



CALIFORNIA

STATE TRADE EXPANSION PROGRAM

— APPLICATION
INSTRUCTIONS —



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WELCOME

This guide should be used as a reference for completing the California State Trade Expansion Program (STEP) application, which is administered by the Governor’s Office of Business and Economic Development (GO-Biz). Prospective applicants should read this guide before starting and while completing the application.

STEP 1. BECOME FAMILIAR WITH THE CALIFORNIA STEP GRANT

Understanding the California State Trade Expansion Program (STEP) is critical to successfully submitting an application. Review the [Program Guidelines](#) to learn about eligibility, the difference between STEP Events and Export Vouchers, and eligible expenses.

STEP 2. UNDERSTAND THE APPLICATION TYPES

The California STEP Grant facilitates two types of applications: STEP Events and Export Vouchers. Consult the [Program Guidelines](#) to understand each type and their distinctions. Determine which one aligns with your needs before initiating the application process.

STEP Events	Export Voucher
GO-Biz selects several trade shows and missions to support financially each program year. Participation involves a limited number of companies exhibiting within a state or country pavilion, with funding provided to significantly reduce their costs. View supported events at Events - California State Trade Expansion Program (STEP) , or a list of potential events at Expression of Interest form .	Companies submit their export promotion activities for potential funding consideration. Categories include: • International Trade Show or Missions (<i>not already supported as STEP Events</i>) • U.S. Commercial Service Products • EXIM Credit Insurance Premiums See all categories on the Program Guidelines .

STEP 3. UNDERSTAND THE APPLICATION TIMEFRAMES

STEP Events: Each STEP Event will have its own registration deadline, which can be found in the respective STEP Event flyer.

Export Vouchers: Grant application cycles for Export Vouchers are organized into rounds. Companies are to submit applications during the round corresponding to the timeframe of their planned activity. While payment for an activity can occur outside of the designated timeframe, the activity itself must conclude within that period.

See the current Export Voucher period at <https://export.business.ca.gov/export-vouchers/>.

Portal Shutdown: The portal may be closed for short periods after each application deadline for technical and maintenance purposes. Applicants must consider these potential downtimes during their application process.

STEP 4. CREATE AN ACCOUNT

The STEP grant program application must be submitted online via the online portal available at <https://step.business.ca.gov/>.

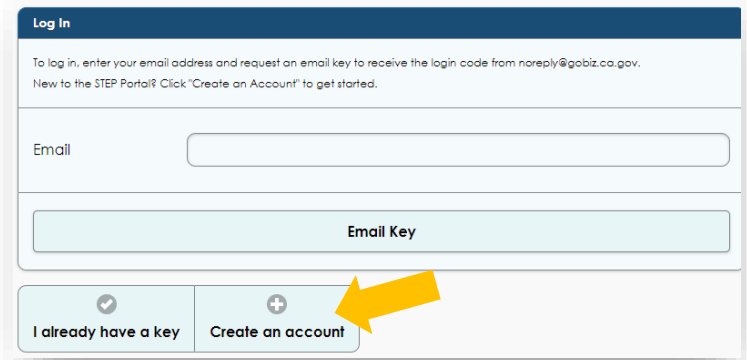
Applicants must first create an account by entering their email address and selecting “Create an Account” on the login screen.

The user will then be prompted to create an account and will be asked to enter the following information:

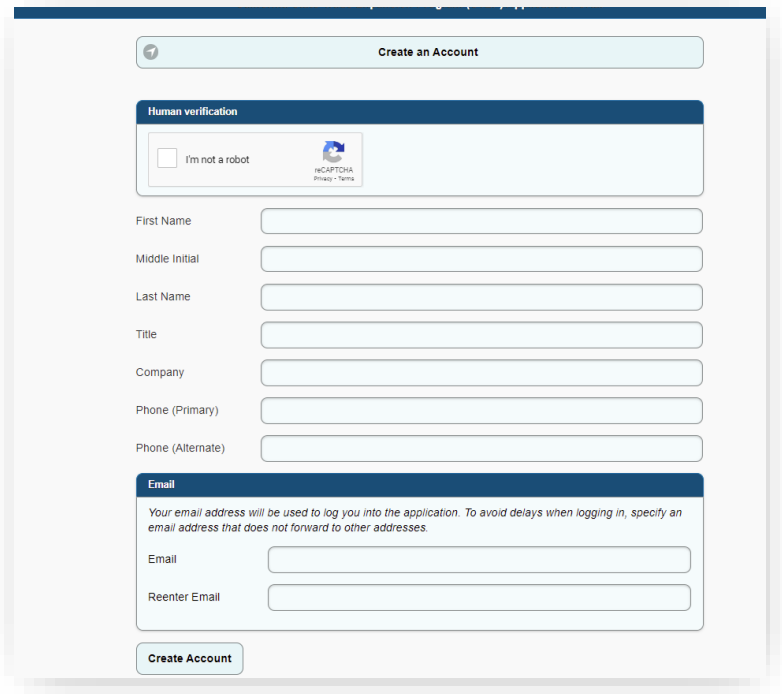
- First Name
- Middle Initial
- Last Name
- Title
- Company
- Phone (Primary)
- Phone (Alternative)
- Email

The user must also check the “Human Verification” in order to complete the registration process.

Once the user selects “Create Account” they will be prompted to a different screen. Select “Email Key.”



