



Source of Los Angeles County's business incentives, service providers, educational institutions, venture capital sources and annual conferences



SASSFA ECONOMIC DEVELOPMENT TOOL KIT

JUNE 2010



LOS ANGELES COUNTY ECONOMIC DEVELOPMENT CORPORATION

www.LAEDC.org • www.ChooseLACounty.com • (888) 4-LAEDC-1

444 South Flower Street, 34th Floor, Los Angeles, CA 90071

TABLE OF CONTENT

What’s in the Guide 3

Business Resources 4

General Business Assistance Providers 23

- CHARO Business Incubator 23
- Gateway Cities Council of Governments 23
- Los Angeles County Economic Development Corporation 23
- San Gabriel Valley Economic Partnership 24
- Valley Economic Development Center 24
- Small Business Development Centers 25

Education Sources 28

- California Community Colleges 28
- California Institute of Technology 29
- Mathematics, Engineering and Science Achievement Program 30
- University of California, Los Angeles 30
- University of Southern California 32

Other Resources 33

- www.eVenturing.org 33
- www.SocalTECH.com 33

Conferences / Events 34

- Growth Capital Institute 34
- International Satellite and Communications Exchange 34
- Los Angeles County Economic Development Corporation 34
- Los Angeles Regional Technology Alliance 35
- Los Angeles Venture Association 35
- Orange County Venture Group 35
- Southern California Venture Network 36
- Tech Coast Angels 36
- Technology Council of Southern California 36
- World Trade Association Los Angeles - Long Beach 37

Incentives 38

 State of California 39

 Federal 41

 City of Los Angeles 44

 Employee Training 45

 Financial Assistance 46

 Renewable Energy 48

WHAT'S IN THE GUIDE?

The SASSFA Economic Development Toolkit (EDTK) is designed to provide an electronic source of Los Angeles County's business incentives, service providers, educational institutions, venture capital sources and annual conferences dedicated to the support of businesses. Information in the EDTK include a guide of general business assistance providers, technology-based academic programs, and a listing of annual conferences and events.

The EDTK is maintained by the LAEDC. In an effort to provide the most current information available to businesses in the SASSFA region, the EDTK will be updated as new information becomes available.

SASSFA (Southeast Area Social Services Funding Authority)

www.sassfa.org

SASSFA is a community service agency that is here to help you. SASSFA was incorporated in 1979, as a Joint Powers Agency, by the cities of Pico Rivera, Santa Fe Springs, Whittier, La Mirada, and the County of Los Angeles. We provide social, as well as, employment and training services to thousands of elderly and economically disadvantaged residents every year. It has a wide variety of employment related services, both for the job seeker and for businesses.

10400 Pioneer Boulevard, Santa Fe Springs, CA 90670

Phone: (562) 946-2237

Fax: (562) 946-5818

Los Angeles County Economic Development Corporation

www.LAEDC.org • www.ChooseLACounty.com

444 South Flower Street, 34th Floor, Los Angeles, CA 90071

Phone (888) 4-LAEDC-1 or (213) 622-4300

Fax (213) 622-7100



STARTING YOUR OWN BUSINESS

Many of us hear the Siren song of small business. Complete freedom. Unlimited opportunity. Dreams realized. Work only for myself. For a first time business owner, starting a business can be thrilling and daunting at the same time. What separates those who succeed from those who fail?

Knowledge of the business, sufficient capital, good experience, and a unique idea at the right time are just some of the characteristics of a successful business owner. Although there isn't any way that you can guarantee that you'll become a successful owner, you can greatly improve your odds by becoming well-prepared for the task.

That's where we come in. We'll take you through the process of starting a new business, from thinking about it to planning it to actually doing it.

DO YOU HAVE WHAT IT TAKES?

There are three things you need to be a successful entrepreneur:

1. GUTS

First, you must have the guts to start a company and grow it into a success. You will find times throughout your startup where you don't think you will be able to make payroll. Times when suppliers are knocking down your door for payment and you just don't have the cash. Times when you have worked 100 hours in a week and not sure where you will find the energy for the next day. All of these things require you to have the guts to stick it out.

2. BRAINS

Successful entrepreneurs are often incredibly smart. It takes a talented person to balance all of the demands a startup company has and to come through the other side (hopefully) unscathed. The most successful entrepreneurs have enough intelligence to hire people smarter than themselves and give them the latitude to succeed.

3. CAPITAL

Finally, your startup company must be well funded. The biggest obstacle most startups face is a lack of capital and funding at crucial junctures for company success. Make sure you have enough startup capital to make it through the tough times and grow your business (at least a year of funding). This may mean friends and family funding, angel investors, and even venture capital.

You must be prepared to do what it takes to make your startup company a success. Are you willing to commit to working 80-100 hours a week? Can you take away time from family or pleasurable activities and invest it in your business? Are you able to handle the stress of business ownership?

Owning a business can be one of the most enjoyable things, but at times very stressful. If you have a family, you need them to buy in on how much time and energy it will take from you to make the business a success. So, do you have what it takes to make it a success in your business?

What is the right small business for you? You will want to explore effective methods for thinking up new business ideas, and the pros and cons of buying an existing business.

Evaluate your chances of success. "Look before you leap" ... what will it really cost you to start a new business. Evaluate the marketing, legal, and financing issues associated with startups; look for more information about your specific industry.

There are many online resources that can help you answer these questions. One of those is www.wbsonline.com. Another good one is www.smallbusiness.findlaw.com/starting-business.

CHECKLIST FOR STARTING A NEW BUSINESS

This is just a general, high-level listing of tasks you need to complete before starting your new business. For example, while it lists "prepare a business plan" as one of the tasks, it does not list every step you need to take to create a business plan. You will want to access one of the resources in this guide to go to that next step.

PERFORMANCE CHECK

- Assess your strengths and weaknesses
- Establish business and personal goals
- Assess your financial resources
- Identify the financial risks
- Determine the start-up costs
- Decide on your business location
- Do market research
- Identify your customers
- Identify your competitors
- Develop a marketing plan

POWER TRANSACTIONS

- Select a lawyer
- Choose a form of organization (proprietorship, partnership, or corporation, for example)
- Create your business (register your name, incorporate the business, etc.)
- Select an accountant
- Prepare a business plan
- Select a banker
- Set up a business checking account
- Apply for business loans (if applicable)
- Establish a line of credit
- Select an insurance agent
- Obtain business insurance

PUTTING IT INTO FIRST GEAR

- Obtain a business license or permit (if applicable)
- Get a federal employer identification number (if applicable)
- Get a state employer ID number (if applicable)
- Send for federal and state tax forms
- Get business cards
- Review local business codes
- Obtain a lease
- Line up suppliers (if applicable)
- Get furniture and equipment
- Join a professional organization
- Set an "opening" date

SO, YOU STILL WANT TO OWN A BUSINESS

You have been through the check list and believe you have what it takes to make your business idea a success. You have started your “first steps” and that includes applying for a business license. In the Southeast Los Angeles County area each city has its own resource for accomplishing that goal.

