



Technical Assistance Grant (TAG) for Businesses

Round Six

Program Overview, Application & Survey

April 3, 2023

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Section A: PROGRAM OVERVIEW

The City of West Linn is offering a sixth round of Small Business Grants to assist West Linn businesses and non-profits with ongoing business recovery in the wake of the Covid-19 pandemic. The **Technical Assistance Grant (TAG)** is designed to give businesses funds for technical assistance that will help solve a development need and improve the operations and growth of the business.

The City of West Linn has offered five previous grants in the last three years to help support the West Linn business community. The first two rounds, provided in 2020, were paid for jointly by the State of Oregon and the City of West Linn. The third round of funding, provided in 2021, used Federal pass-through dollars from the Coronavirus Relief Fund (CRF).

Rounds four, five and six are funded by the American Rescue Plan Act (ARPA) of 2021. In 2022, West Linn City Council allocated \$225,000 of American Rescue Plan Act (ARPA) dollars to support West Linn businesses in need of financial assistance and assist with ongoing pandemic recovery. The City distributed 55 direct to small business grants, totaling \$100,000 of funds, in our round four grant program in June 2022. The City awarded \$100,000 of matching façade improvement grants to 10 businesses in 2022. The City will distribute this sixth round of grants, totaling \$75,000, to small businesses later this year.

The City intends to continue working with the West Linn business community, with help from the City's Economic Development Committee, the West Linn Chamber of Commerce, Historic Willamette Main Street, and other groups to understand business needs and provide any assistance that we can.

Commitment to Equity and Inclusion

The City of West Linn encourages applications from businesses owned by historically disadvantaged groups, and will score all applications equitably and comply with local, state, and federal law. The City of West Linn is committed to equal opportunity for all and will evaluate applications without regard to an individual's race, color, religion, national origin, age, sex, marital status, political affiliation, veteran's status, physical or mental disability, sexual orientation, gender identity or any other status protected by federal, state or local laws.

Section B: APPLICATION PROCESS & TIMELINE

I. How to Apply?

- Step 1: Review eligibility criteria on **Page 3** to determine if your business qualifies.
- Step 2: Fill out *Application Form* (**Pages 5-6**)
- Step 3: Certify that all criteria are met and sign (**Page 7**)
- Step 4: Complete Demographic Survey
- Step 5: Scan & email **Pages 5-8** to: WestLinnBusiness@westlinnoregon.gov (PDF preferred)
****Please be sure to include 4 pages in your email****
(2 page Application; Certification; Demographic Survey)

****Deadline to apply: *Friday, April 21, 2023 at 5:00 pm***

If you are unable to submit application via e-mail, please print the four pages to the following address:

West Linn City Hall
Attn: Alena Schnarr
22500 Salamo Road, West Linn, OR 97068

Mailed submissions must be received no later than: Thurs. April 20, 2023 (City Hall is closed on Friday April 21, 2023)

Section C: Awards, Timeline & Review Process

The City of West Linn expects to have approximately \$75,000 available for this program (final amount may vary).

i. AWARDS

Grant awards are expected to be distributed as follows:

- \$1,000 for qualifying **Home-Based Businesses**, defined as a proprietor/operator and up to 1 employee, with an active home-based business in West Linn (on-line virtual businesses, such as selling on eBay or the like are excluded).
- \$1,000 for qualifying **Non-profit Businesses** having fewer than 25 FTE employees.
- Up to \$3,000 for qualifying brick and mortar **West Linn Small Businesses**, including sole proprietorships, defined as having 0-25 FTE (full-time employee equivalent) employees.

ii. TIMELINE

These figures could increase or decrease based on the number and valuation of applications received. The City reserves the right to determine final grant award allocations and amounts.

- **Monday, April 3, 2023:** Grant Application opens
- **Friday, April 21, 2023:** Applications due
- **Mid-late May 2023:** Announcement of Awards
- **Early-mid June 2023:** Awards distributed

iii. Review Process

The City reserves the right to make final award determinations, the right to reduce the total amount of funds available in this round, and the right to offer additional rounds of funding. The City reserves the right to request additional information.

The following factors will be considered when reviewing applications:

- The potential of project to increase the growth/revenues of a business.
- The potential of the project to solve and/or support a business development need.
- The potential to support businesses that have not received previous funding from the City of West Linn.
- The potential to help a business reach new engagement and performance levels.
- The potential to receive business support on a specific/new aspect of their business.

Section D: ELIGIBILITY

The goal of this grant is to give businesses funds for technical assistance that will help solve a business development need and/or support a business development need.