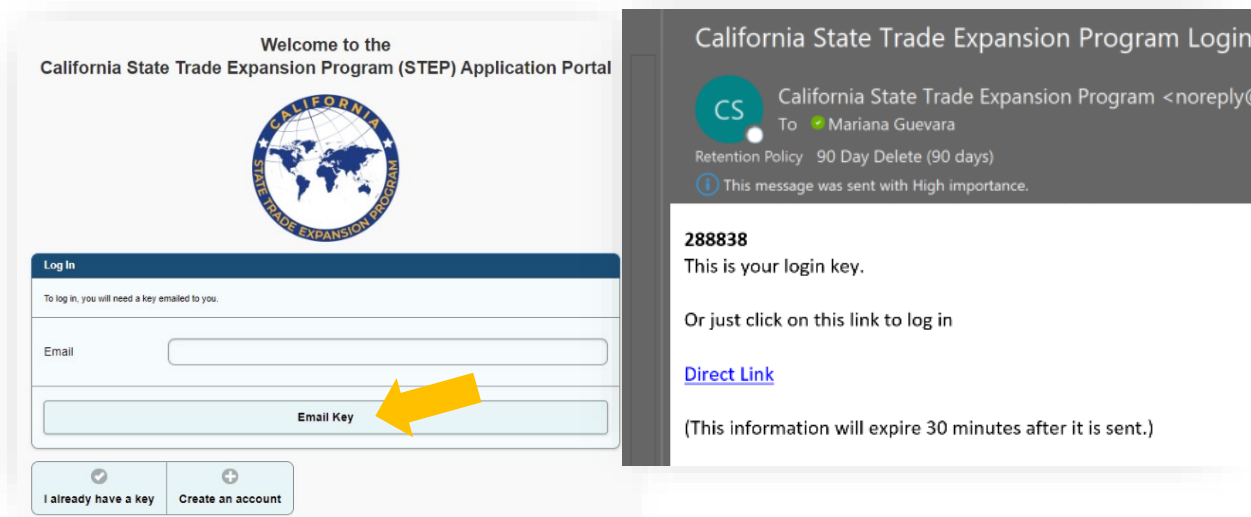
The screenshot shows the 'Log In' page. At the top, it says 'Log In'. Below that, a message reads: 'To log in, enter your email address and request an email key to receive the login code from noreply@gobiz.ca.gov. New to the STEP Portal? Click "Create an Account" to get started.' There is an 'Email' input field. Below it is a button labeled 'Email Key'. At the bottom, there are two buttons: 'I already have a key' and 'Create an account'. A yellow arrow points to the 'Create an account' button.



The screenshot shows the 'Create an Account' page. At the top, it says 'Create an Account'. Below that is a 'Human verification' section with a checkbox labeled 'I'm not a robot' and a CAPTCHA image. Below this are input fields for 'First Name', 'Middle Initial', 'Last Name', 'Title', 'Company', 'Phone (Primary)', and 'Phone (Alternate)'. Below these is an 'Email' section with a message: 'Your email address will be used to log you into the application. To avoid delays when logging in, specify an email address that does not forward to other addresses.' There are input fields for 'Email' and 'Reenter Email'. At the bottom is a 'Create Account' button.

Email Key: For security reasons, GO-Biz requires an access key to be provided each time an applicant logs into their account. Each time the user wishes to log into their account, they must enter their email address in the “Email” field at step.business.ca.gov and click on the “Email Key” button.

A six-digit access key will then be emailed to the applicant’s email address from noreply@gobiz.ca.gov in an email titled “California State Trade Expansion Program Login.” The user will need to copy the access key from their email and paste or type it into the required text box in order to gain access to their account. The access codes expire after 30 minutes. If the access code expires prior to the user logging into the account, the user will need to repeat the login process and obtain a new access key.



Dealing with spam filters: Some email servers with aggressive spam/virus protection can delay delivery of the email. If the delay is greater than 30 minutes, the applicant will not be able to log in. There are two possible solutions:

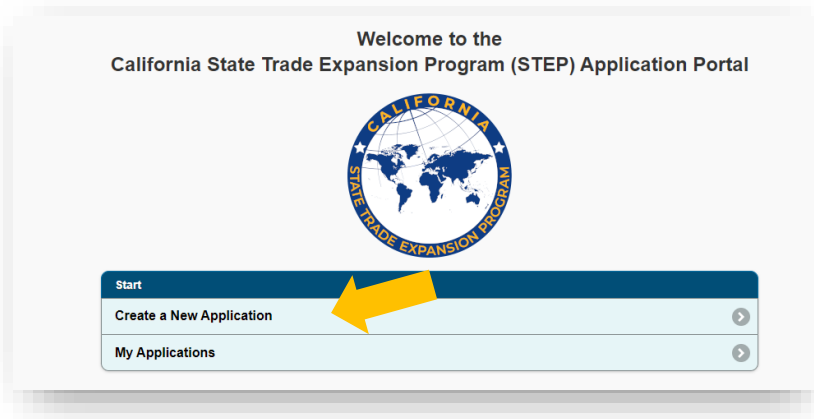
1. The user can ask their employer’s IT team to allow emails from noreply@gobiz.ca.gov to be immediately delivered and/or add this email address to a “trusted” list; or
2. The user may use an alternative email provider (e.g., Gmail, Yahoo, Hotmail, etc.) that does not have the same delivery delays.

If the access code is not received, make sure that the email being used is the same email address that is associated with the account profile. The user should also check spam filters, as the email might have been blocked.

A user’s profile can be edited at any time by clicking on the account application name in the top right corner of the application and selecting “Edit My Profile.” Changing the email address in the user profile will change the email address that is required to log in.

STEP 5. CREATE AN APPLICATION

To create an application, log into the application portal at <https://step.business.ca.gov/> and click “Create a New Application.”



Eligibility Criteria

The applicant will be asked to confirm that the business meets the program eligibility criteria. Detailed information about the eligibility criteria can be found on the [Program Guidelines](#).

Select all criteria that apply to your business.

False Information Consequences:

Submitting false information in order to obtain STEP services is a violation of Federal law. GO-Biz may elect to exclude you from further participation if you submit false information in connection with receiving services.

A screenshot of a form titled 'Please confirm that your business meets the following criteria:'. The form contains a list of nine criteria, each with a checkbox: 'For-Profit Business', 'Organized or incorporated in the United States of America', 'Significant operations in California', 'Exporting goods or services of U.S. origin or that have at least 51% U.S. content (1)', 'Meet SBA small business size standards (which vary by NAICS code (2) based on either annual receipts or number of employees)', 'Registered to do business in the State of California and in good standing with regulatory agencies', 'In business for at least one year at the time the approved export promotion activity takes place', and 'Have sufficient resources to defray the costs associated with trade, including packing, shipping, freight, and customs brokerage costs'. Below the list are two links: '1. STEP U.S. Content Definition/Formula' and '2. NAICS code'. At the bottom, there is a statement: 'By creating an application, you confirm that you have reviewed and acknowledge the Program Guidelines.' and a 'Continue' button.

