



California Office of the
Small Business Advocate
(CaOSBA)



Small Business

Entrepreneurs

Startups





Within the Governor's
Office of Business and
Economic Development

California's SSBCI Technical Assistance for Capital Readiness Program

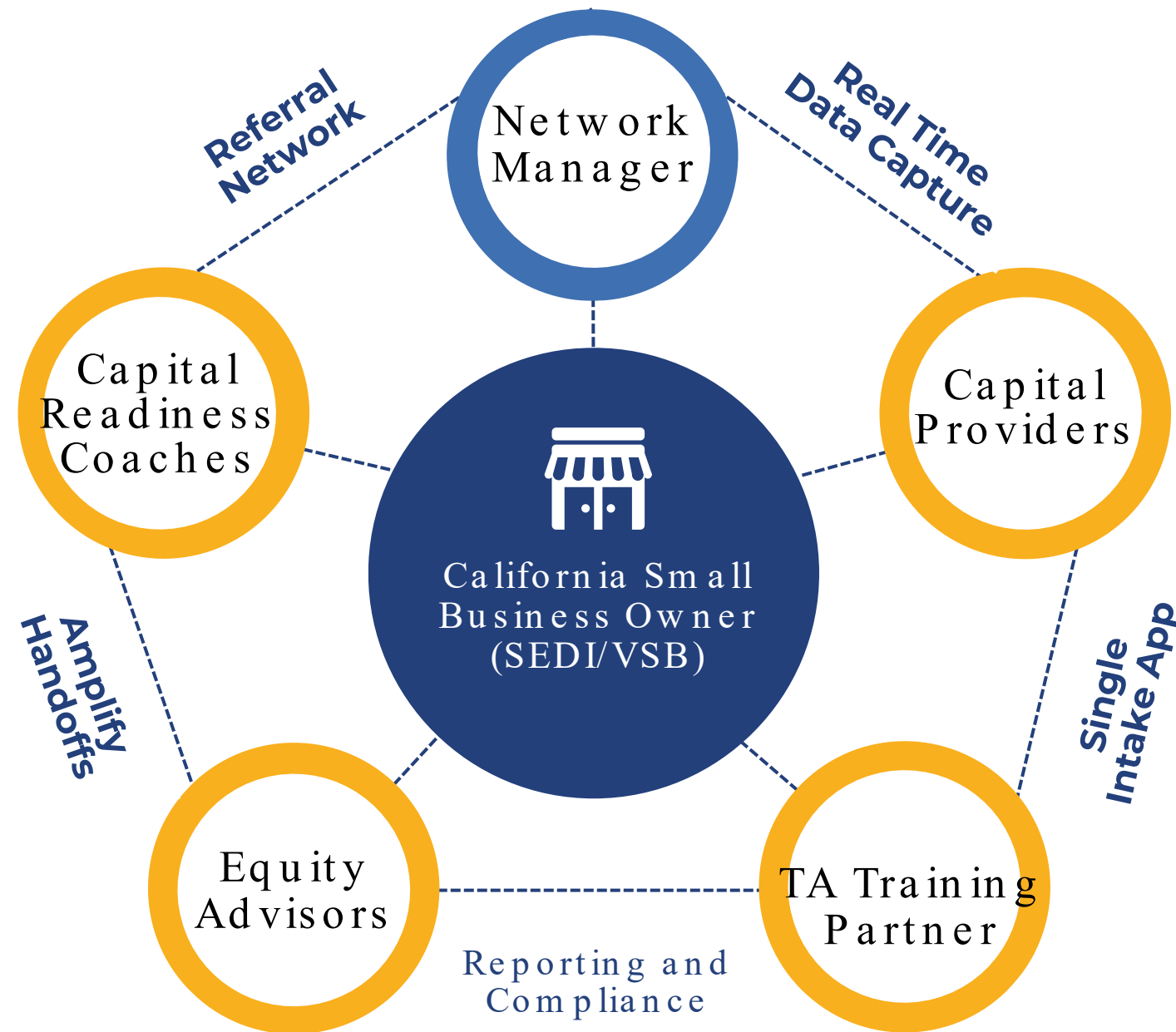
CalOSBA Director Tara Lynn Gray

February 13, 2024





Technical Assistance for Capital Readiness Program



Capital Programs



Trusted Connector Network Using Innovative Processes and Technology to Solve Capital Access Barriers for Small Businesses

