

U.S. Small Business Administration

Office of Entrepreneurial Development

SCORE NOTICE OF FUNDING OPPORTUNITY

PROGRAM YEAR 2026

FUNDING OPPORTUNITY No. SB-OEDSC-26-001

The purpose of this Funding Opportunity is to invite proposals for funding from entities that are current recipients of a Small Business Administration (SBA) SCORE award.

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1.0 Section I – Funding Opportunity Description

1.1 Program Overview

1.1.1.	Federal Agency Name	U. S. Small Business Administration
1.1.2.	Funding Opportunity Title	SCORE
1.1.3.	Announcement Type	Initial
1.1.4.	Funding Opportunity Number	SB-OEDSC-26-001
1.1.5.	CDFA Number	59.026
1.1.6.	Closing Date for Submissions	August 14, 2026
1.1.7.	Authority	Small Business Act, 15 U.S.C. 637(b)(1)(B)
1.1.8.	Duration of Authority	Permanent
1.1.9.	Funding Instrument	Cooperative Agreement
1.1.10.	Funding	Funding is for a 12-month period (FY 2026)
1.1.11.	Award Amount/Funding Range	A total amount of \$17,000,000 in funding is available for this program. SBA expects to make 1 award of not more than \$17,000,000 per award. There is no matching fund requirement.
1.1.12.	Project Duration	Awards will have a twelve (12) month period of performance.
1.1.13.	Project Starting Date	September 30, 2025
1.1.14.	Proposal Evaluation	Proposals will be reviewed for sufficiency in meeting the requirements of the Program as defined in section 8(b)(1)(B) of the Small Business Act (15 U.S.C. 637 (b)(1)(B)). SBA may ask Applicants for clarification of the technical and cost aspects of proposals.
1.1.15.	Agency Programmatic Point of Contact	Small Business Administration, Office of Entrepreneurial Development, Email: rachel.newmankarton@sba.gov

1.2 Introduction

The SCORE Program is the U.S. Small Business Administration’s (SBA’s) largest network of volunteer, expert business mentors, with more than 9,000 dedicated volunteers in more than 165 local chapters designed to provide business counseling and training assistance to existing small businesses and nascent (pre-venture) entrepreneurs. SCORE, in partnership with SBA’s Office of Entrepreneurial Development and SBA District Offices, is dedicated to helping small businesses start, grow and achieve their goals through training, counseling, and mentoring.

1.3 Background

Since its inception in 1953, SBA has served to aid, counsel, assist, and protect the interests of small businesses. While SBA is best known for its financial support of small businesses through its many lending programs, the Agency also provides funding to organizations that deliver technical assistance in the form of counseling and training to small business concerns and nascent entrepreneurs in order to promote growth, expansion, innovation, increased productivity, and management improvement.

1.4 Purpose

SCORE mentors offer area-specific advice on topics such as financing, marketing, human resources, business planning via in person meetings, email, telephone and video at no cost. SCORE mentors are available to meet with their small business clients on an ongoing basis to provide continued advice and support. SCORE provides a wide range of services including training, webinars, online workshops, courses on demand, a library of online resources, and access to its nationwide database of subject matter experts.

1.5 Leveraging of Resources

Applicants selected for awards under this Funding Opportunity are required to maximize their efforts to leverage SBA funding by working in conjunction with SBA District Offices and other Federal, state, local and tribal government small business development programs and activities; SBA resource partners such as Small Business Development Centers (SBDCs), Women's Business Centers (WBCs), Veterans Business Outreach Centers (VBOCs), 7(j) Technical Assistance providers, Small Business Investment Companies (SBICs), U.S. Export Assistance Centers (USEACs), Certified Development Companies (CDCs), and SBA lenders; universities, colleges, and other institutions of higher education; and private organizations such as chambers of commerce, and trade and industry groups and associations.

1.6 SBA Involvement and Oversight

The SCORE Program is managed by an Associate Administrator in the Office of Entrepreneurial Development at SBA Headquarters. The SBA will have substantial involvement in the administration, monitoring, and oversight of the Cooperative Agreement. OED shall assign a Grants Management Specialist (GMS) to review the budget and all fiscal documentation for compliance with applicable Federal and program requirements. The Grants Management Officer (GMO) issues the Notice of Award. A Program Manager within OED serves as the Grants Officer's Technical Representative (GOTR) responsible for overall monitoring and oversight of the Recipient's SCORE Program award, including compliance with the terms of the Cooperative Agreement and program service delivery and performance.

The SBA District Office Project Officers (PO) will conduct delegated grant monitoring activities on behalf of OED. SBA will also conduct financial and programmatic examinations of SCORE.

Changes or Cancellation

SBA reserves the right to amend or cancel this Funding Opportunity, in whole or in part, at the Agency's discretion. Should SBA make material changes to this Funding Opportunity, the Agency will extend the closing date as necessary to afford Applicants sufficient opportunity to address such changes.

2.0 Section II – Award Information

2.1. Estimated Funding

SBA expects to issue the award based on the funds appropriated. The Federal appropriation for the SCORE Program for Program Year 2026 is \$17 million.

Subject to the availability of funds and compliance with the terms and conditions of the Cooperative Agreement, SBA has the discretion to adjust the award to an amount consistent with the authorized funding level under the federal appropriations law.

2.2. Expected Number of Awards

SBA anticipates making no more than one award under this Notice of Funding Opportunity.

2.3. Period of Performance/Budget Periods

The period of performance for this award is one year.

2.4. Project Start Dates

The project start dates are October 1, 2025, responding to Funding Opportunity No. SB-OEDSC-26-001 for Program Year 2026.

2.4.1. Continuation of Funds

The 2027 Budget does not request funding for the SCORE program. If Congress appropriates funding for the program in future years, SBA may issue a funding opportunity to invite proposals for award continuation. However, the awardee may not receive continued funding if there has been a clear showing of poor performance, as measured by SBA. Poor performance is indicated by unsatisfactory oversight reviews (programmatic and/or financial), improper or insufficient activity affecting the operation and integrity of SCORE and/or a failure to follow the rules and procedures set forth in the statute, regulation, executive orders, and/or Funding Opportunity.

2.5. Funding Information

Funds provided under the SCORE Program must be used solely for the purposes stipulated in this Funding Opportunity and the Notice of Award and may not be commingled with any other monies. All costs proposed in an Applicant's budget must meet the tests of allowability, allocability, and reasonableness set forth in the Office of Management and Budget Uniform Guidance at 2 CFR Part 200, Subpart E.

2.6. Funding Instrument

The funding instrument is a cooperative agreement and substantial involvement is expected between the awarding Agency and the Recipient when carrying out the activity contemplated in the Agreement.

SCORE is not required to provide any matching support under this program.

3.0 Section III – Eligibility Information

3.1. Eligible Applicants

To be eligible for this Funding Opportunity an Applicant must meet the requirements described in section 8(b)(1)(B) of the Small Business Act (15 U.S.C. 637(b)(1)(B) and in the section referred to as SCORE.

3.2. Ineligible Applicants

The following will automatically be considered ineligible, and their applications will be rejected without being evaluated:

- Any organization currently having an outstanding, unresolved financial obligation to any Federal Agency;
- Any organization that is currently suspended, debarred, or otherwise prohibited from receiving awards of contracts or grants from the Federal Government;
- Any organization with an outstanding and unresolved material deficiency reported under the requirements of the Single Audit Act or OMB Circular A-133 within the past three years;
- Any organization having at least one non-compliant condition within SBA program guidelines occurring while administering or implementing any SBA program;
- Any organization that has had a grant or cooperative agreement involuntarily terminated or non-renewed by SBA for cause;
- Any organization that has filed for bankruptcy within the past five years; and/or
- Any organization that proposes to serve as a pass-through and permit another organization to manage the day-to-day operations of the project.

4.0 Section IV – Application and Submission Information

4.1. Application Instructions

Applications must consist of the following elements: a.) Technical proposal; b.) Budget information; c.) Certifications, Forms and Assurances; and d.) Attachments and Exhibits.

4.1.1. Technical Proposal (not to exceed 20 pages)

The technical proposal serves as the blueprint for the Applicant’s planned project. This information must be provided in a paginated attachment not to exceed 20 pages. It must include the following information:

4.1.1.1. Program Narrative:

- Organization and Structure
Provide an organizational chart for SCORE. Include the name, title, phone number, and email address for the person to whom the SCORE Director reports.

