Technical Assistance (TA) Provider Grants
Funding Guidelines

The Miami Foundation's core mission is to build a stronger, more equitable and resilient Miami. Through the Open for Business (OFB) program, we are supporting historically underserved small businesses and nonprofits to build resilience and generational wealth through asset ownership. Funded with a $20 million grant from Wells Fargo, The Miami Foundation and community-based financial partner, Partners for Self Employment, are distributing grants and loans to nonprofits and small businesses to support their acquisition of critical assets, such as technology, equipment, machinery, inventory, and property. Ultimately, the program aims to ensure that historically underserved and underinvested entrepreneurs have a fair chance to build prosperity in the Miami they helped create.

The purpose of this grant opportunity is to fund technical assistance (TA) organizations who provide small businesses and nonprofits with the training, education, and knowledge needed to grow their business. Applications are due via [Submittable](#) by Monday 2/13/2023 by 11:59pm ET.

FUNDING CATEGORIES

Below is a summary of the three OFB TA provider grant categories. Additional detail about each, including core competencies and application details, can be found further below.

1. **Community Based Small Business Guides ($75,000 / year for 2 years):** Funding to support 7 community-rooted, trusted local TA providers in each of the OFB priority neighborhoods in order to help local and informal small businesses legitimize and optimize their operations. A provider will be selected in each of the following communities:

   - Allapattah
   - Homestead and Florida City
   - Liberty City and Little Haiti
   - Miami Gardens and Opa Locka
   - North Miami and North Miami Beach
   - Overtown
   - Richmond Heights and West Perrine

2. **Full-Service Nonprofit and Small Business Management ($150,000 / year for 2 years)**: Funding for 2 organizations, one focused on serving nonprofits and one serving for-profits, to deliver more advanced business support services to a larger number of high-capacity enterprises ready to scale.

3. **Workshop Series on Asset Building Topics (Ranging from $4,000 to $10,000 per series)**: Funding to provide regularly occurring, themed workshops that relate to the grants and loans distributed as part of Open for Business so that businesses can maximize their use of these fixed assets (i.e., technology, equipment, vehicles, etc.). The proposed workshop series are on:

   - *Digital enablement*; i.e., deploying technology in the business to improve processes or volume, such as e-commerce, digitizing inventory and invoicing, electronic POS, etc.
   - *Digital content transformation*; i.e., deploying digital content and assets in your business to improve marketing and sales conversion, such as blogs, SEO, marketing automation, etc.
   - *Purchasing fixed assets*, including bidding, insurance and liability, and depreciation.
   - *Remodeling* and renovations, including permitting and building code.
   - *Commercial real estate* acquisition, potentially including info about shared equity models.

GRANT DETAILS

Grant Purpose

The purpose of this funding opportunity is to provide grants to business support organizations that provide technical assistance (TA) trainings and workshops to small businesses so that they can access resources and knowledge that will help grow their business. We are issuing grants to service providers in 3 distinct categories to serve small businesses at a variety of capacity levels.

At a minimum, **all** OFB TA service provider grantees will be expected to:

- Provide high-quality technical assistance (TA) support and instruction to historically underserved minority small business owners in accordance with program goals;

- Co-design intake application(s) with The Miami Foundation and external evaluation vendor, Behavioral Science Research Institute (BSRI), to ensure effective capture of data;

- Include OFB logo and TMF attribution on all collateral associated with TA services;

- Remit data on TA attendance activity to BSRI;

- Facilitate access between participating businesses and BSRI for data collection;

- Compile and aggregate data on TA activity, at a minimum every 6 months, to comply with funder reporting requirements; and

- Provide referrals to and receive referrals from other OFB partner organizations, including the official OFB community-based lending partner Partners for Self Employment, to provide businesses with access to different levels of service.

Additional responsibilities specific to each funding category are described below.

I.   Community Based Small Business Guides

The objective of this funding category is to support community-rooted, trusted local service providers who help the most informal small businesses legitimize their operations and prepare for additional TA and traditional financing. The community provider will be expected to provide hands-on and individualized assistance to owners; as such, the overall number of businesses reached may be lower (e.g., approximately 50-75 businesses per year).