Application Type

On the Create Application page the applicant will be asked to select the application type:

A screenshot of the 'Create Application' page. It features a dropdown menu labeled 'Application Type' with a downward arrow. Below the dropdown, there is a 'Create Application' button. A tooltip or dropdown menu is visible next to the 'Application Type' dropdown, showing two options: 'STEP Export Voucher Application' and 'STEP Event Application'.

STEP Events

A “STEP Event” is a pre-selected trade show or mission organized by GO-Biz or in collaboration with trade promotion partners.

1. **Application Timeline:** Ongoing basis. Each STEP Event has its own registration deadline.
2. **Eligible Activities:** View [supported events](#).
3. **Funding Amount:** Varies by STEP Event. It may be a participation fee where GO-Biz subsidizes a majority of the cost or a set funding amount.
4. **Application Restriction:** Up to two (2) STEP events per federal fiscal year, with potential participation in additional events based on space and funding availability.

Export Vouchers

Export Vouchers provide individual grant reimbursements for a company’s planned export promotion activities. Companies can propose their own activities and receive up to 75% of the costs reimbursed.

- **Application Timeline:** View [Round Application Timeframes](#)
- **Eligible Activities:** Listed on [page 8 and 11 of the Program Guidelines](#).
- **Funding Amount:** \$500 - \$10,000 per federal fiscal year.
- **Application Restriction:** One application per round, or until maximum amount of \$10,000 has been awarded.

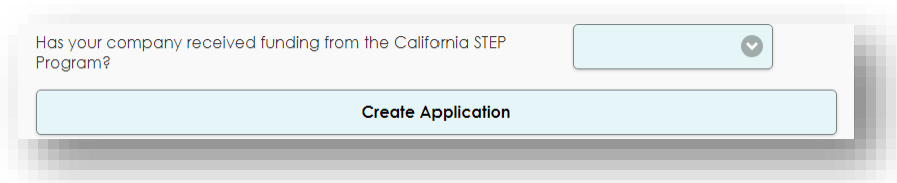
Export Training

Training workshops and education courses that have a direct benefit to gaining knowledge.

- **Application Timeline:** Ongoing basis.
- **Eligible Activities:** Training workshops, and export course certifications.
- **Funding Amount:** Varies by training program.

Previous Funding

The applicant must indicate if the company has received previous funding from the California STEP Program.



The screenshot shows a web form with the question "Has your company received funding from the California STEP Program?". To the right of the text is a dropdown menu with a downward arrow. Below the question and dropdown is a large, light blue button labeled "Create Application".

Note: Having received past funding will NOT make you ineligible. If you are unsure whether or when your company has received STEP funding in the past, please contact STEP@gobiz.ca.gov.

STEP 6. COMPLETE THE APPLICATION SECTIONS

Once the application is created, the Application Summary screen will display all required application sections. The sections will vary based on whether the user is submitting a STEP Event or STEP Export Voucher Application, and whether past STEP funding was indicated.

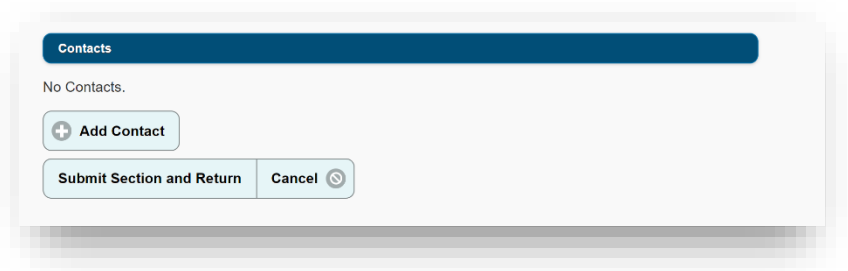
Contact Information

In this section the applicant must click “Add Contact” to enter contact information (name, email address, phone number, etc.).

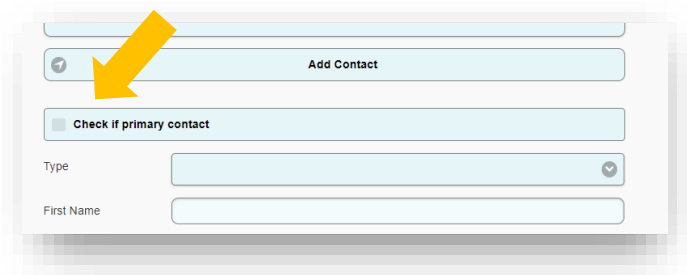
Note: No third-party consultants, agents, or representatives may apply on behalf of a client company or their own consulting firm.

Primary Contact: A primary contact must be designated and entered to complete this section. The primary contact will be the main point of contact that GO-Biz will communicate with during the application and evaluation period. Please ensure that the email address provided for the primary contact is regularly monitored.

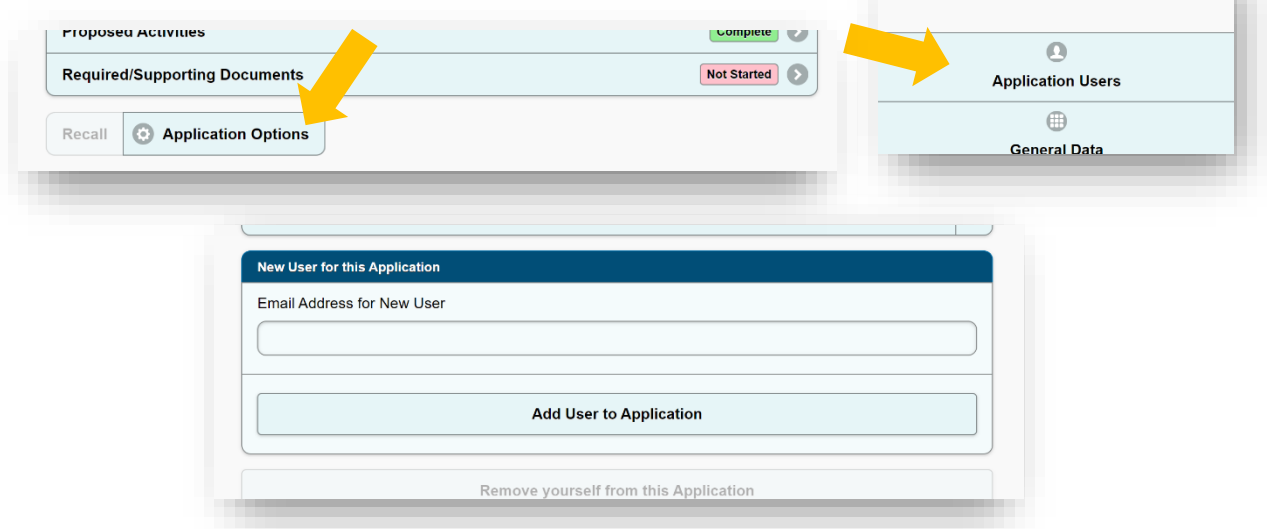
Note: Adding Contacts does not grant the contact person access to the online application. To authorize a contact access to the online application, select “Application Options” at the bottom of the Application Summary screen and then select “Application Users.” Please note that all new application users must create their own account prior to this action.



