Uses**

The 18/19 grant period will commence on October 1, 2018 and end on September 30, 2019.

GO-Biz will award \$17 million during the 18/19 grant period using a merit-based review process. Centers are expected to spend their 18/19 award in full during the 18/19 grant period. On a case-by-case basis upon written approval from GO-Biz, Centers may receive up to a two-year extension to spend down 18/19 grant awards. Centers should ensure that grant funding requests and proposed scopes of work align with the 18/19 grant period timeline.

The requested funding amount may not exceed the total federal award specified in a Center's agreement with a federal funding partner, but in any event may not be less than twenty-five thousand dollars (\$25,000) per year.

### **Funding Conditions and Requirements**

Allowable activities under the Program are listed below.

1. Direct technical assistance to small businesses (one-on-one consulting with businesses and pre-venture entrepreneurs).
2. Direct technical training to small businesses (workshops and classes for business owners). Training may include the cost of trainers, supplies, curriculum development or webinar subscriptions for virtual training. Training may not include travel.
3. Research (time and effort to assess small business service needs in a Center's geographical service area or research to inform a pilot project or other planned service

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<sup>1</sup> All references to "fiscal year" in this Program Announcement refer to the state's fiscal year, which begins on July 1<sup>st</sup> and ends on June 30<sup>th</sup>.

expansion). Research may not include the cost of research tools or reports for individual client consulting.

4. Marketing (printed and online campaigns by Centers to reach small businesses in their communities). Allowable costs include personnel or consultants to conduct Center marketing initiatives, print and digital media, and subscriptions to database and marketing services to support expansions in Center activities.

An unlimited portion of the grant award may be used for business consulting and training. Research and marketing are limited to 20% of the total annual grant award. Centers may spend the full award on business consulting and training. Any spending on marketing and research must be justified in the grant application.

The grant program will fund the hourly rates of personnel or consultants to carry out the allowable activities described above. For personnel, hourly rates may include salary and benefits.

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

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. Indirect costs may not be claimed.

### **Funding Method**

GO-Biz will process grant payments quarterly on a cost-reimbursement basis. GO-Biz will issue payments within forty-five days of receiving a valid or undisputed invoice.

### **Eligibility Requirements**

At the time of applying for funds, Centers must meet the requirements below.

1. Applicants must have an active grant, cooperative agreement or contract with a federal funding partner to administer a federal small business technical assistance program in California **OR** a Letter of Intent from a federal funding partner to administer a federal small business technical assistance program in California by April 1, 2019.<sup>2</sup>
2. Applicants must have a fiscal agent that is able to receive nonfederal funds.
3. Applicants must have a plan of action and commitment to fully draw down all of the federal funds in their primary agreement with a federal funding partner during the 18/19 program period using local cash match.

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<sup>2</sup> If a Center does not have an active contract or Letter of Intent due to the timing of a Federal Funding Partner's award decision, the Center will be required to submit written correspondence from the Federal Funding Partner specifying the timing issue. In such a case, GO-Biz may issue an award contingent on the future federal contract or Letter of Intent.

- a. If the applicant is a new federal small business technical assistance center, the applicant must demonstrate the ability to fully draw down substantially all federal funds available to it.

## **Authorized Representatives**

Applicants may consist of Centers that operate as a group (e.g., regional or statewide networks) or individually. Group-based programs consist of Centers organized under a coordinating administrative entity, such as an SBDC lead center.

Authorized representatives will carry out a variety of responsibilities during the application process and 18/19 grant period. For Centers that operate as a group, the authorized representative will be the coordinating administrative entity defined by their federal program. For Centers that operate individually, the authorized representative will be the Center itself or a designated entity that will represent a group of individual Centers to carry out Program responsibilities on their behalf.

### **Application and Agreement Responsibilities**

The authorized representative will submit the Program application to GO-Biz, receive the Notice of Award and enter into the 18/19 agreement with GO-Biz. For group applications and agreements, the authorized representative will enter into separate sub-agreements with the Centers in their group agreement.

### **18/19 Program Period Responsibilities**

During 18/19 grant period, the authorized representative will submit performance and financial reports to GO-Biz after reviewing for accuracy and completeness. The authorized representative will also receive and distribute GO-Biz's quarterly reimbursements to Centers in group agreements.