4.1.1.2. Program Management

A brief description of:

- a. Methodology, philosophy and justification for the distribution of resources, Chapters, and specialty programs.
 - b. Standard wait time for an initial client counseling appointment. Please note if changes are anticipated in the coming year, such as due to significant increase or decrease of resources, addition or closure of existing service locations etc.;
 - c. Management strategy for recruiting, vetting, training evaluating, and offboarding mentors;
 - d. If applicable, describe plans for the addition of new Regions and Chapters, including the staffing plan.
- Program Objectives
SCORE must include a brief summary of program objectives and ongoing programs, highlighting any new programs, special projects, or activities with particular reference to planned activities for the program year that seek to address **SBA’s Required Services listed in Section 5.**

To facilitate the proposal review, categorize the information on planned program activities using the reporting categories listed in Section 6. The following post-award reporting categories should NOT be included in the proposal:

- 1100 SUCCESS STORIES
- 1500 UNPLANNED TRAVEL
- 1600 KEY PERSONNEL
- 1700 PROBLEMS
- 1800 BUDGET TO ACTUAL

In addition to planned activities described within these categories, the Proposal must include the following:

- a. Planned performance service volume and changes, if any:

- i. Counseling: List most recent 12-month program year total counseling hours and counseling clients for the program and discuss any anticipated changes for the upcoming project period such as the opening or closing of chapters; and
 - ii. Training: List prior year total training sessions and clients for the program and discuss any anticipated changes for the upcoming project period such as the opening or closing of chapters.
- b. Planned milestones and outcomes:
 - i. List SCORE goals for: Clients Advised, New Business Starts, Percent of businesses realizing revenue growth, and Jobs Supported. SCORE should submit goals with the 2026 Program Year funding proposal. Along with the numerical targets for each goal, SCORE should include a business rationale for setting the goal. For example, SCORE may look at a five-year average performance as a basis for the goal target. Alternatively, SCORE may utilize other trend data to determine the target. SCORE can choose any methodology they believe will provide a realistic level of achievement. SBA/OED understands economic conditions change, physical disasters happen, and other local events contribute to changes in the state/regional economy. If the proposed goal target is less than the previous year's achievement, SCORE should include an explanation or rationale for a lower goal target. If a goal target is too low or too high without a sufficient explanation, SBA/OED may request additional clarification or an adjustment to the target.
 - ii. Identify any other key milestones or performance goals for the project period for the award not captured in Part b.i.
- c. Collaboration, outreach, and/or jointly planned ongoing programs or periodic events SCORE is planning to conduct with the District Office and/or other SBA resource partners (e.g., Women's Business Centers, SBDCs, Veteran Business Outreach Centers, Regional Innovation Clusters, and STEP; lender roundtables; government contracting certification training; and events with SBA 7(j) grantees and other SBA Government Contracting and Business Development Resources, Manufacturing Extension Partnerships (MEPs), APEX Accelerators, U.S. Patent and Trademark Office, and U.S. Department of Agriculture; regional and local trade schools; Chambers of Commerce; and state and local economic development programs).
- d. Client Satisfaction Rate: SCORE client satisfaction will be based on overall service, knowledge and expertise of the SCORE mentor, working relationship with the SCORE advisor, and if the client would recommend SCORE services. Describe SCORE's plan to collect client feedback on SCORE services and the rate achieved in the most recent client satisfaction survey. This should be reported in Section 1400 of the SCORE's Annual Report.
- e. Online Client Services: SBA views the use of web-based technology as a means to increase outreach within existing budgets, to access populations or areas otherwise difficult to reach, and to offer services 24/7 when appropriate.
- f. SCORE Operating Hours and Scheduled Closures: Provide a list of scheduled holidays and planned closures.
- g. Partner Location Information Contact: Identify the SCORE contact designated to maintain information in SBA's Partner Location Information, by name, title, phone number, and email address.
- h. Board of Directors:
 - i. Provide a list of the members of the SCORE Board of Directors.
 - ii. Include a description of the Board's responsibilities and provide the date of the Board's last meeting. There should be regular periodic meetings each year. Provide the future dates if available.
 - iii. The reasonable cost of travel of any board member for official board activities may be

paid out of SCORE's Federal funds and must follow the Recipient Organization's policy for per diem and related travel costs. Excessive expenses are not allowed and may be grounds for denial of payment or distribution of funds. See Section 4. for additional guidance.

Conflict of Interest Policy: Include a copy of the SCORE's current conflict of interest policy for the SCORE Network. SCORE must have a written conflict-of-interest policy that is signed annually by all employees, consultants, instructors, and volunteers of SCORE. The policy must include enforceable elements safeguarding the SCORE Program from actual or apparent conflicts.

- i. Training: Provide a list of the types of training to be offered during the budget period. SCORE is expected to provide the SBA Project Officer with a quarterly calendar of SCORE trainings or with electronic access to comparable information.
- j. Personnel Résumés: Attach résumés for any new key personnel directly employed by SCORE since the start of the last program year. If not stated in the résumés, please indicate the person's current position in SCORE. Do not include résumés for trainers, counselors, or support staff.
- k. Activities supported with Program Income: Describe planned activities that will be supported with SCORE program income during the performance period and estimated cost. Program income must be used to expand the quantity or quality of services, resources or outreach provided by SCORE. Planned expenditures from program income are subject to OMB Uniform Guidance and SCORE Program rules and requirements. However, do NOT include program costs supported with program income on the Application, Network budget summary, or budget justifications.
- l. Funds Managed Outside the Cooperative Agreement: Fully describe any other federal or state small business assistance programs, contributions or grant funds or private or corporate donations managed by SCORE outside the SBA Cooperative Agreement. Include the source and amount of Federal or state entities funds provided by each organization and the purpose for which the funds have been provided. Anonymize any donations from private individuals or private companies

SCORE must maintain an updated list of funding sources and amounts for each source of funds received by SCORE including grants, contracts and contributions. In addition, for each source of funds, documentation regarding the name and phone number of the donor/contractor/grantor, the amount of funding, the intended purpose and any requirements, stipulations or deliverables must be maintained and made available during the biennial financial examination process. This disclosure requirement does not apply to donations from private individuals, privately held companies, donor advised funds, trusts, partnerships or estates.

If SCORE is managing other small business programs outside the SBA Cooperative Agreement, it must maintain separate accounting/financial records to ensure a clear audit trail for the funds provided under the SCORE Cooperative Agreement.

- m. Micro-purchase and the Simplified Acquisition Thresholds for Grantees for Financial Assistance: Awards are subject to major revisions to the federal procurement rules found at 2 CFR, including the acquisition thresholds established in 2 CFR §200.320. SCORE must provide a statement acknowledging they are adhering to these thresholds. SCORE will be responsible for ensuring SCORE Chapters also follow the guidelines for the micro-purchase threshold.

4.1.2. Cost Proposal

Information on proposed project costs must be provided through the completion or submission of the following:

- a. Application for Federal Assistance (SF-424). Included in Grantsolutions.gov package;
- b. Budget Information - Non-Construction Programs (SF-424A). Included in Grantsolutions.gov package;
 - In Section B of SF-424A, line 6g titled "Construction" shall be used for Consultant costs as described in the SCORE Budget Justification Instructions Section 4.1.2.3(c).
- c. SCORE Cost Price Analysis and Budget Justifications
 - Include a separate budget justification form with required cost detail for the SCORE Lead Office and each Region.
 - Personnel lists must include each person's name, position, salary, and percent of time budgeted to the SCORE Program.
 - SCORE may use its own budget justification form, as long as the format includes ALL budget details required in the Cost Price Analysis and Budget Justifications template and the guidance herein. It must be uploaded as Attachment #4.
- d. Budget Narrative - If all required cost details are not shown on the SCORE budget justification and personnel list, include a separate budget narrative for SCORE.
- e. Cost Price Analysis and Budget Justifications Worksheet SBA/OED recommend the use of the updated template provided by SBA which includes a template for the SCORE's Cost Price Analysis and Budget Justifications Worksheet

4.1.2.1. Budget Preparation

SBA/OED will provide SCORE with the projected funding level to be used in budget preparation.