The screenshot shows a section titled "Contacts" with a dark blue header. Below the header, it says "No Contacts." There are three buttons: a blue "Add Contact" button with a plus icon, a light blue "Submit Section and Return" button, and a light blue "Cancel" button with a clock icon.



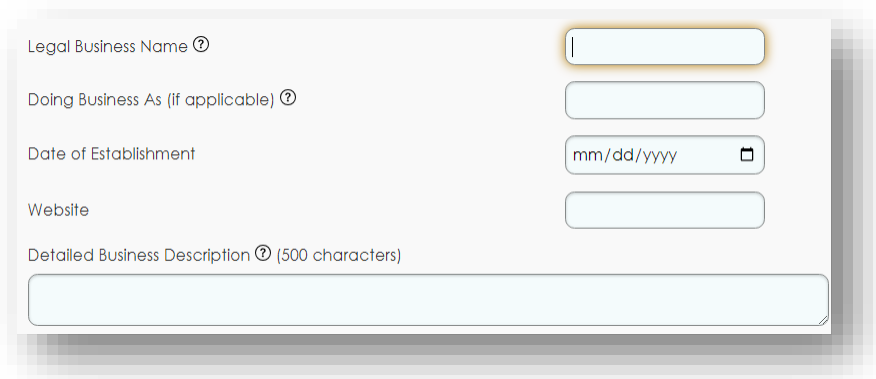
The screenshot shows the "Add Contact" form. A yellow arrow points to the "Add Contact" button at the top. Below the button is a checkbox labeled "Check if primary contact". There are two input fields: "Type" and "First Name".



The sequence of screenshots shows the navigation path. The first screenshot shows the "Proposed Activities" section with a yellow arrow pointing to the "Application Options" button. The second screenshot shows the "Application Options" screen with a yellow arrow pointing to the "Application Users" option. The third screenshot shows the "New User for this Application" form with a yellow arrow pointing to the "Add User to Application" button.

Business Information

In this section the applicant must provide general information regarding the applicant's business.

A form titled "Business Information" with a light blue header. It contains five input fields: "Legal Business Name" with a question mark icon, "Doing Business As (if applicable)" with a question mark icon, "Date of Establishment" with a date format "mm/dd/yyyy" and a calendar icon, "Website", and "Detailed Business Description (500 characters)" with a question mark icon. The "Detailed Business Description" field is a larger text area with a character count indicator.

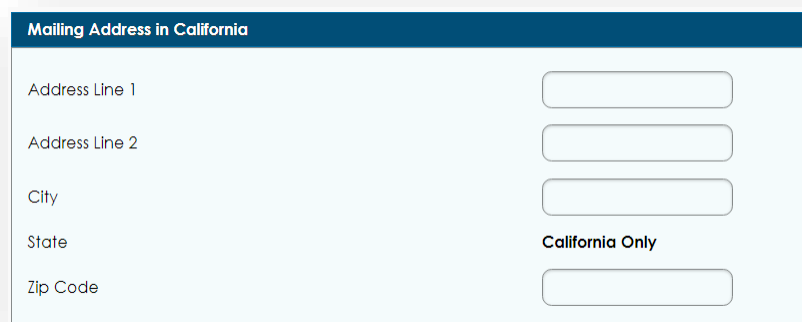
Legal Business Name: Enter the business' legal name as reflected on the California Secretary of State or business tax files.

Doing Business As: If the business filed a fictitious business name (FBN), provide the Doing Business As (DBA). Otherwise, keep blank.

Date of Company Establishment: Enter the year that the business was established.

Website: Enter the business' website.

Detailed Business Description: Provide a description of what your business does, what your business offers, and describe your value proposition.

A form titled "Mailing Address in California" with a dark blue header. It contains five input fields: "Address Line 1", "Address Line 2", "City", "State" (with "California Only" text next to it), and "Zip Code".

Mailing Address: Enter the primary address of the business. For suite numbers, please enter them under Address Line 2.

Business Structure

Legal Entity of Business

[California Secretary of State](#) Business Entity Number [?]

Note: If 'Sole Proprietor' selected above, you will be required to upload business license documentation under the "Required/Supporting Documents" section.

Legal Entity of Business: Select the business entity type (Corporation, LC/LLC, or Sole Proprietor)

Business Entity Number: The Secretary of State Entity Number is the identification number issued to the applicant by the [California Secretary of State \(SOS\)](#) at the time of registration. This is required if the business is registered as a corporation or LC/LLC.

- Corporation: 7-digit number with a “C” at the beginning
- LC/LCC: 12-digit number with no letter at the beginning
- Sole Proprietor: Leave section blank

Business Size

Please provide the NAICS Code that best aligns with your company. Visit [Table of Small Business Size Standards](#) to determine code.

NAICS Code

Number of Employees [?]

Annual Receipts (Total/Gross Income per Year) [?]

NAICS Code: Business should determine the appropriate six-digit [North American Industry Classification System \(NAICS\) Code](#) by classifying the product or service according to the code that best describes its principal purpose.

Number of Employees: This is the average number of people employed for each pay period over the last 12 calendar months. Any person on the payroll must be included as one employee, regardless of hours worked or temporary status. The SBA calculates the number of employees in accordance with 13 CFR 121.106.

Annual Receipts: This is the “total income” (or “gross income”) plus the “cost of goods sold.” These numbers can normally be found on the business’ IRS tax return forms. Receipts are averaged over a business’ latest three complete fiscal years to determine the average annual receipts. If a business has not been in business for three years, multiply its average weekly revenue by 52 to determine its average annual receipts.

