

**Request for 2024 Grant Proposals
Small Business Technical Assistance Program**

Address: Washington Economic Development Finance Authority
1000 Second Avenue, #2700
Seattle, WA 98104

Contact Person: Molly Abbey, molly.abbey@wshfc.org

Please submit all questions and inquiries via email to the contact person listed above.

Schedule:

RFP Release Date:	January 31, 2024
Deadline for Proposals:	March 1, 2024
Information Session:	February 22, 2024 @ 11am Zoom Meeting ID: 833 4965 7637 Passcode: 722318 Link to meeting
Submit application via email to molly.abbey@wshfc.org	
Grants will be awarded:	March 27, 2024 (subject to change) Grant program contingent on funding allocation

Request for 2024 Grant Proposals
Washington Economic Development Finance Authority
Small Business Technical Assistance Program

ANNOUNCEMENT

The Washington Economic Development Finance Authority (WEDFA) is pleased to announce that it is accepting grant applications for participation in its Small Business Technical Assistance pilot program. WEDFA is seeking proposals for technical assistance to assist underserved small businesses and entrepreneurs in five counties in Washington: Adams, Ferry, Okanogan, Pend Oreille and Yakima (the “Service Area”). WEDFA will accept applications from not-for-profit and governmental organizations that currently provide technical assistance and training programs to small businesses and start-ups. These grants are intended to supplement the organization’s current and anticipated funding and not to be the exclusive funding support. Applicants will be required to articulate how funds from other sources are being used and how funding from the Small Business Technical Assistance Program will not be duplicative.

Grant proposals shall identify specific counseling and training programs that assist these small businesses and entrepreneurs to:

- Start new businesses;
- Secure new or increased financing for growth;
- Achieve stability and viability;
- Create/retain jobs;
- Increase the economic vitality of the neighborhood, community, or region.

CONSIDERATIONS

Favorable consideration will be given to:

1. Proposed programs that advance:
 - New business startups;
 - Business expansion;
 - Business stabilization;
 - Increased access to financing; and
 - Other measurable economic growth improvements.
2. Multilingual Program offerings are highly desirable, especially those including Spanish; proposals intending to serve in Yakima, Adams or Okanogan Counties that include significant Spanish language outreach and Spanish-speaking community support will have higher chances of being selected.
3. Proposals which seek to expand digital literacy for small businesses and/or otherwise mitigate the negative impact of limited digital resources in the Service Area for small businesses.
4. Proposals which seek to expand financial literacy in the service area.
5. Proposals which include service in very rural areas.
6. Applicants who are members of the Small Business Resiliency Network established by the

Washington State Department of Commerce or organizations who are Associate Development Organizations affiliated with the Washington State Department of Commerce.

7. Proposed programs which include support and/or resources for some or all of the following specific needs:

- Assistance directed to childcare services;
- Low or no cost legal services for very small businesses;
- Translation and interpretation services, particularly Spanish/English;
- Grant writing assistance;
- Grant management assistance

Proposed programs shall include individual and/or group counseling, training programs, loan packaging services, or direct technical assistance.

Grant proposals should define the communities they serve, the strategy and marketing plan to reach these communities, current and planned programs, and performance benchmarks and metrics. As these grant proceeds can only supplement budgets, the requesting organization must have additional funding sources. Organizations are required to list existing partners and other public and/or private funding sources.

PURPOSE OF GRANT

The purpose of the Small Business Technical Assistance Program is to ensure that start-ups and existing businesses in the Service Area have the best chances to contribute to future economic and entrepreneurial opportunity in the Service Area. The program is designed to complement and enhance traditional public and private small business assistance networks by providing technical assistance or training programs for under-resourced and disadvantaged businesses with 30 or fewer employees. The program seeks to facilitate economic stability and viability for small businesses by helping to improve their ability to navigate business operations, including ability to secure private and public financing, business grants, and micro-loans.

Grant funds are not intended to provide services geared toward prospective ventures. Therefore, at least 85% of the clients served by the grantee organization with these funds shall be for clients who are already operating an existing business or who are within twelve months of opening a new business.

Counseling and training programs should be designed to aid small business owners in stabilizing and growing their businesses in measurable ways through intensive individual counseling/coaching, selective group training and assistance with obtaining loans or loan guarantees. Proposals offering multilingual (particularly Spanish speaking) programming are highly desirable.

APPLICATION

GRANT AMOUNTS AND DISTRIBUTION

- Funds available for this grant program in 2025 are contingent on funding allocation.
- Proposals will not exceed \$120,000.