County Requirements: Fictitious Name, if you want to name your business any other name but your own, also known as a dba (Doing Business As), it must be filed with the County of Los Angeles Registrar.

State Requirements: Many businesses require additional permits from the State, check the list below to ensure you have obtained the required permits to operate your business. Ownership other than a Sole Proprietor must be registered with the State Secretary.

- For Wholesale and Retail Sales – A Seller’s/Resale Permit is required, contact the State Board of Equalization.
- For Alcohol Sales – (Verify that Alcohol Sales are permitted by calling the Planning Department prior to obtaining a Liquor License) A Liquor License is required; contact the State of California Alcohol and Beverage Control Department.
- For Restaurants and Food Sales – A Health Inspection is required; contact the Los Angeles County Environmental Health Department.
- Have employees – Any business that has employees requires a State Tax ID Number, contact the Franchise Tax Board.

Federal Requirements: Any business that has employees requires a Federal Tax ID Number, contact the Internal Revenue Service.

IT’S TIME TO SHIFT IN TO FIRST GEAR GETTING YOUR BUSINESS LICENSE... CITY BY CITY

City of La Mirada
www.cityoflamirada.org
City Hall
13700 La Mirada Boulevard
La Mirada, CA 90638
(562) 943-0131

City of Paramount
www.paramountcity.com
City Hall
16400 Colorado Avenue
Paramount, CA 90723
(562) 220-2000

City of Pico Rivera
www.ci.pico-rivera.ca.us
City Hall
6615 Passons Boulevard
Pico Rivera, CA 90660
(562) 942-2000

City of Santa Fe Springs
www.santafesprings.org
City Hall
11710 East Telegraph Road
Santa Fe Springs, CA 90670
(562) 868-0511

City of Whittier
www.cityofwhittier.org
City Hall
13230 Penn Street
Whittier, CA 90602
(562) 945-8200

STILL IN FIRST GEAR

...THERE IS GENERAL INFORMATION YOU WILL WANT TO KNOW

Most states and many cities and/or counties impose licenses and permits on a wide variety of businesses. The operation of your business will most likely require many of these licenses.

To assist you in finding the appropriate permitting information for your business we have listed most of those agencies you will need to contact as well as a check list to assist you in these efforts.

- Reviewed local business codes
- Applied for federal employer ID number
- Applied for state employer ID number
- Sent for federal and state tax forms
- Applied for resale permit
- Applied for alcohol permits
- Applied for Health permits/ID Number
- Applied for State Workers' Compensation

FILING FICTITIOUS NAME STATEMENTS

If your business will not include the surname of the individual owner of the business, a Fictitious Name Statement must be filed.

Los Angeles County Registrar/Recorder

www.regec.co.la.ca.us/clerk/naming

12400 Imperial Highway

Norwalk, CA 90650

(562) 462-2177

Hours: Monday-Friday, 8:00 AM – 5:00 PM

FEDERAL I.D. NUMBER (FEDID)

Regardless of the number of employees you have, you must have a Federal Identification Number. You may pickup Form SS-4 from any local walk-in IRS office or download it from the internet.

Internal Revenue

www.irs.ustreas.gov

501 West Ocean Boulevard

Long Beach, CA 90802

(562) 980-4194

9350 Flair Drive

El Monte, CA 91731

(626) 312-5138 or (800) 829-4933

Hours: Monday-Friday, 8:30 AM - 4:30 PM

STATE EMPLOYEE IDENTIFICATION NUMBER (SEIN)

Any business that pays an employee for his or her services and has a payroll of \$100 or more is immediately subject to the California Income Tax Withholding Law. You will need a State Employer Identification Number to fulfill the law. Be sure to research all the requirements that must be met before you open your business.

State of California Employment Development Department

www.edd.ca.gov

10330 Pioneer Boulevard, Suite 150

Santa Fe Springs, CA 90670

(562) 923-1237

Hours: Monday-Friday, 8:00 AM – 5:00 PM

FRANCHISE TAX BOARD

www.ftb.ca.gov

300 South Spring Street, Suite 5704

Los Angeles, CA 90013

(More)

(Continued)

CALIFORNIA WORKERS COMPENSATION INSURANCE

www.scif.com

The law requires that you have worker's compensation insurance, even if you only have one part-time employee.

900 Corporate Center Drive
Monterey Park, CA 91754
(877) 405-4545 or (323) 266-5000
Hours: Monday-Friday, 8:00 AM – 5:00 PM

RESALE PERMIT

If you are going to sell a product, resale or wholesale, you must have a Seller's Permit. The permit has a resale number which allows you to buy merchandise wholesale without paying taxes...as long as you resell it.

State Board of Equalization

<http://www.boe.ca.gov/>
12440 East Imperial Highway, Suite 201
Norwalk, CA 90650
Hours: Monday-Friday, 8:00 AM – 5:00 PM

HEALTH PERMITS/HEALTH I.D. NUMBER

If your business is a restaurant or any service that sells any food item including pre-packaged foods, a health permit must be filed before a business license can be issued.

Los Angeles County Environmental Health Services

(All Food & Drink establishments)
www.lapublichealth.org/eh
12400 East Imperial Highway
Norwalk, CA 90650
(562) 345-6800

CONTRACTORS' STATE LICENSE BOARD

www.cslb.gov

12501 East Imperial Highway, Suite 600
Norwalk, CA 90650
(562) 466-6012 or (800) 321-2752

ALCOHOL BEVERAGE CONTROL

www.abc.ca.gov

You must apply for a license if you plan to sell alcoholic beverages. It is advisable to go to the website for all the regulations and laws pertaining to the sale of alcoholic beverages.

3950 Paramount Boulevard, Suite 250
Lakewood, CA 90712
(562) 982-1337
Hours: Monday-Friday, 8:00 AM – 5:00 PM

GENERAL SOURCES OF START-UP INFORMATION

South Coast Air Quality Management District

www.aqmd.gov
21865 Copley Drive
Diamond Bar, California 91765
(909) 396-2000

Better Business Bureau of The Southland

Serving Los Angeles and Orange Counties
www.labbb.org
P.O. Box 970
Colton, CA 92324
(909) 825-7280

Building & Safety Department

Contact each city for their Building & Safety Department

Patent and Trademark Office

www.uspto.gov

For over 200 years, the basic role of the United States Patent and Trademark Office (USPTO) has remained the same: to promote the progress of science and the useful arts by securing for limited times to inventors the exclusive right to their respective discoveries. Under this system of protection, American industry has flourished. New products have been invented, new uses for old ones discovered, and employment opportunities created for millions of Americans.

Business Filings Incorporated

www.bizfilings.com

Business Filings Incorporated is the Internet leader in providing incorporation and related services to small business owners. Since its inception in 1996, Business Filings has helped over 100,000 domestic and international business owners with their corporation, limited liability company, and nonprofit information needs.

