



# **Incentives, Resources & Competitive Advantages Guide & FAQ's**

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**Updated May 2023**

**City of Barstow Economic Development - 760.255.5169**  
220 E. Mountain View Street, Suite A Barstow, California 92311  
[www.barstowca.org/hubofthewest](http://www.barstowca.org/hubofthewest)



# Incentives, Resources & Competitive Advantages Guide & FAQ's

## TABLE OF CONTENTS

---

<b>CITY INCENTIVES</b>	3-10
<a href="#">Low Business License Fees</a>	3
<a href="#">One-Stop Permitting Process</a>	4
<a href="#">Over-the-Counter (OTC) Approvals on Some Projects</a>	5
<a href="#">No Utility User Tax</a>	6
<a href="#">Opportunity Zones (OZ)</a>	7-8
<a href="#">Recycling Market Development Zone (RMDZ) Revolving Loan</a>	9-10
<b>TAX INCENTIVES</b>	11-23
<a href="#">Advanced Transportation &amp; Manufacturing Sales &amp; Use Tax Exclusions</a>	11
<a href="#">California Competes Tax Credit (CCTC)</a>	12
<a href="#">Film &amp; Television Tax Credit Program</a>	13
<a href="#">Manufacturing &amp; Research &amp; Development Equipment Exemption</a>	15
<a href="#">New Employment Credit (NEC)</a>	16
<a href="#">California Research Tax Credit</a>	17
<a href="#">Federal Research &amp; Development Tax Credit</a>	18-20
<a href="#">Business Energy Investment Tax Credit (ITC)</a>	21
<a href="#">EB-5 Immigrant Investor Program</a>	22
<a href="#">Foreign Trade Zone (FTZ) Expansion Potential</a>	23
<b>FINANCING</b>	24-39
<a href="#">Electric Vehicle Charging Station Financing Program (EVCS)</a>	24-25
<a href="#">Small Business Loan Guarantee Program (SBLGP)</a>	26
<a href="#">Pollution Control Tax-Exempt Bond Financing Program</a>	27
<a href="#">Truck Loan Assistance Program</a>	28
<a href="#">Industrial Development Bonds (IDBs)</a>	29
<a href="#">New Markets Tax Credit Program (NMTC)</a>	30
<a href="#">Renewable Electricity Production Tax Credit (PTC)</a>	31



# Incentives, Resources & Competitive Advantages Guide & FAQ's

## TABLE OF CONTENTS (CONTINUED)

---

<b>FINANCING (CONTINUED)</b>	24-39
<a href="#">Small Business Administration (SBA) Loan Programs</a>	32-33
<a href="#">Small Business Administration (SBA) 7(a) Loan Program</a>	34-35
<a href="#">Small Business Administration (SBA) CDC/504 Loan Program</a>	36-37
<a href="#">Small Business Administration (SBA) Microloan Program</a>	38-39
<b>WORKFORCE</b>	40-45
<a href="#">America's Job Center of California</a>	40
<a href="#">Employment Training Panel (ETP)</a>	41-42
<a href="#">Vocational Rehabilitation &amp; Employment Program</a>	43
<a href="#">Work Opportunity Tax Credit (WOTC)</a>	44
<a href="#">Federal Bonding Program</a>	45
<b>GENERAL BUSINESS ASSISTANCE</b>	46-56
<a href="#">Advanced Manufacturing Technology Services (AMTS) Program</a>	46
<a href="#">California Manufacturers Accelerator Plus (CMA+) Program</a>	47
<a href="#">Energy Economic Development Rate (EDR) Program</a>	48-49
<a href="#">Third-Party Energy Efficiency (EE) Programs</a>	50-53
<a href="#">Small Business Development Centers (SBDCs)</a>	54
<a href="#">Inland Empire Small Business Development Center (SBDC)</a>	55
<a href="#">Made in California Program</a>	56
<b>GREEN INCENTIVES</b>	57-62
<a href="#">Alternative and Renewable Fuel and Vehicle Technology Program</a>	57
<a href="#">California Pollution Control Financing Authority (CPCFA)</a>	58-59
<a href="#">Electric Program Investment Charge (EPIC) Program</a>	60
<a href="#">Hybrid &amp; Zero-Emission Truck &amp; Bus Voucher Incentive Project (HVIP)</a>	61



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## CITY INCENTIVES

### LOW BUSINESS LICENSE FEES

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#### Organization

City of Barstow, Community Development Department

#### FAQ's

Q: How much does it cost to obtain a Business License in Barstow?

A: Annual business license fees are dependent on the business type, with fees ranging from \$5.00 to \$500. Additional fees such as CA State mandated Disability Access, business license processing, and technology fees apply to all City of Barstow business license applications. You can calculate your Business License Fee by using the [Business License Fee Schedule](#).

Q: Where can I find the Business License Application, Business License Fee Schedule, and Business License Review Form?

A: <https://www.barstowca.org/i-want-to/view/downloadable-forms>

Q: How long does it take to process a Business License in Barstow?

A: Approximately 5-10 business days, provided that proper paperwork is completed.

Q: How often do I need to renew my Business License?

A: Annually.

#### Process

Complete application and mail to Community Development Department with a check for the annual fee and processing fees. Business license applications can also be submitted in office during business hours.

**Businesses within City limits:** subject to business license inspection. Once business is set up and ready to open, contact Community Development to conduct an inspection. Once passed, the license is issued and considered active.

**Businesses located outside of City limits:** not subject to inspection. License is considered active upon payment

#### Contact

Phone: (760) 255-5161

In Person: 220 East Mountain View St., Suite A, Barstow, CA 92311

Monday-Thursday: 7:30 AM - 5:30 PM

Friday: 7:30 AM - 4:30 PM

#### Link to Program Page

<https://www.barstowca.org/i-want-to/view/downloadable-forms>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## CITY INCENTIVES

### ONE-STOP PERMITTING PROCESS

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#### Organization

City of Barstow, Community Development Department

#### FAQ's

Q: What does "One-Stop Permitting Process" mean?

A: The Barstow Community Development Department offers a single place for residents and developers to submit and coordinate projects and plan checks to ensure efficient and effective service and support from Building and Safety, Fire Protection, Environmental Services, Planning, and Engineering personnel.

Q: Where can I download forms, including Building Permit Applications?

A: <https://www.barstowca.org/i-want-to/view/downloadable-forms>

Q: Can I submit my permit application online?

A: Not at this time. Plans submitted for review shall be designed under the 2019 California Building Codes as of January 1, 2020.

#### Process

Applicants are required to submit the applicable permit application to the Community Development Department. For projects where plan review is required, the applicant must provide three (3) sets of plans and two (2) sets of any applicable supplemental documents (i.e., structural calculations, equipment specifications, etc.). Once the submittal package is reviewed for completion, it is then checked in to plan review with all necessary development departments. All projects requiring plan review are subject to a two (2) week plan review timeline and following plan review, the applicant is notified of either comments prompting a revised resubmittal or an approval of the permit.

When preparing a permit application package, you can reference our [Plan Submittal Checklist](#) to assure the package is complete.

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Friday: 7:30 AM - 4:30 PM

#### Link to Program Page

<https://www.barstowca.org/departments/community-development-department/building-safety/building-forms-and-publications>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## CITY INCENTIVES

### OVER-THE-COUNTER (OTC) APPROVALS ON SOME PROJECTS

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#### Organization

City of Barstow, Community Development Department

#### FAQ's

Q: What is an Over-the-Counter Approval?

A: OTC means that you can get approval without going through the formal approval process, saving you valuable time.

Q: Which projects qualify?

A: Qualified projects can vary once scope of work is reviewed, however the below are most often issued the same day of application submittal:

- Re-roof permits
- HVAC replacements
- Select plumbing permits
- Select electrical permits
- Select minor interior work

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# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## CITY INCENTIVES

### NO UTILITY USER TAX

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#### Organization

City of Barstow

#### FAQ's

Q: What is a Utility User Tax?

A: A Utility User Tax (UUT) may be imposed by a city on a person or business for the consumption of utility services, including (but not limited to) electricity, gas, water, sewer, telephone (including cell phone and long distance), sanitation and cable television.

Q: Does the City of Barstow charge Utility User Tax?

A: No.

Q: Why is this significant?

A: Savings from no UUT could equate to 5% or more of your monthly bill, which some other jurisdictions charge, resulting in thousands of dollars saved each month for many businesses.



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## CITY INCENTIVES OPPORTUNITY ZONES (OZ)

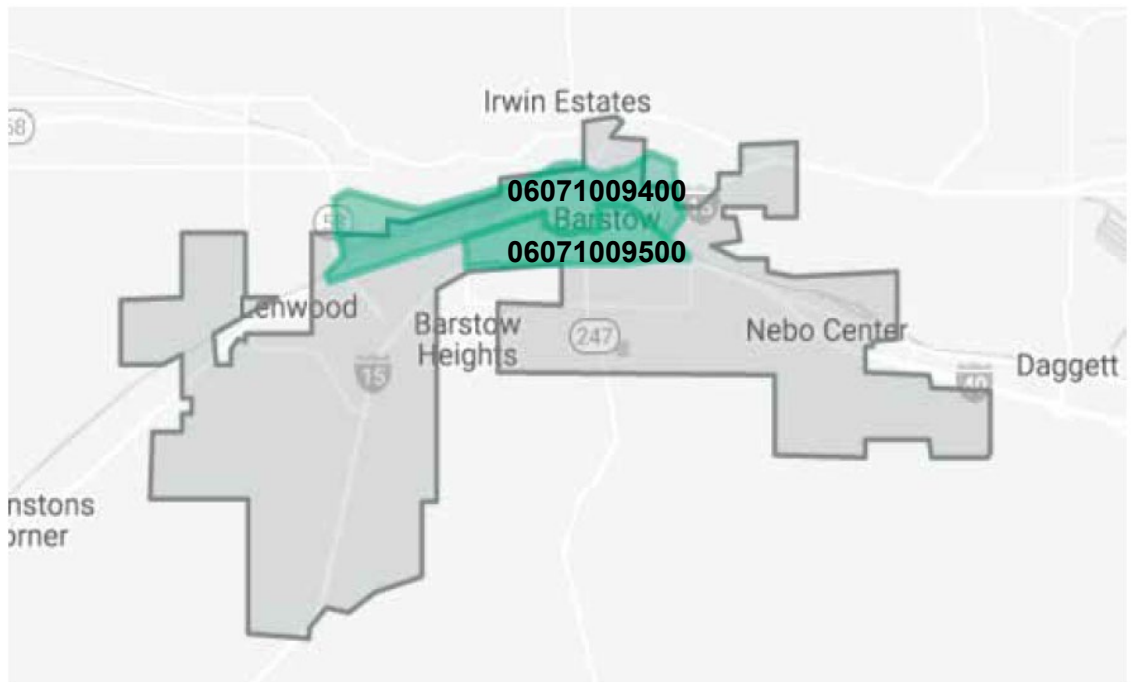
### Organization

Internal Revenue Service (IRS)

### Summary

An Opportunity Zone is an economically distressed area where new investment, under certain conditions, may be eligible for preferential tax treatment. Investors can defer tax on any prior gains until the earlier of the date on which an investment is sold or exchanged, or December 31, 2026, so long as the gain is reinvested in a Qualified Opportunity Fund. If the investor holds the investment in the Opportunity Fund for at least ten years, the investor would be eligible for an increase in basis equal to the fair market value of the investment on the date that the investment is sold or exchanged.

### Barstow's 2 Opportunity Zone Locations



### Eligibility

This program is available to any investor in a qualified opportunity fund; there is no need to live, work or have a business in an Opportunity Zone to qualify.

Continued on next page.





# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## CITY INCENTIVES

### OPPORTUNITY ZONES (OZ)

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#### Process

To become a Qualified Opportunity Fund (QOF), an eligible taxpayer self certifies, thus, no approval or action by the IRS is required. To certify and maintain a Qualified Opportunity Fund, an entity must:

- File a federal income tax return as a partnership, corporation, or LLC that is treated as a partnership or corporation;
- Be organized for the purpose of investing in Qualified Opportunity Zone property under the laws in one of the 50 states, the District of Columbia, a U.S. possession, or a federally recognized Indian tribal government; and
- Hold 90% of its assets in Qualified Opportunity Zone property.