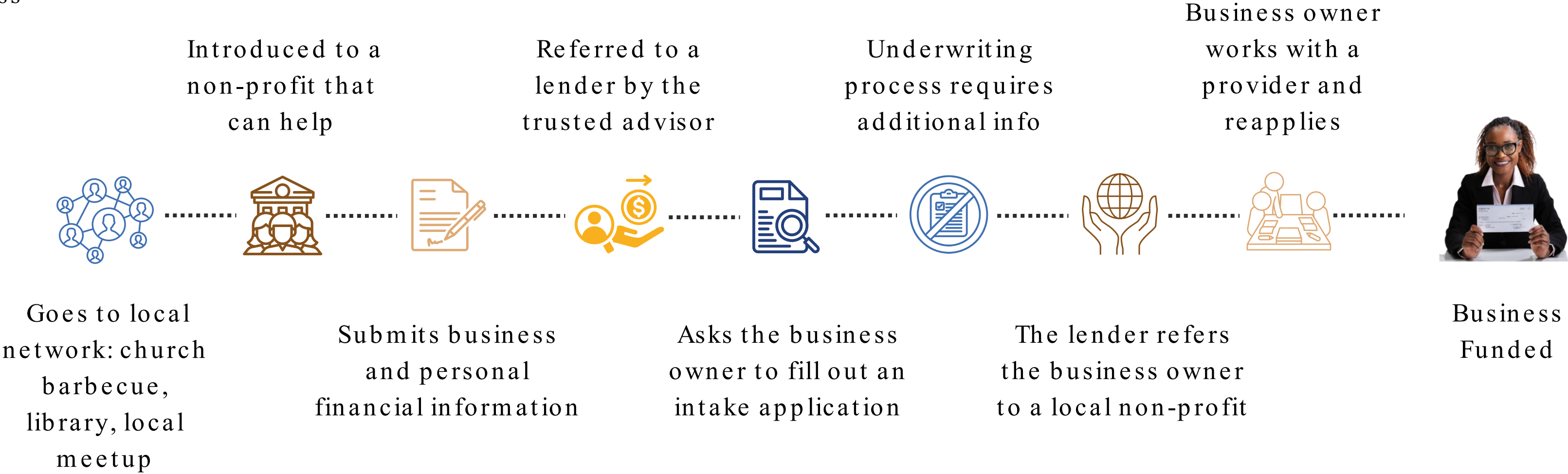
Capital Readiness Network Manager	<p>Will provide TA services, outreach and engagement. Can reach broad audiences across the state to market the technical assistance program to eligible beneficiaries. Will provide guidance to other subrecipients on helping beneficiaries navigate the statewide ecosystem.</p>	<p><i>1 award</i></p>
Capital Readiness Coaches	<p>Federally funded, networked organizations with more than 5 years of experience providing third-party capital infusion TA to small businesses and entrepreneurs. Will provide pre-capital and post-capital TA to eligible beneficiaries applying for, preparing to apply for, or having previously applied for SSBCI capital programs or another federal or other jurisdiction small business program.</p>	<p><i>7 awards</i></p>
Equity Advisors	<p>Organizations specialized in technical assistance to target populations as defined by US Treasury. Will ensure culturally competent, language accessible TA services. Will work with the Network Manager to support outreach and engagement as well as direct TA to their target populations.</p>	<p><i>12 awards</i></p>
Capital Providers	<p>Community Development Financial Institutions (CDFIs) and mission-based lenders that operate pre-capital and post-capital TA. Expected to collaborate with the other funding categories and collaborate with the Network Manager.</p>	<p><i>12 awards</i></p>
Technical Assistance Training Partners	<p>Will provide other subrecipients with training and best practices for building TA capacity to include: application processes, financial assessment, pre-loan packaging and TA, asset management systems, and general policies and procedures.</p>	<p><i>1 award</i></p>



Journey of the Small Business Through the Ecosystem



A small business owner seeks capital:



The data platform brings the providers together to automate data sharing and simplify the journey for the small business owner



Reporting and Compliance for US Treasury



Phase	Reports	Submission Deadlines
Period of Performance	<p>Form SF-425</p> <p>For TA Grants \$250,000 or less, cumulative information on administrative costs.</p>	<p>Semiannually on April 30 (cumulative information through March 31) and October 31 (cumulative information through September 30).</p>
Period of Performance	<p>Annual TA Project Progress and Outcomes Report</p>	<p>Annually, for the period ending March 31 (due April 30).</p>
Expiration of the Period of Performance, Before Award Closeout	<p>Final TA Project Progress and Outcomes Report and final Form SF-425</p>	<p>One time report due no later than 120 calendar days after the end date of the award period of performance.</p>