The Company Corporation

www.incorporate.com

Founded by the original architects of Delaware's corporate laws, The Company Corporation has helped people incorporate their businesses since 1899. Today, we have a nationwide network, a Delaware-based call center and a website to serve thousands of entrepreneurs with a wide variety of corporate services.

Los Angeles County Fire Department

Prevention & Conservation Bureau
19030 South Pioneer Boulevard
Cerritos, CA 90703
(562) 865-3714 or (562) 860-8014

Social Security Administration

www.socialsecurity.gov
12440 Imperial Highway, Suite 170
Norwalk, California 90650
(562) 929-1565

ONLINE RESOURCES

International Code Council

www.iccsafe.org

California Energy Commission

www.energy.ca.gov

CA Department of Industrial Relations (Labor Board)

www.dir.ca.gov

Los Angeles County Office of Small Business

www.laosb.org

Los Angeles County Economic Development Corporation

www.laedc.org • www.ChooseLACounty.com

California Department of Consumer Affairs

www.dca.ca.gov

Occupational Safety and Health Administration

www.osha.gov/dcsp/osp/stateprogs/california.html

EDUCATION & RESEARCH

Business.gov

www.business.gov

Business.gov guides you through the maze of government rules and regulations and provides access to services and resources to help you start, grow, and succeed in business.

Export.gov

www.export.gov

Export.gov provides online trade resources and one-on-one assistance for your international business – whether you're just starting or expanding your global sales. Browse our online information or call 1-800-USA-TRADE to find a trade specialist in your area and get answers to your export questions.

Federal Trade Commission

www.ftc.gov

The FTC works to ensure that the nation's markets are vigorous, efficient and free of restrictions that harm consumers. Experience demonstrates that competition among firms, yields products at the lowest prices, spurs innovation and strengthens the economy. Markets also work best when consumers can make informed choices based on accurate information.

Labor Laws

www.dol.gov/elaws

The e-laws Advisors are interactive e-tools that provide easy-to-understand information about a number of federal employment laws. Each Advisor simulates the interaction you might have with an employment law expert. It asks questions and provides answers based on responses given.

Labor Market Information

www.labormarketinfo.edd.ca.gov

Information and data designed specifically for employers and business owners. There are links to wages, data for your business plan, resources for employees, and more.

Labor Statistics

www.bls.gov

The Bureau of Labor Statistics (BLS) is the principal fact-finding agency for the Federal Government in the broad field of labor economics and statistics. The BLS is an independent national statistical agency that collects, processes, analyzes, and disseminates essential statistical data to the American public, the U.S. Congress, other Federal agencies, State and local governments, business, and labor. The BLS also serves as a statistical resource to the Department of Labor.

Rio Hondo Community College

Corporate & Community Development

www.riohondo.edu/ecc/CCD

3600 Workman Mill Road

Whittier, CA 90601

(626) 433-4720

Corporate and Community Development (CCD), brings the entire resources of Rio Hondo College to your business. CCD works closely with clients to custom-design training programs that increase productivity, improve employee satisfaction, reduce employee turnover and improve profit margins.

Cerritos College

Cerritos College Economic Development
11110 Alondra Boulevard
Norwalk, CA 90650
(562) 860-2451, ext. 2511

Biola University

Crowell School of Business
13800 Biola Avenue
La Mirada, CA 90639
(562) 903-6000

California State University, Long Beach

Department of Economics
1250 Bellflower Boulevard
Long Beach, CA 90840
(562) 985-5061

Whittier College

Department of Business Administration
13406 East Philadelphia Street
Whittier, CA 90608
(562) 907-4200 or (562) 907-4256

Minority Business Development Agency (MBDA)

Provides consultation assistance with business plan, financial packaging, procurement opportunities, and more.

150 South Robles Avenue, Suite 460
Pasadena, California, 91101
(626) 768-1015
Hours: Monday-Friday, 8:30 AM – 5:00 PM

Small Business Development Center

The SBDC's mission is to maintain and strengthen the nation's economy by aiding, counseling, assisting, and protecting the interests of small businesses.

4900 East Conan Street, Suite 108
Long Beach, CA 90808
(562) 938-5020

NOW THAT YOU'VE OPENED YOUR BUSINESS ... YOU WANT TO THRIVE

BUSINESS RETENTION

Your cities are interested in your business. They are there to help you THRIVE and provide Retention and Attraction programs that generally consist of the following services:

- Referrals for assistance from the Small Business Administration (SBA) and electric, gas, telephone and water utility services
- Economic data concerning city demographics and employment
- Coordination of assistance to explain the development process, necessary permits and free structures
- Access to employment and job training resources
- Site identification
- Business Resource Referrals

City of La Mirada

www.cityoflamirada.org

Department of Economic Development
(562) 943-0131

City of Santa Fe Springs

www.santafesprings.org

Department of Economic Development
(562) 868-0511

City of Paramount

www.paramountcity.com

Department of Economic Development
(562) 220-2013

City of Whittier

www.cityofwhittier.org

Department of Economic Development
(568) 464-3380

City of Pico Rivera

www.ci.pico-rivera.ca.us

Department of Economic Development
(562) 942-2000

BUSINESS DEVELOPMENT

Center for International Trade Development

Designed to promote and nurture trade activity, link and interact within the state's development circles and to bridge community college programs throughout the state.

4900 East Conant Street, Building 2, Suite 108

Long Beach CA 90808

(562) 938-5018

Email: citd@lbcc.edu

Federal Technology Center

www.theftc.org

As a not-for-profit public benefit corporation, the FTC promotes economic development in California by helping small businesses successfully compete for federal, state, and local government contracts through the following:

- FREE courses and seminars on a variety of topics of interest to small businesses that want to do business with the federal, state, or local government
- FREE one-on-one counseling to help small businesses achieve their goals. With over 200 years of combined government experience, our counselors are prepared to advise and assist clients in:
 - Identifying marketing opportunities and strategies
 - Preparing and submitting applications and certifications
 - Researching and understanding regulations
 - Responding to solicitations
 - Pursuing subcontracting opportunities
 - Complying with post award administration

4600 Roseville Road, Suite 100
North Highlands, CA 95660
(916) 334-9388 or (866) 382-7822 toll-free (in California)

Los Angeles County Economic Development Corporation (LAEDC)

www.laedc.org • www.ChooseLACounty.com

LAEDC's mission is to attract, retain and grow businesses and jobs for the regions of Los Angeles County. The LAEDC's regional managers are assigned to geographic territories of the County to provide no-cost business assistance services, including: cost containment, finance facilitation, business incentives, permit assistance, trade facilitation, workforce training, industry data and site searches.