#### Filing Requirements

To certify and maintain as a Qualified Opportunity Fund, the entity must annually file [Form 8996, Qualified Opportunity Fund](#) with the eligible partnership or corporation federal tax return. You must file Form 8996 by the due date of the tax return (including extensions). Form 8996 is used to:

- Certify the corporation or partnership is organized to invest in Qualified Opportunity Zone property;
- Report that it meets the 90% investment standard of [section 1400Z-2](#); and
- Figure the penalty if it fails to meet the 90% investment standard.

#### Contact

Phone: (800) 829-1040

Email: [www.irs.gov](http://www.irs.gov)

#### Link to Program Page

<https://www.irs.gov/newsroom/opportunity-zones-frequently-asked-questions>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## CITY INCENTIVES

### RECYCLING MARKET DEVELOPMENT ZONE (RMDZ) REVOLVING LOAN

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#### Organization

California Department of Resources Recycling and Recovery

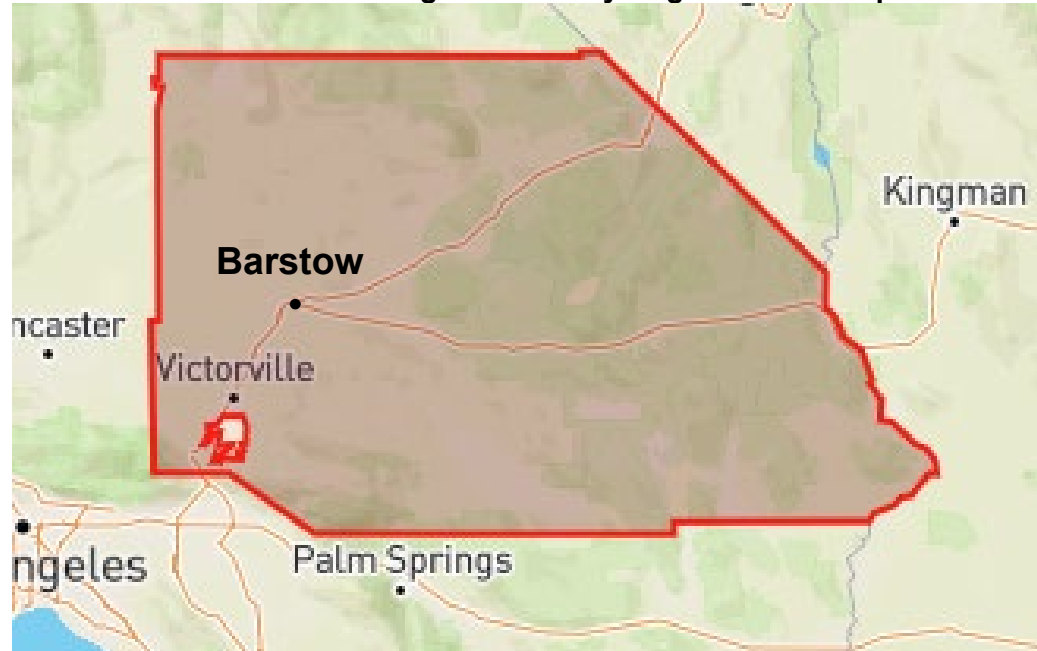
#### Summary

The RMDZ Revolving Loan program provides attractive loans, technical assistance, and free product marketing to businesses that are located in a zone and use materials from the waste stream rather than raw materials to manufacture their products.

Depending on your needs and in which zone you are located, there are many ways that the RMDZ program can assist your business:

- Locating manufacturing materials (feedstock)
- Permitting referral
- Siting
- Offering an attractive loan program
- Finding markets for products
- Providing current market conditions/trends
- Evaluating technology and equipment
- Providing geographical data on demographics, waste streams, and economics
- Marketing products for free via the Recycle Store

#### Barstow is located within the High Desert Recycling Market Development Zone (RMDZ)



Continued on next page.



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## CITY INCENTIVES

### RECYCLING MARKET DEVELOPMENT ZONE (RMDZ) REVOLVING LOAN

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#### Eligibility

To be considered, a project must meet the following criteria and be one of the types of projects described below:

- Highest priority given to projects that demonstrate increased demand for a recyclable material, which is normally disposed of in California.
- Priority given to projects that satisfy additional statewide recycling market development objectives and priorities that are determined by CalRecycle.
- Construction & demolition debris, plastics, organics, and paper are priority materials.
- The project must be located within an RMDZ.
- Each project must result in the diversion of non-hazardous solid waste from California landfills.
- The project must involve reducing manufacturing waste or making new products out of recycled material.
- Projects using post-industrial materials must meet the definition of secondary waste material.

#### Process

A series of documents must be collected in preparation. Applicants are recommended to speak with loan staff. Submit an initial application which includes the required information (link below). If approved, further applications and approvals will follow.

#### Contact

#### State

#### Mojave Desert & Mountain Recycling Authority

Phone: (916) 322-4027

(909) 797-7717

Email: [LAMD@calrecycle.ca.gov](mailto:LAMD@calrecycle.ca.gov)

[recyclingjpa@gmail.com](mailto:recyclingjpa@gmail.com)

Address:

P.O. Box 5001

Victorville, CA 92393-5001

#### Link to Program Page

<http://www.calrecycle.ca.gov/rmdz/>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## TAX INCENTIVES

### ADVANCED TRANSPORTATION & MANUFACTURING SALES & USE

#### TAX EXCLUSIONS

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**Organization**

California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA)

**Summary**

Q: What are Advanced Transportation & Manufacturing Sales & Use Tax Exclusions?  
A: California Revenue and Taxation Code (RTC) section 6010.8 provides an exclusion from sales and use tax for the purchase of tangible personal property by a "participating party" or by a construction contractor (including subcontractors) for use in the performance of a construction contract for a "participating party" for eligible projects involving the following:

- Alternative energy sources
- Advanced transportation technologies
- Advanced manufacturing
- Recycled Feedstock

**End Date**

January 1, 2026

**Process**

Persons who wish to obtain this exclusion must apply to the California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA) online at <https://www.treasurer.ca.gov/caeatfa/>. If CAEATFA informs you that you qualify as a participating party, and the equipment you purchase is considered a "project," you should issue your vendor an exclusion certificate.

**Contact**

Phone: (916) 651-8157

Email: [CAEATFA@treasurer.ca.gov](mailto:CAEATFA@treasurer.ca.gov)

**Link to Program Page**

<https://www.cdtfa.ca.gov/taxes-and-fees/caeafta.htm>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## TAX INCENTIVES

### CALIFORNIA COMPETES TAX CREDIT (CCTC)

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#### Organization

California Governor's Office of Business and Economic Development (GO-Biz)

#### Summary

CCTC is an income tax credit available to businesses of any size that want to locate in California or stay and grow in California and create quality, full-time jobs in California that might not otherwise be created by the business or any other business.

#### **Minimum Credit Request**   **Maximum Credit Request**

\$20,000

No more than 20% (\$60.9 million) per applicant per fiscal year.

#### FAQ's

Q: Is the credit restricted to only certain industries or locations in California?

A: The credit is available statewide to all industries. However, while there are no geographic or sector-specific restrictions, the purpose of the CCTC is to attract and retain high-value employers in California in industries with high economic multipliers and that provide their employees good wages and benefits. The Governor's Office of Business and Economic Development (GO-Biz) is required by statute to consider the extent to which the credit will influence the business's ability, willingness, or both, to create new, full-time jobs in this state that might not otherwise be created in the state by the taxpayer or any other taxpayer.

Q: Is there a fee to apply for the California Competes Tax Credit?

A: No, there is no fee to apply for the credit.

#### End Date

Fiscal Year 2027-28.

#### Process

1. Create an account through the program's website.
2. Complete and submit an application.
3. The Phase I cost-benefit ratio will be evaluated relative to other applicants. The business will be informed within a few days if its application is advancing to the next stage.
4. Phase II applies additional evaluative criteria.
5. If the business is recommended for a tax credit, a contractual agreement will be prepared. The business will be given the details of its tax credit.
6. The tax credit award will be submitted to the California Competes Tax Credit Committee for final approval.

#### Contact

Phone: (916) 322-4051

Email: [CalCompetes@gobiz.ca.gov](mailto:CalCompetes@gobiz.ca.gov)

#### Link to Program Page

<https://business.ca.gov/california-competes-tax-credit/>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## TAX INCENTIVES

### CALIFORNIA FILM COMMISSION TAX CREDIT

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#### Organization

California Film Commission

#### Summary

The California Film Commission administers the Film & Television Tax Credit Program 3.0 which provides tax credits based on qualified expenditures for eligible productions that are produced in California, as follows:

**Relocating TV Series:** 25% non-transferable tax credit for series of six episodes or more with a minimum budget of \$1 million per episode. Credit is reduced to 20% after the first season filmed in California.

**Independent Films:** 25% transferable tax credit for independent films with a minimum budget of \$1 million. Credits apply only to the first \$10 million of qualified expenditures.

**Feature Film, New TV Series, Mini-Series, Pilots:** 20% non-transferable tax credit for:

- **Feature Film:** \$1 million minimum budget. Credit allocation applies only to the first \$100 million in qualified expenditures, plus uplifts.
- **New television & Mini-series** for any distribution outlet: \$1 million minimum budget/episode (at least 40 minutes/episode, scripted only).
- **TV Pilots:** \$1 million minimum budget (at least 40 minutes).

**Out-of-Zone Filming, Visual Effects, Local Hire Labor:** Eligible projects may receive an additional 5% or 10% credit for:

- **Out-of-Zone Filming:** Expenditures relating to original photography and incurred outside the 30-Mile Studio Zone (pre-production through strike). Eligible expenditures include qualified wages paid for services performed outside the Zone, and expenditures purchased or leased and used outside the Zone.
- **Visual Effects:** To qualify, visual effects work must represent at least 75% of the VFX budget or a minimum of \$10 million in qualified VFX expenditures incurred in California.
- **Local Hire Labor:** Non-independent productions (except for Relocating TV) are eligible to receive an additional 10% tax credit for qualified local hire labor. Independent films and relocating TV series are eligible to receive an additional 5% tax credit for qualified local hire labor.

#### End Date

June 30, 2025

#### Process

The application proceeds in two parts.

Phase I: During a certain period, interested parties can submit their applications through the website (link below), accompanying it with the required documentation.

Phase II: The highest-ranking projects will be invited to submit another application.

Continued on next page.



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## TAX INCENTIVES

### CALIFORNIA FILM COMMISSION TAX CREDIT

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#### Contact

Phone: (323) 860-2960 or (800) 858-4749

Email: [filmca@film.ca.gov](mailto:filmca@film.ca.gov)

In Person: 7080 Hollywood Blvd., Suite 900, Los Angeles, CA 90028

#### Link to Program Page

<https://film.ca.gov/tax-credit/the-basics-3-0/>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## TAX INCENTIVES

### MANUFACTURING & RESEARCH & DEVELOPMENT EQUIPMENT EXEMPTION

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#### Organization

California Department of Tax and Fee Administration (CDTFA)

#### Summary

The Manufacturing & Research & Development Equipment Exemption is administered by the California Department of Tax and Fee Administration (CDTFA). Manufacturers and certain research and developers may qualify for a partial exemption of sales and use tax on certain manufacturing and research and development equipment purchases and leases.

Qualified persons pay only 3.3125% sales or use tax plus any applicable district-imposed taxes until June 30, 2030, on qualifying purchases and leases. Qualifying purchases are limited to \$200 million in a calendar year.

#### End Date

July 1, 2030

#### Eligibility

To be eligible for this partial exemption, you must meet all three of these conditions:

- Be engaged in certain types of business, also known as a “qualified person.”
- Purchase “qualified property.”
- Use that qualified property for the uses allowed by this law.

Note: Requirements are extensive and complex. Please see the website for all of the details (link below).

#### Process

The partial exemption is available to anyone who meets the qualifications. You do not need to apply.