This grant is designed to amplify and supplement work already being delivered, not necessarily to start a new TA program. While the organization is welcome to deliver its own curriculum, core business services that the organization should be able to provide include:

- Business *registration* with the county and municipality, as relevant

- Basic *financial principles*, including producing financial statements and filing tax returns

- Basic *online navigation*, such as creating a business phone, email, social media presence

- Basic assistance with *business incorporation* type, business model, and business plan

One grant will be made to a community partner in each neighborhood. Organizations may apply as a collaborative; however, the primary awardee will be responsible for regranting and reporting on behalf of the collaborative. While organizations are encouraged to prioritize serving historically underserved small businesses located in these communities, any eligible small business can receive services.

II.   Full-Service Nonprofit and Small Business Management

The objective of this grant is to identify a TA partner organization who can deliver more advanced business support services for higher-capacity enterprises that are ready to scale. One grant will be awarded to a TA organization that serves *for-profit* small businesses and one grant will be awarded to an organization that serves *nonprofit* small businesses.

Given the focus of delivering specialized services, the expected volume of businesses to be served is higher (e.g., approximately 150-200 businesses per year). While the organization is welcome to deliver its own programming to clients as a part of this grant, the core services the organization should be able to provide include:

▪ Advanced *financial principles*, including accounting, cash flow projections, profit and loss statements, taking depreciations, itemizing deductions, etc. For nonprofits, this should include fundraising strategy, grants cultivation and pipeline development, donor stewardship, etc.

▪ *Digital marketing* strategy, including SEO, website presence, conversions, advertising, etc.

▪ Business *scaling* plans, including pathways to procurement, certifications, etc.

▪ General *risk management* and cybersecurity protections

▪ *Legal* consultation, including insurance and liability

III.   Recurring Workshops on Asset Building Themes

The objective of this last grant is to provide regularly occurring, topically themed workshops that relate to the grants and loans distributed as part of OFB so that businesses can maximize their use of these fixed assets (i.e., technology, equipment, vehicles, property etc.).

Organizations may apply to deliver more than one workshop series, as well as apply for other TA programming; however, only one organization will be selected per workshop series. Workshops may be delivered in-person or virtually; they may be repeated, or comprise a series of learning opportunities.

Below is an overview of the proposed workshop series to be offered on a recurring basis:

▪ *Digital enablement*, i.e., deploying technology in the business to improve processes or volume, such as e-commerce, digitizing inventory and invoicing, electronic POS, etc.

▪ *Digital content* transformation; i.e., deploying digital content and assets in your business to improve marketing and sales conversion, such as blogs, SEO, marketing automation, etc.

▪ *Purchasing fixed assets*, including bidding, insurance and liability, and depreciation

▪ *Remodeling* and renovations, including permitting and building code

▪ *Commercial real estate* acquisition, potentially including info about shared equity models

Target Business Population

While TA providers are welcome to serve any small business or nonprofit, the priority participants should be businesses potentially interested in applying for, or who have already received grants or loans through OFB. The ideal profile for a candidate small business to participate in TA programming includes:

▪ Owned by someone from a historically underserved background (i.e., Black, Latino, immigrant, LGBTQ, military veteran, or person with disabilities)

▪ Less than $1,000,000 in annual gross revenue or operating budget

- Undercapitalized (e.g., proof of prior loan declination, ineligible for SBA, RISE etc.)

- Provides a good or service with a community benefit (i.e., supports local economic development; deprioritizing serving organizations whose primary purpose is to export internationally, sell alcohol, firearms, be in the adult industry, etc.)

- Prioritizing employer firms

Grant Size and Duration

The size and terms of the grant or vendor contract vary depending on the funding opportunity:

- We will award seven (7) grants to **Community Based Small Business Guides**, each in the amount of $75,000 per year for 2 years.

- We will award two (2) grants to a **Full-Service Nonprofit and Small Business Provider**, each in the amount of $150,000 per year for 2 years.

- We will award five (5) grants or contracts to vendors of **Recurring Workshops on Asset Building Themes**, ranging from $4,000 to $10,000 per series per year for 2 years. Final award amounts for each series will vary depending on the workshop frequency, intensity, and delivery method.

While each opportunity is designed to be a two-year grant, The Miami Foundation reserves the right to renew or suspend the TA partnership following year one, contingent on performance and successful delivery of TA services in expectation with program guidelines during the first year.

Eligibility

Eligible TA provider organizations include 501(c)(3) public charities or organizations with an existing relationship with 501(c)(3) fiscal sponsor, government entities, or for-profit companies. TA providers that are nonprofit organizations will be awarded grants while for-profit enterprises will be retained as an independent consultant vendor of the Foundation and issued a W-9 form for services rendered.