In addition, the authorized representative will serve as the principal contact for GO-Biz and the Centers in a group agreement. Any programmatic or agreement-related issues will flow through the authorized representative to the Centers in their agreement. When programmatic issues and questions arise, Centers are expected to contact their authorized representative, who will engage GO-Biz if necessary. Likewise, GO-Biz will communicate to authorized representatives to communicate program-related information.

Applicants that act as an authorized representative in a group application and agreement will receive up to ten (10) additional points in the scoring of their application.

## **Application Submission**

Applications will be submitted electronically to GO-Biz. Group-based programs will apply as a group. The group's authorized representative will submit a single consolidated application to GO-Biz that contains all the applications from the Centers in their group.

Centers that operate individually may submit a group application under a single authorized representative or submit an individual application directly to GO-Biz. Centers may submit a

consolidated application with other Centers in their federal small business technical assistance program or with Centers outside of their program. For instance, a Women's Business Center (WBC) may submit a consolidated application with other WBCs or with the SBDC network.

The application package will be comprised of a technical proposal and optional attachments to support the application, such as letters of support. All application packages must be submitted to GO-Biz electronically and will undergo an initial screening process, consisting of a review for applicant eligibility and completeness. Application packages may be rejected without further evaluation if they are submitted by ineligible applicants or are materially incomplete.

## **Application Criteria and Evaluation Process**

Application packages deemed complete will be evaluated and scored based on their comprehensiveness in accordance with the Evaluation Criteria.

Members of a panel will evaluate and score application packages individually and in a panel format. The scoring results from the individual and panel evaluations will be normalized. Panel members will be employees from GO-Biz and/or other state agencies. The total possible score will be 100 points. Application packages that score below 30 points will not be funded.

### **Evaluation Criteria**

Applications will be evaluated based on the following criteria.

1. Proposed scope of work
  - Proposed scope of work to expand services to businesses in the Center's service area – **40 points**
  - Proposed activities to provide 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. – **15 points**
2. Management strategy – **20 points**
3. Collaboration and leveraging of resources – **15 points**
4. Financial management capability – **10 points**

### **Proposed Scope of Work**

This section will explain how a Center will use the requested grant funding, including the specificity, measurability and ability of the applicant to document and achieve the goals and objectives identified in the application. The proposed scope of work must be consistent with the eligible uses identified in this Program Announcement. Also, this section should clearly describe if the proposed scope of work will provide 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.

Applications must also include the following proposed milestones to be achieved during the performance period:

- Proposed number of clients consulted
- Proposed number of clients trained

### **Management Strategy**

This section will describe the strategy that the applicant will utilize to meet the above-mentioned goals and objectives during the performance period. This should include the service delivery model underlying the proposed scope of work above and how the work will be coordinated and monitored. Applicants should also describe the experience and qualification of proposed staff and planned partnerships for service delivery.

### **Collaboration and Leveraging of Resources**

This section will describe how the applicant complements and leverages the work of other local, state, federal, non-profit or private small business technical assistance resource partners in their area, including institutions of higher education, financial institutions, chambers of commerce, trade and industry groups and associations that are committed to the growth and success of small business.

If an applicant is part of an organization with more than one small business technical assistance Center in the state, the applicant must explain how they currently work with other Centers in their organization to support statewide initiatives and/or share knowledge to improve the operational effectiveness of their Center and the broader organization.

### **Financial Management Capability**

This section will describe an applicant's ability to manage grant funding. Applicants from existing Centers must provide historical evidence that demonstrates their ability to operate their federally-funded program with strong fiscal controls. Applicants will be required to provide the following data for the past three years:

- Annual federal funding award
- Local match requirement (cash match and in-kind)
- Number of clients consulted and number of clients trained

Applicants should also highlight special recognitions for past performance.

Applicants from new Centers must provide the following documentation to satisfy this section:

- Letters of reference
- Key personnel resumes

### **Bonus Points**

Applicants that act as an authorized representative in a group application and agreement will receive up to ten (10) additional points in the scoring of their application.

### **Notice of Award**

Once the award amounts for all recipients have been determined, GO-Biz will email the authorized representative a Notice of Award. The Notice of Award will indicate the award amount along with instructions about next steps. 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. GO-Biz will instruct Centers to submit the requested information within five business days of receiving the Notice of Award.