#### Contact

Phone: (800) 400-7115 or (760) 770-4828

Email: [BTFD-AIS.IndustryGuides@cdtfa.ca.gov](mailto:BTFD-AIS.IndustryGuides@cdtfa.ca.gov) or [RanchoMirageInquiries@cdtfa.ca.gov](mailto:RanchoMirageInquiries@cdtfa.ca.gov)

In Person: 35-900 Bob Hope Drive, Suite 280  
Rancho Mirage, CA 92270-1768

#### Link to Program Pages

<https://www.cdtfa.ca.gov/industry/manufacturing-exemptions.htm> & <https://www.cdtfa.ca.gov/formspubs/pub541.pdf>





# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## TAX INCENTIVES

### NEW EMPLOYMENT CREDIT (NEC)

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#### Organization

State of California Franchise Tax Board (FTB)

#### Summary

NEC is for a qualified taxpayer that hires a qualified full-time employee on or after January 1, 2014, and pays or incurs qualified wages attributable to work performed by the qualified full-time employee in a Designated Geographical Area (DGA), and that meets the requirements listed below.

#### Eligibility

##### Qualified Employer Requirements: Qualified Employee Requirements:

- Must be engaged in a trade or business in California within the DGA
- Hires qualified employees
- Obtains a tentative credit reservation for the qualified employees
- Pays qualified wages
- Is not in an excluded business
- Has a net increase in jobs
- Hired on or after the employee's work location was made part of the DGA
- Performs at least 50% of his/her services in the DGA
- Receives starting wages that exceed 150% California minimum wage at the time of hire
- Is hired for full-time work (paid hourly wages for an average of at least 35 hours per week, or is salaried and paid for full-time work)
- Meets 1 of the following qualification categories at the time of hire:
  - Unemployed for the previous 6 months or more
  - Unemployed means not receiving wages, not self-employed, and not a full-time student
  - If the employee completed a college or similar program, the completion date must have been at least 12-months prior to date of hire
  - Veteran, separated from the U.S. Armed Forces within the previous 12 months
  - Received the federal Earned Income Credit in the previous taxable year
  - Ex-offender convicted of a felony
  - Current recipient of CalWORKS or county general assistance

#### Process

The first step is to obtain a New Employment Credit Reservation (link below). When the credit is claimed on a tax return, it will be subject to audit.

#### Link to Program Page

<https://www.ftb.ca.gov/file/business/credits/new-employment-credit/index.html>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## TAX INCENTIVES

### CALIFORNIA RESEARCH TAX CREDIT

(FORMERLY "RESEARCH & DEVELOPMENT TAX CREDIT")

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#### Organization

State of California Franchise Tax Board (FTB)

#### Summary

The California Research Credit reduces income or franchise taxes. You receive 15% of the excess of current year research expenditures over a computed base amount and 24% of basic research payments. You may carry over any unused amount to future years until none remains. You may elect an alternative income credit method on a timely filed original return. If you want to revoke this method in a later year, you must receive our approval before filing an original return. You cannot change your method on an amended return.

#### Process

1. File your income tax return.
2. Attach [Research Credit \(FTB 3523\)](#).
3. Visit [Instructions for Form FTB 3523](#) for more information.
4. [Credit assignments](#)

#### Contact

Automated (800) 338-0505  
Help:

#### Link to Program Page

<https://www.ftb.ca.gov/file/business/credits/california-research.html>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## TAX INCENTIVES

### FEDERAL RESEARCH & DEVELOPMENT (R&D) TAX CREDIT

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#### Organization

Internal Revenue Service (IRS)

#### Summary

The Federal Research And Development (R&D) Tax Credit results in a dollar-for-dollar reduction in a company's tax liability for certain domestic expenses. Qualifying expenditures generally include the design, development or improvement of products, processes, techniques, formulas or software.

Typically, 6% to 8% of a company's annual qualifying R&D expenses can be applied, dollar-for-dollar, against its federal income tax liability. Various activities may qualify for the credit, including but not limited to:

- Developing processes, patents, formulas, techniques, prototypes or software
- Improving or redesigning existing products
- Hiring scientists, designers or engineers that are engaged in qualified activities
- Devoting time and resources to creating (manufacturing or developing) new or innovative products
- Developing intellectual property
- Paying certain amounts for salaries, supplies, contract research and cloud hosting

Businesses can also claim an R&D tax credit of up to \$250,000 per year against their payroll taxes. Eligible organizations include those that have under \$5 million in gross receipts in the current year and no more than 5 years of generating gross receipts, including the current year. New businesses, meanwhile, can offset payroll taxes for up to five years, with a maximum of \$1.25 million in total credits used on their quarterly federal payroll tax returns.

#### FAQ's

Q: How far back can you claim R&D tax credits?

A: Businesses can claim the R&D credit retroactively by filing amended returns for any open tax years, which in most cases, is three years. The time frame may be longer, however, if the organization endured losses during that period.

Continued on next page.



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## TAX INCENTIVES

### FEDERAL RESEARCH & DEVELOPMENT (R&D) TAX CREDIT

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#### FAQ's

Q: Is R&D tax credit taxable income?

A: The R&D credit reduces federal taxable income, meaning that businesses receive a dollar-for-dollar tax credit and still get to deduct expenses related to research and development.

Q: Do R&D tax credits expire?

A: The Protecting Americans from Tax Hikes (PATH) Act of 2015 permanently extended the R&D credits available under Section 41 of the Internal Revenue Code. If there is a lack of tax liability, business may carry unused credits forward for up to 20 years.

#### Eligibility

R&D tax credits are available to all organizations that engage in certain activities to develop new or improved products, processes, software, techniques, formulas or inventions. This accessibility is partly due to the Protecting Americans from Tax Hikes (PATH) Act of 2015, which broadened the ability of many small-to-midsize businesses to monetize the R&D credit. Activities that generally qualify for the R&D credit have to meet the IRS's four-part test:

1. Permitted purpose

The activity must be related to developing or improving the functionality, quality, reliability or performance of a business component (i.e. product, process, software, technique, formula or invention).
2. Technological in nature

The business component's development must be based on a hard science, such as engineering, physics and chemistry, or the life, biological or computer sciences.
3. Elimination of uncertainty

From the outset, the organization must have faced technological uncertainty when designing or developing the business component.
4. Process of experimentation

The company must have evaluated multiple design alternatives or employed a systematic trial and error approach to overcome the technological uncertainties.

Continued on next page.



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## TAX INCENTIVES

### FEDERAL RESEARCH & DEVELOPMENT (R&D) TAX CREDIT

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#### Process

Businesses can claim the R&D Credit by filing [IRS Form 6765, Credit for Increasing Research Activities](#). As part of the process, they need to identify qualifying expenses and provide adequate documentation that shows how these costs meet the requirements under Internal Revenue Code Section 41. Financial records, business records, oral testimony and technical documents may be used for this purpose. To document their qualified R&D expenses, businesses must complete the four basic sections of Form 6765:

- **Section A** is used to claim the regular credit and has eight lines of required information (lines 1,2,3,7,8,10,11 and17).
- **Section B** applies to the alternative simplified credit (ASC).
- **Section C** identifies additional forms and schedules that warrant reporting based on business structure.
- **Section D** is only required for qualified small businesses (QSBs) making a payroll tax election.

The IRS recommends that businesses calculate their credit using both the regular credit and simplified credit methods and then fill out the section (A or B) that results in the greatest tax benefit.

#### Contact

IRS Main: (800) 829-1040

#### Link to Program Page

<https://www.irs.gov/businesses/corporations/faqs-irc-41-qres-and-asc-730-lbi-directive>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## TAX INCENTIVES

### BUSINESS ENERGY INVESTMENT TAX CREDIT (ITC)

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#### Organization

US Internal Revenue Service (IRS)

#### Summary

The Business ITC is a U.S. federal corporate tax credit that applies to commercial, industrial, utility, and agricultural sectors.

- Base Credit: 6% - 30% (depending on project status and labor factors; see below)
- Domestic Content Bonus: 10% additional
- Energy Community Bonus: 10% additional
- Low-Income Community Bonus: 10% additional
- Low-income Residential Building or Low-Income Economic Benefit Bonus: 20% additional

#### Eligibility

Eligible Technologies:

- Solar Water Heat
- Solar Space Heat
- Geothermal Electric
- Solar Thermal Electric
- Solar Thermal Process Heat
- Solar Photovoltaics
- Wind (All)
- Geothermal Heat Pumps
- Municipal Solid Waste
- Combined Heat & Power
- Fuel Cells using Non-Renewable Fuels
- Tidal
- Wind (Small)
- Geothermal Direct-Use
- Fuel Cells using Renewable Fuels
- Microturbines

#### Process

Fill out [Form 3468](#) to claim the credit and refer to the [instructions](#).

#### Contact

IRS Main: (800) 829-1040  
Direct Assistance: (800) 829-0582 x652  
Business Questions: (800) 829-4933

#### Link to Program Page

<https://www.energy.gov/eere/solar/federal-solar-tax-credits-businesses>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## TAX INCENTIVES

### EB-5 IMMIGRANT INVESTOR PROGRAM

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<b>Organization</b>	US Citizenship and Immigration Services
<b>Summary</b>	Under this program, entrepreneurs and investors (and their spouses and unmarried children under age 21) are eligible to apply for permanent residency.
<b>Eligibility</b>	Investments must: <ol style="list-style-type: none"><li>1. Make the necessary investment in a commercial enterprise in the United States; and</li><li>2. Plan to create or preserve 10 permanent full-time jobs for qualified U.S. workers.</li></ol>
<b>Process</b>	<ol style="list-style-type: none"><li>1. Complete <a href="#">Form I-526</a> and submit for approval.</li><li>2. File either: <a href="#">Form I-485</a>, <a href="#">Form DS-230</a> or <a href="#">DS-260</a>.</li><li>3. Conditional permanent residency for the applicant and family is granted for two years.</li><li>4. 90 days before the two-year period ends, file Form I-829 to remove conditions, allowing unconditional permanent living and working privileges in the US.</li></ol>
<b>Contact</b>	Phone: (800) 375-5283 Email: <a href="mailto:ipostakeholderengagement@uscis.dhs.gov">ipostakeholderengagement@uscis.dhs.gov</a>
<b>Link to Program Page</b>	<a href="https://www.uscis.gov/working-in-the-united-states/permanent-workers/eb-5-immigrant-investor-program">https://www.uscis.gov/working-in-the-united-states/permanent-workers/eb-5-immigrant-investor-program</a>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## TAX INCENTIVES

### FOREIGN TRADE ZONE (FTZ) EXPANSION POTENTIAL

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#### Organization

US Citizenship and Immigration Services

#### Summary

A Foreign Trade Zone is a designated location in the United States where companies can use special customs procedures that help encourage U.S. activity and value added – in competition with foreign alternatives – by allowing delayed or reduced duty payments on foreign merchandise, as well as other savings.

#### FAQ's

Q: What are the benefits of a Foreign-Trade Zone?

A: In the global marketplace, many companies consider moving to foreign facilities to reduce costs. The benefits of the Foreign-Trade Zone program may be the competitive advantage that companies need to keep their manufacturing or distribution operations in the United States. These include:

- No duties on imported goods that are later re-exported.
- Delayed payment of duties on goods that enter the U.S. market.
- Manufacturing-specific benefits – with case-by-case approval by the FTZ Board – that can include reduction of duties if a lower tariff rate applies to the finished product leaving the zone than the tariff rates that would have applied on foreign components (“inverted tariff”).
- Elimination of duties on waste, scrap and rejected or defective parts.
- Reductions in merchandise processing fees because zone users may be able to file a single customs “entry” (and pay a single fee) per week rather than making multiple entries during the course of a week.

Q: Does Barstow currently have a Foreign Trade Zone?

A: No. The nearest FTZ is located in Victorville, however the FTZ can be expanded.

#### Link to Program Pages

<https://www.trade.gov/about-ftzs> & <https://www.cbp.gov/border-security/ports-entry/cargo-security/cargo-control/foreign-trade-zones/about>





# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## FINANCING

### ELECTRIC VEHICLE CHARGING STATION FINANCING PROGRAM (EVCS)

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#### Organization

California State Treasurer

#### Summary

Loans in the Electric Vehicle Charging Station Financing Program (EVCS) can be used for the design, development, purchase, and installation of qualified electric vehicle charging stations in the State of California.

Funded by the California Energy Commission, the California Capital Access Program (CalCAP) may provide up to 100% coverage to lenders on certain loan defaults. Borrowers may be eligible to receive a rebate of 10-15% of the enrolled loan amount.

The maximum enrolled loan amount is \$500,000 per qualified borrower and loans can be insured for up to four years (though the actual term of the loan can be longer). Lenders set the terms and conditions of the loans and decide which loans to enroll into the EVCS Program. The EVCS Program contributes 20% of the principal balance enrolled to a loss reserve account. CalCAP will contribute an additional 10%, up to a maximum of 30%, if the installation is in a multi-unit dwelling or located in a [disadvantaged community as designated in the CalEnviroScreen 2.0](#).