444 South Flower Street, 34th Floor
Los Angeles, CA 90071
(213) 622-4300
(888) 4-LAEDC-1 / (888) 452-3321

SASSFA-LAEDC Partnership Cities

City of La Mirada

www.cityoflamirada.org
13700 La Mirada Boulevard
La Mirada, CA 90638
Phone: (562) 943-0131

Peter Dames
Mayor
Email: citycouncil@cityoflamirada.org

Tom Robinson
City Manager
Email: trobenson@cityoflamirada.org

Reuben Arceo
Community Development Director
Email: rarceo@cityoflamirada.org

City of Paramount

www.paramountcity.com
16400 Colorado Avenue
Paramount, CA 90723

Linda Benedetti-Leal
City Manager
Phone: (562) 220-2225
Email: lbenedetti@paramountcity.com

Joe Perez
Economic Development Director
Phone: (562) 220-2000
Email: jperez@paramountcity.com

(more)

(continued)

City of Pico Rivera

www.ci.pico-rivera.ca.us
6615 Passons Boulevard
Pico Rivera, CA 90660
Phone: (562) 942-2000

Gregory Salcido
Mayor
Email: lgomez@pico-rivera.org

Deborah R. Lopez
Assistant City Manager
Email: prcm@pico-rivera.org

Jeffrey Prang
Assistant City Manager
Email: prcm@pico-rivera.org

City of Santa Fe Springs

www.santafesprings.org
11710 East Telegraph Road
Santa Fe Springs, CA 90670

Betty Putnam
Mayor
Phone: (562) 868-0511, ext. 7314
Email: bettyputnam@santafesprings.org

Steve Masura
Assistant Executive Director of Community
Development Commission and Redevelopment
Manager
Phone: (562) 868-0511, ext. 7550
Email: stevemasura@santafesprings.org

Federick Latham
City Manager
Phone: (868-0511 ext. 7570
Email: fredlatham@santafesprings.org

City of Whittier

www.cityofwhittier.org
13230 Penn Street
Whittier, CA 90602

Greg Norbak
Mayor
Phone: (562) 464-3301
Email: greg@norbaks.com

Steve Helvey
City Manager
Phone: (562) 464-3301
Email: shelvey@cityofwhittier.org
admin@cityofwhittier.org

Jeff Collier
Comm. Development Director
Phone: (562) 464-3380
Email: jcollier@cityofwhittier.org
comdev@cityofwhittier.org

Los Angeles County Office of Small Business/Procurement Technical Assistance Center

www.laosb.org

Created to prepare your business to win government contracts; identify your product or service; identify your customers within the government; familiarize you with government procedures and regulations; help identify opportunities and programs that suit the specialty and focus of your business; source of information on procurement opportunities, certification, financing, and technical assistance; how to register to be a County, State, and Federal vendor; provide links to procurement web sites, not only with the 37 County departments, but also with the federal and state governments, cities and other public jurisdictions; provide workshops and training for businesses on how to sell goods and services to the County, the State, the federal government, and other public agencies in Southern California.

1100 North Eastern Avenue

Los Angeles, CA 90063

(562) 323-881-3964

Email: dcabreira@isd.lacounty.gov

Long Beach Community College - Office of Economics Resource Development

www.econdev.lbcc.edu

The Office of Economic Development supports programs in the following strategic priority areas:

- Advanced Transportation
- Center for Training and Professional Development
- Grants & Research Development
- Healthcare
- Center for International Trade Development
- Technology

4900 East Conant Street, Suite 108

Long Beach, CA 90808

(562) 570-4574

Long Beach International Trade Office

www.lbito.org

Delivers a comprehensive package of free and low-cost services to help Long Beach area companies grow and prosper through international trade.

One World Trade Center, Suite 410

Long Beach, CA 90831

(562) 495-6075

Small Business Development Center

www.longbeachsbdc.org

The SBDC's mission is to maintain and strengthen the nation's economy by aiding, counseling, assisting and protecting the interests of small businesses.

4900 East Conant Street, Suite 108

Long Beach, CA 90808

(562) 938-5020

SCORE

www.score.org

Get advice from successful business advisors. Small business mentoring and training. SCORE is a free service in partnership with the U.S. Small Business Administration. SCORE's 12,400 volunteers help create nearly 20,000 businesses each year.

Orange City SCORE

www.score114.org

200 West Santa Ana Boulevard, Suite 700

Santa Ana, CA 92701

(714) 550-7369

Email: info@score114.org

Western Trade Adjustment Assistance Center

www.wesrac.usc.edu

Provides technical services through independent industry consultants in the broad areas such as marketing, management, engineering, and quality systems for import impacted firms.

3716 South Hope Street, Suite 200

Los Angeles, CA 90007

213) 743-2732

Email: wtaac@usc.edu

World Trade Center Association, Los Angeles-Long Beach

www.wtca-lalb.org

The World Trade Center Association Los Angeles – Long Beach works to support the development of international trade and business opportunities for Southern California companies as the leading international trade association, trade service organization and trade resource in Los Angeles County. It also promotes the Los Angeles region as a destination for foreign investment. The WTCA LA-LB is a subsidiary of the Los Angeles County Economic Development Corporation.

Los Angeles Office

350 S. Figueroa Street, Suite 272

Los Angeles, CA 90071

Tel: (213) 680-1888

Fax: (213) 680-1878

Long Beach Office

One World Trade Center, Suite 410

Long Beach, CA 90831

Tel: (562) 495-6075

Fax: (562) 495-1501

FINANCIAL POWER

Gateway Business Bank

www.gbbanker.com

4146 Woodruff Avenue

Lakewood, CA 90713

(562) 627-9800

Small Business Administration

www.sba.gov

200 West Santa Ana Boulevard, Suite 700
Santa Ana, CA 92701
(714) 550-7420

Southern California Edison – Economic & Business Development

www.sce.com

The primary purpose of SCE's Economic Development Services team is to support the regional economy and create benefit for SCE's customers. The strategic focus of our efforts include retaining and expanding at-risk businesses, attracting businesses in growth industries, providing leadership on initiatives strengthening California's business infrastructure, and advancing key existing and emerging industries.

2244 Walnut Grove
Rosemead, CA 91770
(800) 655-4555

American Express Small Business Information

<http://home.americanexpress.com>

Special savings and credit card information available through American Express.

Bank of America - Small Business

www.bankofamerica.com/index.cfm?page=smbiz

Get real-world strategies and industry knowledge with interactive workshops and calculators.

Corporate Turnaround

www.dontdeclare.com

Corporate Turnaround [CT] is an alternative to bankruptcy for smaller businesses. CT offers a comprehensive program to pay your creditors with a budget you can afford. CT, in cooperation with the ASBDC, has written a free guide on managing business debt. A Free Guide is offered at the website.

Ewing Marion Kauffman Foundation

www.businessekg.com

A free financial benchmarking service provided by the Ewing Marion Kauffman Foundation. The Kauffman Business EKG provides a comprehensive assessment of your company's financial vital signs. You will discover insights about your company's financial well being and how you compare to the "best of the class" in your industry. The assessment requires only a few minutes and will give you ideas and strategies for improving your company's long-term financial health.