Allowable Use of Grant Funds

Grant funds must be used to cover expenses related to delivering programming. Example eligible expenses include payroll and salary, overhead, materials, printing, local travel, etc. You will be asked to complete a detailed budget request as part of your application.

Grant Reporting Expectations

Throughout the course of the grant, TA provider organizations will be expected to provide regular data on TA program attendance, participant demographics, and learning results to our data collection and evaluation partner, Behavioral Science Research Institute (BSRI).

Application Process and Timeline

Applicants must apply online via Submittable at: https://miamiopenforbusiness.submittable.com/.

- *Funding guidelines released*: Wednesday, January 11th, 2023
- *Informational office hours:* Tuesday, January 17th, 2023 from 4:00-5:00pm ET
- *Full proposals due*: Monday, February 13th, 2023 by 11:59pm EST
- *Award decisions*: Late February 2023

Information Session

Prospective applicants are invited to join an information session us to learn more about this funding opportunity. The session will be recorded and uploaded to our website for later access.

▪ Tuesday, January 17th, 2023 from 4:00-5:00pm ET – register here

Questions

If you have any additional questions, please email openforbusiness@miamifoundation.org.

SCORING AND SELECTION CRITERIA

Applications for funding through Miami Open for Business will be scored against the following criteria and awarded to organizations that meet these core funding priorities:

▪ Experience and successful **track record serving historically underserved entrepreneurs;** i.e., the organization specializes in serving businesses owned and operated by a Black, Indigenous, Latino, LGBTQ+, veteran proprietor, or person with disabilities. Organizations that can demonstrate successful community outreach tactics as well as specific success metrics and outcomes in serving these populations will be prioritized. In addition, organizations that can provide services in more than one language will be prioritized.

▪ Have **strong organizational and financial capacity**; i.e., the organization can effectively steward and deploy the grant funding; organization has sufficient cash flow and projected revenue or fundraising to continue operating. The proposed staffing model and experience of the personnel are appropriate for the programming. The program budget is reasonable given the scope of proposed programming. The organization is properly incorporated and has accurate and updated registration information.

▪ Organization has **thoughtful and effective curriculum**; i.e., the programming has specific learning objectives, the content is appropriate for the subject at hand, the lessons are actionable and provide entrepreneurs with specific tactics and strategies they can deploy in their business. The curriculum includes multiple modalities of teaching to accommodate different learning styles.

▪ Organization is **committed to collaborating** with The Miami Foundation, evaluation partner BSRI, and the community-based lending partner PSE; i.e., the organization will be capable of collecting and remitting data on TA activities. The organization is committed to initiating and/or receiving referrals from small businesses, and is willing to collaborate with the other OFB partners to maximize TA participants' success.

APPLICATION OVERVIEW

Introductory Information

To apply, applicants will provide basic contact information, as well as organizational details, including mission, annual operating budget, staffing details, and core demographic information for the organization's leadership (i.e., CEO or Executive Director).

Narrative Questions

1. **Experience |** Please describe your experience providing technical assistance to small businesses in the neighborhood you identified. If possible, include an example/summary of one type of programming you have successfully delivered in the past.

2. **Outreach and Recruitment |** What are the methods you employ to market your organization and its services to small businesses in your community(s)? If you plan on conducting new outreach for OFB-funded services, please describe your proposed outreach plan.

3. **Impact |** What impact have you had on small businesses served in your community(s)? What is your process for collecting data and measuring impact? Please provide specific metrics such an increase in revenue/sales for clients, increase in jobs, opening additional locations, increases in skills, $ of additional funding enabled, etc.

4. **Curriculum Plan |** Please describe, in as much detail as possible, your proposed plan to serve prospective OFB applicants and OFB grant recipients in the community selected. Please describe your proposed curriculum plan and methodology for working with small businesses.

Attachments

Please provide in PDF format.
Required

- **Project Budget** | Please submit a copy of a budget breakdown that specifies how your organization will utilize the funding.

- **Organizational Financial Statement(s) |** Please submit a copy of your organization's latest financial statement or operating budget.

- **Staffing Roster** | Please include a list of the project leadership as well as a list of staff and/or consultants who will provide TA services, including a brief bio for each person listed.

- **Example Curriculum for OFB-Funded Programming** | Required for Full-Service Providers and Topical Workshop Series. Optional for Community-Based Guides

Optional

- Client **Testimonials** and/or **Letter(s) of Support**