#### Eligibility

##### Small Business Borrowers:

- The borrower is a small business defined as: a company, corporation, partnership, firm, or other entity or group of entities that together with its affiliates, has 1,000 or fewer employees.
- The borrower has legal control of the EVCS installation site for a term that is equal to or greater than the length of the enrolled loan.
- The EVCS installation is located within the boundaries of the State of California.
- Furthermore, individual lenders determine the eligibility of a borrower.

##### Lenders:

- Any federal or state-chartered bank, savings association, certified Community Development Financial Institutions (CDFI), or credit union is eligible to participate in CalCAP. A lender must certify that it is in good standing with its regulatory body (Federal Reserve, Federal Deposit Insurance Corporation (FDIC), Comptroller of Currency, Thrift Supervision, National Credit Union Administration (NCUA), or state banking authority). Finance Lenders and others may also be eligible.

Continued on next page.



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## FINANCING

### ELECTRIC VEHICLE CHARGING STATION FINANCING PROGRAM (EVCS)

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#### Process

#### Small Business Borrowers:

- Apply to a Participating Financial Institution for a loan.
- After business repays the loan, or after 48 months with no more than one 30-day late payment, the borrower is eligible for a rebate of half the enrolled contribution amount.
- Example: on a \$10,000 loan for a charging station in a multi-unit dwelling, the EVCS Program will contribute \$3,000 to a lender's loan loss reserve program to cover any loan defaults in their portfolio of loans. After the borrower successfully repays the loan, or after 48 months with no more than one 30-day late payment, the borrower will receive a rebate of \$1,500 (half of the loan loss reserve contribution).

#### Lenders:

- Apply to the California Pollution Control Financing Authority (CPCFA) to participate in CalCAP.
- Enroll each loan with CalCAP.
- At the time of loan enrollment approval, CPCFA pays a contribution into the lender's loan loss reserve account. The contribution is 20% of the loan amount with an additional 10% for installations at multi-unit dwellings and in disadvantaged communities. Loan enrollment applications must be received at CPCFA within 15 business days of the "Date of First Disbursement" (Date of Loan).
- If a qualified claim is requested, CPCFA approves up to 100% of the claim or the amount of the lender's loss reserve balance, whichever is less.
- For Borrowers eligible for a rebate, the rebate will be funded from the lenders loan loss reserve account.

#### Contact

Phone: (916) 654-5610

Email: [CPCFA@treasurer.ca.gov](mailto:CPCFA@treasurer.ca.gov)

#### Link to Program Page

<https://www.treasurer.ca.gov/cpcfca/calcap/evcs/summary.asp>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## FINANCING

### SMALL BUSINESS LOAN GUARANTEE PROGRAM (SBLGP)

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#### Organization

California Infrastructure and Economic Development Bank (IBank)

#### Summary

The California Infrastructure and Economic Development Bank (IBank) administers the SBLGP, which encourages lenders to provide funds to small businesses to help them grow and prosper. This program helps businesses create and retain jobs, and encourages investment in low- to moderate-income communities. It is available to small businesses throughout the state of California and serves hundreds of small businesses each year.

Loan Guarantee terms:

- Maximum guarantee amount: \$5 million
- Guarantee term: Up to 7 years
- Guarantees up to 80% of the loan
- Interest rate and qualifications determined by each lender

#### Eligibility

Small businesses with 1-750 employees. The business must be in one of the industries listed in the North American Industry Classification System (NAICS) codes list.

Eligible use of funds:

- Start-up costs
- Working capital
- Construction
- Business expansion
- Inventory
- Lines of credit
- Agriculture
- Export financing
- Disaster relief

#### Contact

Phone: (916) 341-6600

Email: [SBFC-programs@ibank.ca.gov](mailto:SBFC-programs@ibank.ca.gov)

#### Link to Program Page

[www.ibank.ca.gov](http://www.ibank.ca.gov)



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## FINANCING

### POLLUTION CONTROL TAX-EXEMPT BOND FINANCING PROGRAM

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#### Organization

California State Treasurer

#### Summary

The Pollution Control Tax-Exempt Bond Financing Program provides private activity tax-exempt bond financing to California businesses for the acquisition, construction, or installation of qualified pollution control, waste disposal, waste recovery facilities, and / or the acquisition and installation of new equipment.

Financing is performed in conjunction with allocation from the [California Debt Limit Allocation Committee](#) (CDLAC). The allocation is required by federal tax law for private activity tax-exempt bonds to be issued.

Tax-exempt bond financing provides qualified borrowers with lower interest costs than are available through conventional financing mechanisms.

#### Eligibility

The following types of projects are eligible for financing:

- **Large Business:** Provides financing to California business, irrespective of company size, for the acquisition, construction or installation or qualified pollution control, waste disposal, and resource recovery facilities.
- **Small Business:** Provides financing to California businesses that meet the size standards set forth in Title 13 of the Code of Federal Regulations or are an eligible small business, which is defined as 500 employees or less, including affiliates, for the acquisition, construction or installation of qualified pollution control, waste disposal, and resource recovery facilities.

#### Process

1. Potential Borrowers submit an application for Initial Resolution.
2. Qualified projects will be submitted to the CPCFA board members for approval of an Initial Resolution (IR).
3. A Final Resolution (FR) authorizes a bond sale for a project within a certain period (usually 180 days).
4. After FR approval potential borrowers, via CPCFA, request "allocation" from the California Debt Limit Allocation Committee.
5. Once projects receive allocation the Office of the State Treasurer schedules the bonds for sale. CPCFA utilizes a Bond Trustee to distribute the bond proceeds to the borrower and, on behalf of bondholders, to collect and disburse bond payments.

#### Contact

Phone: (916) 654-5610 or TDD (916) 654-9922

Email: [cpcfabond@treasurer.ca.gov](mailto:cpcfabond@treasurer.ca.gov)

#### Link to Program Page

<https://www.treasurer.ca.gov/cpcfca/bondfinancing.asp>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## FINANCING

### TRUCK LOAN ASSISTANCE PROGRAM

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#### Organization

California State Treasurer

#### Summary

In partnership with the California Pollution Control Financing Authority (under the umbrella of the State Treasurer's Office), the California Air Resources Board (CARB) offers the Truck Loan Assistance Program to provide financial assistance to truckers affected by the Truck and Bus Regulation. Implemented through the California Pollution Control Financing Authority's California Capital Access Program (CalCAP), CARB's program provides financing opportunities to qualified small-business truckers who fall below conventional lending criteria and are unable to qualify for traditional financing for cleaner trucks.

#### Eligibility

The program is open to qualified trucking fleets with 10 or fewer heavy-duty vehicles. In addition to meeting CARB's program criteria, CalCAP requires that an eligible trucking company meet basic requirements by qualifying as a small business (fewer than 100 employees), generate less than \$10 million in annual revenue, and operate primarily in California.

Loans may be used to finance individual technologies, or a combination of technologies, to help fleet owners comply with the Truck and Bus Regulation. Potential products available for financing include:

- Used and new trucks with 2010 and newer model year engines CARB-certified to 2010 and later model year emission standards.
- The engines can use diesel fuel, compressed natural gas (CNG), liquefied natural gas (LNG), or other fuels including zero-emission technology.

#### Process

Truckers may access the program simply by contacting participating CalCAP lenders and completing a loan application. Truckers may also work with their preferred truck dealers to coordinate financing through participating CalCAP lenders. A list of contact information for these lenders is available at:

- CalCAP: <https://www.treasurer.ca.gov/cpcfca/calcap/arb/lenders.pdf>
- TruckStop: <https://ww2.arb.ca.gov/sites/default/files/truckstop/truckstop.html>

#### Contact

Phone: CARB's Diesel Hotline (866) 634-3735

Email: [8666DIESEL@arb.ca.gov](mailto:8666DIESEL@arb.ca.gov)

#### Link to Program Page

<https://ww2.arb.ca.gov/our-work/programs/truck-loan-assistance-program>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## FINANCING

### INDUSTRIAL DEVELOPMENT BONDS (IDBs)

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<b>Organization</b>	California Infrastructure and Economic Development Bank (IBank)
<b>Summary</b>	Industrial Development Bonds are tax-exempt financing up to \$10 million for qualified manufacturing and processing companies for the construction or acquisition of facilities and equipment. IDBs allow private companies to borrow at low interest rates normally reserved for state and local governmental entities.
<b>Eligibility</b>	The project financed by the bonds must be a facility used for manufacturing, production or processing of tangible or intangible property (including the processing resulting in the change of such property). No more than 25% of the bond proceeds can be applied to ancillary office, warehouse or other space. The project financed by the bonds must meet certain public benefit criteria established by the IRS, which include, among other things, the creation or retention of jobs. All IDBs need to submit a separate application to the California Debt Limit Allocation Commission (CDLAC) in order to receive a tax-exempt allocation. Please visit <a href="http://treasurer.ca.gov">treasurer.ca.gov</a> .
<b>Process</b>	<p>The IDB financing process can generally be completed within 120-150 days. The IBank staff and financing team, which typically consists of an underwriter, bond counsel and financial advisor, will assist the applicant through each stage of the process.</p> <p>Stage 1: Pre-Qualification</p> <ul style="list-style-type: none"><li>• Federal Requirements</li><li>• State Requirements</li></ul> <p>State 2: Approvals</p> <ul style="list-style-type: none"><li>• Inducement Resolution by Issuer</li><li>• Application to Issuer for Final Approval</li><li>• Noticed Public Hearing ("TEFRA")</li><li>• Letter of Credit Commitment from Bank</li><li>• State Tax-Exempt Allocation Approvals</li></ul> <p>Stage 3: Bond Issuance</p> <ul style="list-style-type: none"><li>• Documentation</li><li>• Final Resolution of Issuance by Issuer</li><li>• Bond Sale</li><li>• Funding</li></ul>
<b>Contact</b>	Phone: (916) 341-6644 Email: <a href="mailto:BondUnit@IBank.ca.gov">BondUnit@IBank.ca.gov</a>
<b>Link to Program Page</b>	<a href="https://www.ibank.ca.gov/bonds/industrial-development-bonds/">https://www.ibank.ca.gov/bonds/industrial-development-bonds/</a>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## FINANCING

### NEW MARKETS TAX CREDIT PROGRAM (NMTC)

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#### Organization

US Department of the Treasury

#### Summary

The New Markets Tax Credit (NMTC) Program attracts private capital into low-income communities by permitting individual and corporate investors to receive a tax credit against their federal income tax in exchange for making equity investments in specialized financial intermediaries called Community Development Entities (CDEs). The credit totals 39% of the original investment amount and is claimed over seven years.

CDEs are financial intermediaries through which private capital flows from an investor to a qualified business located in a low-income community. CDEs use their authority to offer tax credits to investors in exchange for equity in the CDE.

The NMTC Program helps businesses access financing that is flexible and affordable. Investment decisions are made at the community level, and typically involve more favorable terms and conditions than the market offers. Terms can include lower interest rates, flexible provisions, lower origination fees, higher loan-to-values, lower debt coverage ratios, and longer maturities.

#### Eligibility

CDEs are responsible for recruiting investors. Contact your local CDE or CDFI (Community Development Financial Institution; information below) for help finding one. Also see the list of CDE's (link below).

#### Process

Interested parties should contact their area's CDE. Contact the CDFI (information below) for help finding a CDE right for you. Also see the list of CDE's (link below). After making investments, investors go to the IRS and request a write-off.

#### Contact

Phone: (202) 653-0421

Email: [cdfihelp@cdfi.treas.gov](mailto:cdfihelp@cdfi.treas.gov)

#### Link to Program Page

<https://www.cdfifund.gov/programs-training/programs/new-markets-tax-credit>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## FINANCING

### RENEWABLE ELECTRICITY PRODUCTION TAX CREDIT (PTC)

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#### Organization

US Internal Revenue Service (IRS)

#### Summary

The federal Renewable Electricity Production Tax Credit (PTC) is an inflation-adjusted per-kilowatt-hour (kWh) tax credit for electricity generated by qualified energy resources and sold by the taxpayer to an unrelated person during the taxable year. The duration of the credit is 10 years after the date the facility is placed in service for all facilities placed in service after August 8, 2005.

