

## **Cannabis Equity Program**

Direct Grants, Fee Waiver, &  
Direct Technical Assistance  
Guidelines

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## Background

On July 10, 2018, the Long Beach City Council approved the Adult-Use Cannabis Business Ordinance, which included the creation of the Long Beach Cannabis Equity Program. The goal of the Cannabis Equity Program is to recognize and address the long-term impact that federal and state cannabis enforcement policies have had on low income, communities of color in the city of Long Beach.

To minimize disparities within the cannabis industry in Long Beach, the City of Long Beach (City) provides equity applicants with prioritized licensing and permitting, expedited application review, fee waivers and deferrals, technical assistance, and financial assistance through the Direct Grants Program.

Since the initial round of grant funding in 2019, Long Beach has continued to receive grant funding from different State agencies, including the Bureau of Cannabis Control (BCC) (now known as the Department of Cannabis Control (DCC)) and the Governor's Office of Business and Economic Development (GO Biz).

The City designed the direct grants program to support equity businesses with a portion of the financial costs towards opening a cannabis business. As the program progresses, the City will continue to revise the direct grants program to respond to changing policies enacted by the City Council and/or the State of California.

### *Reservation of Rights*

The City of Long Beach reserves the right to evaluate and revise the Direct Grants and Fee Waiver Program at any time based on information gathered in its ongoing evaluation of the program.

# Direct Grants

## *Program Summary*

The City of Long Beach's Cannabis Equity Direct Grants Program utilizes funding from the Governor's Office of Business and Economic Development (GO Biz) to provide grants to Long Beach's cannabis equity entrepreneurs (Equity Applicants). To receive grant funds, Equity Applicants must complete a grant application and undergo a business verification process. Grant amounts are disbursed at four milestones during the business license process that will assist Equity Applicants in starting a sustainable cannabis business. If an Equity Applicant meets the requirements of all milestones, they will be eligible to receive a grant depending upon the type of cannabis business and size (square footage) of the cannabis facility.

**PLEASE NOTE:** The grant funding provided to Equity Applicants will help offset a portion of the capital needed to start a cannabis business but will likely not be able to fully fund the business operation. Equity Applicants will likely need additional sources of funding to start and sustain their cannabis operation. In addition, grant funds are currently not available to Equity Businesses once the business becomes licensed and operational; therefore, it is recommended to not rely solely on the grant funding.

Grant funds are solely provided to assist an Equity Applicant with obtaining a business license. The City is exploring ways to provide additional resources and assistance to Cannabis Equity Businesses once they become operational without the use of grant funds, including Direct Technical Assistance and incubation support.

## *Grant Application Prerequisite Documentation*

Before an Equity Applicant can apply for a Direct Grant, they must have completed the following:

- Have been verified as an Equity Applicant by the Economic Development Department and received the *Cannabis Social Equity Program Verification Letter*
- Have submitted a response to the Cannabis Equity Program Demographic Questionnaire

## *Grant Application*

A completed [grant application](#) will be reviewed by staff from the Economic Development Department and scored according to the [Direct Grant Assessment](#).

**Given the limited amount of grant funds, grants will be issued on a first come first served basis and grant applications must also receive a minimum score of 60 out of 100 points on the Direct Grant Assessment.** If a grant application does not score 60 points or higher, feedback will be provided, and the Applicant can resubmit their grant application to improve their score.

A completed grant application will be required for all grant milestones; however, a Direct Grant Assessment is not required for fee waiver Milestones 1A, 1B, 1C, 2A, 2B, 2C, & 2D.

The documents that will be reviewed as part of the Direct Grant Assessment include the following:

- Equity Applicant resume or [answers to experience questions](#)
- Partner(s) resume or answers to experience questions
- Updated Business Plan
- Business Entity Documents
- Written explanation of how funding will be used

## Grant Milestone Requirements

Direct grants will be awarded for each milestone of the business license process completed by an Equity Applicant. The amount of grant funding will be dependent upon the type of cannabis activity being conducted and the size of the cannabis facility. For microbusinesses, grant funds will be issued for each separate cannabis activity occurring at the business location.

To qualify for the grant under each milestone, the Equity Applicant must meet the following requirements:

Milestone	Grant Application Requirements	Eligible Uses
<b>Milestone 1</b> <i>Securing Business Location</i>	<ul style="list-style-type: none"> <li>- Completed grant application</li> <li>- Completed Prerequisite Documentation</li> <li>- Completed Assessment Documentation</li> <li>- Letter of Intent or Executed Commercial Lease/Rental Agreement for cannabis facility property</li> </ul>	<ul style="list-style-type: none"> <li>Rent/lease payments</li> <li>Security deposit</li> <li>Consultants</li> <li>Legal fees</li> </ul>
<b>Milestone 1A</b> <i>Application Fees</i>	<ul style="list-style-type: none"> <li>- Completed grant application</li> <li>- Completed Prerequisite Documentation</li> <li>- Bill Notice for Application Fees</li> </ul>	Fee waivers
<b>Milestone 1B</b> <i>Administrative Use Permit Fees</i>	<ul style="list-style-type: none"> <li>- Completed grant application</li> <li>- Completed Prerequisite Documentation</li> <li>- Invoice for Administrative Use Permit (AUP) fees</li> </ul>	Fee waivers
<b>Milestone 1C</b> <i>Conditional Use Permit Fees</i>	<ul style="list-style-type: none"> <li>- Completed grant application</li> <li>- Completed Prerequisite Documentation</li> <li>- Invoice for Conditional Use Permit (CUP) fees</li> </ul>	Fee waivers
<b>Milestone 2</b> <i>Drawing Up Plans</i>	<ul style="list-style-type: none"> <li>- Completed grant application</li> <li>- Completed Prerequisite Documentation</li> <li>- Completed Assessment Documentation</li> <li>- Letter of Local Authorization to Apply for a State License</li> <li>- Executed Lease Agreement</li> </ul>	<ul style="list-style-type: none"> <li>Items in Milestone 1</li> <li>Consultants</li> <li>Architect</li> <li>Structural Engineer</li> <li>Legal assistance</li> <li>Fees</li> </ul>
<b>Milestone 2A</b> <i>Cannabis Facility Consultation Fee</i>	<ul style="list-style-type: none"> <li>- Completed grant application</li> <li>- Invoice for Cannabis Facility Consultation Fees</li> </ul>	Fee waivers
<b>Milestone 2B</b> <i>Plan Check Fees</i>	<ul style="list-style-type: none"> <li>- Completed grant application</li> <li>- Invoice for Plan Check Fees</li> </ul>	Fee waivers
<b>Milestone 2C</b> <i>Permitting Fees</i>	<ul style="list-style-type: none"> <li>- Completed grant application</li> <li>- Invoice for Permitting Fees</li> </ul>	Fee waivers

<b>Milestone 2D</b> Categorical Exemption Fees	<ul style="list-style-type: none"> <li>- Completed grant application</li> <li>- Invoice for Categorical Exemption Fees</li> </ul>	Fee waivers
<b>Milestone 3</b> <i>Starting          Construction</i>	<ul style="list-style-type: none"> <li>- Completed grant application</li> <li>- Completed Prerequisite Documentation</li> <li>- Completed Assessment Documentation</li> <li>- Copy of issued Building Permit</li> </ul>	Items in Milestone 1 and 2 Contractor Electrician Plumber Consultants
<b>Milestone 4</b> <i>Opening Your          Business</i>	<ul style="list-style-type: none"> <li>- Completed grant application</li> <li>- Completed Prerequisite Documentation</li> <li>- Completed Assessment Documentation</li> <li>- Copy of issued Business License</li> </ul>	Items in Milestones 1,2, and 3 Inventory Packaging Marketing IT and website Equipment Fixtures

## *Direct Grants Milestone Funding Amounts*

Direct grants will be issued for each milestone based upon the type of cannabis activity being conducted and the size of the cannabis facility and operation found in the matrixes below.

### Funding Amount – Milestone 1

Milestone 1 does not have a designated funding amount because it is unique to each cannabis operation. To determine the funding amount, staff from the Economic Development Department will review the following criteria:

- Direct Grant Assessment
- Letter of Intent or Executed Commercial Lease/Rental Agreement Terms including price per square foot, monthly rental amount, and security deposit
- Whether the business activity is required to obtain an Administrative Use Permit or Conditional Use Permit (which would extend the timeline to approve the application by the Planning Bureau)

The goal of the Milestone 1 funding is to provide funding for applicants to secure a location for their cannabis business prior to entering the licensing process. Grant funding in this milestone may also be provided to assist an applicant with some portion of their annual rent to continue in the licensing process. The grant funding amount for Milestone 1 will be different for each business.

If staff determines that the applicant does not meet the criteria for Milestone 1, feedback will be provided, and the Applicant can resubmit their grant application to improve their score.

### **Please note:**

If staff determines an LOI or executed commercial lease/rental agreement to be predatory (financial terms are unreasonable beyond typical market value for cannabis), staff will not approve the grant funding for Milestone 1.

### Funding Amount – Milestones 2-4

The designated funding amounts for Milestone 2-4 are found in the Direct Grants Program Funding Matrix. The funding amount for Milestone 2 is determined based upon the suite and building square footage as indicated in the executed commercial lease/rental agreement. The funding amount for Milestones 2-4 are determined based upon the square footage of the space utilized for each cannabis activity as indicated on the approved architectural plans.



## State License Type Summary

State License Type	Description
<b>Cultivation</b>	
<b>Nursery</b>	Indoor cultivation of only clones, immature plants, seeds, or other types of cannabis used for propagation.
<b>Specialty Cottage</b>	Indoor cultivation site with 500 square feet or less of total canopy.
<b>Specialty</b>	Indoor cultivation site between 501 and 5,000 square feet of total canopy.
<b>Small</b>	Indoor cultivation site between 5,001 and 10,000 square feet of total canopy.
<b>Medium</b>	Indoor cultivation site between 10,001 and 22,000 square feet of total canopy.
<b>Manufacturing</b>	
<b>Type S - Shared-Use Manufacturing</b>	Small manufacturers who use a shared manufacturing facility to conduct extraction using butter or cooking oils, infusions, and packaging and labeling.
<b>Type P - Packaging and Labeling</b>	Manufacturers that can only package and label products.
<b>Type N - Infusions</b>	Manufacturers that conduct infusions of cannabis into cannabis products (cookies, candies, vape pens, etc.).
<b>Type 6 - Non-Volatile Manufacturing</b>	Manufacturers that conduct extractions of cannabis oil using non-volatile solvents.
<b>Type 7 - Volatile Manufacturing</b>	Manufacturers that conduct extractions of cannabis oil using volatile solvents.
<b>Lab Testing</b>	
<b>Type 8 - Lab Testing</b>	Facility that tests cannabis goods prior to final sale at a retailer.
<b>Retail (Dispensary)</b>	
<b>Type 10 – Storefront Retailer</b>	A storefront retailer has a physical location where cannabis goods are sold. Storefront retailers can also deliver cannabis goods.
<b>Distribution</b>	
<b>Type 11 - Distribution</b>	Distributors that can transport product between cultivation, manufacturing, and distribution premises, move finished product to retail premises, provide storage services for other licensed businesses, and arrange for testing of cannabis goods.
<b>Type 13 - Transport Only Distribution</b>	Distributors that can only transport product between cultivation, manufacturing, and distribution premises.
<b>Microbusiness</b>	
<b>Type 12 - Microbusiness</b>	Business that conducts at least three (3) of the following activities: cultivation up to 10,000 square feet, manufacturing (Type 6, P, or N), distribution (Type 11 or 13), and retail (dispensary or delivery).

### Cultivation Grant Funding Amounts

Square Feet	Milestone 1 <i>Securing Business Location</i>	Milestone 2 <i>Drawing Up Plans</i>	Milestone 3 <i>Starting Construction</i>	Milestone 4 <i>Opening Your Business</i>	Total <i>Excluding Milestone 1</i>
<b>Nursery</b>					
0-500	TBD	\$2,500.00	\$15,000.00	\$5,000.00	\$22,500.00
<b>Specialty Cottage</b>					
0-500	TBD	\$2,500.00	\$15,000.00	\$5,000.00	\$22,500.00
<b>Specialty</b>					
501-1,000	TBD	\$5,000.00	\$25,000.00	\$10,000.00	\$40,000.00
1,001-2,000	TBD	\$7,500.00	\$35,000.00	\$15,000.00	\$57,500.00
2,001-3,000	TBD	\$10,000.00	\$45,000.00	\$20,000.00	\$75,000.00
3,001-4,000	TBD	\$12,500.00	\$55,000.00	\$25,000.00	\$92,500.00
4,001-5000	TBD	\$15,000.00	\$65,000.00	\$30,000.00	\$110,000.00
<b>Small</b>					
5,001-7,500	TBD	\$20,000.00	\$80,000.00	\$40,000.00	\$140,000.00
7,501-10,000	TBD	\$25,000.00	\$95,000.00	\$50,000.00	\$170,000.00
<b>Medium</b>					
10,001+	TBD	\$30,000.00	\$110,000.00	\$60,000.00	\$200,000.00

### Manufacturing Grant Funding Amounts

Square Feet	Milestone 1 <i>Securing Business Location</i>	Milestone 2 <i>Drawing Up Plans</i>	Milestone 3 <i>Starting Construction</i>	Milestone 4 <i>Opening Your Business</i>	Total <i>Excluding Milestone 1</i>
<b>Type 7: Volatile Solvent Manufacturing</b>					
0-500	TBD	\$2,500.00	\$15,000.00	\$5,000.00	\$22,500.00
501-1,000	TBD	\$2,500.00	\$45,000.00	\$5,000.00	\$52,500.00
1,001-2,500	TBD	\$5,000.00	\$65,000.00	\$10,000.00	\$80,000.00
2,500+	TBD	\$8,000.00	\$90,000.00	\$15,500.00	\$113,500.00
<b>Type 6: Non-Volatile Solvent Manufacturing</b>					
0-500	TBD	\$2,500.00	\$35,000.00	\$5,000.00	\$42,500.00
501-1,000	TBD	\$5,000.00	\$60,000.00	\$10,000.00	\$75,000.00
1,001-2,500	TBD	\$8,000.00	\$90,000.00	\$15,500.00	\$113,500.00
2,500+	TBD	\$11,500.00	\$120,000.00	\$21,000.00	\$152,500.00

Type P: Packaging & Labeling					
0-500	TBD	\$2,500.00	\$15,000.00	\$5,000.00	\$22,500.00
501-1,000	TBD	\$5,000.00	\$25,000.00	\$10,000.00	\$40,000.00
1,001-2,500	TBD	\$8,000.00	\$40,000.00	\$15,500.00	\$63,500.00
2,500+	TBD	\$11,500.00	\$55,000.00	\$21,000.00	\$87,500.00
Type S: Shared Use Manufacturer					
N/A	TBD	N/A	N/A	\$20,000.00	\$20,000.00

### Distribution Grant Funding Amounts

Square Feet	Milestone 1 <i>Securing Business Location</i>	Milestone 2 <i>Drawing Up Plans</i>	Milestone 3 <i>Starting Construction</i>	Milestone 4 <i>Opening Your Business</i>	Total <i>Excluding Milestone 1</i>
Type 11: Distributor					
501-1,000	TBD	\$5,000.00	\$10,000.00	\$5,000.00	\$20,000.00
1,001-2,000	TBD	\$7,500.00	\$15,000.00	\$10,000.00	\$32,500.00
2,001-3,000	TBD	\$10,000.00	\$25,000.00	\$15,000.00	\$50,000.00
3,001-4,000	TBD	\$12,500.00	\$35,000.00	\$20,000.00	\$67,500.00
4,001-5000	TBD	\$15,000.00	\$45,000.00	\$25,000.00	\$85,000.00
5,001+	TBD	\$17,500.00	\$55,000.00	\$30,000.00	\$102,500.00
Type 13: Transport-Only Distributor					
N/A	TBD	N/A	N/A	\$30,000	\$30,000

### Lab Testing Grant Funding Amounts

Square Feet	Milestone 1 <i>Securing Business Location</i>	Milestone 2 <i>Drawing Up Plans</i>	Milestone 3 <i>Starting Construction</i>	Milestone 4 <i>Opening Your Business</i>	Total <i>Excluding Milestone 1</i>
Type 8: Lab Testing					
501-1,000	TBD	\$5,000.00	\$25,000.00	\$5,000.00	\$35,000.00
1,001-2,000	TBD	\$7,500.00	\$40,000.00	\$10,000.00	\$57,500.00
2,001-3,000	TBD	\$10,000.00	\$55,000.00	\$15,000.00	\$80,000.00
3,001-4,000	TBD	\$12,500.00	\$70,000.00	\$20,000.00	\$102,500.00
4,001-5000	TBD	\$15,000.00	\$85,000.00	\$25,000.00	\$125,000.00
5,001+	TBD	\$17,500.00	\$100,000.00	\$30,000.00	\$147,500.00

## Dispensary Grant Funding Amounts

Square Feet	Milestone 1 <i>Securing Business Location</i>	Milestone 2 <i>Drawing Up Plans</i>	Milestone 3 <i>Starting Construction</i>	Milestone 4 <i>Opening Your Business</i>	Total <i>Excluding Milestone 1</i>
<b>Type 10: Storefront Retailer</b>					
501-1,000	TBD	\$20,000.00	\$50,000.00	\$25,000.00	\$95,000.00
1,001-2,000	TBD	\$22,500.00	\$55,000.00	\$30,000.00	\$107,500.00
2,001-3,000	TBD	\$25,500.00	\$60,500.00	\$35,500.00	\$121,500.00
3,001-4,000	TBD	\$29,000.00	\$66,500.00	\$41,500.00	\$137,000.00
4,001-5000	TBD	\$33,000.00	\$73,000.00	\$48,000.00	\$154,000.00
5,001+	TBD	\$37,500.00	\$80,000.00	\$55,000.00	\$172,500.00

## Grant Approval Process

The steps to apply for a Direct Grant are as follows:

**Step 1 – Submit Application:** Once an Equity Applicant has met the milestone requirements, Applicants may submit a completed Grant Application found on the City's website. Grant applications must be submitted by email or mail to the Economic Development Department at [cannabizLB@longbeach.gov](mailto:cannabizLB@longbeach.gov).

**Step 2 – Application Review:** Grant applications will be reviewed by staff in the Economic Development Department to ensure that the Equity Applicant has met the milestone requirements and submitted the required documents for that milestone.

- If the grant application is complete, the Applicant will receive an email saying that the application is complete and has been sent to the Manager of Cannabis Oversight for final review.
- If the grant application is not complete, the Applicant will receive an email explaining which documents are missing and/or which milestone requirements have not been met.

**Step 3 – Grant Assessment:** A completed grant application will be scored by staff in the Economic Development Department according to the Direct Grant Assessment. A grant application must receive a minimum score of 60 out of 100 points to be approved for a direct grant.

- If the grant application scores 60 points or more, the Applicant will receive an email saying that the application has been approved and will be sent to the Manager of Cannabis Oversight for final review.
- If the grant application scores 59 points or less, the Applicant will receive an email explaining that they did not meet the minimum score of 60 points. Staff will call and/or meet with the Applicant to explain what they can do to improve their score. The Applicant can resubmit their grant application to improve their score.

**Step 4 – Grant Closing:** Staff from the Economic Development Department will close the grant as follows:

- Send an email to the Applicant letting them know the grant has been approved.
- Obtain a completed W-9 from the Equity Applicant (if one is not currently on file).
- Enter the grant into the City's financial system for payment processing.

**Step 5 – Grant Issuance:** Once the grant payment has been processed, the check for the grant amount will be mailed to the address as indicated in the W-9 on file with the City. It typically takes up to 3 weeks for the grant payment to be processed and a check to be mailed out.

## Fee Waivers

### Fee Waiver Summary

The City of Long Beach's Cannabis Equity Program utilizes funding from the Governor's Office of Business and Economic Development (GO Biz) to provide fee waivers to Long Beach's cannabis equity entrepreneurs (Equity Applicants). "Fee waivers" refers to City fees being paid using the grant funding provided by the State – not that fees aren't being charged. Fees will continue to be assessed; however, some fees may be paid using grant funds as opposed to being paid directly by the applicant.

To receive fee waivers, Equity Applicants must complete a grant application and provide invoices/receipts for fees that need to be paid using grant funds. Fee waivers are disbursed during the business license process to offset some of the costs of licensing and permitting.

Milestone	Fee Type	Fee Waiver Amount
Milestone 1A	Application Fees	\$56.30*
Milestone 1B	Administrative Use Permit Fees	\$4,719.60*
Milestone 1C	Conditional Use Permit Fees	\$9,072.00*
Milestone 2A	Cannabis Facility Consultation Program Fees	\$766.80
Milestone 2B	Plan Check Fees	<i>Varies, depending upon business model, license type, and size of operation.</i>
Milestone 2C	Permitting Fees	<i>Varies, depending upon business model, license type, and size of operation.</i>
Milestone 2D	Categorical Exemption Fees	<i>Varies, depending upon business model, license type, and size of operation.</i>

*\*Fees are charged for each business activity/license at the facility*

**PLEASE NOTE:** The grant funds provided to Equity Applicants for fee waivers will help offset a portion of the capital needed to pay for all licensing and permitting fees but will likely not be able to fully pay for all fees required to obtain a license. Equity Applicants will likely need other, additional sources of funding to pay for all costs of the licensing and permitting process; therefore, it is recommended to not rely solely on the grant funding.

### Fee Waiver Procedures

To be awarded grant funds for fee waivers, businesses must follow the same steps to be issued a direct grant including meeting the prerequisite documentation requirements and submitting a full and complete grant application. However, grant applications for fee waivers will **not** be subject to the Direct Grant Assessment.

## Grant and Fee Waiver Terms & Restrictions

The following grant and fee waiver terms and restrictions shall apply to all grant funds issued by the Economic Development Department.

1. To create a sustainable program for all Equity Applicants, grant funds will only be issued to an individual Equity Applicant once for each milestone, regardless of business entities, business locations, and/or business status (if the business moves, changes entities, etc.). Additional grant funds will not be provided to an Equity Applicant for multiple business entities and/or business locations.
2. Grant funds will only be issued to one Equity Applicant per household. Separate grant funds will not be issued to spouses and/or relatives living within the same household and/or filing jointly on their tax return.
3. The maximum amount of grant funding issued for any individual Equity Applicant conducting one cannabis activity from their business location is \$350,000.
4. Equity Applicants must provide proof of expenses including but not limited to vendor quotes, invoices, receipts etc., upon applying for a new grant milestone. Failure to provide proof of expenses for each grant milestone may result in ineligibility for future grant funds. The City reserves the right to request proof of expenses and other supporting documentation as necessary, at any time.
5. If the City discovers an Equity Applicant misused past grant funds, the Equity Applicant will be ineligible to receive any future grant funds and may be required to repay the amount of misused grant funds back to the City.
6. The City reserves the right to not award grant funding to any Equity Applicant that does not meet the requirements of the direct grants program.

### *Ineligible Use of Grant Funds*

- Unlicensed cannabis business activity
- Buying unlicensed inventory
- Relending or investing
- Non-cannabis businesses that serve the cannabis industry
- Personal expenses or the acquisition of personal property
- To engage in prohibited operations as specified in the state and local regulations

# Direct Technical Assistance

## *Program Summary*

The goal of the Direct Technical Assistance Program is to provide free technical assistance to Equity Applicants to help acquire the knowledge and skills necessary to start, sustain and grow a viable cannabis business in Long Beach.

Under this program, the City contracts consultants to provide free training and educational services to Equity Applicants that cover a variety of subjects including, but not limited to:

- Finding appropriate commercial properties for their cannabis business
- Negotiating lease agreements
- Developing business plans, financial plans, budget documents, and projections
- Securing capital and investors
- Understanding State and local taxes and other regulatory compliance requirements
- Setting up proper payroll and accounting procedures
- Entering into business agreements
- Navigating the City and State's licensing and permitting processes

The City seeks to make available technical assistance services that:

- Offer flexibility in the method of learning, such as in-person, virtual, and/or asynchronous learning and individual or group meeting
- Provide generalized business education and/or training but also cannabis-specific training and/or education
- Increase the number of Equity Applicants that can successfully enter and complete the business license process
- Increase access to, enrollment in, and sustained participation in direct technical assistance services

## *Prerequisites*

To be eligible for assistance you must complete the following:

- Have been verified as an Equity Applicant by the Office of Cannabis Oversight (OCO) and received a *Cannabis Equity Program Verification Letter*
- Have submitted an [interest form](#) to the Economic Development Department (ED)



## One-on-One Advisory Services Program Process

A completed interest form or application will be reviewed by staff from ED. An assessment of the requested assistance will be reviewed, and the Equity Applicant will be matched with a consultant that specializes in the area of need. Assignment of a consultant is on a first-come, first-served basis. If clarification on consulting needs is required, ED staff will connect via phone or email with the Equity Applicant. After confirming areas of consulting needs, the Equity Applicant will be introduced to an assigned consultant via email and will be provided information on the requirement to regularly engage in communications with the consultant.



## *Rules of Engagement*

Participation in the One-on-One Advisory Services subjects Equity Applicants to the rules of engagement. Failure to comply with these rules may result in ineligibility for future program services.

### **Rules of Engagement are as follows:**

1. Equity Applicants will limit unproductive behavior with consultants
2. Equity Applicants shall notify consultants and the City of any changes to their contact information (i.e., phone number and email address)
3. Equity Applicant must contact City staff regarding any requests to change their assigned consultant, request an additional consultant, or remove themselves from the program
4. Equity Applicant shall demonstrate adequate preparation to meeting with consultant - prepared with "homework assignments" and questions
5. Equity applicants shall address consultant meetings as professional sit-down business meetings whether that is virtual or over the phone. Meetings with consultants that are deemed unprofessional by interruptions, traveling etc. will be rescheduled.
6. Information shared with consultants is confidential, equity applicants are encouraged to provide business details for consultants to provide their best recommendations
7. Any questions surrounding City Cannabis Equity grants, City Program policies and procedures should be directed to City staff not consultants.

## Direct Technical Assistance Terms & Restrictions

The following program terms and restrictions apply to any Equity Applicant participating in the Direct Technical Assistance Program.

1. To create an equitable and sustainable program for all Equity Applicants, Equity Applicants will be allowed a maximum of 3 hours weekly for One-on-One Advisory Services with a consultant.
2. Equity Applicants may work with multiple consultants but are limited to the 3-hour weekly maximum.
3. One-on-one sessions will include the assigned vendor and the equity applicant only. No other representatives may participate in the sessions. Based on the circumstance, exceptions may be requested in writing in advance. These exception requests will be reviewed by ED staff and final determination will be provided prior to the session.
4. Equity Applicants are to notify consultants at least 24 hours prior to any cancellations of a scheduled session.
5. Equity Applicants will be subject to request reinstatement from the Direct Technical Assistance Program if they incur three (3) of the following (or a combination thereof) for scheduled sessions:
  - i. No-Shows
  - ii. Last minute cancellations (less than 24-hour notification)
  - iii. Late-shows (five (5) minutes or more)
6. If after reinstatement equity applicant is still not showing up to scheduled appointments with consultants without the adequate 24 hour notice they may be ineligible for future program services.