## **Agreement**

Once milestones are finalized, the Program's funding will be awarded in an agreement between GO-Biz 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.

## **Amendments**

GO-Biz may amend agreements if necessary as a result of external factors, including changes in federal funding, Center closures or openings, Center staffing issues, noncompliance in carrying out the agreement or other agreement-related issues that may arise during the 18/19 program period.

In some cases, a Center may not be able to spend their 18/19 award in full. If needed, a portion of a Center's funding award may be redirected to other Centers in the same group agreement without an amendment if the change in funding results in no net change to the total award in the agreement. Funding redirections that result in no net change in the total award must be requested in writing by the authorized representative. GO-Biz will evaluate requests and provide written approval if allowed. Funding redirections that result in a change in the total award in an agreement will require an amendment.

If a recipient ceases to operate a federal small business technical assistance program, the state is obligated to compensate the recipient only for all allowable and unavoidable expenses reasonably incurred by the recipient in the performance of its work under the agreement as of the effective date of the terminating event. In addition, if a recipient has received notification from its federal funding partner that its cooperative agreement is scheduled for termination or that its operations are placed under a probationary status, the recipient must notify GO-Biz within 48 hours.

## **Reporting**

All recipients are required to submit performance reports and financial reports. Recipients will submit performance and financial reporting data to their authorized representative to review accuracy and completeness. The authorized representative is responsible for submitting final reports to GO-Biz once reviewed and approved. Reports will be submitted electronically to GO-Biz using an online reporting system. Reporting system instructions will be provided to recipients no later than one month before the end of the first quarter of the 18/19 grant period.

The reports or portions thereof provided by recipients may be made public.

GO-Biz may withhold payment if reports are not received or are deemed inadequate. Failure to report in a timely manner may also be weighed against future applications for grant funding from the same organization.

GO-Biz reserves the right to audit the information submitted in a performance report by requesting additional documentation, contacting clients served or verifying other information as necessary to verify the information contained in a performance report.

### **Performance Reports**

Recipients will submit performance reports quarterly during the initial grant year and semi-annually in years two through five. Performance reports must be submitted using the Performance Report Template according to the following schedule:

- During Year 1: Within 45 days of the completion of the first, second and third quarter and within 60 days of the completion of the fourth quarter. The first quarter report and invoice will be due on February 15, 2019.
- During Years 2-5: Within 60 days of the completion of each semi-annual and year-end reporting period.

GO-Biz reserves the right to increase reporting requirements at any time during the Program, if needed, to better track progress and actual results.

The performance reports will include but not be limited to the following information:

- Actual outcomes compared to proposed milestones for number of clients consulted and trained as identified in the agreement's scope of work.
- A detailed narrative description of how the funds awarded were used to expand services to underserved business groups, including women, minority and veteran-owned businesses, and to help businesses and entrepreneurs to start, expand, facilitate investment and create jobs in California, including in rural communities, low-wealth communities and disaster-impacted areas included in a state or federal emergency declaration or proclamation.
- Five success stories from clients
- Award amount and actual funding expended
- The size of businesses assisted; based on the number of employees at the time those businesses were assisted, as reported by the assisted businesses. Reporting shall be in categories of business size, as determined by GO-Biz.
- The city and county in which the businesses assisted were located.
- Industry sectors of the businesses assisted, as reported by the assisted businesses.

### **Financial Report**

Recipients will be required to submit quarterly financial reports to GO-Biz using a Financial Report Template within 45 days of the completion of the first three quarters and within 60 days of the completion of the fourth and final quarter of the 18/19 program period.

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

- Business consultant names
- Cost for client consulting, including hourly rates and number of hours worked
- Costs for client trainings
- Cost for research and marketing
- Reimbursement period

- Signature from Center director or designee affirming that the information is accurate

## **Record Keeping**

Recipients must maintain complete and accurate records and supporting documentation of sufficient detail to facilitate a thorough financial and/or programmatic and/or legal compliance audit or examination of their performance in the Program. Upon request, recipients must make these records available to GO-Biz, its agents and/or state investigators and provide them with unrestricted access to review and make copies of all products, materials and data, including those prepared or stored electronically. At a minimum, the records recipients must maintain for this Program include:

- The 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.
- Copies of checks, receipts, letters of donation and other supporting documentation for all local cash match contributions related to this Program.
- 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 your adherence to the legal requirements of this Program and the requirements established by your federal funding partner.