- Budget information must describe the financial resources contributed by the Applicant. The budget summary SF-424A budget justification form must clearly indicate which program costs will be paid by Federal dollars and in-kind.

Applicants must NOT include SCORE program income or unspent program funds from prior budget periods on the Application SF-424, Budget Information SF-424A, or budget justification forms submitted in response to this Funding Opportunity. Planned program income expenditures should be described instead as part of the Technical Proposal. See Section 4 for guidance.

4.1.2.2. SCORE Budget Justification Instructions

The budget cost categories and required cost details for each category are described below. The direct total cost must agree with the SF-424 and SF-424A.

- a. Personnel: List name and title of all personnel charged to federal funds (direct costs). For vacancies, show the position title in the budget justification. If additional space is needed to explain the cost, include a budget narrative. Use the personnel list to show annual salary, and total amount budgeted for each position as the basis used to estimate personnel costs charged to the SCORE Program.
- b. Fringe Benefits: Indicate the fringe rates and provide the schedule used. Do not include fringe cost

in the total amount required for personnel.

- c. Travel: For local travel, provide total anticipated mileage and mileage rate. For out of state/region travel, provide estimated cost and justification including a.) Purpose, b.) Destination, c.) Mode of transportation and rate (i.e., airfare or mileage and rate), d.) Number of trips, and e.) Number and position of travelers. Federal grant funds are not authorized to attend out of state/region conferences.
- d. Equipment: List items per unit above the cost threshold established in 2 CFR 200 and having at least one year of useful life. The Recipient Organization must maintain an inventory of equipment purchased with program dollars, including cost, location, and a detailed description of each item. Equipment inventory must be made available upon request of SBA.
- e. Supplies: Show anticipated cost of supply items such as general office, operational, computer supplies and other supply items above the threshold established in 2 CFR 200. The Recipient Organization must maintain an inventory of controlled supplies of higher dollar value and high potential for loss such as computers, and it must be made available upon request of the SBA.
- f. Contractual: List costs for contractual services that support program operations, such as IT and website support, marketing, equipment maintenance, or meeting facilitation. Provide budget details, including a.) Name of contractor, b.) Statement of work, c.) Number of hours and d.) Rate of pay.
- g. Consultants: Provide detail for consultant costs shown on the line 6g of SF-424A. (Note that form SF- 424A lists category g. as "Construction," but Applicants are asked to use this line for SCORE Consultant costs only.
- h. Consultant costs include costs for non-employee SCORE advisors, trainers and other staff who provide client services on an hourly or fee for professional service basis. Provide consultant(s) name, specify purpose, and indicate the number of hours, and rate of pay.
- i. Other: List all expenses included in this cost category separately, with planned cost per item.

Other expense items may include, but are not limited to, computer software, copying, postage, printing, publications, subscriptions, dues, telephone, conference fees, and office space rental, see 2 CFR 200.465. If rental costs are proposed, provide square footage required for SCORE activities and rate.

If nominal costs for meals and hospitality expenses associated with client workshops or related events are proposed, include a justification that demonstrates such costs are reasonable and necessary to support the SCORE program mission and goals. Details may be included on the budget justification form, budget narrative, or in a clearly marked section of the technical narrative.

Do not list other items with zero amounts.

** SF-424B and SF-LLL are also incorporated as part of the electronic Application form on Grantsolutions.gov.

4.1.3. Attachments

Please upload in GrantSolutions the following in the appropriate section and include "Attachment #" in the document name.

- Attachment #1: List of Attachments submitted through GrantSolutions.gov;

- Attachment #2: Technical Proposal, including program narrative, organization chart, Chapter listing, resumes, and other required information;
- Attachment #3: Cost Proposal, including SCORE budget narrative, detailed budget justification by line item, personnel listing and other required cost details for each Network Service Center and the Cost Price Analysis Worksheet;
- Attachment #4: Additional information or other documentation the Grantor and the Applicant deem (e.g., Single Audit specific to the SCORE Program) necessary to support its Proposal.

4.1.5 Financial Guidelines

4.1.5.1 Administrative Requirements and Cost Principles

SCORE is governed by the Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards, in accordance with 2 CFR Part 200.

4.1.5.2 Budget Preparation & Funding

Specific items of cost may be included in the Proposal and considered allowable under the additional conditions and requirements set forth below.

1. Travel

All travel performed as part of this Agreement must be in accordance with SCORE Program objectives and in compliance with the Recipient's travel policy.

2. Lobbying

There is a broad federal restriction on all grantees of the Federal Government, which prohibits the use of federal appropriated funds to lobby Congress or agencies concerning certain specified federal actions 31 U.S.C. §1352 (also known as the Byrd Amendment).

3. Justification of Costs

All costs proposed require justification and narrative explanation for SCORE. All proposed costs must be included in the specific line items and fully justified. All forms contained in the financial application package must be completed accurately and in full.

4. Supplies, Printing, and Costs Related to SCORE

Generally, promotional items are not an allowable expense using SCORE Program funds (including program income). Promotional items are objects such as gifts, memorabilia, awards, mugs, and any other item which does not have a specific direct benefit to SCORE. However, costs proposed for printing the SCORE logo on SCORE training supplies such as pens, name tags, notepads, or flash drives (which contain course material), are allowable. Certain promotional items (e.g., clothing imprinted with the SCORE logo) may be charged to Program funds on a case-by-case basis and should be listed in detail in the Proposal. SBA/OED will review such proposed costs on a case-by-case basis to determine reasonableness and allowability. The SBA Grants Management Specialist may request further information if required to make this determination.

This Section does not include advertising materials specifically allowed in 2 C.F.R. § 200.421 such as:

- (a) The recruitment of personnel required by the non-Federal entity for performance of a Federal award;
- (b) The procurement of goods and services for the performance of a Federal award;
- (c) The disposal of scrap or surplus materials acquired in the performance of a Federal award except when non-Federal entities are reimbursed for disposal costs at a predetermined amount;
or
- (d) Program outreach and other specific purposes necessary to meet the requirements of the Federal award.

5. Miscellaneous or Contingency Costs

No miscellaneous or contingency costs may be included in the budget. Contributions to a contingency reserve or any similar provision made for unforeseen events are unallowable.

6. Subcontracting

All subcontracting awarded as a result of this Agreement will be in accordance with 2 CFR §200.317-332.

7. Proposal Costs

This request does not commit the Federal Government to pay any costs incurred in the submission of a proposal.

8. SCORE Board Compensation

With the exception of travel costs, compensation for the Board members is not allowed. This includes compensation reimbursed from Federal funds or donated by the Board member and used as non-cash match (in-kind).

9. Improvements to SCORE Facilities

If minor construction/physical improvement to SCORE facilities is proposed, Applicant must provide justification for use of program funds, estimated costs, facilities, or lease agreement or other documentation from the property owner.

4.2. Submission Instructions

In order to receive your award, you must successfully complete the application process via www.grantsolutions.gov using amounts no greater than those to be provided in your directed announcement from the Office of Entrepreneurial Development. You will receive an invitation to apply, also referred to as your directed announcement for this cooperative agreement from www.grantsolutions.gov and the application period will be provided. SBA will only accept applications submitted via www.grantsolutions.gov. Intermediaries that submit incomplete application packages or do not submit a package via www.grantsolutions.gov within the application deadline may not receive funding.

All SBA programs and services are extended to the public on a nondiscriminatory basis. If you have questions regarding the development and submission of your grant application, please contact help@grantsolutions.gov for assistance.

All proposals (narratives and forms) must be submitted electronically via the Federal Government-wide portal, www.Grantsolutions.gov. Applicants should save and print written proof of an electronic submission made at Grantsolutions.gov. If problems occur while using Grantsolutions.gov, the Applicant is advised to a) Print any error message received; and b) Contact Grantsolutions.gov for immediate assistance.

Applicants may obtain advice and assistance with the Grantsolutions.gov submission process by visiting www.Grantsolutions.gov or by calling 1-866-577-0771 or 202-401-5282 Monday through Friday 7 AM – 8 PM EDT (closed Federal holidays) or email: help@grantsolutions.gov.

4.3. SCORE Application Timeline

SCORE is funded on the FISCAL year:

July 8, 2026:	2026 Notice of Funding Opportunity posts to Grantsolutions.gov
August 14, 2026:	Proposal due via electronic submission on http://www.grantsolutions.gov at 11:59 pm EDT

4.4. Additional Proposal Information

4.4.1 Treatment of Proposal Information

If SCORE's Proposal contains confidential data, such information will be treated in accordance with [13 CFR Part 102](#).