#### Eligibility

The PTC provides a corporate tax credit for electricity generated from:

- Up to \$0.013/kWh for landfill gas (LFG), open-loop biomass, municipal solid waste resources, and small irrigation power facilities, or
- Up to \$0.026/kWh for wind, closed-loop biomass and geothermal resources.

The credit is good for 10 years after the equipment is placed in service.

#### Process

To claim the PTC, a taxpayer must complete and attach IRS Form 8962 to their tax return. Instructions for completing the form are available at <http://www.irs.gov/pub/irs-pdf/i8962.pdf> ("Instructions for Form 8962," IRS).

#### Contact

Phone: (800) 829-1040

#### Link to Program Pages

<https://www.epa.gov/lmop/renewable-electricity-production-tax-credit-information> & <https://www.energy.gov/eere/solar/federal-solar-tax-credits-businesses>





# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## FINANCING

### SMALL BUSINESS ADMINISTRATION (SBA) LOAN PROGRAMS OVERVIEW

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#### Organization

California Infrastructure and Economic Development Bank (IBank)

#### Summary

The U.S. Small Business Administration helps small businesses get funding by setting guidelines for loans and reducing lender risk. These SBA-backed loans make it easier for small businesses to get the funding they need. Loans guaranteed by SBA range from \$500 to \$5.5 million and can be used for most business purposes, including long-term fixed assets and operating capital. Loan programs offered:

- **7(a) Loans:** A group of SBA loans which guarantee portions of the total amount, cap interest rates, and limit fees. The maximum loan amount for a 7(a) loan is \$5 million.
- **504 Loans:** Long-term, fixed-rate financing to purchase or repair real estate, equipment, machinery, or other assets. The maximum loan amount for a 504 loan is \$5 million.
- **Microloans:** SBA's smallest loan program, providing \$50,000 or less to help businesses start up and expand.

#### Benefits

- **Competitive terms:** SBA-guaranteed loans generally have rates and fees that are comparable to non-guaranteed loans.
- **Counseling & education:** Some loans come with continued support to help you start and run your business.
- **Unique benefits:** Lower down payments, flexible overhead requirements, and no collateral needed for some loans.

#### FAQ's

Q: Does the SBA directly issue loans?

A: SBA does not make direct loans to small businesses. Rather, it sets the guidelines for loans, which are made by its partners. The specific terms of SBA loans are negotiated between a borrower and an SBA-approved lender.

Continued on next page.



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## FINANCING

### SMALL BUSINESS ADMINISTRATION (SBA) LOAN PROGRAMS OVERVIEW

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#### Eligibility

Lenders and loan programs have unique eligibility requirements. In general, eligibility is based on what a business does to receive its income, the character of its ownership, and where the business operates. Normally, businesses must meet SBA [size standards](#), be able to repay, and have a sound business purpose. Even those with bad credit may qualify for startup funding. The lender will provide you with a full list of eligibility requirements for your loan.

- Be a for-profit business: The business is officially registered and operates legally.
- Do business in the U.S.: The business is physically located and operates in the United States or its territories.
- Have invested equity: The business owner has invested their own time or money into the business.
- Exhaust financing options: The business cannot get funds from any other financial lender.

#### Process

In order to get an SBA-backed loan:

- Learn more about 7(a) Loans, 504 Loans, and Microloans to determine which loan that best suits your need.
- Enter your Zip Code on [SBA's Lender Match](#) to find a lender in your area.
- Apply for a loan through your local lender.
- Lenders will approve and help you manage your loan.

#### Contact

Phone: (800) 877-8339

Email: [answerdesk@sba.gov](mailto:answerdesk@sba.gov)

In Person: Santa Ana - Main SBA Office  
5 Hutton Centre Dr., Suite 900  
Santa Ana, CA 92707  
(714) 550-7420

#### Link to Program Page

<https://www.sba.gov/funding-programs/loans>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## FINANCING

### SMALL BUSINESS ADMINISTRATION (SBA) 7(A) LOAN PROGRAM

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#### Organization

California Infrastructure and Economic Development Bank (IBank)

#### Summary

The 7(a) Loan Program, SBA's most common loan program, includes financial help for small businesses with special requirements. This is the best option when real estate is part of a business purchase, but it can also be used for:

- Short- and long-term working capital
- Refinance current business debt
- Purchase furniture, fixtures, and supplies

The maximum loan amount for a 7(a) loan is \$5 million. Key eligibility factors are based on what the business does to receive its income, its credit history, and where the business operates. Your lender will help you figure out which type of loan is best suited for your needs.

#### FAQ's

Q: How do I use the 7(a) loan?

A: Basic uses for the 7(a) loan include:

- Long- and short-term working capital
- Revolving funds based on the value of existing inventory and receivables
- The purchase of equipment, machinery, furniture, fixtures, supplies, or materials
- The purchase of real estate, including land and buildings
- The construction a new building or renovation an existing building
- Establishing a new business or assisting in the acquisition, operation or expansion of an existing business
- Refinancing existing business debt, under certain conditions

Q: How do I pay back my 7(a) loan?

A: Loan repayment terms vary according to several factors.

- Most 7(a) term loans are repaid with monthly payments of principal and interest.
- Payments stay the same for fixed-rate loans because the interest rate is constant.
- For variable rate loans, the lender can require a different payment amount when the interest rate changes.

Q: Where can I find lenders?

A: <https://www.sba.gov/funding-programs/loans/lender-match>

Continued on next page.



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## FINANCING

### SMALL BUSINESS ADMINISTRATION (SBA) 7(A) LOAN PROGRAM

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#### FAQ's

Q: Does the SBA directly issue loans?

A: SBA does not make direct loans to small businesses. Rather, it sets the guidelines for loans, which are made by its partners. The specific terms of SBA loans are negotiated between a borrower and an SBA-approved lender.

#### Eligibility

To be eligible for 7(a) loan assistance, businesses must:

- Operate for profit.
- Be considered a [small business, as defined by SBA](#).
- Be engaged in, or propose to do business in, the United States or its possessions.
- Have reasonable invested equity.
- Use alternative financial resources, including personal assets, before seeking financial assistance.
- Be able to demonstrate a need for a loan.
- Use the funds for a sound business purpose.
- Not be delinquent on any existing debt obligations to the U.S. government.
- Some businesses may not qualify for a 7(a) loan. Read more about [Terms, conditions, and eligibility](#).

#### Process

The application should be filled out and submitted to an SBA participating lender.

Documents needed are:

1. SBA Loan Application
2. Borrower Information Form [SBA Form 1919](#)
3. Personal Financial Statement [SBA Form 413](#)
4. Business Financial Statements
5. Ownership and Affiliations
6. Business Certificate/License
7. Loan Application History
8. Income Tax Returns
9. Resumes
10. Business Overview and History
11. Business Lease

#### Contact

Phone: (800) 877-8339 or (714) 550-7420

Email: [answerdesk@sba.gov](mailto:answerdesk@sba.gov)

In Person: Santa Ana - Main SBA Office  
5 Hutton Centre Dr., Suite 900, Santa Ana, CA 92707

#### Link to Program Page

<https://www.sba.gov/funding-programs/loans/7a-loans>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## FINANCING

### SMALL BUSINESS ADMINISTRATION (SBA) CDC/504 LOAN PROGRAM

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#### Organization

California Infrastructure and Economic Development Bank (IBank)

#### Summary

The CDC/504 Loan Program provides long-term, fixed rate financing for major fixed assets, such as real estate and equipment, that promote business growth and job creation. 504 loans are available through Certified Development Companies (CDCs), SBA's community-based partners who regulate nonprofits and promote economic development within their communities. CDCs are certified and regulated by the SBA. The maximum loan amount for a 504 loan is \$5 million. For certain energy projects, the borrower can receive a 504 loan for up to \$5.5 million per project, for up to three projects not to exceed \$16.5 million total.

#### FAQ's

Q: How do I use a 504 loan?

A: A 504 loan can be used for a range of assets that promote business growth and job creation. These include:

- Purchase or construction of existing buildings or land, new facilities, long-term machinery and equipment.
- Improvement or modernization of land, streets, utilities, parking lots and landscaping, or existing facilities.
  
- A 504 loan cannot be used for:
  - Working capital or inventory
  - Consolidating, repaying or refinancing debt
  - Speculation or investment in rental real estate

Q: How do I pay back my 504 loan?

A: Loan repayment terms and interest rates vary according to several factors.

- Repayment terms: both 10- and 20-year maturity terms available.
- Interest rates:
  - Pegged to an increment above the current market rate for 5-year and 10-year U.S. Treasury issues.
  - Totals approximately 3% of the debt, rate may be financed with the loan.

Continued on next page.



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## FINANCING

### SMALL BUSINESS ADMINISTRATION (SBA) CDC/504 LOAN PROGRAM

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#### Eligibility

To be eligible for a 504 loan, your business must:

- Operate as a for-profit company in the United States or its possessions.
- Have a tangible net worth of less than \$15 million.
- Have an average net income of less than \$5 million after federal income taxes for the two years preceding your application.
- Other general eligibility standards include falling within [SBA size guidelines](#), having qualified management expertise, a feasible business plan, good character and the ability to repay the loan.
- Loans cannot be made to businesses engaged in nonprofit, passive, or speculative activities. For additional information on eligibility criteria and loan application requirements, small businesses and lenders are encouraged to contact a Certified Development Company in their area.

#### Process

504 loans are available exclusively through Certified Development Companies (CDCs).

1. [Find a CDC](#) in your area to ensure you are dealing with a qualified lender.
2. Prepare and assemble your 504 loan authorization package, using SBA's [504 Authorization File Library](#) to identify the documentation you will need to apply for your 504 CDC loan.
3. Complete [Form 1244](#) and submit to your lender.

#### Contact

Phone: (800) 877-8339 or (714) 550-7420

Email: [answerdesk@sba.gov](mailto:answerdesk@sba.gov)

In Person: Santa Ana - Main SBA Office  
5 Hutton Centre Dr., Suite 900, Santa Ana, CA 92707

#### Link to Program Page

<https://www.sba.gov/funding-programs/loans/504-loans>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## FINANCING

### SMALL BUSINESS ADMINISTRATION MICROLOAN PROGRAM

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#### Organization

California Infrastructure and Economic Development Bank (IBank)

#### Summary

The Microloan Program provides loans up to \$50,000 to help small businesses and certain not-for-profit childcare centers start up and expand. The average microloan is about \$13,000. SBA provides funds to specially designated intermediary lenders, which are nonprofit community-based organizations with experience in lending as well as management and technical assistance. These intermediaries administer the Microloan program for eligible borrowers.

#### FAQ's

Q: How do I use a microloan?

A: Microloans **can** be used for a variety of purposes that help small businesses expand. Use them when you need less than \$50,000 to rebuild, re-open, repair, enhance, or improve your small business. Examples include:

- Working capital
- Inventory
- Supplies
- Furniture
- Fixtures
- Machinery
- Equipment

Proceeds from an SBA microloan **cannot** be used to pay existing debts or to purchase real estate.

Q: How do I pay back my microloan?

A: Loan repayment terms and interest rates vary according to several factors.

- Repayment terms:
  - Amount, planned use, lender requirements, needs of the small business owner.
  - Maximum repayment term allowed for an SBA microloan is six years.
- Interest rates:
  - Interest rates vary depending on the intermediary lender
  - Generally, between 8% and 13%.

Continued on next page.



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## FINANCING

### SMALL BUSINESS ADMINISTRATION (SBA) CDC/504 LOAN PROGRAM

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<b>Eligibility</b>	Each intermediary lender has its own lending and credit requirements. Generally, intermediaries require some type of collateral as well as the personal guarantee of the business owner.
<b>Process</b>	Microloans are available through certain nonprofit, community-based organizations that are experienced in lending and business management assistance. Individual requirements will vary. To apply for a microloan, work with an <a href="#">SBA-approved intermediary in your area</a> . SBA-approved lenders make all credit decisions and set all terms for your microloan.
<b>Contact</b>	Phone: (800) 877-8339 or (714) 550-7420 Email: <a href="mailto:answerdesk@sba.gov">answerdesk@sba.gov</a> In Person: Santa Ana - Main SBA Office 5 Hutton Centre Dr., Suite 900, Santa Ana, CA 92707
<b>Link to Program Page</b>	<a href="https://www.sba.gov/funding-programs/loans/microloans">https://www.sba.gov/funding-programs/loans/microloans</a>





# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## WORKFORCE

### AMERICA'S JOB CENTER OF CALIFORNIA

#### Organization

San Bernardino County Workforce Development Department (WDD)

#### Summary

America's Job Center of California (AJCC) is your one-stop shop for workforce services, providing a comprehensive range of no-cost employment and training services for employers and job seekers. The AJCC is a network of local, state, private, and public organizations offering a variety of services which brings employers with job openings and qualified job seekers together at no cost.