## **Program Monitoring and Reviews**

GO-Biz will monitor recipient grant agreement performance. This monitoring will include regular review of Performance and Financial Report data. GO-Biz may also 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. GO-Biz 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 thirty (30) days before the program review.

GO-Biz is not responsible for providing oversight of a Center's performance between program reviews. Moreover, GO-Biz does not accept liability for information not submitted in good faith by a Center for a program review.

## **Pre-Bid Webinar**

GO-Biz will host a pre-bid webinar on Thursday, July 26, 2018 at 11 AM to answer questions from interested Centers about the information contained in this Program Announcement. Centers may email their questions in advance of the webinar to [SBTAEP@gobiz.ca.gov](mailto:SBTAEP@gobiz.ca.gov) no later than Wednesday, July 25<sup>th</sup> at noon. Centers may register for the webinar at the link below:  
<https://attendee.gotowebinar.com/register/5950254955866367235>

## Timeline

- July 19, 2018: Program Announcement Released
- July 26, 2018: Pre-Bid Webinar at 11 AM
- August 24, 2018: Grant application deadline (applications must be submitted by email to SBTAEP@gobiz.ca.gov by 12:00 PM)
- September 3, 2018: Grant awards announced
- October 1, 2018: Grant program begins
- September 30, 2019: Grant program ends

## Application

### Instructions for Group Submissions

Group submissions will consist of the following two items:

1. A single consolidated application to GO-Biz that contains all the applications from the Centers in their group. Each Center will complete their application and provide it to their group's authorized representative to be aggregated into one consolidated application. Authorized representatives must also complete Section IV of the application form. The consolidated application must be submitted in a **single PDF**.
2. An Intake Sheet that lists each of the applicants in their group and their annual funding requests and proposed milestones. The Intake Sheet must be attached separately using the instructions on Page 14.

The authorized representative is responsible for ensuring the completeness of group application submittals.

### Instructions for Individual Submissions

Centers that operate individually may submit a group application under a single authorized representative as described above or submit an individual application directly to GO-Biz. The individual application containing Sections I, II and III must be submitted in a **single PDF**. An Intake Sheet must be attached separately using the instructions on Page 14.

### 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 section 6250 et. seq.). 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 6255 to the extent applicable.

## Intake Sheet

Authorized representatives must prepare an Intake Sheet summarizing the grant request and proposed milestones in the submission. Authorized representatives will submit a single Intake Sheet that includes this information for all of the Centers in their group submission. The Intake Sheet template is attached as an Excel file to the email containing this Program Announcement. The first row contains sample data to demonstrate how the cells should be populated.

Complete the Intake Sheet by providing the data requested in each column. **Do not alter the formatting or structure of the spreadsheet.**

The requested funding amount may not exceed the total federal award specified in a Center's contract with a federal funding partner, but in any event may not be less than twenty-five thousand dollars (\$25,000) per year. An unlimited portion of the grant award may be used for business consulting and training. Research and marketing are limited to 20% of the total annual grant award.

### Intake Sheet Submittal

Once the Intake Sheet is populated, complete the following steps:

- Rename the Excel file by selecting "Save As." Rename using the following naming convention: [Authorized Representative Name] Intake Form [insert date]. For example: "Norcal Lead Center Intake Form 7.10.18"
- Create a .CSV file copy by selecting "Save As" again. In the "Save As" dialogue box, click on "Save as Type" and select "CSV (Comma Delimited) \*.csv." and select "Save." Additional dialogue box prompts will appear. Select "OK" or "Yes" for each one to save the new .CSV file.

Submit the Intake Sheet to GO-Biz by attaching the Excel and .CSV versions of your intake sheet to the email containing your application.