4.4.2 Treatment of Client Information (Privacy Requirements)

Unless otherwise specified, all financial, statistical, personnel and/or technical information and data furnished, produced or otherwise made available to SCORE by its small business customers during the performance of this Agreement shall not be used for purposes other than performance of work under this Agreement. The above information received by SCORE may be privileged and must not be released or disclosed by SCORE without the prior written consent of the client unless otherwise required by law. If such information is requested in a legal proceeding, SCORE must take the necessary precautions and legal recourse to protect privileged information.

For clients who have responded "yes" to Participation in Surveys and SBA Communications in Part I of SBA Counseling Information Form 641, SCORE shall provide the information and data contained in Part I along with the small business name every 90 days. SBA will safeguard client and customer Personal Identifiable Information (PII).

No files or records will be removed from the premises of any government agency with which the Recipient may work without the approval of the agency in possession of such documents.

Except where a client consents in writing or as directed by SBA, SCORE is not permitted to disclose any client information to a third party (or share such information with other units of your organization not directly involved in the conduct of this project).

5.0 Section V – Application Review Information

5.1. General

Applications will first be screened to determine if the Applicant meets stated mandatory eligibility requirements. SBA will not evaluate Applicants that do not document in their application that they meet the requirements for participation in the SCORE Program. Submissions will only be accepted via www.Grantsolutions.gov.

Proposals will be rejected without being evaluated if they are submitted by ineligible organizations or are illegible or materially incomplete due to an Applicant's failure to include all required forms and/or provide the required level of detail.

In addition, an Applicant must disclose in its application if it currently holds any other financial assistance awards from SBA or has any other applications for SBA financial assistance awards still pending. If it does, the Applicant must identify how it will avoid duplication of efforts, commingling of funds, and overlapping or double claiming of costs among those projects. Applicants must treat each SBA project as separate and discrete with individual outcomes and deliverables and provide distinct reporting, accounting, and audit trails for each application and award.

Failure to sufficiently distinguish between multiple applications from the same organization, or between an application and one or more current SBA awards, may result in rejection of an application on the ground that it is duplicative of proposed or existing efforts.

5.1.1. SBA Duties and Responsibilities

SBA Agency Officials and Offices will coordinate and communicate through SCORE for the following:

- Carry out the duties and responsibilities imposed on it by the statutes and regulations governing this program.
- Respond to requests for guidance or information related to the SCORE Program.
- Respond to requests for Agency participation and collaboration in project activities, as appropriate.
- Promote the project by referring interested parties to you for assistance and displaying your printed materials.
- Facilitate cooperation and coordination between SCORE, other SBA resource partners, and other Federal agencies.
- Review and act upon requests for modifications to your technical proposal, budget, key personnel, project/budget period, and other project parameters.
- Review and act upon SCORE reports and payment requests.
- Where authorized by law, share SBA resources and/or donated materials.
- Monitor performance under this award and ongoing operations to determine if SCORE is making effective and efficient use of project funds. This includes reviewing records, files, and procedures relating to performance under this award, as well as interviewing clients to gauge program effectiveness.

5.1.2. Intergovernmental Review

The SCORE Program does not involve the mandatory payment of any matching funds from the state or local government and does not affect directly any state or local government. As appropriate, SCORE

programs should comply with [Executive Order 12372](#), “Intergovernmental Review of Federal Programs.”

5.1.3. SCORE Program Objectives and Required Services

The SCORE Program is sponsored and partially funded by the U.S. Small Business Administration (SBA). The SCORE Program is governed by the Small Business Act, 15 U.S.C. 637(b)(1)(B) and Federal regulations. Although SBA is responsible for the oversight of the SCORE Program, a legal partnership exists between SBA and the Recipient Organization for the delivery of assistance to the small business community.

SCORE, under the Small Business Act, is required to 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.

The SCORE Program is governed by a binding legal instrument between the Recipient Organization and the SBA known as a notice of award or cooperative agreement. The purpose of the Cooperative Agreement is to ensure the delivery of high-quality business and economic development assistance (as defined by 15 U.S.C. 637(b)(1)(B) and the Small Business Act) to small businesses and prospective small businesses.

SCORE must ensure that their training, business counseling, and technical assistance services are available to all small business populations.

The services provided must include those required by statute and shall include the activities of SCORE (Applicant). Each Applicant will be accountable to SBA for performing all services included in its Proposal.

5.1.4. Required Services

SCORE is required to provide the following services:

5.1.4.1. On a non-fee basis, one-on-one confidential counseling/consultation/advising/guidance:

- Working with individuals or businesses to increase awareness of basic credit practices and credit requirements;
- Working with individuals or businesses to develop business plans, financial packages, credit applications, and contract proposals;
- Develop and provide informational tools to assist individuals with pre-business startup planning, existing business expansion, and export planning. To the extent practical, work with SBA to develop and deliver tools;
- Working with individuals or businesses referred by the SBA District Offices, other SBA resource partners, and SBA participating lenders (Providing any preferential treatment to clients of any specific lender is prohibited, as is the SCORE’s acceptance of payment for the provision of counseling services); and,
- SCORE must have counselor resources or referrals available to meet the needs of entrepreneurs.

5.1.4.2. Rural Assistance:

- Assisting small businesses in rural areas in an effort to increase their participation in exporting,

government procurement, tourism, access to credit, incubators, innovation and technology, and other small business programs, in cooperation with the U.S. Department of Commerce, the U.S. Department of Agriculture, and other relevant Federal Agencies; and

- SCORE may develop marketing and production strategies that will enable the rural businesses to better compete in the domestic market, provide technical assistance needed by rural small businesses, make available managerial assistance to rural small business concerns and provide information and assistance in obtaining financing for business startups and expansion.

5.1.4.3. Export Assistance:

- Report client data for export assistance as required.
- Make qualified referrals to SBA's Office of Manufacturing and Trade of small businesses that need (1) help obtaining financing for export development activities, to expand export operations, or to facilitate export transactions; (2) assistance overcoming trade barriers; or (3) access to grant funding through the State Trade Expansion Program (STEP) grant to begin or expand exporting.
- Cooperate with SBA's Office of Manufacturing and Trade, the Department of Commerce, and other relevant Federal Agencies to assist small businesses to:
 - Identify and develop potential export markets;
 - Develop trade linkages between U.S. and foreign small business firms;
 - Participate in international trade shows, trade missions, and other export development activities;
 - Access export assistance in rural areas;
 - Develop export marketing strategy;
 - Globalize websites and strengthen e-commerce capabilities to support global sales;
 - Overcome barriers to export expansion and obtain referrals to appropriate resources for trade adjustment and trade remedy assistance; and
 - Identify translation services.

Where appropriate, SCORE and the SBA may work collaboratively with state governments to establish a state international trade center for these purposes.

5.1.4.4. Intellectual Property Protection

SCORE will provide services to individuals to include training in person or through a website relating to:

- Domestic and international intellectual property protections, and
- How those protections should be considered in the business plans and growth strategies of small businesses.

5.1.4.5. Regulatory Compliance:

- Share current information concerning environmental, energy, health, safety, and other Federal, state and local regulations that affect small businesses and counsel small businesses on methods of compliance with such regulations. Such information may be in the form of notifications of areas of risk or requirements and links and referrals to sources of expert information; and
- Develop information publications, establish reference materials, make appropriate referrals to the SBA's Office of the National Ombudsman and Office of the Advocate, and distribute online links to

compliance guides published under section 212(a) of the Small Business Regulatory Enforcement Fairness Act of 1996, Public Law 102-121.