#### Services

##### Businesses

- **Free Human Resources Hotline:** protect businesses from costly fines and penalties. General HR questions: 877-282-3763.
- **Customized recruitment services:** find the right employees to fit your needs.
- **Access to a large pool of screened job applicants:** a database of pre-screened and assessed applicants.
- **Customized training programs:** save up to 50% on skills training for your team.
- **On-the-Job Training funds:** reimbursement for the initial training period for new employees, up to 50% reimbursement of their wages for up to three months is available.
- **Provide tax credit information:** leverage benefits through Federal and State hiring tax credits, California Competes Tax Credit, and tax credits on qualified machinery purchases.

##### Job Seekers

- Career planning
- Individual employment counseling
- Staff-assisted placement services
- Career assessments
- Job search resources
- Individual Employment Plan (IEP)
- Personal coaching and mentoring
- On-the-Job Training and vocational training
- Career counseling
- Skills and aptitude assessments
- Resume writing
- Successful interview techniques
- Referral to partner agencies
- Resource Room
  - Computers
  - Phones
  - Staff Assistance
  - Typing Tests (non-certificated)
  - Job Leads

#### Contact

##### Business Services

##### Job Seeker Services

Phone: Curtis Compton (909) 215-7255  
Email: [ccompton@wdd.sbcounty.gov](mailto:ccompton@wdd.sbcounty.gov)

(760) 552-6550  
[HDreferral@eda.sbcounty.gov](mailto:HDreferral@eda.sbcounty.gov)

In Person: AJCC High Desert branch  
17310 Bear Valley Rd #109, Victorville, CA 92395  
Hours: Monday-Friday 8AM-5PM

#### Link to Program Page

<https://wp.sbcounty.gov/workforce/>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## WORKFORCE

### EMPLOYMENT TRAINING PANEL (ETP)

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#### Organization

State of California Employment Training Panel (ETP)

#### Summary

ETP is a state business and labor agency that assists employers in strengthening their competitive edge in the economy by providing funds to partially off-set the costs of upgrading the skills of their workers through training that leads to good paying, long-term jobs. Priority industries include agriculture, allied health, biotechnology, construction, green/clean technology, goods movement and transportation logistics, information technology systems, manufacturing and food production, multi-media and entertainment, and technical services.

Trainees can include: Frontline workers, managers and supervisors, business owners, top-level executives, temporary to permanent employees, and seasonal employees.

An ETP contract is 100% performance-based (i.e. reimbursement is earned per trainee):

- Completes a minimum of 8 training hours and no more than 200 hours from an approved curriculum (\*some exceptions may apply)
- Completes an employment retention period of 90 consecutive days employed on a permanent fulltime basis (working at least 35 hours per week) with one employer (\*some exceptions may apply)
- Meets ETP minimum wage requirements after retention.

#### Eligibility

ETP can contract directly with the following entities:

- Single Employers
- Groups of Employers
  - Chambers of Commerce
  - Joint Apprenticeship Training Committees
  - Trade Associations
  - Economic Development Corporations
- Training Agencies
  - Community College or Community College District
  - University or University foundations
  - Adult School
  - Regional Occupational Program
  - Private training agency
- Workforce Development Boards
- Workforce Investment Act (WIA) Grant Recipients or WIA Administrative Entities

Continued on next page.



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## WORKFORCE

### EMPLOYMENT TRAINING PANEL (ETP)

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#### Contact

Regional Office: Questions on your Application or Contract

Phone: (619) 881-1777

Email: [etpedunit@etp.ca.gov](mailto:etpedunit@etp.ca.gov)

General Info: (916) 327-5258

Tech Support: [ETPCalEForce@etp.ca.gov](mailto:ETPCalEForce@etp.ca.gov)

#### Link to Program Page

<https://www.etp.ca.gov/>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## WORKFORCE

### VOCATIONAL REHABILITATION AND EMPLOYMENT PROGRAM

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#### Organization

The California Department of Rehabilitation (DOR)

#### Summary

The California Department of Rehabilitation (DOR) assists individuals with disabilities to build viable careers and live independently in their community. DOR's Vocational Rehabilitation Program provides a variety of services including career guidance and counseling, job search and interview skills training, independent living skills, on the job training, employment preparation, assistive technology, and other services.

#### Eligibility

To be eligible for services, an individual must:

- Have a physical or mental impairment that substantially impedes his / her ability to secure employment, and vocational rehabilitation services are required to prepare for, secure, retain, or regain employment consistent with the applicant's unique strengths, resources, priorities, concerns, abilities, interests, and informed choice; **Be able to benefit from the DOR's services in terms of an employment outcome in an integrated setting.**

#### Contact

Phone: (800) 952-5544; TTY: (844) 729-2800

In Person: Victorville Branch Office

15415 West Sand Street, 2nd Floor, Victorville, CA 92392

#### Link to Program Page

<https://www.dor.ca.gov/Home/VocationalRehabilitation>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## WORKFORCE

### WORK OPPORTUNITY TAX CREDIT (WOTC)

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#### Organization

The U.S. Department of Labor (DOL) and the U.S. Department of the Treasury

#### Summary

The Work Opportunity Tax Credit (WOTC) is a Federal tax credit available to employers for hiring and employing individuals from certain targeted groups who have faced significant barriers to employment. The WOTC may be claimed by any employer that hires and pays or incurs wages to certain individuals who are certified by a designated local agency (sometimes referred to as a state workforce agency) as being a member of one of 10 targeted groups. The credit available ranges from \$2,400 up to \$9,600, depending on the targeted group and qualified wages paid to the new employee generally during the first year of employment. Generally, the credit is 40% of qualified first-year wages for individuals who work 400+ hours in their first year of employment.

#### Eligibility

WOTC targeted groups include:

1. Qualified IV-A ("TANF") recipient
2. Qualified Veteran
3. Qualified Ex-Felon
4. Designated Community Resident
5. Vocational Rehabilitation Referral
6. Summer Youth Employee
7. Supplemental Nutrition Assistance Program (SNAP or "food stamps") recipient
8. Supplemental Security Income (SSI) recipient
9. Long-term Family Assistance (Long-term TANF) recipient
10. Qualified Long-term Unemployment recipient

#### End Date

December 31, 2025

#### Process

To verify whether a job applicant is a first-time, qualifying member of a targeted group, employers are required to submit IRS Form 8850 together with ETA Form 9061 or ETA Form 9062 to the state workforce agency in which the employer's business is located (where the employee works) **within 28 calendar days after the new hire's start date.**

1. IRS Form 8850, *Pre-Screening Notice and Certification Request for the Work Opportunity Credit*, available at: <https://www.irs.gov/forms-pubs/about-form-8850> ; **AND**
2. [ETA Form 9061](#) (OR) [ETA Form 9062](#) must be completed and submitted to the state workforce agency to complete the application. Note: The [Spanish - ETA Form 9061](#) is available for translation purposes only.

**Additional forms may be required for certain targeted groups, as noted below:**

3. [ETA Form 9175](#) is a *Self-Attestation Form* (SAF) completed by job applicants of the Qualified Long-Term Unemployment Recipient (LTUR) targeted group, only.

#### Contact

Phone: (866) 487-2365 or (866) 593-0173

Email: [Ask.WOTC@dol.gov](mailto:Ask.WOTC@dol.gov) or [WOTCsupport@edd.ca.gov](mailto:WOTCsupport@edd.ca.gov)

#### Link to Programs

<https://www.dol.gov/agencies/eta/wotc> & <https://www.irs.gov/businesses/small-businesses-self-employed/work-opportunity-tax-credit>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## WORKFORCE

### FEDERAL BONDING PROGRAM (FBP)

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#### Organization

The U.S. Department of Labor (DOL)

#### Summary

The Federal Bonding Program provides Fidelity Bonds for “at-risk,” hard-to-place job seekers. The FBP:

- Provides access to \$5,000-\$25,000 of fidelity bond coverage for an employee’s first six months of employment.
- Is not cost-prohibitive: employers gain access to bonds at no charge.
- Protects employers against employee theft, forgery, larceny and embezzlement.
- Ensures coverage for any job, in any state, and on or away from the work site. Coverage begins once an applicant receives a job offer.
- Supports employees who work full- or part-time and have Federal taxes automatically deducted from their pay. Temporary agencies qualify; self-employed people do not.
- Enables employers to obtain worker skills without taking risk.

#### Eligibility

This unique hiring incentive tool targets individuals whose backgrounds can pose significant barriers to securing or retaining employment, including:

- Justice-involved men, women, and youth
- People in recovery from substance abuse
- TANF recipients
- Individuals with poor credit records
- Economically disadvantaged youth and adults with little or no work histories
- People dishonorably discharged from the military
  
- NO bond approval processing
- NO papers for employer to sign
- NO Federal regulations covering bonds issued
- NO follow-up or termination action
- NO deductible in bond insurance amount if employee dishonesty occurs
- NO bondee age requirements other than legal working age in State

#### Process

1. Find your [State Bonding Coordinator](#), who will put you in touch with a local job placement agency or organization responsible for issuing bonds.
2. Present a secure job offer to this entity.
3. Provide company information and the employee’s name to the job placement agency.
4. The bond will be sent to the employer within 10 business days.

#### Contact

Phone: (800) 233-2258

Email: Tom Villanova at [tom@bonds4jobs.com](mailto:tom@bonds4jobs.com)

#### Link to Program Page

<https://bonds4jobs.com/>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## GENERAL BUSINESS ASSISTANCE

### ADVANCED MANUFACTURING TECHNOLOGY SERVICES (AMTS) PROGRAM

#### Organization

California Manufacturing Technology Consulting (CMTC)

#### Summary

The Advanced Manufacturing Technology Services (AMTS) Program is a Manufacturing Extension Partnership (MEP) Program that helps manufacturers adopt advanced technologies. The program offers offset funding for pilot projects with the goal of developing scalable, repeatable technology adoption services. The program is focused on three target industries paired with three technologies as illustrated below:

CNC Machine Shop	Food & Beverage Producer	Plastic Injection Molder
<ul style="list-style-type: none"> <li>• Increase efficiency</li> <li>• Enable multiple shifts</li> <li>• Improve product quality</li> <li>• Optimize production output</li> <li>• Improve worker health &amp; safety</li> <li>• Solutions: Printed Fixtured &amp; Jigs, Machine Tending Robotics</li> </ul>	<ul style="list-style-type: none"> <li>• Optimize production throughput</li> <li>• Predict machine maintenance</li> <li>• Reduce unplanned downtime</li> <li>• Reduce production waste</li> <li>• Improve product quality</li> <li>• Reduce energy costs</li> <li>• Inspect assembly and packaging</li> <li>• Detect allergens/contaminants</li> <li>• Solutions: Machine Vision (Quality Inspection), Condition Monitoring Sensors</li> </ul>	<ul style="list-style-type: none"> <li>• Optimize production throughput</li> <li>• Predict machine maintenance</li> <li>• Reduce unplanned downtime</li> <li>• Reduce production waste</li> <li>• Improve product quality</li> <li>• Reduce energy costs</li> <li>• Solutions: Printed Molds with Conformal Cooling, Condition Monitoring Sensors</li> </ul>

#### Contact

California Manufacturing Technology Consulting (CMTC)

Phone: (310) 263-3060

Email: [comm@cmtc.com](mailto:comm@cmtc.com)

#### Link to Program Page

<https://www.cmtc.com/advanced-manufacturing-technology-services>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## GENERAL BUSINESS ASSISTANCE

### CALIFORNIA MANUFACTURERS ACCELERATOR PLUS (CMA+) PROGRAM

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#### Organization

California Manufacturing Technology Consulting (CMTC)

#### Summary

The California Manufacturers Accelerator Plus Program is designed exclusively for small manufacturers to jump start their business growth. This co-investment program offers management and technical expertise needed to identify and solve business issues. California Manufacturing Technology Consulting (CMTC) administers this program, and appoints a Business Advisor and Growth Coach, who provide one-on-one coaching to help you achieve your business goals.