### Section I Applicant Information

Legal Name of Center:	San Francisco Small Business Development Center (Hosted by the City and County of San Francisco's Office of Economic and Workforce Development Department)
Legal Name of Authorized Representative:	Angel J. Cardoz
Name of Federal Technical Assistance Program	Small Business Development Center (SBDC)
Federal Funding Partner	Small Business Administration (SBA)
Employer/Taxpayer Identification Number:	946000417
Organizational DUNS (if available):	

#### Center Contact Information

Mailing Address (insert physical address if different):			
Street	1 Dr. Carlton B. Goodlett Place, Room 448		
City	San Francisco	Zip Code	94102
County	San Francisco		
Website	www.sfsbdc.org		

#### Name and Contact Information of Center Director/Representative

Name and Title	Angel J. Cardoz, Director		
Telephone Number	415-533-8440	Email	angel.cardoz@sfgov.org

1. Do you have an active contract with a federal funding partner to operate a Federal Small Business Technical Assistance Center in California? Yes X No
2. If yes, what is the term of your active contract? 01/01/2018 to 12/31/2018
3. If no, do you have a Letter of Intent from a federal funding partner to operate a Federal Small Business Technical Assistance Center in California by September 30, 2019?  
Yes      No

As the duly authorized Center Director/Representative described above, I hereby certify that the Center budget during the 18/19 program period will contain federal grant dollars in the amount of \$225,000 from the federal funding partner identified above and local cash match dollars in the amount of \$ 332,332.

Center Director/Representative Signature \_\_\_\_\_  
Date: 8/10/2018

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

## Section II Evaluation Criteria

The information requested in this section applies directly to the evaluation criteria that will be used to competitively score and rank each application. Refer to the Program Announcement for details on each of the criteria and application review process. **Responses to questions in Section II must be succinct and answered fully in the space allowed.**

### Proposed Scope of Work

1. Describe how your Center proposes to use the requested grant funding. Describe major objectives and any new or ongoing special projects or activities that the Program's grant funding would support and explain how your Center will measure progress and outcomes.

This section should also clearly describe if the proposed scope of work will provide 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. **Limit responses to 750 words.**

### Center Overview

The San Francisco Small Business Development Center ("SFSBDC") is hosted by the City of San Francisco's Office of Economic and Workforce Development (OEWD) since January of 2014; however, the program has been serving the community for over 20 years. In Fiscal Year 2017-18, the SFSBDC helped small business owners access \$12,916,072 in capital, of which \$5,608,072.67 were loans. This amount represents more than double the amount of capital accessed four years ago. The SFSBDC's success in helping small business owners access funding can be attributed to Go Biz funding, the program's outreach strategy, a team of specialized advisors, and SBDC's partnership.

### Description of Market Needs

The City of San Francisco has experienced major changes since the great recession. Real estate is at an all-time high, the tech boom has transformed the local economy, and unemployment is at its lowest point since the year 2000; unfortunately, economic forces have also threaten the existence of many small businesses operating in the City, as many business owners cannot afford the rising cost of rent, cost of labor, and raw material. Moreover, Small businesses face technical, financial, regulatory and market driven challenges that stagnate business growth, or worse, force micro-enterprises out of business. Socially and economically disadvantaged businesses are particularly vulnerable.

Technical challenges include an inappropriate level of understanding and/or improper execution of key business functions (i.e. marketing, financial management, and operations). It also includes inadequate strategy, informal organization management, and a tendency towards minimal utilization of available technologies. As a result, small enterprises find it difficult to compete against large competitors, who have the knowledge, resources, and capacity to fulfill these technical requirements.

In addition to technical knowhow, business owners need adequate resources to operate profitable businesses; resources include, but are not limited to: capital, information, and networks. Access to capital has long been considered pivotal to the success of a small business; while this continues to be the case, informed and responsible borrowing is equally important. Therefore, business owner need help navigating an assortment of lending products, pairing the lending product to its proper use, and understanding the cash flow implications of borrowing. Lastly, in addition to lenders, business owners need access to networks that can support the stabilization and growth of their small business. Networks include: business professionals, support organizations, and strategic partners.

### **Expansion Initiative**

In an effort to address these issues, and in the spirit of expanding services, the SF SBDC will not only offer consulting and training to a greater number of businesses, but it will also work closely with the Lead Center to lead the effort and help drive the regional expansion of online training; including webinars, live streaming of in person workshops, online counseling sessions, and the creation of an online library featuring pre-recorded training sessions.

Not only do small businesses face the technical challenges mentioned above, but they also face an accessibility problem; be it geographical restrictions, which is the case in rural areas, transportation problems (traffic and parking are a big issue in Cities across the Bay Area), or simply time impediments, which we know is the a major reason why some established businesses cannot take advantage of our services. Online training and webinars will help mitigate this issue by reducing the time and distance entrepreneurs need to travel to access information.