Demographic Data	
Is your business woman-owned? ⓘ	☐ No
Is your business owned by a socially or economically disadvantaged individual? ⓘ	☐ No
Is your business veteran and/or service-connected disabled veterans? ⓘ	☐ No
Is your business located in a rural area? ⓘ	☐ No
Is your business located in an Opportunity Zone? ⓘ	☐ No

Woman-Owned Business: At least 51 percent of the business is unconditionally and directly owned and controlled by one or more women who are United States citizens.

Socially and Economically Disadvantaged Individual: At least 51 percent of the business is unconditionally and directly owned and controlled by one or more socially and economically disadvantaged individuals. These are defined as those who have been subjected to racial or ethnic prejudice or cultural bias within American society because of their identities as members of groups and without regard to their individual qualities; whose ability to compete in the free enterprise system has been impaired due to diminished capital and credit opportunities as compared to others in the same or similar line of business who are not socially disadvantaged. These include Black Americans; Hispanic Americans; Native Americans (Alaska Natives, Native Hawaiians, or enrolled members of a Federally or State recognized Indian Tribe); Asian Pacific Americans (complete list available in 13 C.F.R 103); and Subcontinent Asian Americans (persons with origins from India, Pakistan, Bangladesh, Sri Lanka, Bhutan, the Maldives Islands or Nepal).

Veteran and/or Service-Connected Disabled Veterans: At least 51 percent of the business is unconditionally and directly owned and controlled by one or more veterans. As defined at 38 CFR 3.1(d) and 13 CFR 125.8(g), a veteran is a person who served in the active military, naval, or air service and who was discharged or released under conditions other than dishonorable, which is demonstrated on the DD Form 214.

Located in a Rural Area: An eligible small business located in a rural area, as defined in 26 USC 1393(2), Rural Area. This includes any area that is outside of a metropolitan statistical area (MSA). MSAs have at least one urbanized area of 50,000 or more people, plus adjacent territory that has a high degree of social and economic integration as measured by commuting ties. See OMB Bulletin No. 15-01 for a complete list of MSAs.

Located in an Opportunity Zone: An opportunity zone is an economically distressed community where new investments, under certain conditions, may be eligible for preferential tax treatment. Localities qualify as opportunity zones if they have been nominated for that designation by the state and that nomination has been certified by the Secretary of the U.S. Treasury via their delegation of authority to

the IRS. The most current list of designated Qualified Opportunity Zones is available on the U.S. Treasury’s website at cdfifund.gov/pages/opportunity-zones.aspx.

Proposed Activities (Applies to Export Voucher application only)

In this section, the applicant will add the planned export promotion activity by selecting “Add Activity.”

Activity Category: Select the activity that best matches the export promotion activity you are planning. To review category details, review the [Program Guidelines](#).

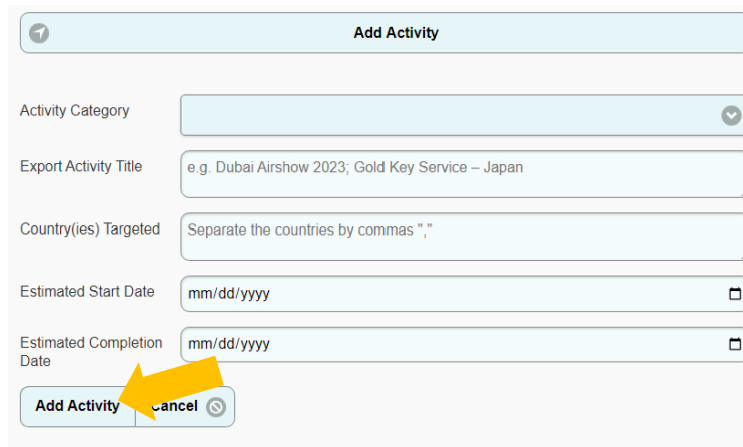
Export Activity Title: Provide a short title of what the planned activity is. Examples can be:

Category	Title
International Trade Show	Dubai Airshow 2024
U.S. Commercial Service	Gold Key Service – Japan
International Marketing	Translation of packaging in Japanese

Countries Targeted: Enter the countries the activity will target.

Estimated Start Date: Enter the activity start date.

Estimated Completion Date: Enter the activity completion date. Please note that the activity must be completed within the relevant [Application Round](#) timeframe.



Add Activity

Activity Category

Export Activity Title

Country(ies) Targeted

Estimated Start Date

Estimated Completion Date

Add Activity **Cancel**

Select “Add Activity” to load the activity related questions.

Describe the Export Activity and How It

Plays into Your Export Strategy: Explain the export activity and its alignment with their broader Export Strategy. This information is crucial for grant evaluators to assess the strategic relevance and impact of the proposed initiative.

Provide the URL: Provide a functional link to the website of the third-party responsible for implementing the planned activity.

Note: GO-Biz will review to ensure the third party is not affiliated with the applicant, as that would make the activity ineligible.

Do you Anticipate Receiving Support from Federal, State, or Nonprofit Export

Promotion Organizations to Implement this Activity: Indicate if you will be working with a government or non-profit organization to implement this activity. For example, state “Yes” if you are working with the U.S. Commercial Service, and Minority Business Development Agency (MBDA) center, County or City office, Small Business Development Center (SBDC), etc.

Provide the Contact Information of the Organization and Specify the Assistance: Provide the organization name, the contact’s name and email, and how they are supporting in the implementation of the activity.

Anticipated Outcomes: Outline the anticipated and intended outcomes in a direct and measurable manner, demonstrating a thorough understanding of the expected results from the export activity. This allows evaluators to gauge the initiative's potential contribution to business growth, market expansion,

Activity Questions

Describe the export activity and how it plays into your Export Strategy

500 characters remaining

Provide the URL or details associated with the third-party implementors. *Third party must have an active website and be able to provide proof of validity upon GO-Biz’s request*

500 characters remaining

Do you anticipate receiving support from federal, state, or nonprofit export promotion organizations to implement this activity?

If your answer is yes, please provide the contact information of these organizations and specify the type of assistance they will provide and their intended involvement in the implementation process.

500 characters remaining

Describe the anticipated and intended outcomes expected as a direct, measurable result of this export activity.