Benefits include:

- Tools and resources to improve productivity and profitability.
- A CMA+ Advisor acting as a Business Advisor, may work in concert with a Growth Coach, providing one-on-one coaching to help you achieve your business goals.
- Helpful referrals to other business assistance resources.
- Networking opportunities with local manufacturers as potential customers, suppliers, and strategic partners
- Information to leverage incentives and funding, when these special programs are available to offset costs for improvement or employee training.

#### Contact

California Manufacturing Technology Consulting (CMTC)

Phone: (310) 263-3060

Email: [comm@cmtc.com](mailto:comm@cmtc.com)

#### Link to Program Page

<https://www.cmtc.com/california-manufacturers-accelerator>





# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## GENERAL BUSINESS ASSISTANCE

### ENERGY ECONOMIC DEVELOPMENT RATE (EDR) PROGRAM

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#### Organization

Southern California Edison (SCE)

#### Summary

Southern California Edison (SCE) offers an energy discount through their Economic Development Rate (EDR) program to attract, retain, or expand business operations in their service territory versus out of state. Specifically, the program offers a 12% discount on your energy bill over a 5-year period. The three EDR levels are as follows:

- **EDR-Retention:** Minimum load demand of 150 kW<sup>\*\*\*</sup>. Applicable to existing customers who show that relocation of their entire operations—or a qualified portion of their operations, which consists of load of at least 150 kW (either individually or in the aggregate across accounts at the same physical facility)—to a site outside of California is a viable alternative or that closure of the customer's existing facilities is otherwise imminent.
- **EDR-Expansion:** Minimum load demand of 150 kW<sup>\*\*\*</sup>. Applicable to existing customers who increase load by at least 150 kW over their current Maximum Demand (either individually or in the aggregate across accounts at the same physical facility), as established in their Base Period Usage. Such increase must represent load that is new to California and is intended to expand load in California relative to out-of-state options.
- **EDR-Attraction:** Minimum load demand of 150 kW<sup>\*\*\*</sup>. Applicable to new customers who locate their facilities within SCE's service territory. Such load (either individually or in the aggregate across accounts at the same physical facility) must be new load to California and is intended to attract load to California relative to out-of-state options.

All three EDR options must also attest that, "But-For" this discount, either on its own or in combination with a package of incentives made available to the customer from other sources, they would not have retained or added their load within California.

Continued on next page.



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## GENERAL BUSINESS ASSISTANCE

### ENERGY ECONOMIC DEVELOPMENT RATE (EDR) PROGRAM

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#### Eligibility

The EDR program discount is available to SCE Bundled Service, Direct Access\*\*, and Community Choice Aggregation\*\* business customers. Your business must meet the following criteria to be eligible for the EDR Retention (EDR-R), Expansion (EDR-E), or Attraction (EDR-A) rate schedules:

- Minimum load requirement must be 150 kilowatts (kW) or more (either individually or in the aggregate across accounts at the same physical facility).
- Options are also available for small businesses using less than 150 kW combined load.
- Your business is not identified as a residential, state, or local government customer.
- You must provide a business case demonstrating your critical need for the EDR program and present a viable out-of-state option or facility closure.
- The California Office of Economic Development must perform an independent review that is separate from SCE.
- You must sign an affidavit attesting that “But-For” this rate, your business would not retain or add its energy load within California.

#### Contact

Local SCE Economic Development Consultant, Michael Curley:

Phone: (626) 633-4856

Email: [Michael.Curley@sce.com](mailto:Michael.Curley@sce.com)

#### Link to Program Page

<https://www.sce.com/sites/default/files/custom-files/Web%20files/EDR%20Fact%20Sheet.pdf>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## GENERAL BUSINESS ASSISTANCE

### THIRD-PARTY ENERGY EFFICIENCY (EE) PROGRAMS (FORMERLY "SCE ENERGY EFFICIENCY CUSTOMIZED SOLUTIONS")

#### Organization

Various Third Party Companies Within Southern California Edison (SCE) Service Area

#### Summary

The SCE Energy Efficiency Customized Solutions Program is closed to new enrollments as of December 24, 2021. However, Third Party Energy Efficiency (EE) programs still can help you save energy and contribute to a clean energy future. You can directly contact a third-party company (i.e., not affiliated with SCE) for many of these programs. You can learn more about the various third-party programs listed below and how they may be able to help you conserve energy and lower your energy costs. The following program information is also available online at <https://www.sce.com/business/savings-incentives/third-party-energy-efficiency-programs>.

#### Programs



**ICF**  
AGRICULTURE ENERGY  
EFFICIENCY PROGRAM (AgEE)

Implemented by ICF, the Agriculture Energy Efficiency (AgEE) Program helps growers and producers incorporate EE equipment and technology at their facilities. Making EE improvements helps conserve electricity and may lead to; reduced maintenance time, operating and overhead costs, and increase production and profits.

[Learn more at CaAgEnergy.](#)



The statewide California Energy Design Assistance program (CEDA), implemented by Willdan, provides a complimentary, comprehensive analysis of different EE options. It also identifies potential energy savings and incentives tailored to your specific new construction or major alteration project. CEDA serves Commercial, Multifamily (four stories and higher), Public, Industrial, and Agricultural customers.

[Learn more at CEDA.](#)



Instant Rebates is a statewide EE program that enables Commercial Foodservice (CFS) equipment dealers to offer rebates as point-of-sale discounts. The program applies to commercial utility customers who purchase qualifying high-efficiency natural gas and electric kitchen equipment.

[Learn more at California Foodservice Instant Rebates.](#)

Continued on next page.



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## GENERAL BUSINESS ASSISTANCE

### THIRD-PARTY ENERGY EFFICIENCY (EE) PROGRAMS

(FORMERLY "SCE ENERGY EFFICIENCY CUSTOMIZED SOLUTIONS")

#### Programs



The Statewide Electric Emerging Technologies Program, branded as CalNEXT, will identify and resource ideas that will advance the state's priorities for decarbonization through electrification, utility grid priorities such as load flexibility, new measures for utility programs, and engaging hard-to-reach customers and disadvantaged communities. Project categories include research and development addressing appliances, Heating, Ventilation, and Air Conditioning (HVAC), lighting, process loads, water heating, and the whole buildings. Selected projects will be tested and potentially incorporated into investor-owned utility programs.

[Learn more at CalNEXT.](#)



#### Comfortably CA

Comfortably CA is a statewide EE program offering Heating, Ventilation, and Air Conditioning (HVAC) distributors and retailers incentives on specific high-efficiency residential and commercial heating and cooling equipment. The program also provides no-cost training to contractors and technicians. Together, we're helping California feel good, while participating businesses "outcomfort" the competition.

[Learn more at Comfortably CA.](#)



Illuminate California is a statewide program that provides incentives to promote EE lighting installed at qualified commercial and industrial businesses. Approved distributors receive access to lighting product incentives through a streamlined incentive payment process. Visit our website to learn how to become a program-approved distributor.

[Learn more at Illuminate CA.](#)



The Statewide Midstream Water Heating Program provides expert distributors incentives and program support for offering attractive point-of-sale water heating rebates to eligible commercial SoCalGas, PG&E, SCE, and SDG&E customers.

[Learn more at Statewide Midstream Water Heating Program.](#)

Continued on next page.



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## GENERAL BUSINESS ASSISTANCE

### THIRD-PARTY ENERGY EFFICIENCY (EE) PROGRAMS (FORMERLY "SCE ENERGY EFFICIENCY CUSTOMIZED SOLUTIONS")

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#### Programs



The State of California Energy Strategy and Support Program is designed to help California state agencies implement energy savings projects at state-owned buildings. The program provides support in four areas: financial, policy, technical, and Trade Professional management.

[Learn more at SOC ESS.](#)



#### COMMERCIAL ENERGY EFFICIENCY PROGRAM (CEEP)

The Willdan Commercial Energy Efficiency Program (CEEP) provides comprehensive EE to commercial SCE customers who have monthly maximum energy demands of greater than 20 kW across Southern California Edison's (SCE's) service territory. This program uses Deemed, Custom Calculated, and Normalized Meter Energy Consumption (NMEC) approaches to reach customers across Commercial North American Industry Classification (NAICS) codes, including Lodging, Restaurants, Grocery Stores, Warehouses, Refrigerated Warehouses, Retail and Technology, Offices, and others.

[Learn more at Commercial Energy Efficiency Program.](#)



#### INDUSTRIAL ENERGY EFFICIENCY PROGRAM (IEEP)

The Willdan Industrial Energy Efficiency Program (IEEP) provides comprehensive EE to SCE industrial customers who have monthly maximum energy demands of greater than 20 kW across Southern California Edison's (SCE's) service territory. This program uses Deemed, Custom Calculated, and NMEC approaches to reach customers across Industrial Normalized Meter Energy Consumption (NAICS) codes, including Manufacturing, Wholesale Trade, Transportation and Warehousing, Mining, Utilities, Construction and others.

[Learn more at Industrial Energy Efficiency Program.](#)



#### MULTIFAMILY ENERGY EFFICIENCY PROGRAM (MFEEP)

The Willdan Multifamily Energy Efficiency Program (MFEEP) provides comprehensive EE to multifamily SCE customers across Southern California Edison's (SCE's) service territory. This program uses Deemed, Custom Calculated, and Normalized Meter Energy Consumption (NMEC) approaches to reach multifamily properties as well as the Property Management Offices, Leasing Offices, Residential Remodelers and other facilities that directly support the Multifamily segment.

[Learn more at Multifamily Energy Efficiency Program.](#)

Continued on next page.



# Incentives, Resources & Competitive Advantages Guide & FAQ's

## GENERAL BUSINESS ASSISTANCE

[Return to Table of Contents](#)

## THIRD-PARTY ENERGY EFFICIENCY (EE) PROGRAMS (FORMERLY "SCE ENERGY EFFICIENCY CUSTOMIZED SOLUTIONS")

### Disclaimers

The California Public Utilities Commission (CPUC) ordered the California Investor-Owned Utilities (IOUs) to procure Energy Efficiency (EE) programs designed and implemented by third- parties. As a result, each IOU entered into contracts with certain vendors who were selected through competitive solicitation processes. Additionally, customers will now receive EE services, products, compensation, and/or installation directly or indirectly from such third-party implementers, based on individual agreements between the customers and such third-party implementers. The following applies to third-party EE programs:

- SCE does not (i) design third-party implemented EE programs or program requirements, (ii) determine what measures are eligible or appropriate for customers, (iii) install the measures, or (iv) arrange for installations.
- SCE is not and shall not be deemed to be a party or guarantor to any agreement between customers and any third-party implementers. SCE has no contractual obligation, directly or indirectly, to customers as related to third-party EE programs.
- SCE is not liable for any actions or inactions, negligence, gross negligence, or willful misconduct of any third-party implementer, or any distributor, vendor, installer, or manufacturer of the product(s) purchased.
- Customers are strongly encouraged to perform their own research and due diligence and to obtain multiple bids or quotes when seeking any third-party implementers to perform any type of work or procure any type of product.
- Customers should thoroughly review the terms and conditions of their agreements with any third-party implementers, to understand the terms of agreements before signing, including all costs, installation, allocation of risk, and maintenance or warranty periods after installation.
- SCE does not recommend, endorse, qualify, guarantee, or make any representations or warranties regarding the services, work, quality, financial stability, or performance of any third-party implementers or any of the third-party implementers' distributors, contractors, subcontractors, product installers, or any product brands listed on the third-party implementers' websites or provided, directly or indirectly, by such third-party implementers.

### Link to Program Page

<https://www.sce.com/business/savings-incentives/third-party-energy-efficiency-programs>.



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## GENERAL BUSINESS ASSISTANCE

### SMALL BUSINESS DEVELOPMENT CENTER (SBDC)

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#### Organization

U.S. Small Business Administration (SBA)

#### Summary

Small Business Development Centers provide counseling and training to small businesses including working with the SBA to develop and provide informational tools to support business start-ups and existing business expansion.

#### FAQ's

Q: How can an SBDC help my small business?