STAGED FUNDING

WEDFA expects release of grant money to technical assistance providers will be based on initial requirements and subsequently on completed projects and accomplishments. Staging may include:

1. Early assistance with out-of-pocket ramp-up costs;
2. One or more stages for completed deliverables;
3. Final payment to include payment bonus for extraordinary economic development success.

ELIGIBILITY

Each of the following shall automatically be treated as qualified to apply for this grant funding:

1. *Associate Development Organizations in the 5-county Service Area recognized as such by the Washington State Department of Commerce (“Commerce”)*
2. *Each current member of Commerce’s Small Business Resiliency Network actively providing services in the 5-county Service Area*
3. *Each federally-recognized tribe with reservation territory in the 5-county Service Area*
4. *Each local government at least partly within the 5-county Service Area*

All other entities must meet the following criteria:

- 1) Be duly organized under Washington Chapter 24.03A RCW and incorporated as such by the Secretary of State for the State of Washington.
- 2) Hold a tax-exempt status under the United States Internal Revenue Code.
- 3) Licensed to do business in Washington state as of the contract start date.
- 4) Demonstrate an ability to develop and manage programs as reflected in the effective functioning of the Board of Directors, operations managed by adequate staff, involvement of and responsiveness to community residents and constituents.
- 5) Demonstrated organizational capacity to serve as a contractor providing services and assistance to all or part of the 5-county Service Area.
- 6) Provide evidence of fiscal stability, as documented in prepared financial statements(audited or reviewed are preferred) .

INELIGIBLE ACTIVITIES

Ineligible for funding under the Small Business Technical Assistance Program are projects or activities which:

- Are for the private profit or benefit of an individual or a select group of individuals.
- Involve the replication of services already provided under the auspices of a federal or state agency.

- Are primarily intended to serve prospective business ventures, defined as individuals who are more than twelve months from beginning to operate a business.
- Do not have the capacity to measure status outcomes relating to business stabilization and growth.

WEDFA reserves the right to reject any and all submitted proposals and any or all parts of a proposed activity.

REVIEWERS

Small Business Technical Assistance Grants will be awarded by the Washington Economic Development Finance Authority. A review panel will review and recommend proposals for approval and will include individuals not affiliated with WEDFA.

GRANT AGREEMENT

Grants will be awarded in March 2024. Dates are subject to change. Upon receipt by WEDFA, all proposals become public documents, to the extent required under the public records law. If a proposal is approved for funding, the proposal and the attached work plan and budget shall become the basis for WEDFA's grant award negotiations with the applicant organization to determine the precise project scope, budget and use of funds. All documents ultimately negotiated and incorporated into the Grant Agreement will be added as attachments, and references to all attachments will be written into the agreement form prior to the execution by the partner.

Grant Agreements will contain a requirement that grantee entities release names and contact information of clients served under the grant to WEDFA for the purposes of outcomes verification and other legitimate uses as defined by WEDFA. Grantees also agree to cooperate with any third-party evaluation that WEDFA may decide to undertake of this program.

Reporting requirements, including deadlines for submission, will also be contained in the Grant Agreement.

USE OF FUNDS – LIMITATION OF ADMINISTRATION COSTS

Administrative costs associated with the Small Business Technical Assistance Program may not exceed 10% of the proposed budget.

SELECTION CRITERIA

A review committee will evaluate proposals, seeking those that most completely meet the established criteria accompanied by credible, historic outcome metrics and will make recommendations to the WEDFA Board. All awards are subject to final approval by the WEDFA Board.

Proposals must demonstrate the ability to meet the following small business assistance priorities in order to receive funding:

- 1) Provide a strategy for addressing small business needs in your target market.
- 2) Provide a minimum of 5 hours of direct services to small business clients from target populations.

- 3) Implement coordinated services that magnify the delivery of services in efficient, economical, and effective ways. Preference will be given to entities that can demonstrate strong collaborations with micro-lenders or whose funding will support micro-loan fund clients.
- 4) Enhance and complement government service providers, such as Commerce and the Small Business Development Centers.
- 5) Collect and report on specific outcomes achieved that can be attributed to services provided in terms of business starts, financing made or facilitated, businesses stabilized, jobs created or retained, and/or revenue growth.
- 6) Receive a letter or resolution of approval showing support for the proposal from the county in which the proposal is based. Such an approving letter or resolution may come from the County's Board of Commissioners or the local Associate Development Organization. WEDFA will initiate the request for the approving letter or resolution and will work with the grant recipient if additional information is requested.