I. Eligible Projects | The following projects are *eligible* to apply for a grant:

- **Marketing Strategy** | Hire consultant to develop marketing strategy for your business.
- **Branding/Logo Design** | Hire consultant to create a brand and/or logo for your business.
- **Social Media Strategy**
 - Hire consultant to develop social media strategy and/or hire full service digital marketing partner to run social media pages for 6 months (or less but no more) with creation of a plan for business owner to manage after 6 months.
- **Printed Marketing Materials** | Paying a graphic designer to design business cards, brochure.
- **CRM/Mailing List** | Funds for setting up a CRM/Mailing List (ie. Mailchimp, HubSpot, Keap, Klaviyo, Constant Contact).

**Funds can pay for 3 months of a CRM subscription, but not recurring costs after 3 months.*

- **Website | E-commerce**
 - Build a new website
 - Add e-commerce platform to existing website and/or hire e-commerce consultant to help integrate existing your marketplace to other channels (ie. Amazon, Etsy, Houzz etc.)
- **Writing a Business Plan**
 - Hire someone to help you develop a business plan and/or take either the Growth Wheel or Greenhouse Program at the Small Business Development Center at Clackamas Community College.
- **Accounting & Bookkeeping**
 - Hiring someone to help you implement bookkeeping/accounting software, develop chart of accounts (ie. QuickBooks class, consultant).

**Funds can pay for 3 months of a QuickBooks on-line subscription, but not recurring costs after 3 months.*

- **IT Consulting** | Hire a consultant to improve your IT (ie. Security, network configuration, app development.)

II. Ineligible Projects | The following projects are *ineligible* for a grant:

- Ongoing costs (grant is for a one- time project); Monthly recurring subscriptions (Software, CRM, accounting, marketing platforms etc. (unless terms stated above); Solo advertising (ie. Funds cannot just be used for singular Facebook ads or print advertising); Equipment; Signage; Professional Development (classes must tie in with your project).

III. Eligible Applicants: Please complete this checklist.

If you check **YES** to the following statements, you are *eligible* to apply:

- Business is located with the City of West Linn..... Yes No
- Business has 25 or fewer full-time equivalent employees..... Yes No
- Business is a for-profit or non-profit [limited to 501(c)(3) corporations. Yes No
- Business has a current City of West Linn Business License..... Yes No

IV. Ineligible Applicants:

Please complete this checklist. If you answer **YES** to any of the following, you are *ineligible* to apply:

- Business is owned by a City of West Linn employee, family member of City employee, or official of the City of West Linn..... Yes No
- Business is located outside City of West Linn city limits..... Yes No
- Business is a passive real estate holding company or passive investment holding company. Yes No
- Business is a non-profit entity that does not have a federal 501(c)(3) status. Yes No
- Business is delinquent on federal, state or local taxes that were due on or before date of this application. Yes No
- Business does not comply with all federal, state and local laws/regulations. Yes No
- Business is not registered to do business in Oregon (Secretary of State Business Registry verification) if such registration is required..... Yes No



Section E: Technical Assistance Grant Application

Instructions for Application:

- Step 1: Review eligibility criteria on **Page 3** to determine if your business qualifies.
 - Step 2: Fill out *Application Form* (**Pages 5-6**)
 - Step 3: Certify that all criteria are met and sign (**Page 7**)
 - Step 4: Complete Demographic Survey
 - Step 5: Scan & email **Pages 5-8** to: WestLinnBusiness@westlinnoregon.gov (PDF preferred)
- **Please be sure to include 4 pages in your email****
(2 page Application; Certification; Demographic Survey)

****Deadline to apply - Friday, April 21, 2023 at 5:00 pm**

(Please note City Hall is closed on Friday 4/21, so if you are hand delivering – please deliver by 5:00 pm on Thursday 4/20)

If you are unable to submit application via e-mail, please print the four pages to the following address:

West Linn City Hall
Attn: Alena Schnarr
22500 Salamo Road, West Linn, OR 97068

OTHER NOTES:

- **Confidentiality:** Applications could be included in public materials, including City Council packet. Applicants' SSN and EIN numbers will be kept confidential. Information submitted may be subject to public records law disclosure per Oregon law.
- **Tax Implications:** Grant awards may be taxable to businesses, as described here: <https://www.irs.gov/newsroom/cares-act-coronavirus-relief-fund-frequently-asked-questions>. The City of West Linn does not provide tax advice and cannot make a determination on this issue.

Questions?

Please contact: Alena Schnarr, West Linn Business Support Staff

E-mail: aschnarr@westlinnoregon.gov

Phone: 503-742-6010

Section E: Technical Assistance Grant Application Form

Applicant Information: Please complete all sections on Page 5 and 6.