500 characters remaining

and overall success. The specificity of the outcomes aids in evaluating the effectiveness of the proposed activity, ensuring that funded initiatives are well-planned, realistic, and have the potential to yield tangible, measurable results.

Budget Expense: Select “Add Expense” to start listing the estimated expenses for the activity. Limit of five (5) expenses per activity.



The screenshot shows a 'Budget' header. Below it, the text 'No Expenses.' is displayed. A button labeled 'Add Expense' is visible, with a yellow arrow pointing to it from the right.

The Add Expense screen will show drop-down options relevant to the activity that was chosen. For example, the International Trade Show will only show options relating to the booth and show costs. Sample shipping will only show options for sending samples.



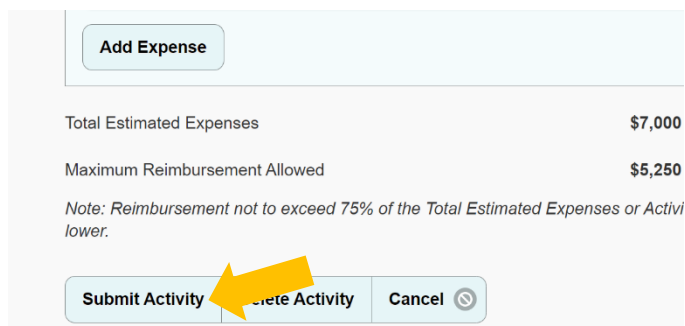
The screenshot shows the 'Add Expense' screen. It has a header 'Add Expense' with a step indicator '1'. Below the header, there are two input fields: 'Budget Category' with a dropdown arrow and 'Amount'. At the bottom, there are two buttons: 'Add Expense' and 'Cancel' with a circular arrow icon.

Note: The total estimated expense will sum all the entered amounts, but the maximum reimbursement will automatically calculate what the total reimbursement allowed will be. Reimbursement is not to exceed 75% of the Total Estimated Expenses or Activity Category, whichever is lower.

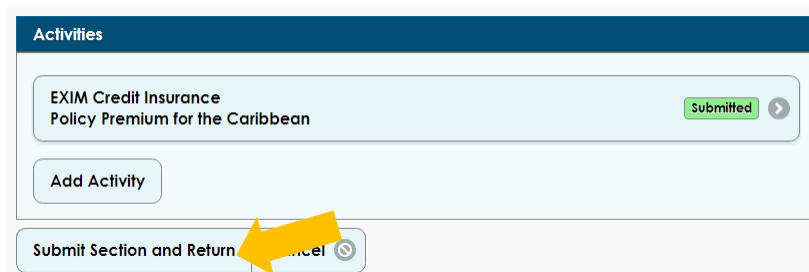
Select “Add Expense” and you will be directed back to the corresponding activity.

Continue to add expenses for the activity (up to 5) or select “Submit Activity” to save and go back to the Proposed Activities page. Add up to five (5) proposed activities.

Once completed, select “Submit Section and Return.” You will be directed back to the Application Summary with additional sections to complete.



The screenshot shows a summary screen. At the top, there is a button labeled 'Add Expense'. Below it, there is a table with two rows: 'Total Estimated Expenses' with a value of '\$7,000' and 'Maximum Reimbursement Allowed' with a value of '\$5,250'. Below the table, there is a note: 'Note: Reimbursement not to exceed 75% of the Total Estimated Expenses or Activity Category, whichever is lower.' At the bottom, there are three buttons: 'Submit Activity', 'Delete Activity', and 'Cancel' with a circular arrow icon. A yellow arrow points to the 'Submit Activity' button.



The screenshot shows the 'Activities' screen. It has a header 'Activities'. Below the header, there is a list of activities. One activity is listed: 'EXIM Credit Insurance Policy Premium for the Caribbean' with a green 'Submitted' status and a right arrow. Below the list, there is a button labeled 'Add Activity'. At the bottom, there are two buttons: 'Submit Section and Return' and 'Cancel' with a circular arrow icon. A yellow arrow points to the 'Submit Section and Return' button.

Event Selection (Applies to STEP Event application only)

In this section, the applicant will select the STEP pre-selected event for their application.

Event Selection

Event 

Available Event Details

Japan Aerospace
Japan Aerospace is one of the largest exhibitions in Japan showcasing the world's aviation, space, and defense industries. This im...
Registration Deadline: Jul 31, 2024
Contact: Emily Desai, Emily.Desai@gobiz.ca.gov
<https://export.business.ca.gov/event/japan-international-aerospace-exhibition/>

Africa Health
GO-Biz is awarding up to 3 STEP-eligible California health and medical technology companies with \$5,000 in export vouchers to off...
Registration Deadline: Sep 20, 2024
Contact: Patricia Utterback, patricia.utterback@gobiz.ca.gov
<https://export.business.ca.gov/event/africa-health/>

ReBuild Ukraine - Business in Ukraine and Poland
Energy, technology, and construction firms - join the California Pavilion at ReBuild Ukraine from November 11-15. The delegation fe...
Registration Deadline: Oct 11, 2024
Contact: Patricia Utterback, patricia.utterback@gobiz.ca.gov
<https://export.business.ca.gov/event/rebuild-ukraine/>

Submit Section and Return **Save Draft** **Cancel** 

Once the event has been selected, click “Submit Section and Return.” Please note that the applicant will have to submit an application for each STEP Event, as the Export Readiness Assessment’s answers must be specific to each event.

Export Readiness Assessment

In this section, the applicant will provide information regarding the business’ export knowledge and experience. Answer the questions related to the business’ competencies and experience.

New to Export: Select if the business has no export experience at all, only ‘accidental’ or ‘novice’ export experience, or no export experience within 24 months.

Market Expansion: Select if the business currently exports to one or more markets and is seeking to expand into a new country market or expand into a new region/segment/product line within an existing market.

Export Voucher Export Readiness Questions: Short or vague answers will not be considered.

1. List the target country(ies) you would like to export to.
2. Describe the current challenges the company faces in exporting.
3. Elaborate on the market research you have conducted to identify potential opportunities and demand in your target export markets.
4. Describe how prepared your production or service delivery process is to handle potential increases in demand that may arise from exporting.
5. What steps have you taken to ensure that your products or services comply with any regulatory requirements or standards in your target export markets?
6. Do you have a dedicated team or personnel responsible for managing international sales and logistics?
7. What financial resources and capabilities do you currently have in place to support your export initiatives?