In response to the resource gap, the SF SBDC will foster and expand relationships across the City; in particular, the SF SBDC will nurture and formalize relationships with organizations that compliment SBDC services to address the City's most immediate needs. For example, we understand that there is a tremendous need in San Francisco for real estate brokerage and lease negotiation services to help keep small businesses from being displaced as a result of the rising cost of rent. SF SBDC will work closely with real estate brokerage agencies and local law firms to establish a cross referral network and quick response task force to help keep owners in business.

### **Enhance Services**

Additional funding would help the SF SBDC enhance services to and serve a greater number of women, minority, and low-wealth entrepreneurs. For instance, the San Francisco SBDC will partners with women, minority, and low-wealth serving local institutions to provide QuickBooks training. Not only would this help address the disproportionate number of small businesses that do not maintain accurate financial statements, but it would also reduce the accessibility gap, as most QuickBooks Training Clinics are unaffordable for some of these groups.

### **Metrics**



Milestone	GOBIZ
Total Client Hours	1452.5
Total Clients	248.5
New Businesses Started	20
Jobs Created	72
Jobs Retained	67.5
Changed in Sales	3000024
Loans	3495959
Equity	3495959
Trainings	24

2. If your Center anticipates spending on research and marketing, justify the need and how the funds will be used. (Research and marketing are limited to 20% of the total annual grant award. Centers may spend the full award on business consulting and training.) **Limit responses to 400 words.**

### Marketing

Our Center is taking part in the Norcal SBDC regional marketing program that will be rolled out by the Lead Center. As a region, we got together and came to agreement that having a centralized approach to marketing would increase the impact and make our funds go farther. The marketing program includes print collateral, advertisements, online marketing tools, etc. With one common message, look and feel, and a common graphic designer, we anticipate a strong set of tools that reinforce each other. Each center will get to pick and choose which marketing elements best fit their center, and pay for these elements for the local market. We are particularly focused on creating marketing materials that focus on the ethnic communities in our market: Hispanic, Native American, Korean, Vietnamese, Chinese. All marketing materials will be translated into the appropriate languages. We will also make every effort to place marketing items in culturally appropriate media and location.

### Research

A percentage of the total funding will be invested in research. In particular, we'll work with OEWD, and leverage local funding, to conduct an assessment of small business located in San Francisco to better understand current business needs, challenges faced by existing businesses, and explore solutions for identified problems. Additionally, and of special interest, the assessment will aim to understand the specific problems faced by women, minority, and economically disadvantaged business owners. The project will inform and help us better position our programs by suggesting services to increase, reduce, eliminate, or add.

3. Provide a plan of action below indicating how you will draw down all of the federal funds available during the 18/19 program period using local cash match. If your Center did not fully draw down federal funds previously, address how your action plan will prevent local under-match going forward. **Limit responses to 400 words.**

The San Francisco SBDC is an existing program that has been federally funded since 2014. We have never had an issue drawing down federal funds using our local cash match. The San Francisco SBDC committed our cash match up front for the year, so it is identified and set aside as federal match—not to be spent for other purposes. As we go through the year, our internal fiscal processes split expenses such that we are spending federal funds and cash match funds in relation to each other. Also, we are required by contract with our Lead Center to keep our cash match spending equal to our federal spending. We have zero cash match that we have to still raise for the year.

#### **Management Strategy**

4. Describe the management strategy that will be utilized to achieve the proposed milestones (as shown on the Intake Sheet) during the performance period. **Limit responses to 400 words.**

#### **Service Delivery Model**

All of our efforts under the TAEP funding will be based on the counseling and training model that is well established at our center. Part of a national service delivery program, we focus on counseling and training that emphasize achieving measurable results for every client served. We have 18 consultants who provide training and consulting at the local level and also take advantage of the regional counseling program offered by the Lead Center which brings in additional subject experts to our clients.

#### **Coordination and Monitoring**

We are able to serve so many clients because we have a systemized approach to the client process. All clients receive a Scope of Work that identified positive outcomes to be achieved within a specific period of time. Our Intake Specialist reviews Scopes of Work on a monthly basis and is in communication with the assigned consultants about each client's progress. We also have a robust database that helps us to monitor progress of clients. NeoSerra records every client engagement, keeps track of our training attendees, sends surveys of satisfaction to clients, and provides monthly management reports to our Center Director.