FedBizOpps.gov

www.fbo.gov

The single government point-of-entry for Federal government procurement opportunities over \$25,000. Government buyers are able to publicize their business opportunities by posting information directly to FedBizOpps via the Internet.

AND NOW YOU WANT YOUR BUSINESS TO GROW...KICK IT IN TO OVERDRIVE NETWORKING HELPS KICK IT IN TO OVERDRIVE

CHAMBERS OF COMMERCE

Chambers of Commerce are organized to advance the economic well-being and uniqueness of all businesses for the prosperity of the business and the community.

La Mirada Chamber of Commerce

www.lmchamber.org

11900 La Mirada Boulevard, Suite 9

La Mirada, CA 90638

(562) 902-1970

Paramount Chamber of Commerce

www.paramountchamber.com

15357 Paramount Boulevard

Paramount, CA 90723

(562) 634-3980

Pico Rivera Chamber of Commerce

www.picoriverachamber.org

5016 Passons Boulevard

Pico Rivera CA 90660

(562) 949-2473

Santa Fe Spring Chamber of Commerce and Industrial League

www.sfschamber.com

12016 East Telegraph Road, Suite 100

Santa Fe Springs, CA 90670

(562) 944-1616

Whittier Chamber of Commerce

www.whittierchamber.com

8158 Painter Avenue

Whittier, CA 90602

(562) 698-9554

ONLINE RESOURCES

Microsoft Small Business Information

www.microsoft.com/smallbusiness

Use technology and software to maximize your productivity.

Small Business Guide

www.toolkit.cch.com

Use the information in the CCH Small Business Guide to answer your business, tax, and legal questions and to get practical tips that will help you work smarter, save money, and stay in compliance with the law. Try out some of the business tools and see how you can get the job done easier and save significant time and dollars in the process. And keep up to date on the latest news and trends that affect small business.

WHEN YOU GROW, YOU HELP CREATE JOB OPPORTUNITIES

EMPLOYMENT & RECRUITMENT ORGANIZATIONS

ACT • 1

www.act-1.com

330 South Hope Street, Ground Floor
Los Angeles, CA 90071
(213) 623-8166

Apple One Employment Service

12750 Center Court Drive, Suite 120
Cerritos, CA 90703
(562) 356-1694

Community Youth Corps

www.selaco.com

12440 East Firestone Boulevard
Norwalk, CA 90650
(562) 402-9336 ext. 2201

SELACO WIB

Disability Navigator Program

Explore untapped resources... the Navigator will help you enhance your workforce.

10900 East 183rd Street, Suite 350
Cerritos, CA 90703
(800) 481-6555 ext. 1220

Los Angeles County Economic Development Corporation

www.laedc.org • www.ChooseLACounty.com

444 South Flower Street, 34th Floor
Los Angeles, CA 90071
(888) 4-LAEDC-1 or (888) 452-3321

Manpower

10350 Heritage Park Drive
Santa Fe Springs, CA 90670
(562) 903-3990

Partners for Progress Work-Source Center (SASSFA)

www.myjoblink.org

1040 Pioneer Boulevard, Suite 8 & 9
Santa Fe Springs, CA 90670
(562) 946-2237

VOLT Service Group

17785 Center Court Drive
Cerritos, CA 90703
(562) 809-1419

YOU AND YOUR BUSINESS ARE IN CRUISE CONTROL

MISCELLANEOUS HANDY INFORMATION

Better Business Bureau

Provides reports on businesses and charities to help consumers and donors make informed decisions, helps resolve consumer complaints, and promotes ethics in business.

3363 Linden Avenue, Suite A
Long Beach, CA 90807
(562) 216-9242

Time Warner Business Service Department

14338 Lakewood Boulevard
Bellflower, CA 90706
(888) 872-2189

DISASTER ASSISTANCE AND RECOVERY

SBA Disaster Assistance: SBA provides low interest disaster loans to homeowners, renters, businesses of all sizes and private, non-profit organizations to repair or replace real estate, personal property, machinery & equipment, inventory and business assets that have been damaged or destroyed in a declared disaster.

For information about SBA disaster resources:

www.sba.gov/services/disasterassistance/index.html

For information about applying for SBA disaster business loans:

www.sba.gov/services/disasterassistance/businessesofallsizes/applyforloan/index.html

For a fact sheet on SBA disaster loans:

www.sba.gov/idc/groups/public/documents/sba_homepage/serv_da_disastr_loan_factsht.pdf

Open For Business - A Disaster Protection and Recovery Planning Toolkit for the Small to Mid-Sized Business

www.disastersafety.org/resource/resmgr/pdfs/OpenForBusiness_new.pdf

The Open For Business toolkit was prepared by the Institute for Business & Home Safety (IBHS), a nonprofit initiative of the insurance industry to reduce the social and economic effects of natural disasters and other property losses:

National Council on Readiness and Preparedness (NCORP) - Public/ Private Partnerships to Strengthen Homeland Security

www.ncorp.org

NCORP's mission is to establish community-level programs and public/private partnerships that strengthen homeland security through education, training and communication between citizens, businesses, governments and responders/law enforcement and medical professionals.

ONLINE RESOURCES

FRANCHISING

Franchise Registry
www.franchiseregistry.com

GENERAL INFORMATION

Business Loans
www.yourbusinessloans.com
www.sba.gov

California Business Bureau
www.cbbinc.com

California Business & Economy
www.californiabusinessminute.com

California Business Laws
www.calbusiness.ca.gov/cedpeybcblr.asp

California Business Portal
www.sos.ca.gov/business/business.htm
www.calbusiness.ca.gov
www.bth.ca.gov

California Business Roundtable
www.cbrt.org

California Code
www.leginfo.ca.gov/calaw.html

California Employers Tax Guide
www.edd.ca.gov/taxrep/de44.pdf

Choose L.A. County
www.ChooseLACounty.com

DEVELOP YOUR WORKERS' SKILLS

Disability Insurance Program
www.edd.ca.gov/employer2.htm
#ProtectYourWorkersWithDisabilityInsurance

Employment Training Panel (ETP)
www.etp.ca.gov/program.cfm

Labor Market Information
www.labormarketinfo.edd.ca.gov

Military to Business
www.ascendiarypathfinding.net/default.aspx

Southeast Area Social Services Funding Authority (SASSFA)
www.sassfa.org/index.html

GOVERNMENT AGENCIES

Bureau of Economic Analysis
www.bea.doc.gov

Bureau of Labor Statistics
www.bls.gov

California Department of Finance
www.dof.ca.gov

California Economic Diversification & Revitalization
www.cedar.ca.gov

California State Treasurer's Office
www.treasurer.ca.gov

Commerce Department's Trade Information Center
www.ita.doc.gov/tic

U.S. Dept. of Commerce
www.commerce.gov

U.S. Postal Service
www.usps.gov/ncs

SMALL BUSINESS IMPORT & EXPORT RESOURCES

Export/Import Information
www.exim.gov

Small Business & Entrepreneurship Resources
www.prenhall.com/scarbzim/html/link14.html