Business Name (DBA):	
Do you file taxes under a different name than your DBA? If so, please write in name:	
Legal Business Structure: (Sole proprietor, LLC, S-Corp)	
Business Address:	
Applicant First and Last Name:	
Applicant Email:	
Applicant Phone #:	
Business Website:	
Type of Business: (Describe what you do or sell)	
Employer Identification Number (EIN): If you are sole proprietor, this is your SSN.	
How many employees do you have?	
What date did you start your business?	
West Linn Business License Number:	

Section E: Technical Assistance Grant (TAG) Application Continued...

ADDITIONAL QUESTIONS:

1. Have you received previous grant funding from the City of West Linn?
 Yes No
2. Is this a home-based business?
 Yes No
3. Do you have a physical storefront (“brick and mortar” business)?:
 Yes No
4. How long has your business been operating in West Linn?
 0-3 years 4-8 years 9 or more years
5. Please describe the business development need you are trying to solve or support with these funds?
(Please describe in detail (2-3 sentences), not just “New Website”, but features and goals of new website)

6. How will this project help you increase your revenues?

7. Please include a rough cost estimate for the cost to complete this project.
(If there are separate elements, please list a rough breakdown.)
If you have an invoice/estimate for the project, feel free to include, but **not required**.

8. If you receive a grant, will you be able to complete your project and submit report describing the work and a paid invoice and/or receipts to the City of West Linn within 6 months (by end of 2023). Yes No

9. Please briefly describe the impact the pandemic had on your business and/or any new struggles you are facing today.

10. Will this grant help you reach new engagement and performance levels? If so, please describe how.

Section G: Certification

The information in this application, including all attachments and certifications, are, to the best of the knowledge of the undersigned, complete, current and accurate.

Your signature on this application certifies the following:

- My business has 25 or fewer full-time equivalent employees.
- My business is located within the City of West Linn.
- My business has a current West Linn Business License.
- My business is current on all federal, state and local taxes as of the date on this application.
- My business and its operations are compliant with all federal, state and local laws.
- I agree to provide business, financial and ownership information as necessary to determine and verify eligibility.
- My business will only use these proceeds to support business-related expenses, to maintain operations and assist with pandemic recovery. Grant proceeds will not be used for personal purposes.
- I certify that I am the duly certified owner or authorized representative of the aforementioned business and that all the information provided above is truthful and certifiable. I know that this program may be audited locally or by the Federal government.
- I certify that any grant funds will only be used for the intentions outlined for this program.
- I certify that my business meets all program eligibility requirements and that I am not an ineligible applicant as described in Section D: Eligibility Requirements.
- Expenses being applied for have not been funded through other grant programs including the CARES Act of 2020 or any other federal, state, county, or City of West Linn programs (including PPP, EIDL or other federal programs to date for emergency pandemic funding).
- I will supply the City of West Linn any necessary documentation or information requested to comply with this Technical Assistance Grant Program. If awarded funds, I agree to enter into a grant agreement if required by the City of West Linn.
- I understand that I will need to submit a report with update on completed project and costs utilized by the Technical Assistance Grant by December 1, 2023.
- I understand that failure to comply with eligible use of proceeds, or making a material misrepresentation about the business and its operations to qualify for an award will be a provision of default of the award and subject the award to recapture. Should the City or other officials determine a misrepresentation exists, the award may be forfeited and subject to repayment. Failure to repay or cure a default will result in any and all collections actions permissible by law. The applicant allows the City to pursue such collection actions.

Applicant's Printed Name

Date

Applicant's Signature & Title

(No typed signature. Please print, sign, and email.)

Section H: DEMOGRAPHIC SURVEY



Technical Assistance Grant (TAG)
Round Six – Demographic Survey

All business owners with 20% or more ownership are required to complete this demographic survey as part of a Business Assistance Grant Application. If you do not wish to disclose your race, ethnicity and/or gender you may select “Prefer not to answer.”

The City of West Linn is committed to equal opportunity for all and will evaluate applications without regard to an individual’s race, color, religion, national origin, age, sex, marital status, political affiliation, veteran’s status, physical or mental disability, sexual orientation, gender identity or any other status protected by federal, state or local laws.

We encourage you to answer the voluntary demographic questions below. Responses will help track our work to assist every part of our business community and advance economic opportunity for all. Responses will only be reported in aggregate.

Responses will not be viewed prior to awards being issued. Therefore, providing the information or declining to provide the demographic information will not subject you to any adverse treatment.

Business Name

Your name:

% of business ownership:

Race: How do you identify? (American Indian or Alaskan Native; Black; Hawaiian or Pacific Islander; Asian; White; Other; Prefer Not To Answer)

Ethnicity: How do you identify? (Hispanic/Latino; Non-Hispanic/Latino; Prefer Not To Answer)

Gender: How do you identify? (Female; Male; Non-binary; Self-identify; Prefer Not To Answer)

Language: What is your primary language?

Thank you!