1. List the target country(ies) you would like to export to.

Separate the countries by commas

500 characters remaining

2. Describe the current challenges the company faces in exporting.

500 characters remaining

3. Elaborate on the market research you have conducted to identify potential opportunities and demand in your target export markets.

500 characters remaining

4. Describe how prepared is your production or service delivery process to handle potential increases in demand that may arise from exporting?

500 characters remaining

5. What steps have you taken to ensure that your products or services comply with any regulatory requirements or standards in your target export markets?

500 characters remaining

6. Do you have a dedicated team or personnel responsible for managing international sales and logistics?

500 characters remaining

7. What financial resources and capabilities do you currently have in place to support your export initiatives?

STEP Event Export Readiness Questions: Short or vague answers will not be considered.

1. List the target country(ies) you would like to export to.
2. Describe your primary objectives for participating in this event/trade show/trade mission.
3. Have you previously participated in this event or other comparable trade events? Please share your past experiences, including any successes or challenges encountered.

1. List the target country(ies) you would like to export to.

Separate the countries by commas

500 characters remaining

2. Describe your primary objectives for participating in this event/trade show/trade mission.

500 characters remaining

3. Have you previously participated in this event or other comparable trade events? Please share your past experiences, including any successes or challenges encountered.

500 characters remaining

4. Describe how your product or service aligns with the industry focus and target audience of the event/mission.

4. Describe how your product or service aligns with the industry focus and target audience of the event/mission.

500 characters remaining

5. What unique features or competitive advantages does your company offer?

5. What unique features or competitive advantages does your company offer?

500 characters remaining

6. Have you conducted market research or identified potential target clients, partners, or distributors for your product or service in the event's target geographical market?

6. Have you conducted market research or identified potential target clients, partners, or distributors for your product or service in the event's target geographical market?

500 characters remaining

7. How do you plan to engage with attendees and generate leads or business opportunities during the event?

7. How do you plan to engage with attendees and generate leads or business opportunities during the event?

Required/Supporting Documents

This section is where applicants will upload all required documentation.

1

Required/Supporting Documents

The following document is required in order to complete and submit the application. Please download the document, sign it, and upload it to this page using the 'Add File' button below. You may also upload any other files that you would like to include in support of your application.

 SBA Self-Representation Form

 Grant Agreement

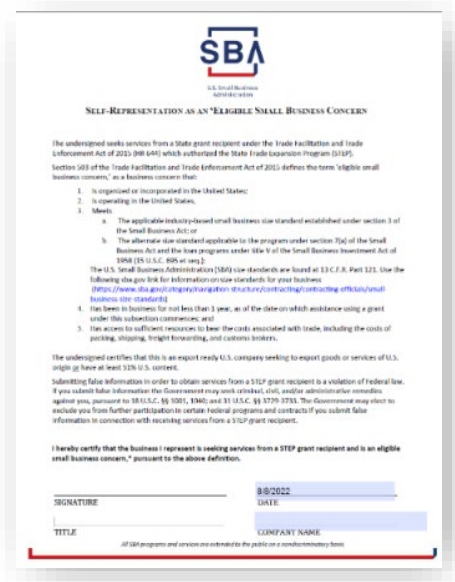
SBA Self-Representation Form

Select "SBA Self-Representation Form" to download the Self-Representation as an Eligible Small Business Concern document.

Carefully read through the document, fill out, and sign.

Acceptable Signatures: A typed name will not be accepted as a signature. Acceptable signatures are:

- Wet ink signature
- Digital ID Signature
- Digitized image of a handwritten signature that is attached to an electronic record



The SBA Self-Representation Form is a document used to certify that a business is an eligible small business concern. It includes a header with the SBA logo and the title "SELF-REPRESENTATION AS AN ELIGIBLE SMALL BUSINESS CONCERN". The form contains several sections: a statement of the undersigned's intent to seek services from a State grant recipient, a list of criteria for eligibility (e.g., organization type, size, location), a section for the undersigned to certify that the business is an eligible small business concern, and a section for the undersigned to sign and date the form. The form also includes a footer with the SBA logo and the text "SBA programs and services are available to the public on a non-discriminatory basis".

Grant Agreement Form

Select “Grant Agreement & Self-Representation” to download the grant agreement form. Carefully read the document, fill out, and sign.

The image shows a PDF document titled "California State Trade Expansion Program Grant Agreement". It contains several numbered sections: 1. Effective Date, 2. The Application, 3. Eligibility, 4. Funding Process, 5. Reporting Requirements, 6. Material Breach, 7. Recapture, 8. Public Records, 9. Indemnification/Warranty and Disclaimer/Limitation of Liability, 10. Integration, 11. Representation on Authority of Parties/Signatories, and 12. Governing Law and Consent to Jurisdiction. At the bottom, there are fields for Applicant Name, Title, Applicant Signature, and Date.

Uploading Required Documents

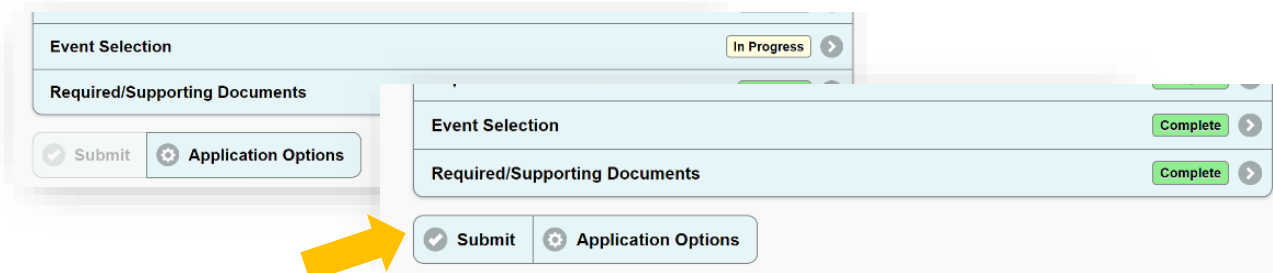
The image shows a web interface for uploading documents. On the left, under "Required/Supporting Documents", there are buttons for "SBA Self-Representation Form" and "Grant Agreement". Below these, it says "No files." and there is a yellow arrow pointing to an "Add File" button. On the right, under "STEP Event Application", there is a "Not Submitted" button and an "Add File" button. Below the "Add File" button, there are fields for File, Name, Type, and Other Type. The File field has a "Choose File" button and "No file chosen" text. The Name field has "(Leave blank to use file name above)" text. The Type field has a dropdown menu with "(Select a file type)" text. The Other Type field has "(Only if 'Other' is selected above)" text. At the bottom, there are "Upload File" and "Cancel" buttons.