Tradeport for Exporting
www.tradeport.org

SMALL BUSINESS INFORMATION

Women in Business
www.bizwomen.com

Home-Based Business
www.gohome.com

Dun & Bradstreet, Inc.
www.dnb.com/us

Online Domains
www.buydomains.com

Thomas Register of Manufacturers
www.thomasregister.com

MORE SMALL BUSINESS INFORMATION

www.csba.com
www.calsmallbusinessalliance.org
www.smallbusiness.officelive.com
www.business.com/directory/small_business
www.sba.gov/smallbusinessplanner/index.html
www.sba.gov/services/contractingopportunities/sizestandardtopics/size/index.html
www.sba.gov/espanol
www.business.gov
www.smallbusiness.doe.gov
www.products.smallbusinesscomputing.com
www.smallbusiness.findlaw.com/business-forms-contracts
www.smallbusinessbible.org
www.taxes.ca.gov/Small_Business_Assistance_Center/index.shtml

Tax Data

www.californiataxdata.com/A_Free_Resources/currentLaw.asp

Tax Law

www.ftb.ca.gov/law/index.shtml
www.boetaxes.ca.gov
www.saclaw.lib.ca.us/pages/california-tax-law.aspx
www.weblocator.com/attorney/ca/law/b19.html



GENERAL BUSINESS ASSISTANCE PROVIDER

CHARO BUSINESS INCUBATOR

www.charocorp.com/incubator.htm

Contact:

4301 East Valley Boulevard
Los Angeles, CA 90032
Phone: (323) 269-0751

CHARO Business Incubator located near CSULA and 10 minutes from Downtown. Assists small and home-based business transition into commercial office space by offering furnished space, paid utilities and support services included in one affordable rental fee.

GATEWAY CITIES COUNCIL OF GOVERNMENTS

www.gatewaycog.org

Contact:

16401 Paramount Boulevard
Paramount, CA 90723
Phone: (562) 663-6850
Fax: (562) 634-8216

Gateway Cities COG is comprised of 27 cities in Southeast Los Angeles County and numerous unincorporated communities of the County. The County of Los Angeles and the Port of Long Beach are also member agencies. Its ethnically diverse population of over 2 million people is housed in similarly diverse cities and communities. It is home to residential communities with beautiful neighborhoods, some with soaring foothill views or coastal beach fronts. It is also home to large industrial communities, which contribute greatly to the region's productive work force.

LOS ANGELES COUNTY ECONOMIC DEVELOPMENT CORPORATION

www.laedc.org
www.ChooseLACounty.com

Contact:

444 South Flower Street, 34th Floor
Los Angeles, CA 90071
Phone: (213) 622-4300 or
(888) 4-LAEDC-1 / (888) 452-3321

The mission of the LAEDC is to attract, retain and grow businesses and jobs for the regions of LA County. The LAEDC is uniquely positioned to help expanding businesses take full advantage of all that Los Angeles has to offer. Through a broad-based coalition of chambers of commerce, trade organizations, business associations, and government officials, the LAEDC's team of economic development professionals offer confidential, free-of-charge information. This information and assistance is offered to decision makers and consultants representing both significant large and small, domestic and international businesses in all industry sectors.

The Business Assistance department is dedicated to providing business assistance services and answering any of your inquiries. Its services include help with permitting, incentives, workforce development, and financing assistance, as well as project management and connections to public/private resources, cities and regional EDCs.

**SAN GABRIEL VALLEY
ECONOMIC PARTNERSHIP**
www.valleyconnect.com

Contact:
4900 Rivergrade Road, Suite A310
Irwindale, CA 91706
Phone: (626) 856-3400
Fax: (626) 856-5115

The San Gabriel Valley Economic Partnership is a nonprofit corporation representing both public and private sectors. The Partnership is the exclusive source for San Gabriel Valley-specific information, expertise, consulting, products, services, and events. It is the single organization in the Valley with the mission to sustain and build the regional economy for the mutual benefit of all thirty (30) cities, chambers of commerce, academic institutions, businesses and residents.

**VALLEY ECONOMIC
DEVELOPMENT CENTER (VEDC)**
www.vedc.org

5121 Van Nuys Boulevard, 3rd Floor
Van Nuys, CA 91403
Phone: (818) 907-9977
Fax: (818) 907-9720
Email: info@vedc.org

VEDC has consistently provided services to small and medium sized business owners, entrepreneurs and members of the communities it serves. VEDC has grown to become the largest non-profit business development corporation in the metropolitan L.A. area.

The combination of successful programs that anticipate the needs of growing businesses in our ever-changing economy has created a focused vision of economic opportunity, effective organization of resources, and the fostering of job creation. VEDC will continue its efforts, unconditionally, to maintain a strong economy and a better quality of life in the communities we serve.

**SMALL BUSINESS
DEVELOPMENT CENTERS
(SBDCS)**

Whether you need assistance with your established business to take it to the next level, or are almost ready to start up your own business, SBDCs are here for you.

The Los Angeles Regional Small Business Development Center Network (LA SBDC Network) is part of the national, U.S. Small Business Administration (SBA) effort to provide free one-on-one customized consulting services and low-cost training workshops to growing businesses and start-up businesses. The LA SBDC Network has seven convenient service centers throughout Los Angeles, Ventura and Santa Barbara counties.

SBDC counselors are business owners and professional advisors who have been there and done that and have both the practical experience and no-nonsense insights in how to create, run and grow successful businesses.

If you seek to grow your business, find new clients and markets, obtain financing, learn about and apply new technology or operate more professionally, we can help. Please explore our site to learn more about us or contact us at (866) 270-2444 or (562) 938-5020, to get information about your nearest SBDC Center.

EL CAMINO SBDC

www.southbaysbdc.org

Geographical Area Served:

Los Angeles County's South Bay, which includes the cities from Inglewood south to San Pedro and El Segundo east to Carson, Compton and Lynwood.

El Camino College Business Training Center

Small Business Development Center

13430 Hawthorne Boulevard
Hawthorne, CA 90250
Phone: (310) 973-3177
Fax: (310) 973-3132



The El Camino College SBDC assists prospective and existing small business owners in the South Bay area to start, retain or expand their businesses. It also provides affordable workshops, no cost one-on-one consulting services, and many other resources to the small business community.

Services include: interactive workshops that cover all aspects of business growth and development during convenient hours; one-on-one counseling, bilingual workshops; loan-packaging assistance; legal assistance (business formation, permits and licenses), and export/import.

Specialties:

Focus on businesses in retail, wholesale, manufacturing and construction industries. Specialty workshop topics include patent copyright, marketing for Latino-owned, veteran operated, and women- and minority-owned businesses.

Workshops also address various business-cycle needs, including start-up, growing, mature, and declining businesses.