A: SBDC Programs deliver professional, high quality, individualized business advising and technical assistance to existing small businesses and pre-venture entrepreneurs. SBDCs provide problem-solving assistance to help small businesses access capital, develop and exchange new technologies, and improve business planning, strategy, operations, financial management, personnel administration, marketing, export assistance, sales and other areas required for small business growth and expansion, management improvement, increased productivity and innovation.

#### Contact

Santa Ana - Main SBA Office: Serving Orange and San Bernardino Counties

Phone: (714) 550-7420

Email: [https://www.sba.gov/contact/contact\\_your\\_district\\_office?district=18](https://www.sba.gov/contact/contact_your_district_office?district=18)

In Person: 5 Hutton Centre Dr., Suite 900, Santa Ana, CA 92707

Hours: Monday-Friday 8:00 a.m. to 4:30 p.m.

#### Link to Program Page

<https://www.sba.gov/district/orange-county-inland-empire>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## GENERAL BUSINESS ASSISTANCE

### INLAND EMPIRE SMALL BUSINESS DEVELOPMENT CENTER (SBDC)

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#### Organization

Inland Empire Center for Entrepreneurship (IECE) & California State University San Bernardino School of Entrepreneurship

#### Summary

The Inland Empire Small Business Development Center (SBDC) provides a vast array of technical assistance to small businesses and aspiring entrepreneurs. This includes:

- Free, extensive, one-on-one, long-term professional business advising
- Low-cost training and other specialized services

#### The Inland Empire SBDC provides additional specialized assistance in:

- QuickBooks
- Franchise and service-based operations
- Government contracting
- Website search engine optimization
- Securing funding from both traditional and nontraditional sources

#### Some Inland Empire SBDC staff members include:

- Certified QuickBooks ProAdvisors who can assist with accounting systems
- Marketing specialists who can help attract new clients and increase sales
- Loan consultants with lending preference knowledge
- Procurement specialists who can help you bid on local, state, and federal solicitations

#### Business Consulting & Resources:

Inland Empire SBDC's Riverside and Ontario service locations and more than 8 outreach centers provide new or existing businesses with confidential consulting services and training opportunities on a variety of business topics throughout the service territory. Consulting services are offered at no cost to the client along with many training sessions throughout the region.

#### Contact

##### Ontario Location

603 N. Euclid Avenue  
Ontario, CA 91762

Phone: (800) 616-7232  
Email: [entre@csusb.edu](mailto:entre@csusb.edu)

##### Riverside Location

3780 Market Street  
Riverside CA 92501

#### Link to Program Page

<https://www.iece.csusb.edu/content/sbdc-team>





# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## GENERAL BUSINESS ASSISTANCE

### MADE IN CALIFORNIA PROGRAM

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#### Organization

California Manufacturing Technology Consulting (CMTC)

#### Summary

CMTC's Made in California Program is dedicated to highlighting the contributions of California's manufacturers and raising awareness of the products made in the Golden State. Each month, Made in CA members are featured on CMTC's website, social media accounts, and newsletter. There is cost to join the 2,000+ Made in California Members.

#### Benefits to California Manufacturers:

- Complimentary listing of your company profile on CMTC's website
- Direct emails about national business opportunities & industry news
- Special invites to premiere networking events
- Use of Made in CA logo on your website & marketing materials
- Customized Made in CA certificate to display in your facility

#### CMTC's Reach:

- CMTC's website receives over 300,000 page views annually
- The Made in CA Program page ranks #1 out of all CMTC's website pages, earning the majority of website traffic
- CMTC's monthly newsletter is deployed to over 12,000 people
- CMTC has over 8,000 social media followers across all channels

#### Contact

California Manufacturing Technology Consulting (CMTC)

Phone: (310) 263-3060

Email: [comm@cmtc.com](mailto:comm@cmtc.com)

#### Link to Program Page

<https://www.cmtc.com/made-in-california-profile>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## GREEN INCENTIVES

### ALTERNATIVE & RENEWABLE FUEL & VEHICLE TECHNOLOGY PROGRAM

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#### Organization

California Energy Commission Fuels and Transportation Division

#### Summary

The California Energy Commission's Clean Transportation Program (also known as the Alternative and Renewable Fuel and Vehicle Technology Program) provides funding to support innovation and accelerate the development and deployment of advanced transportation and fuel technologies. Administered by the Energy Commission's Fuels and Transportation Division, this program plays an important role in achieving California's ambitious goals on climate change, petroleum reduction, and adoption of zero-emission vehicles, as well as efforts to reach air quality standards. The program also supports the state's sustainable, long-term economic development. The program invests up to \$100 million annually, leveraging public and private investments to accelerate the development of clean, efficient, low-carbon technologies to reduce greenhouse gas emissions and petroleum dependence.

#### Eligibility

The following fuels and vehicle technologies qualify:

- **Biofuels:** Biomethane, Diesel Substitutes, Gasoline Substitutes
- **Electric Vehicles & Charging Infrastructure:** Plug-in Hybrid Electric, Battery
- **Hydrogen Vehicles & Refueling Infrastructure**
- **Medium and Heavy-Duty Vehicles:** Construction Equipment, Public Transit, School Busses, Delivery Trucks
- **Natural Gas Vehicles & Refueling Infrastructure:** Compressed Natural Gas or Liquefied Natural Gas
- **Workforce Development:** programs to support workers with training and job opportunities in California's zero-emission vehicle and zero-emission vehicle infrastructure sectors. The Energy Commission's public partners include the California Community Colleges Advanced Transportation and Logistics program (ATL), California Community Colleges Chancellor's Office, Employment Development Department, and Employment Training Panel.

#### End Date

January 1, 2024

#### Contact

California Manufacturing Technology Consulting (CMTC)

Phone: (916) 776-0738

Email: [FTD@energy.ca.gov](mailto:FTD@energy.ca.gov)

#### Link to Program Page

<https://www.energy.ca.gov/programs-and-topics/programs/clean-transportation-program>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## GREEN INCENTIVES

### POLLUTION CONTROL FINANCING AUTHORITY

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#### Organization

California State Treasury

#### Summary

The California Pollution Control Financing Authority (CPCFA) administers programs which incentivize private capital loans to small businesses and private capital investment in projects serving a public good. CPCFA offers the following programs:

- **Tax Exempt Bond Financing Program:** facilitates low-cost capital through private activity, tax-exempt bonds. The securities pay for acquisition, construction or installation of qualified pollution control, water furnishing, waste disposal, waste recovery facilities and equipment. Tax-exempt bond financing assists qualified borrowers to get lower interest than through conventional loans. Types of projects, which may qualify for tax-exempt bond financing, include:
  - Curbside collection facilities
  - Recycling facilities
  - Composting facilities
  - Materials recovery facilities
  - Transfer station
  - Landfills
  - Waste-to-energy facilities
  - Qualified solid waste or hazardous waste disposal projects
  - Waste recovery facilities
  - Purchase of collection vehicles and residential waste containers
  - Water Furnishing Facilities
  - Wastewater Treatment Facilities
- **California Capital Access Programs (CalCAP):** incentivize participating financial institutions (PFIs) to make loans for a wide array of small business borrower (SBB) financing needs, as well as very specific small business capital needs. CalCAP programs use two different mechanisms, loan loss reserve and collateral support, to help build a safety net for PFIs when they do the important work of making capital available to SBBs. Programs include:
  - CalCAP for Small Business
  - CalCAP Collateral Support
  - State Small Business Credit Initiative (SSBCI 2.0)
  - CalCAP CARB Heavy-duty Vehicle Air Quality Loan Program “Truck Loan Assistance
  - Americans with Disabilities Act Financing Program
  - California Seismic Safety Financing Program

Continued on next page.



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## GREEN INCENTIVES

### POLLUTION CONTROL FINANCING AUTHORITY

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- **California Recycle Underutilized Sites (CALReUSE) Programs:** assist with the creation of housing in California through assessment and remediation and transformation of contaminated, vacant and underutilized properties such as railyards and auto repair facilities to expand California's housing inventory and accelerate local economic development opportunities, particularly in disadvantaged communities.
- **Rate Reduction Bond Program:** issue rate reduction bonds to finance publicly owned water and wastewater utility projects.
- **Industrial Development Bond (IDB) Financing Program:** help communities grow their economies and provide good-paying jobs through tax-exempt bonds. CPCFA, as a conduit issuer, is able to issue IDBs for projects which involve a pollution control facility and also feature a manufacturing component. Such facilities include but are not limited facilities for:
  - Furnishing water, sewage and solid waste disposal
  - Local furnishing of electric energy or gas
  - Local district heating and cooling
  - Environmental enhancements to hydroelectric facilities

Qualified green building and sustainable design projects

#### Contact

California Pollution Control Financing Authority (CPCFA)

Phone: (916) 654-5610

Email: [cpcfa@treasurer.ca.gov](mailto:cpcfa@treasurer.ca.gov)

#### Link to Program Page

<https://www.treasurer.ca.gov/cpcfa/>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## GREEN INCENTIVES

### ELECTRIC PROGRAM INVESTMENT CHARGE

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#### Organization

California Energy Commission Energy Research and Development Division (ERDD)

#### Summary

The California Energy Commission's Electric Program Investment Charge (EPIC) program invests in scientific and technological research to accelerate the transformation of the electricity sector to meet the state's energy and climate goals. To help meet the state's climate goals, new clean energy solutions are developed and commercialized to decarbonize the electricity sector. The EPIC program invests more than \$130 million annually. EPIC-funded research is helping to:

- Expand the use of renewable energy.
- Build a safe and resilient electricity system.
- Advance electric technologies for buildings, businesses, and transportation.
- Enable a more decentralized electric grid.
- Improve the affordability, health, and comfort of California's communities.
- Support California's local economies and businesses

#### Eligibility

- **All businesses must:**
  - Register with the California Secretary of State.
  - Be in good standing in order to enter into an agreement with the Energy Commission.
  - For information and registration, go to: <http://www.sos.ca.gov>
- **EPIC projects must fall within at least one of the following program areas identified by the CPUC:**
  - Applied Research and Development
  - Technology Demonstration and Deployment
  - Market Facilitation
  - Projects must also fall within one or more of the strategic objectives and funding initiatives identified in the Energy Commission's EPIC Investment Plan. Review the EPIC Investment Plan for descriptions of program areas, strategic objectives, and funding initiatives.

#### End Date

December 31, 2030

#### Contact

The Energy Research and Development Division (ERDD)

Phone: (916) 654-4287

Email: [ERDD@energy.ca.gov](mailto:ERDD@energy.ca.gov)

#### Link to Program Page

<https://www.energy.ca.gov/programs-and-topics/programs/electric-program-investment-charge-epic-program>



# Incentives, Resources & Competitive Advantages Guide & FAQ's

[Return to Table of Contents](#)

## GREEN INCENTIVES

### HYBRID & ZERO-EMISSION TRUCK & BUS VOUCHER INCENTIVE PROJECT

#### Organization

California Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project (HVIP)

#### Summary

California's Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project (HVIP) plays a crucial role in the deployment of zero-emission and near-zero-emission technologies. HVIP accelerates commercialization by providing point-of-sale vouchers to make advanced vehicles more affordable. HVIP is the earliest model in the U.S. to demonstrate the function, flexibility, and effectiveness of first-come first-served incentives that reduce the incremental cost of commercial vehicles.

#### FAQ's

Q: When is HVIP open to voucher requests and how much money is available?

A: Funds are available now! Funds have been continually available since March 2022. Funding for Fiscal Year 22-23 were added to the remaining Fiscal Year 21-22 allocation when CARB's 2023 [Funding Plan for Clean Transportation Incentives](#) was adopted in November 2022. Specific funds set aside for school buses and small trucking fleets (Innovative Small E-Fleets, ISEF) will have their own timelines later in 2023.

#### Eligibility

HVIP remains open for all vehicle types. The table below shows currently available funds.

Funding Category	Total FY22-23 Funding
Standard HVIP	\$250M**
Transit	\$65M
School Bus	\$126M: See <a href="#">Purchasers page</a> for updates about the timeline for opening of this set-aside for FY22-23.
Drayage Truck	\$146M**
<u>Innovative Small e-Fleet</u>	\$33M: See the <a href="#">Purchasers page</a> for updates about opening of this set-aside for FY22-23.
Local Education Agency School Bus Replacement Grants	Funds to be available in FY23-24

#### Contact

Phone: (888) 457-4847

Email: [info@californiahvip.org](mailto:info@californiahvip.org)

#### Link to Program Page

<https://californiahvip.org/>