



Hub Nomination Preparation Worksheet

Accelerate California Innovation Grant Program

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Use this worksheet to assemble a complete nomination offline, then transcribe it into the online form in one sitting. This worksheet is an optional preparation tool; you do not submit it.

WHY THIS PACKET EXISTS

The online nomination form cannot be saved and resumed — it must be completed in a single session. Gather everything below first, and the online submission takes about 15 minutes.

Submit one nomination per business. Nothing is saved until you press Submit.

Nomination at a Glance

Steps 1 through 4 are yours. Steps 5 and 6 happen after you submit.

STEP	WHAT HAPPENS	WHO DOES IT
1	Confirm eligibility Work through the pre-check in Section 1	Your Hub
2	Collect the five required documents Section 2 checklist	Your Hub
3	Complete this worksheet Section 3	Your Hub
4	Submit online in one session Section 4	Your Hub
5	Eligibility and compliance review Within five business days; you will be contacted directly if anything needs correction	CCA
6	Final award decision All award decisions are made by CalOSBA	CalOSBA

Section 1 • Eligibility Pre-Check

Mark each box. If any item cannot be checked, the nomination cannot proceed.

✓	REQUIREMENT
☐	For-profit business based in California Fewer than 100 employees; high-growth, high-wage
☐	Registered with the California Secretary of State on or after July 1, 2021 If registered earlier, an Eligibility Justification Narrative is required — see document 4 in Section 2. Approval is not guaranteed.
☐	California address and at least one owner domiciled in California May be incorporated out of state, but primary operations must be in California
☐	Existing client of your Accelerate CA Hub
☐	Completed your Hub's required technical assistance activities Cohort training, capital access support, 1:1 mentorship, subject-matter expert engagement, resource referrals
☐	Not owned or operated by Hub staff or their immediate family Parents, siblings, spouse, children, and relatives through marriage are automatically ineligible
☐	Business is registered and in good standing with the appropriate California jurisdiction(s) at the time of submission Incorporation is not required; other California business entity types are accepted.

AWARD TIERS AND AMOUNTS

Tier 1 — proof of concept, initial R&D, prototype, early-stage pre-commercialization: \$25,000.00 or \$50,000.00.

Tier 2 — continuing or expanding R&D, minimum viable product, pre-commercialization: \$75,000.00 or \$100,000.00.

Phase II SBIR/STTR awardees are not eligible for Tier 1 awards.

Section 2 • Document Package Checklist

Five documents. Collect all of them before starting the online form. Documents 1, 2, and 4 use CalOSBA-issued templates — use them as issued and do not reformat them.

✓	REQUIRED DOCUMENT	NOTES
☐	Grant Award Justification Narrative	Tier 1 or Tier 2 CalOSBA template. Include the cover page. Keep the required format: 1" margins, single-spaced, 12 pt Times New Roman, prompts left in place, five pages maximum beginning on page 2.
☐	Innovation Grant Recommendation Letter	Signed PDF on Hub letterhead, CalOSBA template. Must state the tier, the requested dollar amount, and the hours or referrals of Hub assistance.
☐	California Secretary of State Filings	Formation filings, registration filings for out-of-state entities, and the current Statement of Information. Entity must be Active and in good standing.
☐	Innovation Grant Eligibility Justification Narrative	Required only if the business registered with the Secretary of State before July 1, 2021. CalOSBA template.
☐	Backup documentation for required activities	Combine this category's items into a single PDF for its one upload field. Event photos, marketing material, press releases, training records.

AVOID THESE COMMON ERRORS**Legal business name does not match the Secretary of State filing.**

The legal business name must be identical on the narrative cover page, the recommendation letter, and the online form. Any DBA or other names belong only in the application's separate DBA/Other Names field. This is the most common reason a nomination is returned.

Entity is not Active or not in good standing.

A suspended or forfeited entity cannot proceed.

Tier or dollar amount disagrees across documents.

The cover page, the recommendation letter, and the online form are compared at review.

Narrative exceeds five pages or the template prompts were deleted.

Pages beyond page 5 are not read. Keep 1" margins, single spacing, and 12 pt Times New Roman.

Supporting documentation sent as multiple files.

Each document type takes one PDF in its own field; combine the backup items into a single file for that field. Loose or multiple files are returned for consolidation.

A DUNS number or SAM.gov UEI entered instead of the Secretary of State entity number.

This program uses neither.

Eligibility Justification Narrative missing for a pre-July 2021 entity.

The nomination is held pending receipt rather than denied. Send it as soon as possible.