A review committee will evaluate proposals, seeking those that most completely meet the established criteria accompanied by credible, historic outcome metrics.

SUBMISSION GUIDELINES

Any materials submitted will become the property of WEDFA and must be made available for reproduction and may not be copyrighted. Application submissions will be accepted via email to molly.abbey@wshfc.org.

An application will not be considered if it fails to meet the minimum requirements. The requirements are as follows:

1. Must be submitted via email to molly.abbey@wshfc.org by midnight on March 1, 2024.
2. Completed all application components:
 - a. Narrative questions (1-8)
 - b. Attach all documents identified (1-9)

APPLICATION NARRATIVE QUESTIONS

Overview

1. Describe the mission of the applicant organization, the community it serves, and its outreach strategy. Describe the various ways by which the applicant organization first engages clients, triages the services they require, and refers them to other service providers if unable to assist them. Also describe how the applicant organization moves clients forward once they have received all available services.

Business Community Challenges

2. Based on the applicant’s client profile, describe the issues they face with business development, securing financing and achieving financial viability. Describe the organization’s technical assistance role, training and counseling programs, or other initiatives with the small business community that create, maintain, and grow the business’s financial viability, ability to obtain private or public financing and/or create jobs.

Staff Qualifications

3. Describe the professional qualifications of the small business assistance professionals on staff and consultants regularly used for client referrals.

Partnerships and Collaboratives

4. Detail partnerships and collaborations that support the applicant’s program, including but not limited to, how the applicant partners with their regional SBDC and other providers, including legal, accounting, tax professionals, marketing specialists, private and government lenders, and micro-lenders. Please use the Partners Form below to provide this information.

Partnering Organization Type	Name of Partnering Organization	Description of Collaboration
Regional Small Business Development Center		
Legal Aid		
Tax Professionals		
Marketing Specialists		
Private Government Lenders		
CDFI or CDCs Lenders		
Municipalities		
State Government Departments		

Specific Grant Program & Activities

5. Describe the proposed program and its related activities. The proposal must include a program description that is reflected in the work plan, and which clearly explains the proposed budget.

Activity	Outcome	Staff involved in this activity from Lead Organization	Staff involved in this activity from Partner organization(s) (joint apps)	Consultant(s) involved in this activity (if applicable)

Budget

6. Describe how Small Business Assistance Program grant funding will be used to support the proposed program. SBTA funds are intended to supplement current and anticipated funding and not to be the primary funding support. *See Appendix A for Organizational Budget Form.*

Data Collection and Outcome Measures Plan

7. Outline how the applicant expects to define outcomes relating to business start-ups, stabilization and expansion, what indicators will be used to determine outcomes, and the methodology for collecting and reporting on performance, demographic, and outcome data. *See Sample Performance Data & Outcomes Form.*

Other Considerations

8. Describe how Small Business Technical Assistance Program grant funding will be used to support other priorities described above under “Considerations.”

REQUIRED APPLICATION DOCUMENTS (ATTACHMENTS)

1. Proposed Organizational Budget Form (See Appendix A)
2. Resumes of key personnel delivering direct service
3. Current Certificate of Existence from the Washington Secretary of the State
4. Current list of members of governing body, such as Board of Directors
5. U.S. IRS Tax Exempt Certification/Determination Letter
6. Most recent Financial Statement (audited or reviewed are preferred)
7. Current fiscal year-to-date organizational Financial Statement: Income & Expense/Balance Sheet

PROGRAM REPORTING

WEDFA will require a final report on performance, demographic, and outcome data. Reporting templates will be provided as a way to help gather data, and all reports and files must be submitted via email to WEDFA. Deadlines for submitting these reports will be included with the Grant Agreement.

Mid-year and final reports will include the following elements (subject to modification):

- Narrative that references proposal work plan and answers: What worked well, what did you learn, and what were the challenges in providing assistance to your small business clients and achieving your goals?
- Description of methodology used for verifying outcome data, including which indicators were used to validate business start-up, stabilization, growth, job creation and retention, and how follow-up was conducted (phone, internet, face-to-face; survey, interview, document verification, etc.)
- Changes in key staff or organizational changes that impact the small business program during the grant period. (Resumes for key staff to be required)
- Description of partnerships developed with other organizations (i.e. other WEDFA grantees, financial institutions, funders, peer-to peer, city programs, etc.) during the grant period.
- List of media attention received or organized events related to this grant. Media refers to: print (newspaper, newsletter, flyers, etc.), TV, radio, social media.
- Professional development that the business technical assistance provider(s) attend during the grant period.
- Business success story that illustrates a business in start-up, stabilization or growth stage and the economic impact of the provision of technical assistance services. It should include a brief description and relevant history of the business and the business owner, challenge, technical assistance solution and the economic impact.