COLLEGE OF THE CANYONS SBDC

www.canyonsecondev.org

Geographical Area Served:

The San Fernando Valley, Santa Clarita and the Antelope Valley

Small Business Development Center

28460 Avenue Stanford, Suite 100
Santa Clarita, CA 91355
Phone: (661) 294-9375
Fax: (661) 294-5203



College of the Canyons' SBDC offers one-stop assistance by providing a wide variety of information and guidance in central and easily accessible locations throughout the Antelope, San Fernando and Santa Clarita Valleys.

Consulting

Free, one-on-one meetings with professional business consultants to discuss business planning, marketing tactics, financing resources and legal considerations.

Training

Affordable workshops on topics such as business basics, strategic marketing, accounting, access to capital, and human resource issues.

Specialties

Spanish language workshops on starting and managing a business and on developing a business plan.

College of the Canons offers assistance to companies that handle robotics, fiber optics, biomedical products and digital manufacturing through its Center for Applied Competitive Technology.

Annual Entrepreneurship and Women's Leadership Conferences

LONG BEACH SBDC

lbsbdc.lbcc.edu

Geographical Area Served:

City of Long Beach and the nearby cities of Norwalk, Paramount, Bellflower, Downey, South Gate, Cerritos, Artesia, Lakewood and Hawaiian Gardens.

Small Business Development Center

3447 Atlantic Avenue, Suite 205
Long Beach, CA 90807
Phone: (562) 570-4574
Fax: (562) 570-4575
Email: sbdcinfo@lbcc.edu



The SBDC hosted by Long Beach City College (LBCC) provides one-on-one counseling, business training seminars in marketing, financing, business start-up, international trade, and procurement programs to small businesses. Many of its services are offered in Spanish and it focuses on serving emerging markets and minority and women-owned businesses.

Assistance is offered to business owners, many of whom are Hispanic.

One-on-one counseling and workshops:

Workshop topics include obtaining government contracts and 8A certifications, human resources, management and obtaining business licenses and DBAs.

Specialties:

- International trade assistance under a close partnership with the Long Beach Center for International Trade
- Focus on helping businesses engaged in production of specialty packaged foods and foodstuffs
- International trade counselors
- Spanish-speaking counselors and workshops given in Spanish

MT. SAN ANTONIO COLLEGE SBDC

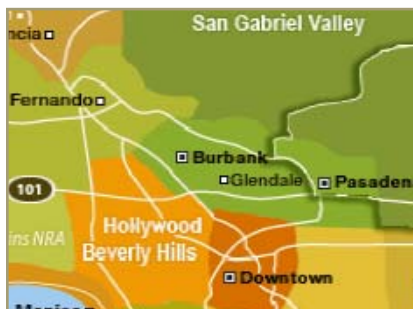
www.sangabrielvalleysbdc.com

Geographical Area Served:

Eastern San Gabriel Valley from Duarte to Claremont, with outreach locations in Irwindale, San Dimas, Whittier, Santa Fe Springs and other cities.

San Gabriel Valley SBDC

5200 Irwindale Avenue, Suite 140
Irwindale, CA 91706
Phone: (626) 337-2101
Fax: (626) 337-2104



The SBDC Service Center hosted by Mt. San Antonio College has a reputation as a well-known, reliable business resource in Los Angeles County.

Services include free business counseling for business that meet SBA, small-business definition, typically service businesses with under \$6 million in sales and manufacturers with 500 or fewer employees. Also, workshops in marketing, financing, website development, loans, business plans, loan application assistance and help with bankers, and other topics.

Specialties:

- Advice on acquiring and running a franchise, obtaining patents
- International trade and website counseling
- Counseling and workshops provided in Spanish and Chinese (Cantonese) languages

PACIFIC COAST REGIONAL

www.pccorp.org

Geographical Area Served:

Metropolitan Los Angeles and outlying areas, including Huntington Park, Bell, South Pasadena, La Canada Flintridge, Glendale, Burbank, Sun Valley, Pacoima, Universal City and Hollywood.

Pacific Coast Regional Small Business Development Corp.

3255 Wilshire Boulevard, Suite 1501
Los Angeles, CA 90010
Phone:(213) 674-2696
Fax: (213) 739-0639



The Pacific Coast Regional (PCR) SBDC became part of the SBDC Network in 2007 to expand upon the work it began in 1977 as an economic development corporation assisting small business owners. Pacific Coast Regional Small Business Development Corp. is a private, nonprofit corporation helping small businesses most in need. Through federal and California state contracts, plus partnerships with private institutions, PCR provides financial technical assistance, entrepreneurial education and one-on-one consulting services.

PCR's SBDC financial programs include loan and bond guarantees, disaster bridge loans and direct (environmental) loans. Educational services include the Entrepreneurial Training institute, Small Business Consultants Program and Small Business Start-Up Guide, plus Small Business Seminars.

Specialties

Helps small businesses most in need, those otherwise deemed "unbankable". Specializes in small loans averaging \$80,000, but can lend up to \$500,000. One of the top providers of state-funded and SBA-backed loan programs.

SANTA MONICA COLLEGE

www.smc.edu/sbdc

Geographical Area Served

Los Angeles County's coastal regions from Malibu through Century City and parts of West Los Angeles to Santa Monica and Mar Vista.

Small Business Development Center

3400 Airport Avenue, Suite 76
Santa Monica, CA 90405
Phone: (310) 434-3566
Fax: (310) 434-3891



Santa Monica College has been assisting small businesses through its Office of Work Force and Economic Development since 1997. It has provided employer and corporate training and its many projects have included the One Stop Center customized training activities and retraining events under the Employment Training Panel. In January, the college established its Small Business Development Center to become a part of the SBDC Network/Los Angeles-Ventura-Santa Barbara.

Services include: One-on-one business counseling and workshops covering core business topics provided to entrepreneurs and small business owners.

Specialties

Focus on businesses in the importing, retail, fashion, and apparel industries.

Business help for logistics companies – those involved in packaging and moving products.

Expert advice for retailers and businesses involved in food and service field including those in the tourism sector.



CALIFORNIA COMMUNITY COLLEGES

www.cccco.edu

Los Angeles Region Locations:

Antelope Valley College

www.avc.edu

Cerritos College

www.cerritos.edu

Citrus College

www.citruscollege.edu

College of the Canyons

www.canyons.edu

Compton Community Educational Center

www.compton.edu

East Los Angeles College

www.elac.edu

El Camino College

www.elcamino.edu

Glendale Community College

www.glendale.edu

Long Beach City College

www.lbcc.edu

Los Angeles City College

www.lacitycollege.edu

Los Angeles Harbor College

www.lahc.edu

(more)

The California Community Colleges is the largest higher educational system in the nation comprised of 72 districts and 110 colleges with more than 2.6 million students per year. Community colleges supply workforce training and basic skills education, prepare students for transfer to four-year institutions and offer opportunities for personal enrichment and lifelong learning. The System Office provides leadership, advocacy and support under the direction of the Board of Governors of the California Community Colleges.