#### **Staff Experience**

The SF SBDC team will be comprised of a Center Director and three Business Case Managers. While the center is working on hiring two team members, the existing Business Case Manager, Lawrence Liu, and the Center Director, each have more than a decade of experience in economic development and small business consulting. Additionally, the SFSBDC works with a

team of 18 business consultants with over a century of combined small business experience. Other areas of expertise include, but are not limited to: financial analysis, loan packaging, forecasting, business planning, capital structuring, lender pairing, marketing, sales, technology, accounting, strategy, social media, business scaling, international trade, leadership, and industry specific expertise.

### **Partners in Delivery**

Lawyers' Committee for Civil Rights (LCCR) has served the San Francisco Bay Area for 48 years. LCCR has performed business sustainability work since 1997 by providing direct legal services to entrepreneurs. Many of the businesses it serves are among the mom-and-pop shops most vulnerable to displacement, including food businesses, retail shops, and cleaning services.

Another partner is Working Solutions (WS,) whose mission is to provide microbusinesses with capital resources to grow their business. WS funds entrepreneurs with loans from \$5,000 to \$50,000 in all 9 Bay Area Counties and provides long-term coaching support.

### **Collaboration and Leveraging of Resources**

5. Indicate how your Center complements and leverages the work of other local, state, federal, non-profit or private small business technical assistance resource partners in their area, including institutions of higher education, financial institutions, chambers of commerce, trade and industry groups and associations that are committed to the growth and success of small business. **Limit responses to 250 words.**

The SFSBDC believes in collaborating with other community organizations to help solve the myriad of challenges faced by small business owners; as such, the center maintains and actively seeks out new partnerships with lenders, chambers, city officials, technical assistance providers, and other business professionals. Maintaining a strong network helps the SFSBDC refer clients to proper sources of funding, or to other partner organization for specific advice; such as, legal support, real estate assistance, procurement, and exporting advice. More specifically, some partners include: The San Francisco Chamber of Commerce, the Small Business Administration District, the Office of Economic and Workforce Development, Northeast Community Federal Credit Union, Mainstreet Launch, Kiva Zip, CDC Small Business Finance, Office of Small Business, Mission Economic Development Agency, Renaissance Entrepreneurship Center, SCORE, and Legal Services for Entrepreneurs,

In May 2018, the center partnered with the SBA, the Office of Small Business, San Francisco Chamber of Commerce, the University of San Francisco, lenders, and other small business technical assistance providers to put together the 2018 San Francisco Small Business Week, the largest City wide event dedicated to small business owners in the nation. The event featured a week-long series of events; including, a small business resource fair, sidewalk sales, networking events, a small business awards ceremony, and over 40 individual workshops.



Yes, the San Francisco Small Business Development Center was recognized on March 12<sup>th</sup>, 2018 by the San Francisco Small Business Commission for our “commitment to the entrepreneurial spirit of the small business community by supporting them with direct business services for the benefit of an inclusive and vibrant San Francisco. Please see attachment.

10. For new centers: Attach letters of recommendation and resumes of key Center personnel.

### **Bonus Points Section**

Is your Center acting as an Authorized Representative to submit a group application and administer a group agreement? Yes \_\_\_\_\_ No \_\_\_\_\_

### **Section III Attachments (Optional)**

Centers may attach the following documents to support their application:

1. Letters of Support
2. Letters of Intent from federal funding partners

**Do not** include the following:

1. Additional sheets to answer the narrative questions in Section II.
2. Organizational charts
3. Marketing sheets

**Section IV (For Authorized Representatives of Group Submissions Only)**

1. Has your organization had an outstanding and unresolved material deficiency reported under the requirements of the Single Audit Act or OMB Circular A-133 within the past five years? Yes \_\_\_\_\_ No \_\_\_\_\_
2. Provide the funding information in the table below:

Total Grant Request in Consolidated Application	
Organization's Current Cash Balance	
<b>Cash Balance Ratio</b>	<b>#DIV/0!</b>

**Liedl, Fred (ECN)**

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**From:** Cardoz, Angel (ECN)  
**Sent:** Tuesday, September 25, 2018 2:08 PM  
**To:** Liedl, Fred (ECN)  
**Subject:** FW: TAEP 18-19 Award - San Francisco SBDC  
**Attachments:** SB TAEP Program Announcement FINAL\_San Francisco.DOCX

Hi Fred,

Great news! While not official, because we haven't received the final contract, it looks like we'll be awarded a new grant from GOBIZ (see below). I'm sending you the proposal we submitted to GOBIZ in the attachment. This grant will, in short, expand the services we already offer, allowing us to 1) serve a greater number of businesses, 2) dive in deeper with clients, and 3) explore new opportunities that were previously unavailable to us due to limited funding (such as online training). Finally, there's more flexibility with this award as it is not limited to access to capital services; also, we'll have some ability to roll over the funding into future years (if need be).