5.1.5. SBA Required Services

SBA District Directors and SCORE should identify services that meet local needs based on periodic needs assessments. SCORE should integrate the SBA strategic plan into the Proposal, including but not limited to:

- Assisting small businesses to onshore services and production facilities.
- Assisting manufacturing workers interested in starting their own business and working closely with the U.S. Department of Commerce, National Institute of Standards and Technology's (NIST) Manufacturing Extension Partnership Program to assist small manufacturers;
- Providing programs focused on existing businesses to assist them with growth and expansion.
- Developing, facilitating and/or leveraging appropriate virtual programs and/or initiatives that can be utilized by small business clients and, where appropriate, other SBA resource partners;
- Using market research tools, to serve the needs of the small business community;
- Provide access to tools and initiatives offered by SBA's Office of Veterans Business Development;
- Developing programs in conjunction with the SBA Regional Administrators and SBA District Offices; coordinating with their state, local, and tribal economic development officials, chambers of commerce, lenders and other public and private entities to maximize business development in underserved areas;
- Developing economic recovery programs and plans that include counseling small business owners on ways and means to strengthen business recovery and continuity; and
- Participating in and actively supporting community economic development and recovery in the SCORE's stated area of geographic coverage, including coordination with all levels of government – Federal, state, and local in support of initiatives that strengthen the infrastructure of the community and ensure stability and equality in community-based economic growth and development. The private sector, including business and professional organizations, should be invited to become stakeholders with SCORE acting as catalysts to initiate development projects beneficial to the community as a whole.

5.1.5.1. Addressing the Need for Skilled Labor

- Partnering with other Federal, state, and local resources that deliver apprenticeship and job training programs to assist small businesses with labor shortages, particularly in onshoring and manufacturing, construction trade and childcare.

5.1.5.2. Government Contracting Assistance

- Provide information and assistance to small business owners interested in pursuing Federal, state, and local prime contract and subcontract opportunities;
- Advise and assist small business owners to develop and execute effective marketing and sales plans for targeting Federal prime contracts;
- Work cooperatively with the APEX Accelerator Program;
- Provide information and assistance to small business owners interested in participating in the SBA Certification Programs; and

5.1.5.3. Access to Capital and Other SBA Programs

- Provide assistance and guidance with the necessary documentation required for applications for capital assistance; including assistance for SBA loan products and services, including small-dollar loans.
- Inform small business contractors about SBA's Surety Bond Guarantee Program, as appropriate.

5.1.5.4. Additional SBA Service Groups

While the core purpose of the SCORE program remains the provision of direct assistance to small businesses, SCORE may also, under certain circumstances, provide technical assistance to non-profit organizations. Specifically, where a significant portion of a non-profit organization's activities involves providing aid to small business concerns, it is permissible for SCORE to provide counseling or training to such non-profits on the grounds that such action still results in the provision of technical assistance to small business concerns.

5.1.6. Program Operations Overview

SCORE must provide services as geographically close as possible to small businesses by using a variety of service delivery mechanisms, including satellite locations, and virtual counseling and training, as appropriate. The facilities and volunteers of SCORE will be in places that will provide maximum accessibility and benefits to the small businesses that SCORE is intended to serve. SCORE will develop a plan as part of the proposal specifying the extent to which SCORE program duties will be delivered to address the needs of the small business community in the area to be served. If an applicant is nationwide, it can have a nationwide proposal with flexibility to address local communities.

5.1.7. Prior Approval

Actions requiring prior approval by SBA not listed in this Funding Opportunity are listed in the SBA and SCORE Program Notice of Award Terms and Conditions and 2 CFR 200.

5.1.9.1 Travel Outside the Region

Prior approval for out of region travel not included in the original proposal and exceeding \$10,000 to areas impacted by federally designated disasters is required from the local District Office and SBA/OED.

5.1.9.2 Travel Outside the U.S.

Federal funds are not authorized for travel outside the United States or its territories.

5.1.9.3 Improvements to SCORE Facilities

If minor construction/physical improvement to SCORE facilities is proposed, Applicant must provide justification along with budget revision for use of program funds, including estimated costs, facilities or lease agreement, or other documentation from the property owner prior to implementation.

5.1.9.4 Changes in Service Delivery Plan

If a Recipient proposes to add or close a Chapter, SCORE must request prior approval in writing or by email from the SBA/OED Program Manager. The Recipient may also be required to submit modifications to the technical proposal and/or cost proposal and supporting documents to effect this change.

5.2. Evaluation Criteria

All timely, materially complete applications received from eligible organizations will be reviewed in accordance with the criteria listed below.

5.2.1. Organizational Experience and Capacity

Applications will first be screened to determine if the Applicant meets stated mandatory eligibility requirements.

5.2.2. Collaboration and Leveraging of Resources

Applicants will be reviewed on the breadth of their plans for coordinating their proposed activities and working to expand the scope and reach of their project in collaboration with entities such as SBA's District Offices, other Federal, state, local and tribal government agencies, other SBA grant Recipients/resource partners (e.g., SBDCs, WBCs, STEP, VBOCs, Regional Innovation Clusters), Community Development Corporations, Small Business Investment Companies, trade associations and schools, business/industry groups, institutions of higher education and/or private organizations. Additionally, Applicants should note the availability of any non-award funds and/or in-kind resources that will be pledged to the performance of their projects.

5.2.3. Risk Assessment

As required by 2 CFR § 200.205(b), Applicants will be further evaluated by SBA/OED to assess the possible risks they may pose to accomplishing the objectives of the award and to maintain compliance with the terms and conditions of the award. In assessing the possible risks posed by individual Applicants, SBA/OED will include in its consideration the following:

- a. Financial stability;
- b. Financial Management systems' quality and their ability to meet the management standards prescribed in 2 CFR § 200.302;
- c. History of performance in managing other Federal awards, including timeliness of providing required reports; compliance with the terms and conditions of the award; ability to meet matching funds requirements; and the extent to which the Applicant has failed to fully expend funds provided under prior awards; results, reports, and findings from any of its available audits or programmatic reviews and its responses to them; evidence of Federal delinquent debt; and
- d. Ability to effectively implement statutory, regulatory, or other requirements.

SBA may decline to issue an award under this Funding Opportunity based on this risk assessment.

5.3. Review and Selection Process

After the Proposal has been received by SBA/OED, all submissions and/or revisions (if any) will be reviewed for programmatic and financial content and sufficiency by the appropriate SBA/OED Program Manager and Grants Management Specialist. Applicants will be contacted by SBA/OED if the Proposal has issues that require resolution. The SBA Program Manager recommends approval for funding to the Grants Management Specialist once the programmatic review of the Proposal has been completed. The Grants Management Specialist reviews the budget and all fiscal documentation to ensure costs are in compliance with applicable OMB cost principles, and the Grants Management Officer issues the Notice of Award.

6.0 Section VI – Award Administration

6.1. Award Notification

Recipient Organizations will be notified of the funding award status.

6.2. Administrative and National Policy Requirements

The successful Applicant will be required to comply with the requirements set forth in Section 21 of the Small Business Act (15 U.S.C. 637(b)(1)(B); 2 CFR Parts 200 and 2701; the Assurances for Non-Construction Programs (SF-424B); and the terms and conditions set forth in the Notice of Award. In addition, SBA may, from time to time, advise the Recipient of the award made under this Funding Opportunity of new legal requirements and/or statutorily authorized policy initiatives with which they must agree to comply.

6.3. Reporting

6.3.1. Required Data Collection System

SCORE is required to report program data through SBA's data management system which will serve as a centralized data collection system. While SCORE may use SBA's platform as their primary data platform, they may also choose to maintain existing or complementary systems should they individually require more extensive data collection needs than that of the SBA.

SCORE must be fully capable of either manually entering data or uploading batch files to SBA's data management system. SCORE is required to upload all data they have collected via the SBA data management system tools (Form 641 and Form 888) except as precluded by statute.

Partner Location Information Maintenance: SBA requires SCORE to maintain their Chapter information in SBA's Partner Location Information, which interfaces with the SBA data management system. SCORE will designate one employee to update Partner Location Information and will provide their name, email address, and phone number within the Proposal.

6.3.2. Required SBA Reports

SCORE must provide the required reports to SBA by the established deadlines. Failure to submit accurate, complete and timely reports may result in withholding of reimbursements and/or cancellation of the cooperative agreement. Required reporting documents and submission are detailed in the Notice of Award Terms and Conditions.

6.3.3. Reporting Categories

Top priorities of this Administration include supporting the manufacturing sector, furthering the reach of services provided to rural small businesses, aiding in the need for skilled labor and addressing childcare shortages and fostering growth in critical minerals and rare earth elements (CM/REE). Activities in these areas should be reported in 0500 for Onshoring and Manufacturing and CM/REE, 1000 for Rural Assistance and 1400 for skilled labor and childcare support.