1. Save file format as PDF
2. You must upload all required documents to complete this section.
3. To upload the signed documents, select “Add File”.
4. On the Add File screen, select “Choose File” and select the file on your computer.
5. Select the appropriate document type using the drop-down menu.
 - a. SBA Self-Representation Form (required)
 - b. Grant Agreement Form (required)
 - c. Sole Proprietor Business License (if applicable)
 - d. Domestic Trade Show/Mission Strategy (if applicable)
6. Then click “Upload File.”

Once all required documentation is uploaded, click the “Submit Section and Return” button. You will not be able to exit this section until all required documentation is uploaded.

STEP 7. SUBMIT THE APPLICATION

When all required sections have been completed, the applicant may submit the application by clicking “Submit” on the Application Summary page. The “Submit” button will not be active until all sections have been completed.



Submit Application Screen

The Submit Application Screen will display Opt-In choices for the applicant to review and select.

A screenshot of the 'Submit Application' screen. At the top is a header 'Submit Application' with a question mark icon. Below is a section titled 'Opt-In Choices'. It contains two questions with radio button options. The first question is about receiving the monthly International Affairs and Trade Newsletter from GO-Biz, with options 'YES, I would like to receive the monthly newsletter.' and 'NO, I would not like to receive the monthly newsletter.' The second question is about sharing information with the SBA, with options 'Please SHARE my information with the SBA' and 'Please DO NOT share my information with the SBA'. To the right of these options is a large block of text detailing the terms and conditions of the application. At the bottom, there is a checkbox labeled 'I agree to the conditions above.' and a 'Submit Application' button.

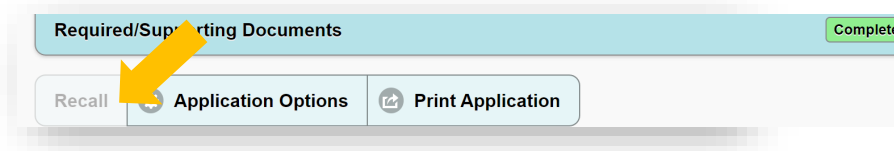
Once submitted, an applicant will receive an automated message stating that the application has been submitted.

ADDITIONAL RESOURCES

Making Changes to a Submitted Application

Provided that an application period is still open and the application has a status of “Submitted,” an applicant may recall, amend, or resubmit a previously submitted application.

1. Open the submitted application
2. Click on “Recall”
3. Make changes
4. Re-Submit!

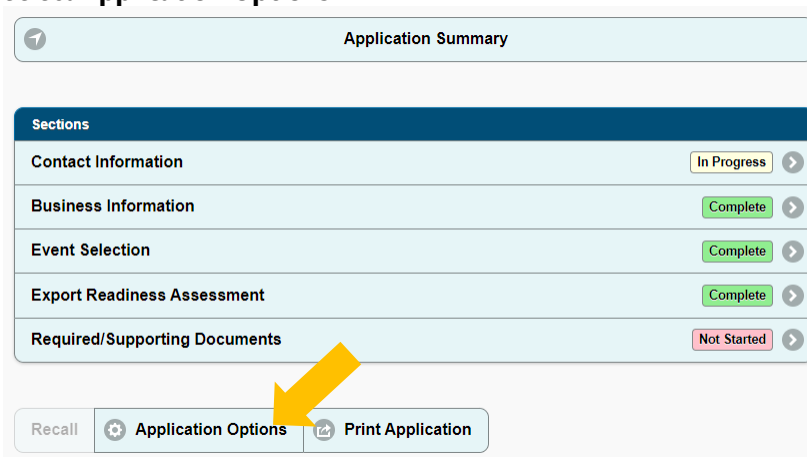


Duplicating an Application

Companies wanting to submit a new application can “Duplicate” and the site will pull previously entered Contact Information, Business information, and Export Readiness Assessment.

Duplicate an application by following the steps below:

1. From the Home Screen go to your applications by selecting “My Applications.” Click on the submitted application you wish to duplicate.
2. Select **Application Options**



3. Select **Copy**

1 Application Options

- Application Users
- General Data
- Copy
- Delete Application

- Go through the eligibility requirements and select the appropriate application type and select **Create Application**.

Previous Funding

Has your company received funding from the California STEP Program?

STEP Event Application: Pre-selected activities selected by the GO-Biz team for support. To view the existing events, visit <https://export.business.ca.gov/step-events/>. To learn more about STEP Event visit the Program Guidelines.

STEP Export Voucher Application: Competitive reimbursement funding for companies to propose their own export promotion activities. To learn more about the Export Voucher visit the Program Guidelines.

Application Type

Create Application

View Deleted Applications

Applications may be automatically deleted if not completed by 14 days, reminders to submit will be sent from STEP@gobiz.ca.gov. Deleted applications may be retrieved.

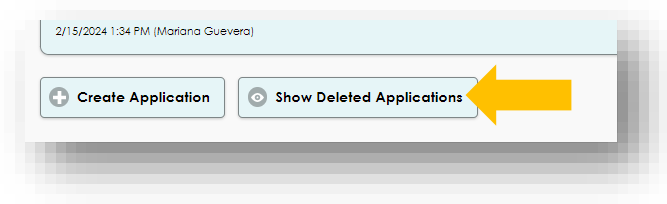
EXPANSION

Please carefully review the [Program Details](#) to learn about the eligibility requirements, application period, and allowable expenses.

Start

- Create a New Application
- My Applications

- From the home screen, select “My Applications”



2. Select “Show Deleted Applications”

If any additional assistance is needed, please contact the STEP team by emailing step@gobiz.ca.gov.

This document was last updated on July 2, 2024.