Additionally, our previous GOBIZ contract was increased to \$62,500. Aside from the grant amount, there will be no other changes to this contract.

Again, we are waiting for the financial contracts, but it looks like the total will be approximately \$266,417.50.

I know we'll need to introduce this for Supervisor's approval. Please advise on next steps, or let me know if you have any questions. We can also meet if you would like to discuss in detail.

Thanks,

**Angel J. Cardoz**

Director  
San Francisco Small Business Development Center  
1 Dr. Carlton B. Goodlett Place, Suite 110  
San Francisco, CA 94102  
415.554.6489  
[www.sfsbdc.org](http://www.sfsbdc.org)

Program of:

Office of Economic and Workforce Development  
City and County of San Francisco  
[www.oewd.org](http://www.oewd.org)

**From:** Serena G Maybee-Baltzer [mailto:Serena.Maybee@humboldt.edu]  
**Sent:** Thursday, September 20, 2018 10:30 AM  
**To:** Cardoz, Angel (ECN)

Cc: Kristin Johnson  
Subject: TAEP 18-19 Award - San Francisco SBDC

Good Morning Angel,

We have submitted a proposal for the state TAEP 18-19 award, and as you are aware, your organization intends to participate as a sub-recipient to the anticipated award.

The purpose of this email is to indicate that Humboldt State Sponsored Programs Foundation intends to enter into a contract with your host for the delivery of services pursuant to the Award, in the amount listed below. You may continue to incur costs for normal business activities pending receipt of your contract, not to exceed this amount.

The new budget cycle will be for the period October 1, 2018 through September 30, 2019. Please be advised that **the final contract may reflect changes to the below referenced amount:**

Applicant Name	18/19 Grant Request	18/19 Amount Awarded (90.63%)
San Francisco SBDC	\$ 225,000.00	\$ 203,917.50

Regards,

--  
*Serena Maybee-Baltzer*

Administrative Support Assistant  
Northern California Region SBDC Lead Center  
House 71  
1 Harpst St  
Arcata Ca 95521  
PH: 707-826-3919  
F: 707-826-3912



Print Form

# Introduction Form

By a Member of the Board of Supervisors or the Mayor

BOARD OF SUPERVISORS  
SAN FRANCISCO

2018 NOV 27 AM 11:49

BY AK Time stamp  
or meeting date

I hereby submit the following item for introduction (select only one):

- 1. For reference to Committee. (An Ordinance, Resolution, Motion, or Charter Amendment)
- 2. Request for next printed agenda Without Reference to Committee.
- 3. Request for hearing on a subject matter at Committee.
- 4. Request for letter beginning "Supervisor [ ] inquires"
- 5. City Attorney request.
- 6. Call File No. [ ] from Committee.
- 7. Budget Analyst request (attach written motion).
- 8. Substitute Legislation File No. [ ]
- 9. Reactivate File No. [ ]
- 10. Question(s) submitted for Mayoral Appearance before the BOS on [ ]

Please check the appropriate boxes. The proposed legislation should be forwarded to the following:

- Small Business Commission     Youth Commission     Ethics Commission
- Planning Commission     Building Inspection Commission

Note: For the Imperative Agenda (a resolution not on the printed agenda), use a Imperative Form.

Sponsor(s):

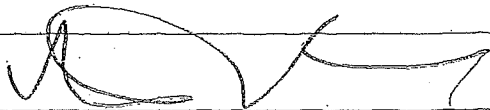
Brown

Subject:

Accept & Expend \$203k for technical assistance for the small businesses development center (SBDC) through OEWD

The text is listed below or attached:

Attached.

Signature of Sponsoring Supervisor: 

For Clerk's Use Only:

