

STANDARD OPERATING PROCEDURE

Small Business Assistance Grant Program

Date: August 5, 2026

BACKGROUND

This document describes the Small Business Assistance Grant Program (the “Program”). The City’s Administrative Policy titled *Sponsorship & Grant Program Awards* establishes the general framework and basic requirements for the Program. This document provides additional Program-specific information, including its purpose, eligibility criteria, application process, and evaluation methodology.

The Program funds will provide financial assistance directly to private-sector small businesses operating in Bend. Small businesses are essential contributors to Bend’s economic health, workforce stability, and community vibrancy. To recognize and support their contributions, the Program is designed to support small business retention, operational resilience, inclusive economic participation, and long-term competitiveness—all priority focus areas within the City of Bend Economic Development Strategic Plan (“CoBEDSP”) and the Bend Economic Development Advisory Board’s (“BEDAB”) 2026–2028 Workplan. The CoBEDSP is available [here](#).

A portion of the Program funds will be available to support small business projects that align with the City’s 2025 Community Climate Action Plan (“CCAP”) focus areas. This climate-related component of the Program is designed to support implementation of the CCAP in the private sector and reduce environmental impact of small business operations. The CCAP is available [here](#).

Overall, the Program creates a mechanism through which the City can directly support business-led activities that strengthen operational capacity, improve customer-facing services, expand opportunity for underserved entrepreneurs, reduce climate risks, and enhance the overall business environment in Bend.

BEDAB, which serves as the City’s business-facing advisory body, will review and score Program applications for projects proposing CoBEDSP-related projects. This will ensure grants respond to real-world business conditions and are aligned with community goals, economic priorities, and business climate indicators. For Program applications proposing climate-related projects that align with the CCAP focus areas, the Environmental & Climate Committee (ECC) will serve as the review body, evaluating alignment with



the scoring matrix. Staff, after considering BEDAB's and the ECC's scoring input, will make award recommendations to the City Manager.

PURPOSE & ELIGIBLE PROJECTS

The Program provides financial assistance to eligible private-sector businesses for eligible projects. There are two categories of eligible projects: 1) Projects that align with the CoBEDSP core economic development objectives, and 2) Projects that align with the CCAP focus areas.

The CoBEDSP core economic development objectives include:

- Business retention, stabilization, and growth
- Inclusive access to economic opportunity for underserved entrepreneurs
- Operational and workforce resilience
- Business modernization, innovation, and adaptation
- Long-term competitiveness and alignment with Bend's economic vision

The CCAP four focus areas are:

- 1) Energy in Buildings
- 2) Energy Supply
- 3) Materials & Waste
- 4) Transportation

Examples of Eligible Projects

Projects that align with the CoBEDSP core economic development objectives:

- **Business Development, Outreach & Customer Engagement**
 - Projects that increase business visibility, strengthen customer access, or support growth, including:
 - Website modernization, e-commerce adoption
 - Marketing and communications campaigns
 - Multilingual outreach materials
 - Customer experience improvements
- **Workforce Development, Skills Training & Talent Stability**
 - Activities that support employee retention, upskilling, and talent attraction, including:
 - Employee training or credentialing
 - Management and leadership coursework
 - Technical or job-specific certification programs
 - Tools or systems that improve workforce stability
- **Technical Assistance, Operational Improvements & Modernization**
 - Initiatives that strengthen business resilience and efficiency, such as:



- Financial systems upgrades
- Point-of-sale modernization
- Cybersecurity improvements
- HR, compliance, or legal support
- Business planning or financial management consulting
- **Resilience, Continuity Planning & Risk Preparedness**
 - Projects that improve a business's ability to withstand economic, climate, or market disruptions:
 - Business continuity plans
 - Supply-chain resilience strategies
 - Climate-related adaptation of facilities or operations
 - Redundancy or risk-mitigation equipment
- **Innovation, Expansion Planning & Feasibility Studies**
 - Activities that explore new product lines, business models, or growth pathways:
 - Feasibility or market studies
 - Prototype testing
 - Strategic planning and diversification analysis

Projects that align with the CCAP focus areas

- **Climate Action, Resilience & Emissions Reduction**

Projects that directly support implementation of the CCAP or reduce the environmental impact of business operations, including:

- Energy-efficiency upgrades or audits*
- Electrification of equipment or facilities*
- On-site renewable energy feasibility or installation planning*
- Waste reduction, reuse, or composting systems
- Low-carbon operational practices or fleet transitions
- Climate metrics, tracking, or reporting tools

*For energy-related upgrades, applicants should first seek funding from utility programs such as the **Energy Trust of Oregon** or **Central Electric Cooperative**, which may offer more substantial support for energy projects. A table of available Energy Trust of Oregon incentives is included on the webpage. Applications for grants under this Program should demonstrate that these funding sources have been explored.

ELIGIBLE COSTS

Eligible costs include but are not limited to expenditures incurred for the following in an eligible project:

- Staff time and contracted service providers



- Equipment, tools, or technology essential to the project
- Training, certification, or professional services
- Marketing, communications, and translation
- Supplies and operational expenses related to the project

For projects that align with CCAP focus areas, eligible costs may *also* include expenditures incurred for the following in an eligible project:

- Technical studies
- Professional assessments
- Implementation support necessary to achieve measurable environmental outcomes

Additional costs may be considered for eligibility at the City's discretion.

ELIGIBILITY CRITERIA

Applications must meet the following criteria to be considered eligible for funding:

- The applicant must be a private-sector business registered in the State of Oregon
- The applicant must possess a current City of Bend business license
- The applicant must employ 50 or fewer employees
- The proposed project must benefit the business' operations within the City of Bend
- The proposed project must meet at least one of the following support requirements:
 - a. Support one or more of the following CoBEDSP priority areas:
 - Business retention and stability
 - Inclusive prosperity and access to opportunity
 - Economic resilience and risk preparedness
 - Planning for future growth and competitiveness
 - Innovation and modernization

OR

- b. Support one or more of the 2025 Community Climate Action Plan's four focus areas:
 - Energy in Buildings
 - Energy Supply
 - Materials & Waste
 - Transportation

APPLICATION PROCESS

The Program maintains a streamlined application process consistent with BEDAB's emphasis on responsiveness, transparency, and predictability for businesses. The application process and award shall be as follows:

1. **Initial Application** – Businesses submit a completed application and required documents.



2. **Staff Screening** – City staff screen applications for completeness and eligibility based on program parameters. Staff determine whether an application aligns with 1) the CCAP focus areas, or 2) CoBEDSP core economic development objectives. Staff may determine that an application contains proposed project activities that fall under both categories of eligible projects (CCAP and CoBEDSP). Under these circumstances, staff may refer the application to one or both advisory bodies for review as staff determines in their discretion. Staff will bring eligible applications to BEDAB or ECC as appropriate.
3. **Advisory Body Review** – BEDAB or the ECC, as applicable, review eligible applications. The advisory body may invite applicants to present their proposals at a public meeting to gather additional information. The advisory body will apply the evaluation scoring criteria below, then provide feedback to staff. Applications will be reviewed on a nondiscriminatory basis in accordance with state, federal, and local law, as well as the evaluation factors described below.
4. **Staff Recommendation** – Considering the applicable advisory body's feedback, staff will make grant award recommendations to the City Manager for approval. Applications will be considered and recommended on a nondiscriminatory basis in accordance with state, federal, and local law, as well as the evaluation factors described below.
5. **Award** – The City Manager considers staff's recommendations when making final funding decisions but retains full discretion over grant award outcomes. Final awards will be granted on a nondiscriminatory basis in accordance with state, federal, and local law, as well as the evaluation factors described below.
6. **Grant Agreement** – Applicants selected for an award will enter a grant agreement prepared by the City. The grant agreement will be a contract establishing the terms for the grant, including insurance requirements and reimbursement details. For insurance, Grantees will be required to name the City of Bend as additional insured and provide a Certificate of Insurance meeting the insurance requirements prior to the City's distribution of awarded funds. Grantees will have up to one (1) year from the grant agreement date to complete the project. The City may allow extensions at its discretion.
7. **Reporting Requirements** – Bi-annually (every 6 months), grantees will submit a brief Memorandum including updates and outcomes of how the award was utilized to support business needs and/or growth. These memos are required for two (2) years after awards are granted.

APPLICATION REQUIREMENTS

Applications must include:

- 1) Completed application form
- 2) Business description and ownership details



- 3) Clear description of the project to be funded (summary, scope)
- 4) Identify how the requested funds will be used to support 1) CoBEDSP core economic development objectives, or 2) the CCAP focus areas.
- 5) Explanation of business need and anticipated outcomes
- 6) Description of economic benefits (e.g., resilience, job retention, customer access)
- 7) Amount of funds requested and proposed budget for the project
- 8) State registration, City of Bend business registration, quotes, or other required supplemental documents

All submissions may be subject to public disclosure under the Oregon public records law. Materials which the applicant deems exempt from disclosure under the public records law must be clearly marked by the applicant as "Proprietary." Marked pages must be placed in a group separate from the remainder of the application. The City will make an independent determination regarding exemptions applicable to information that has been properly marked and segregated. The City will attempt to maintain the confidentiality of materials clearly marked "Proprietary" to the extent allowable under Oregon public records law.

EVALUTION CRITERIA

Eligible applications may be evaluated and scored based on the criteria below. BEDAB or the ECC, as appropriate, will evaluate and score applications using the criteria below. Applying the criteria, the advisory body will provide feedback to staff on project competitiveness. Staff will then consider the advisory body's feedback in making final recommendations to the City Manager for grant award. These evaluation criteria align with the CoBEDSP, BEDAB's 2026–2028 Workplan, and the 2025 Community Climate Action Plan.

Category	Description	Points
Project Impact	For projects related to CoBEDSP core economic development objectives: Assess the project's benefits to business retention, growth, resilience, job stability, and competitiveness, and the extent to which the project impacts customer experience improvements. Impact will also take into account the cost-effectiveness of the proposal.	42
	For projects related to the CCAP focus areas: Assess the project's ability to reduce greenhouse gas (GHG) emissions and the extent to which the project engages and benefits the local community. Impact will also take into account the cost effectiveness of the proposal and alignment with other City and community priorities.	



Business Capacity & Readiness	Consider the business' stability, readiness to implement the project (including resources to support project implementation), and past business performance.	12
Feasibility	Assesses the project's budget, timeline, implementation plan, and likelihood of successful project delivery. Consider realistic outcomes for these areas.	12
Alignment with CoBEDSP or CCAP Goals	For projects related to CoBEDSP core economic development objectives: Assess how well the project supports and aligns with CoBEDSP core economic development objectives, as well as BEDAB priorities (retention, inclusive prosperity, resilience, growth planning, modernization).	12
	For projects related to the CCAP focus areas: Assess how well the project supports and aligns with CCAP goals.	
Equity & Accessibility	Assess how the project supports underserved businesses, improves economic access, or reduces structural barriers.	22