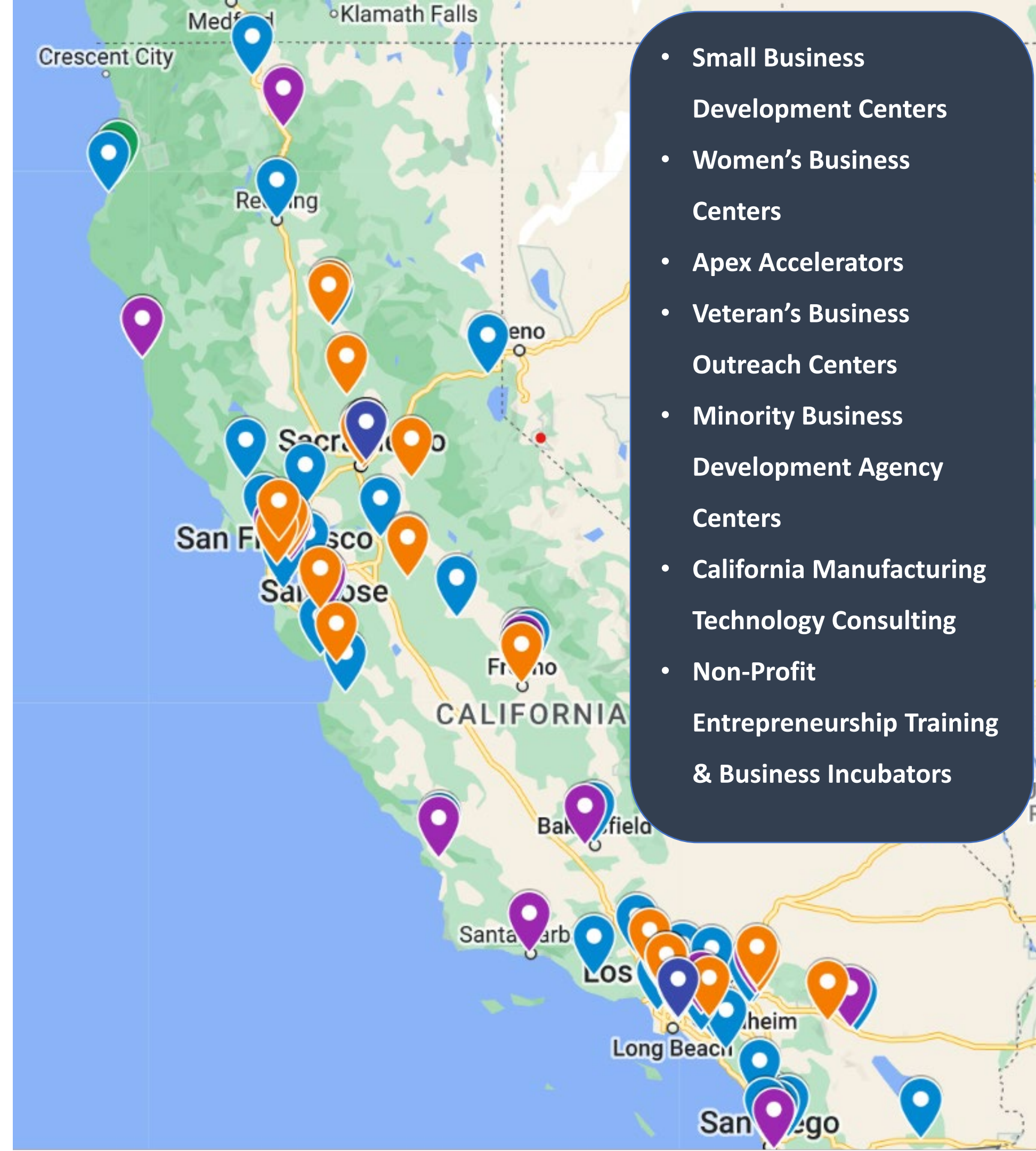
Reporting and Compliance for US Treasury



Category of Information	Reporting Frequency
TA Provider Data	Data only must be reported one time for each TA provider. If there are updates to previously reported information, the recipient may submit updates to those elements, along with a statement that all other data remains unchanged.
Eligible Beneficiary Data (if applicable)	Data must be reported once for each business that receives TA services (except for attendees as a classroom-style TA services event). If a business receives separate services in separate months, each service should be reported as individual (ex. "TA Service 1" and "TA Service 2"). If a business receives a TA service that spans the annual reporting periods, the continuing services may be reported in a subsequent annual reporting period, but should specify that they are ongoing in the "Brief Description" field for the corresponding TA service.
Classroom-Style TA Services (if applicable)	Data must be reported once for each classroom-style TA event.

Statewide Small Business Support Network

- \$23 million in permanent annual funding for the CalOSBA Technical Assistance Program - 107 providers statewide providing service in more than 40 languages
- No-cost/low-cost entrepreneurial training and 1:1 counseling/mentoring for guidance on the full spectrum of business operations and financing
- Find an interactive statewide map of Small Business Centers [here](#)



- Small Business Development Centers
- Women's Business Centers
- Apex Accelerators
- Veteran's Business Outreach Centers
- Minority Business Development Agency Centers
- California Manufacturing Technology Consulting
- Non-Profit Entrepreneurship Training & Business Incubators

TAP & CIP Loan Pipeline 2018-2023

TAP & CIP Loan Pipelines	CIP Amount of Loans	TAP Amount of Loans	Combined Amount of Loans
Statewide SBDC Reporting Totals	\$1,043,921,258.62	\$1,486,255,912.37	\$2,530,177,170.99

126,486 Unique Clients Counseled

126,486 Unique Clients Counseled	Jan 1 2019 – August 14 2023
WOMEN	56,093
PEOPLE OF COLOR	60,408
WOMEN OF COLOR	31,242
HISPANIC	30,117
ASIAN	12,611
BLACK OR AFRICAN-AMERICAN	16,119
VETERAN	6,194
LOW-WEALTH (Based on City/County)	16,877
RURAL	14,541

#SupportingSmallStrengthensUsAll

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