SCORE performance reports must summarize accomplishments in each of the following categories. Performance reports should be a summary of SCORE Program accomplishments - NOT an itemized SCORE listing of accomplishments - in each of the categories. Each category should include, where applicable, number of clients, number of counseling hours, and outcomes.

0100 CAPITAL FORMATION

- Assist small businesses in identifying and accessing sources of capital, including leveraging the SBA Team and Lender Match;
- Provide technical assistance on SBA and other capital access products, including small dollar programs, to assist small businesses; and
- Develop close linkages with SBICs, venture capital firms, Certified Development Companies (CDCs) and state and local finance programs.

0200 INNOVATION, TECHNOLOGY TRANSFER, AND TECHNOLOGY ASSISTANCE

- Identifying innovation and technology developed by the Federal Government and/or academic organizations having commercial or practical potential and alerting industry and state and local governments to its availability;

- Include a formal section on the SCORE's Intellectual Property training program and the results and impact of its IP program;
- Transferring expertise and equipment available from the Federal Government to the private sector;
- Transferring innovation and technology from business to business, SBIR, and other related activities. Note any collaboration with the National Institute of Standards and Technology (NIST);
- Providing information and education on the use of technology in everyday business activities or processes;
- Report cyber training that provides a broad mix of small businesses with a variety of training programs that range from introductory familiarization to intermediate and advanced cybersecurity training; and,

0300 INTERNATIONAL TRADE

- Promoting increased exports by small businesses such as: supporting U.S. Export Assistance Centers (USEACs); evaluating small business firms' export capabilities; assisting with a client's export related financing needs, providing counseling, training and outreach assistance including co-partnership events; providing rural export assistance; partnering with public and private sector organizations involved in export development; database development; match services and market research; rural exporting and participating in World Trade Week;
- Data reported for the following categories (from SBA Form 641):
 - # of small businesses receiving export assistance from SCORE
 - # of small businesses that started to export (new to export) after receiving SCORE assistance and to what markets;
 - # of small business exporters that entered new foreign markets (new to market) as a result of SCORE assistance;
 - Increase in export revenues attributed to SCORE assistance;
 - Jobs created or retained as a result of exporting assistance; and
 - # of small businesses referred to the Departments of Commerce, Agriculture, State, the Export-Import Bank of the United States, Overseas Private Investment Corporation, The U.S. Trade and Development Agency, and the SBA Office of Manufacturing and Trade for trade assistance.
- Indicate if SCORE has Chapters that are co-located with USEAC and/or state or local trade agencies, or program offices.

0400 PROCUREMENT

- Fostering opportunities for increasing small businesses' share of procurement dollars spent by the government and private sector through conferences, computer matching services such as SBA's "Business Matchmaking," assistance to Certificate of Competency businesses and prime contractor outreach; and

0500 ONSHORING and MANUFACTURING

- Assistance to small businesses to onshore services and production facilities.
- Assistance to manufacturing companies or their employees, including displaced manufacturing workers. Can include efforts and support to troubled companies, companies challenged by foreign competition, and foreign labor alternatives. This may also include cooperation efforts with other local organizations or government units concerned with manufacturing issues such as the National Institute of Standards and Technology's (NIST) Manufacturing Extension Program (MEP); and
- Supporting food quality, affordability, and security in all stages of the supply chain.

0600 VETERANS, RESERVISTS, SERVICE-DISABLED VETERAN-OWNED BUSINESSES AND ALL OTHER MEMBERS OF THE U.S. MILITARY

- Assistance targeted toward veteran and service connected-disabled veteran owned businesses, as well as Reservists and National Guard members called to active duty, such as: Veteran Entrepreneurial Training Programs; coordination with Veteran Business Outreach Centers (VBOCs); providing Veteran Entrepreneurial Training Programs, include marketing the availability of the Boots to Business programs managed by the SBA Office of Veterans Business Development (OVBD); summits for veteran business owners; activities in conjunction with the Department of Veterans Affairs Vocational Rehabilitation and Employment Services; Employer Support of the Guard and Reserve (ESGR) and National Guard State Adjutants; DELTA Program; marketing and assistance for the Military Reservist Economic Injury Disaster Loan program; Patriot Express program; base closings and RIF counseling; and, Department of War (DoW) or Department of Labor Transition Assistance Program (TAP) seminars and DoW Yellow Ribbon Reintegration Program events; and
- Identify any SCORE Chapters co-located with VBOCs or other armed services/veteran assistance programs.

700 RURAL ASSISTANCE

- Marketing, technical assistance, and service delivery strategies to rural businesses to better compete in the marketplace, including information and assistance in obtaining financing for business startups and expansion in rural areas;
- Assistance to increase participation of rural businesses in exporting, government procurement, tourism, access to credit, incubators, innovation and technology and other small business programs, in cooperation with the U.S. Departments of Commerce (DoC) and Agriculture (USDA), and other relevant Federal agencies; and
- Identify any SCORE Chapters co-located with USDA assistance centers or other state/local rural assistance program centers.

800 ECONOMIC DEVELOPMENT, FAITH BASED, AND COMMUNITY INITIATIVES

- Activities not specific to an individual client, do not fit in other categories, and are aimed at supporting/strengthening the economic environment;
- Areas reported on may include Agribusiness, Rural Development, Community Development, corporate downsizing or plant closing assistance, convention/tourism, and incubators; and
- Activities aimed toward assisting small businesses and community economic development organizations such as providing counseling, training and outreach to community organizations, or other such entities with a significant focus on supporting the needs of small businesses.

9000 ONLINE ACTIVITY

- Activities and accomplishments which demonstrate use of web-based technology to enhance direct client service delivery such as: the use of online counseling (email and real-time) and training; online expert systems or diagnostic tools to identify needed services; audio or video streaming; electronic registrations and scheduling; webinars; and other targeted uses of the internet to virtually facilitate delivering information to clients more cost effectively.

1000 OTHER ACTIVITY

- Provide information regarding any efforts that do not fit in the categories above.
- Include collaborations with Federal, State, and Local organizations that deliver apprenticeship and other job-training programs.

- Include information about programs to assist childcare providers and the number of childcare businesses SCORE provided services.
- For the Average Client Satisfaction Rate, include:
 - Count of the counseling clients surveyed;
 - Count of counseling clients responding; and,
 - The average rating from all respondents.

1100 SUCCESS STORIES [DO NOT INCLUDE IN PROPOSAL]

- Report at least three examples of assistance provided in which tangible results occurred. Include a description of the business, the problems encountered, the assistance provided, the resources used and the actual or expected results including economic impact. A signed statement from the success story client(s) of his/her consent for use of the success story by SBA must be kept on file. (SBA can provide a sample form if one is not available locally.)

1200 RESOURCE DEVELOPMENT

- Collaborating with funding or other partners to assist SCORE in its mission through recruiting, developing and overseeing private and public resource organizations/individuals for the purpose of providing business development counseling, training and outreach efforts; and
- Any increase in match funding or other new program resources achieved during the reporting period.

1300 COLLABORATION AND LEVERAGING

- Address key partnerships and collaborations throughout the Network and the type of interaction or relationship enjoyed. Include participation in Federal interagency collaboration efforts such as broadband efforts.
- Indicate collaboration with SBA's special initiatives and other Office of Entrepreneurial Development programs and identify any SCORE Chapters that are co-located with other SBA resource partners such as WBC and SBDC.

1400 UNPLANNED TRAVEL [DO NOT INCLUDE IN THE PROPOSAL]

- Provide a description of any unanticipated travel for SCORE not disclosed in the Cooperative Agreement.

1500 KEY PERSONNEL CHANGES [DO NOT INCLUDE IN THE PROPOSAL]

- Provide description of new key personnel not included in the proposal, including name, position, date of hire and resume. Also indicate any key personnel vacancies and anticipated fill date. If Partner Location Identification point of contact has changed since the proposal was submitted, report that change here and provide name, contact information including email address, and effective date of change.

1600 PROBLEMS [DO NOT INCLUDE IN THE PROPOSAL]

- Provide a description of any and all problems that have significant impact on the Program or program objectives.

1700 BUDGET TO ACTUAL COMPARISON [DO NOT INCLUDE IN THE PROPOSAL]

- Provide a comparison of actual program expenditures to date to the approved budget, by budget category and an explanation for any significant variances.
- SCORE must also furnish copies of SF-425, SBA Form 2113, the Cost Price Analysis worksheet and other requested financial reports and attachments as required.

6.4. Recordkeeping Requirements

SCORE is required to maintain complete and accurate records and supporting documentation to facilitate a thorough program examination. All significant client counseling, training, and other activities shall be fully documented. SCORE will support SBA's required data collection and reporting system.

In addition to the performance, financial and program reports already mentioned in this Funding Opportunity, SCORE must maintain the following records:

6.4.1. Counselling Activity

SCORE is responsible for reporting all counseling activities on SBA Form 641, "Counseling Information Form" or an equivalent form that supports SBA's management information database. A client will be counted once in a Federal fiscal year with reporting to include both the number of sessions and the number of hours spent with the client. Copies of these forms or an electronic signed copy must be available for review by the SBA when requested.

Online counseling must meet the standards identified in the client definitions and there must be a signed SBA Form 641 or its equivalent that supports SBA's management information database.

6.4.1.1 Agreement

Each client is required to sign a request for assistance, SBA Form 641 or equivalent, and must be shown the following statement:

I request business counseling service from the Small Business Administration (SBA) or an SBA Resource Partner. I agree to cooperate should I be selected to participate in surveys designed to evaluate SBA services. I permit SBA or its agent the use of my name and address for SBA surveys and information mailings regarding SBA products and services (Yes/No). I understand that any information disclosed will be held in strict confidence. (SBA will not provide your personal information to commercial entities.) I authorize SBA to furnish relevant information to the assigned management counselor(s). I further understand that the counselor(s) agrees not to: 1.) Recommend goods or services from sources in which he/she has an interest, and 2.) Accept fees or commissions developing from this counseling relationship. In consideration of the counselor(s) furnishing management or technical assistance, I waive all claims against SBA personnel, and that of its Resource Partners and Host Organizations, arising from this assistance.

These forms shall be retained in accordance with current OMB and SBA requirements. SCORE may use an electronic version of this form.

6.4.2. Transactions with Suspended or Debarred Entities

SCORE is responsible for verifying that entities (such as employees, consultants, contractors, or other service providers) paid with program funds and clients receiving counseling assistance supported by program funds are not currently under suspension or debarment by or have an unresolved debt with a Federal Agency. SCORE may require clients to certify that they are not currently suspended or debarred prior to receiving counseling assistance and should retain certification records with client files.

6.4.3. Training Activity

SCORE must use SBA Form 888 or its equivalent to document and report SCORE training activities. The agenda and/or program content, attendee list and evaluations are required for each training event. SCORE will submit all training information from SBA Form 888 or equivalent form quarterly to SBA's data management system. The training information will be considered certified by the SCORE Program

Director when uploaded into the SBA management information system. The SBA Form 888 or similar program developed form must be maintained at SCORE for review by the SBA when requested.

6.4.3.1. Multi-Session Training:

For courses with multiple sessions, each session may count as one course. Sessions must correspond with the minimum training duration identified in the definitions listed in Section 8.1. SBA's management information system collects both the number of sessions and hours for the course.

6.4.3.2. Online Training:

An SBA Form 888 is required for all online training events.

6.4.3.3. Co-hosted (Collaborative) training:

When reporting training numbers for co-hosted training, the hosts (SBA and Entrepreneurial Development resource partners) can each receive credit for the clients.

6.4.4. SCORE Client Evaluation Forms

Evaluations should be solicited from SCORE clients who receive counseling or attend a SCORE training event. SCORE should develop internal procedures to ensure that these evaluations are performed on a regular basis and retain these documents on file. Client satisfaction rate data should be reported in the Annual Report in Section 1400.

6.4.5. Financial Recordkeeping

SCORE must maintain the documentation for the year-end Standard Form 425 (SF-425) Financial Report as required by 2 CFR 200 and SBA Regulations. SCORE must maintain separate ledgers and transaction journals for the SCORE financial activity and any non-SCORE funds (not included in the Proposal or SBA Cooperative Agreement) to ensure a clear audit trail of the financial resources used under the SCORE Cooperative Agreement as required by 2 CFR §200.302. SCORE expenditures of Federal and program income must be accounted for separately from other SCORE resources. In addition, funds must be identifiable to the program year for which they were provided. SCORE must maintain support documents for SBA Form 2113 and SF-425. This support should consist of at a minimum:

- A spreadsheet that reconciles the SF-425 and the disbursement journals at SCORE.
- Support for all charges to the Cooperative Agreement, but not limited to the disbursement ledger, vendor invoices, canceled checks, and journal entries;
- The expense reimbursement invoices submitted from any subcontracts and any related supporting documentation (i.e., disbursement ledgers, comparison of actual to budgeted expenditures).
- Support for program income receipts and expenditures including receipt and disbursement journals;
- Salary and wage records for SCORE employees charged to the Cooperative Agreement (SCORE must maintain the appropriate standards to document costs for full-time and part-time personnel allocated to the Program). This may include, but is not limited to, time and effort certification, appointment letters or contracts, performance reviews, payroll journals and/or activity reports. (The records should be incorporated into the official records of the institution.)

7.0 Section VII - Agency Contacts

7.1. SCORE Program Point of Contact

Questions concerning general information and technical aspects within this Funding Opportunity should be directed to Rachel Karton at rachel.newman-karton@sba.gov.

7.2. Grantsolutions.gov Technical Support

For technical support with filing an electronic application in response to this Funding Opportunity, contact the Grantsolutions.gov help desk Monday through Friday 7 AM – 8 PM ET (closed Federal holidays) or call 1-866-577-0771 or 202-401-5282 or help@Grantsolutions.gov.

8.0 Section VIII - Other Information

8.1. Definitions

The following definitions apply to awards made under this Funding Opportunity:

8.1.1. Clients Advised

This will be the number of unique clients advised in a given project year. It does not include clients trained.

8.1.2. Small Business

A business entity:

- i) That is independently owned and operated, is not dominant in its field of operation, is organized for profit with a place of business located in the United States, and operates primarily within the United States; and
- ii) That does not exceed the applicable size standard for its industry as established under 13 CFR § 121. In general, the most common size standards are:
 - 500 employees for most manufacturing and mining industries;
 - \$45 million in average annual receipts for most general & heavy construction industries;
 - \$19 million in average annual receipts for all specialty trade contractors;
 - \$9.0 million in average annual receipts for most retail and service industries; and
 - \$2.0 million to \$5.0 million in average annual receipts for most agricultural industries.

8.1.3. Technical Assistance

Counseling or training services provided to an individual and/or business in accordance with the terms of this Funding Opportunity and a Recipient's Notice of Award.

8.1.3.1. Online training (or webinars):

A structured program of knowledge, information or experience on an entrepreneurial or business-related subject. It must be of a quality and substantive nature and include a registration process as well as an evaluation process (e.g., one to five-star ranking). Online training can be synchronous or asynchronous. (Note: Must meet other criteria listed above).

Synchronous: A group of clients proceed through the training module(s) or program as a group.

Asynchronous: A client individually proceeds through the training module(s) or program individually and is self-paced.

8.1.3.2. Co-hosted Training (Collaborative)

Meets the definition of “training” and is further defined as an activity where each Host Organization actively participates and contributes substantially to the training.

8.1.4. Training Hours (Total Number of Training Hours)

Total hours of training are the number of hours that the trainer spends teaching the training session.

8.2. Guidelines

8.2.1. Faith-Based & Neighborhood Partnerships

SCORE is encouraged to coordinate activities through either a contractual or a partnership relationship with faith-based and other neighborhood organizations. SCORE is also encouraged to coordinate their efforts with SBA’s Center for Faith initiatives designed to open government programs to these organizations to improve their communities. There are no grant funding set-asides for faith-based organizations. Instead, the Center for Faith creates a level playing field for faith based as well as other neighborhood organizations to work with the Federal Government to meet the needs of America’s communities.

8.2.2. Financial Packaging Assistance/Access to Capital

SCORE should work with its SBA District Offices to provide services that increase small businesses' access to capital, including SBA’s 7(a), 504, microloan, surety bond and investment programs. SCORE is encouraged to develop linkages with lenders, Small Business Investment Companies (SBICs), venture capital firms, Certified Development Companies (CDCs), SBA micro-lending intermediaries, and state and local finance programs.