BANKING AND TAX FORMS ARE NOT COLLECTED AT NOMINATION

Do not send banking details, a voided check, or an IRS Form W-9 with the nomination. CCA requests the Grantee ACH Payment Enrollment form and Form W-9 only from businesses CalOSBA approves for award. The FEIN requested in Section 3 is used for eligibility verification only and does not replace the W-9.

STD 204 (Payee Data Record) and STD 21 (Drug-Free Workplace Certification) are not required from nominees. Earlier versions of this packet listed them; that requirement has been removed. The drug-free workplace certification is carried as a clause inside the grant agreement signed at award.

Section 3 · Nomination Worksheet

Every question below appears on the online form. Fill this in first, then transcribe.

Accelerate Hub Contact Information

#	QUESTION	YOUR ANSWER
1	Hub Name Your Accelerate CA Hub	
2	Contact Name Person completing the nomination	
3	Contact Title	
4	Contact Email The confirmation of receipt is sent to this address	
5	Contact Phone	

Innovation Grant Nominee Information

#	QUESTION	YOUR ANSWER
6	Legal Business Name Must match the Secretary of State filing exactly and be identical on every submitted document. Enter any DBA, trade name, or other names in the separate DBA/Other Names field on the form, not here.	
7	Describe the business in one sentence	
8	Describe the innovation in one sentence	
9	Describe your Innovation A novel way of creating, delivering, or capturing value: solving a known problem more efficiently, addressing unmet needs that create new markets, or using technology to disrupt a legacy industry	
10	Grant Tier Tier 1 or Tier 2	
11	Grant Amount to be Awarded Tier 1: \$25,000.00 / \$50,000.00 · Tier 2: \$75,000.00 / \$100,000.00	
12	Name of nominating Accelerate CA Hub	

Business Information

#	QUESTION	YOUR ANSWER
13	Business Website	
14	Business Principals Founders, owners, CEO, or other key decision-makers, with titles	
15	California Secretary of State Entity Number Must match the filings uploaded with the nomination	
16	Business Incorporation Date If before July 1, 2021, an Eligibility Justification Narrative is required	
17	Federal Employer Identification Number (FEIN) Nine digits, no dashes	
18	NAICS Code(s) or Category	
19	California City of Primary Operations	
20	California County of Primary Operations	
21	Domiciliation State of incorporation	

Business Classifications

Answer Yes or No for each. Ownership classifications require 51 percent or more ownership.

#	QUESTION	YOUR ANSWER
22	HubZone Yes / No	
23	Rural Yes / No — territory not defined as urban (fewer than 2,000 housing units or 5,000 persons)	
24	Disaster-Impacted Yes / No	
25	Women-owned Yes / No	
26	Veteran-owned Yes / No	
27	Diverse-owned Yes / No — reported as "Minority-owned" on the CalOSBA narrative template	
28	Socially or Economically Disadvantaged (SEDI) Yes / No	

#	QUESTION	YOUR ANSWER
29	Pre-revenue Yes / No	

Innovation Metrics

#	QUESTION	YOUR ANSWER
30	Number of Patents Awarded	
31	Number of Patent Applications	
32	SBIR Applications in Progress Enter N/A if none	
33	SBIR/STTR Grants Awarded Yes / No	
34	If yes — number of grants and award amount(s) Include agency, award amount, contract number, and award begin and end dates	

California Jobs and FTEs

Include the founder in the FTE count. Nominations reporting zero California jobs receive additional scrutiny.

#	QUESTION	YOUR ANSWER
35	California-based FTEs Full-time equivalent employees	
36	Out-of-State FTEs	
37	California-based 1099 Contractors	
38	Out-of-State 1099 Contractors	

Section 4 · Submitting

- Open the online nomination form and transcribe your answers. Allow about 15 minutes.
- Upload each document from the Section 2 checklist to its own field as a single PDF. Do not combine all documents into one file, and do not upload more than one file per document.
- Press Submit. Nothing is saved until you do — do not close the form partway through.
- You will receive a confirmation email listing what was submitted, along with a tracking reference. Retain it.

Before You Submit

Final check. Work down this list before you open the online form.

- ☐ Worksheet complete — every question in Section 3 answered
- ☐ All five documents from Section 2 collected
- ☐ Legal business name identical on every document and matching the Secretary of State filing
- ☐ Tier and dollar amount identical on the narrative, the recommendation letter, and your worksheet
- ☐ Secretary of State record shows Active status and good standing
- ☐ Each document uploaded as one PDF to its own field; backup items combined into a single PDF
- ☐ Narrative within five pages, prompts intact, CalOSBA format applied
- ☐ Eligibility Justification Narrative included if the business registered before July 1, 2021

No award shall be made until final approval. Submission of required documents is for consideration and does not guarantee a grant award.

QUESTIONS

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