WEDFA Small Business Technical Assistance Program Grant

Appendix A: Organizational Budget Form

Cost Elements (1-4)	Annual Project Budget	WEDFA Funding Request
1. List Direct Personnel/Staff Costs		
Total Staff Costs	\$	\$
2. List Consultants, such as grant managers (include pay rate)		
Total Consultant Costs	\$	\$
3. Non-Personnel Cost (Program related materials, supplies, travel, etc.)		
Total Non-Personnel Costs	\$	\$
Total Direct Costs (1-3 above)	\$	\$
4. Administrative Overhead/Indirect Costs (e.g. utilities, rent, audit, admin staff)		
	\$	\$
TOTAL PROJECT COSTS (1-4, above)	\$	\$
Funding Sources / Revenue Elements	Amount	Award Date
Projected Fees	\$	
Matching Funds	\$	
Contributions	\$	
Contracts / Grants (list separately)	\$	
	\$	
	\$	
	\$	
	\$	
Total Organizational Funding	\$	
WEDFA Request	\$	
Total Projected Funding	\$	
Funding Gap	\$	

WEDFA Small Business Technical Assistance Program Grant

Sample Performance Data & Outcome Form (Mid-Year and Final Report)

Grantee Organization Name:	Grant Agreement Dates:
	Amount of Grant: \$
Mid-Year and Final Performance Data & Outcome Report Form	
How many businesses overall received technical assistance during the grant agreement period?	#
How many businesses received technical assistance of at least 5 hours?	#
Percentage of businesses that received 5+ hours of technical assistance	%
What were the business stages of the businesses that received technical assistance?	
Prospective business owners (>1 year from starting a business)	#
Pre-Start-Up clients (within 1 year of start-up)	#
Start-Up clients (business operating/generating revenue)	#
Established business clients (is/was profitable and employing at least 1 FTE)	#
What were the outcomes for the businesses that received technical assistance?	
Number of new businesses created	#
Number of businesses stabilized	#
Number of businesses that grew/increased revenue as a result of services	#
Number of businesses that didn't experience a positive outcome	#
Job Creation & Preservation	
What were the jobs outcomes for the businesses that received technical assistance?	
FTE jobs created as a result of technical assistance	#
FTE jobs preserved as a result of technical assistance (applies to businesses stabilized)	#
Number of FTE jobs created and preserved	#
Outcomes- Access to Financing & Grants	
What were the financing outcomes for the businesses that received technical assistance?	
Number of of businesses receiving financing	#
Number of Direct loans (if you are a CDFI or CDC)	#
Value of direct loans	\$
Number of Indirect loans (loan packaging- you helped a business put their documents together in order to apply for a loan)	#
Value of indirect loans	\$
Total Value of loans closed	\$
Value of smallest loan closed	\$
Value of largest loan closed	\$
Populations Served	
Number of Women-owned businesses	#
Number of Latino-owned businesses	#
Number of Native American-owned businesses	#
Number of Black/African American-owned businesses	#
Number of API (Asian Pacific Islander)-owned businesses	#
Number of Arab-owned businesses	#
Number of Multiracial-owned businesses	#
Number of Non-minority businesses	#
Number of Unknown/other	#
Total Number of BIPOC (Black, Indigenous & People of Color) businesses that received technical assistance	#
% of technical assistance provided went to BIPOC businesses	%
Number of women-owned businesses	#
Number of women & BIPOC-owned businesses	#
Number of men & BIPOC-owned businesses	#
Other Attributes of Businesses that Received Technical Assistance	
Number of LGBTQ+-owned businesses	#
Number of of immigrants and/or non-native English speakers	#
Number of US Military Veterans	#
Number of owners that started businesses as a result of being unemployed	#
Number of Low/Moderate income business owners (use HUD guidelines)	#
Number of disabled business owners	#
Number of businesses located in rural communities	#
Number of businesses located in low/moderate income or underserved/distressed community (as defined by HMDA/CRA – use: https://geomap.ffiec.gov/ffiecgeomap/)	#