SCORE will assist small businesses with business plan development, financial statement preparation and analysis, cash flow preparation and analysis, source and application of funds. In addition, SCORE, in cooperation with SBA District Offices, are expected to offer service to new SBA clients and to assist delinquent SBA borrowers who are referred to them by SBA and/or lenders to assist in problem solving, business restructuring, cost analysis, market penetration, and other similar subjects.

8.2.3. Financial Assistance Restrictions

SCORE cannot make loans, service loans, or make credit decisions regarding the award of loans.

SCORE must not advocate, recommend approval, or otherwise attempt in any manner to influence SBA

to provide financial assistance to any of its clients. SCORE may not charge fees for providing assistance for financial packaging. Providing any preferential treatment to clients of any specific lender is prohibited, as is SCORE's acceptance of payment for the provision of counseling services.

8.2.4. Financial Packaging Assistance Guidelines

SCORE is encouraged to provide counseling services that increase a small business concern's access to capital, such as business plan development, financial statement preparation and analysis and cash flow preparation and analysis.

SCORE should help prepare their clients to represent themselves to lending institutions.

While SCORE may attend meetings with lenders to assist clients in preparing financial packages, they may not take a direct role in representing clients in loan negotiations.

SCORE should inform their clients that counseling assistance or financial packaging assistance does not guarantee receipt of a loan.

8.2.5. Onshoring and Manufacturing Assistance

SCORE may partner with the Department of War's APEX program and/or the Department of Commerce, National Institute of Standards and Technology's (NIST) Manufacturing Extension Partnerships (MEPs) to provide specialized services to small manufacturers. Through this partnership, a small manufacturer can receive business advising services including capital, contracting, and exporting support from SCORE and engineering assistance from the MEPs.

SCORE's partnership with the APEX or NIST MEPs are encouraged to continue this valuable assistance to small business manufacturers. SCORE Chapters without a working partnership with the APEX or NIST MEPs may wish to pursue one. The nature of any participation with APEX or MEPs must be reported in the SCORE Semi-Annual Annual Report in Section 0500.

8.2.6. Procurement Assistance

SCORE is encouraged to provide services that provide basic information needed by small business concerns interested in procurement opportunities in the Government arena and/or refer clients to SBA field staff. These services should include, but not be limited to:

- Providing information on government buying methods;
- Educating small businesses about the Federal Government's acquisition policies and procedures;
- Assisting small businesses with understanding the required documentation for applications responding to procurement bids and proposals;
- Working cooperatively *with* SBA resources including SBA 7(j) grantees and other SBA Government Contracting and Business Development Resources as well as the APEX Accelerator.

8.2.7. Rural Development

SCORE Applicants must make a full range of business development and technical assistance services available to small businesses located in rural areas. These services will be designed to increase rural small business participation in exporting, government procurement, tourism, access to credit, incubators, innovation and technology, and other small business programs.

8.2.8. Training

Training planned by SCORE Chapters must be shared with the SBA Project Officer to avoid duplication with training efforts offered by other local organizations and SBA and to foster collaboration. In addition, all training materials developed in an electronic format will be made available to the SBA Project Officer upon request.

8.2.8.1. SCORE Co-hosted Training

In order for SCORE to receive credit for a co-hosted training event, it must actively participate (i.e., provide speakers, materials, publicity) with the organization assuming primary responsibility for financing the training session. Final responsibility for the quality of the training rests with SCORE. For all co-hosted training among Office of Entrepreneurial Development (OED) resource partners where there will be a distribution of receipts in whole or in part to the co-host, the training file for the activity must clearly document the role and responsibility of SCORE and each participant receiving a share of the receipts. The training file must also document how the receipts were distributed.

Each OED resource partner participating in a co-hosted training event is allowed to claim the total number of participants that attend a training event. Each OED resource partner must contribute substantive value to the co-hosted event in order to claim each participant attending the training event. The substantive value provided by the OED resource partner must be documented in the training file.

SCORE is reminded that income received by SCORE for all co-hosted programs is considered program income and must be used to further support the SCORE program. Note that SCORE programs involving the SBA District Office and one or more third party organizations as co-hosts (such as lenders or chambers of commerce) are subject to the Agency's co-sponsorship requirements and may require a different treatment of program income receipts.

8.2.9. Veteran and Service-Connected Disabled Veteran Business Ownership

SCORE must support the entrepreneurship track of the Department of Defense's Transition Assistance Program (TAP) known as Boots to Business (B2B). The B2B program is offered to service members and their spouses at military installations worldwide as a two-day Introduction to Entrepreneurship. The B2B program uses a multi-phase approach to introduce transitioning service members to the fundamentals of small business ownership and highlights follow-on training and counseling opportunities with a focus on the eight-week online Foundations of Entrepreneurship course offered by Institute for Veterans and Military Families (IVMF) at Syracuse University. SCORE may provide B2B instructors, preferably veterans or those with knowledge of military culture, and assist with program marketing and outreach activities. Selection of instructors and the delivery of B2B will be coordinated by SBA District Offices and their designated Veterans Business Development Officer. As an extension of B2B, SBA also offers Boots to Business: Reboot. This Program offers the same tailored curriculum to veterans of all eras and their families and is also delivered collaboratively by all SBA partners.

SCORE must make available all of its economic development and technical assistance services to veterans, including service-connected disabled Veterans and their immediate families as well as Reservists and National Guard members called to active duty as appropriate. Both national and local initiatives for Veterans shall be supported by the appropriate SCORE chapter as needed.

8.2.10. Women's Business Services

SCORE chapters will make available all of its economic development and technical assistance services to women business owners and prospective women business owners. SCORE chapters will also provide referrals to the Women’s Business Centers (WBCs) for women business owners when appropriate.

8.3. Advance Understandings

8.3.1. Hours of Operation

SCORE services shall be accessible to the public during normal business hours throughout the year except as granted by prior approval. In addition, provision should be made to provide evening and weekend assistance, both online and in-person, as appropriate to meet local community demands and needs. Anticipated closings will be included in any annual renewal application.

8.3.2. Travel

The travel charged to the Cooperative Agreement must be in accordance with provisions of the grant and utilized in conformance with Program regulation and must be used under the same formula for travel reimbursement as provided by SCORE. Award funds are not available for the payment of per diem, lodging, meals, or other subsistence expenses associated with local travel (50-mile radius).

However, award funds may be used to pay transportation expenses for local travel.

Unanticipated travel is defined as “travel which is necessary to further SCORE objectives, but for which a complete description and/or justification could not be provided in the proposal.” Federal funds will not be allowable for unanticipated travel, with the exception of unanticipated disaster travel less than \$10,000. SCORE is required to report on unanticipated travel out-of-state, completed after the fact, in the Semi-annual or Annual Report.

Federal funds are not authorized to attend conferences.

8.3.3. Small Business Week

SCORE is encouraged to promote, support, plan, implement and participate in Small Business Week activities in cooperation and coordination with local and national SBA officials. SCORE Chapter Leaders and other SCORE personnel, with their strong links to prominent entrepreneurs and small business advocates in their communities, should nominate individuals for Small Business Week awards.

8.3.4. Legal Services Restrictions

No costs associated (either directly or indirectly) with civil, criminal or administrative litigation are allowable under an award made pursuant to this Funding Opportunity. Project funds may be used to pay the cost of non-litigation legal counseling services either to the recipient of this Award or project beneficiaries. However, all parties receiving such services must agree in writing or by email to waive any claims of privilege over such services with regard to SBA to the extent necessary for the Agency to perform its monitoring and oversight function.

8.3.5. Conflict of Interest Policy

SCORE must have a written conflict of interest policy which is signed annually by all employees, consultants, instructors and volunteers. The policy must include enforceable elements safeguarding the SCORE Program from actual or apparent conflicts in accordance with 2 CFR § 2701.112.

8.3.6. Disaster Operations Plan

Each SCORE Chapter must have in place disaster plans to ensure delivery of services to small businesses in its area of operations. Such plans must be kept on file and available for review by SBA officials. Plans should be reviewed annually by SCORE Chapter Directors and updated as needed. SCORE, in cooperation with SBA and other Federal Agencies as well as state and local entities, are encouraged to provide disaster recovery assistance to support impacted small businesses in local economies.