The Economic Development Program (EDP) was established in 1991, and in 1996 economic development became one of the primary missions of the California Community Colleges. The purpose of the Program is to advance the state's economic growth and global competitiveness through education, training, and services that contribute to continuous workforce improvement, technology deployment and business development consistent with the state's regional economies. The role of the community colleges in this effort is to fulfill the vocational education and instructional needs of California business and industry through leadership, communication, and liaisons with the private sector as well as with public sector education and training providers. The California Community Colleges work with employers, advisory committees, and agency partners to identify, on a region-by-region basis, workforce education and training needs, including the needs of small business. Colleges have created a network of service providers that meet identified needs in a most cost-effective and timely manner.

The Regional Centers are the long-term delivery structure of the Program. They provide regional sites to respond to employer and worker needs that support the strategic initiative areas. Existing centers are on a competitive bid schedule, on average every five years. Regional Centers provide a foundation for long-term, sustained relationships with businesses, labor and colleges in the region. They support, develop and deliver direct services to businesses, colleges, labor organizations, employees and employers in an economic region of the state. Regional Centers provide direct services such as curriculum development, faculty training, assessment, one-on-one counseling, seminars, workshops, conferences, training, technology transfer and educational services. Regional Centers are mandated to follow prescriptive criteria and a highly delineated scope of work and deliver services for a particular Strategic Priority Initiative, which include Advanced Transportation and Energy; Biotechnologies; Applied Competitive Technologies; International Trade Development; Business and Workforce Performance Improvement; Health Occupations; Multimedia and

(continue)

Los Angeles Mission College

www.lamission.edu

Los Angeles Pierce College

www.piercecollege.edu

Los Angeles Southwest College

www.lasc.edu

Los Angeles Trade-Tech College

www.lattc.edu

Los Angeles Valley College

www.lavc.edu

Mt. San Antonio College

www.mtsac.edu

Pasadena City College

www.pasadena.edu

Rio Hondo College

www.riohondo.edu

Santa Monica College

www.smc.edu

West Los Angeles College

www.wlac.edu

Entertainment; Environmental Safety, Health and Homeland Security; Small Business Development; and Workplace Learning Resources. Centers also provide technical assistance to colleges within the region to meet the business and workforce education and instructional needs in their districts. There are more than 100 Regional Centers serving all areas of the state.

CALIFORNIA INSTITUTE OF TECHNOLOGY (CALTECH)

www.irc.caltech.edu

Caltech Industrial Relations Center

Industrial Relations Center, 1-90
Pasadena, CA 91125
Phone: (626) 395-4041
Fax: (626) 795-7174
Email: excedu@caltech.edu

The Caltech Industrial Relations Center provides executive education programs, which focus on strategic and competitive issues in technology based organizations. The Center's intensive short courses and membership forums address topics such as technological innovation, time to market, business process improvement, and customer focus. Programs for managers build skills in leading groups, managing projects, organizing teams and improving systems and processes. The executive management programs are continually revised and updated to incorporate new and emerging trends.

MATHEMATICS, ENGINEERING AND SCIENCE ACHIEVEMENT PROGRAM (MESA)

www.mesa.ucop.edu

MESA Statewide Office

300 Lakeside Drive, 7th Floor
Oakland, CA 94612-3550
Phone: (510) 987-9337
Fax: (510) 763-4704

California State University, Long Beach

California State University, Los Angeles

University of California, Los Angeles

University of Southern California

College of the Canyons

East Los Angeles College

El Camino College

Pasadena City College

Rio Hondo College

The Mathematics, Engineering and Science Achievement Program (MESA) enables educationally disadvantaged students to prepare for and graduate from a four-year college or university with a math-based degree in areas such as engineering, the sciences, computer science, and mathematics.

Through MESA, students develop academic and leadership skills, increase educational performance, and gain confidence in their ability to compete professionally. MESA has particular interest in and focus on students from those groups who historically have had the lowest levels of attainment to four-year and graduate level programs.

The MESA Schools Program assists pre-college students to succeed in math and science studies and go on to college in math-based fields.

The MESA Community College Program supports community college students to succeed in math, engineering and science studies so they can transfer to four-year colleges and universities in math-based fields.

The MESA Engineering Program assists engineering and computer science majors in four-year institutions so they will graduate with baccalaureate degrees.

UNIVERSITY OF CALIFORNIA, LOS ANGELES

www.ucla.edu

UCLA Office of Intellectual Property and Industry Sponsored Research

11000 Kinross Avenue, Suite 200
Los Angeles, CA 90095
Phone: (310) 794-0558
Fax: (310)794-0638

About UCLA

California's largest university, UCLA enrolls approximately 38,000 students per year and offers both undergraduate and graduate degrees from the UCLA College of Letters and Science and 11 professional schools in dozens of varied disciplines. UCLA consistently ranks among the top five universities and colleges nationally in total research-and-development spending, receiving more than \$820 million a year in competitively awarded federal and state grants and contracts. For every \$1 state taxpayers invest in UCLA, the university generates almost \$9 in economic activity, resulting in an annual \$6 billion economic impact on the Greater Los Angeles region. The university's health care network treats 450,000 patients per year. UCLA employs more than 27,000 faculty and staff, has more than 350,000 living alumni and has been home to five Nobel Prize recipients.

Research at UCLA

UCLA is one of the leading public research universities in the world, it is consistently ranked nationally in the top five institutions for research funding with Year 2007 awards totaling over \$900 million.

UCLA's great strength lies in its ability to address significant interdisciplinary research challenges. Research at UCLA has a long tradition of interdisciplinary collaborations. Projects that cross academic boundaries flourish at UCLA, where faculty from the sciences, engineering and medicine, and a full spectrum of academic departments and professional schools work together on a single university campus.

There are over 300 organized faculty and student research centers at UCLA. UCLA's size and broad research base give its research community a natural advantage in addressing important societal and technological problems. Among the many distinguished UCLA faculty are nine National Medal of Science winners, deserving of special recognition by reason of their contributions to knowledge in the physical, biological, mathematical, or engineering sciences.

Accomplishments of note include:

The UCLA David Geffen School of Medicine ranked number 7 among National Institute of Health (NIH) grants with nearly \$304 million in fiscal year 2005.

The California Nanosystems Institute (CNSI), a joint research center run by UCLA and UC Santa Barbara, established in 2000 with \$100 million from the State of California and an additional \$250 million in federal research grants and industry funding.

Research and development, commercialization and specialized partnerships abound at the UCLA Office of Intellectual Property. The Office of Intellectual Property and Industry Sponsored Research is a campus-wide organization where:

- Technologies developed by UCLA researchers are patented, marketed and licensed to industry for public dissemination and benefit
- Start-ups based on UCLA discoveries begin to take shape
- Industry finds a gateway to research collaboration opportunities at UCLA

UNIVERSITY OF SOUTHERN CALIFORNIA

www.usc.edu

University Park Campus
Los Angeles, CA 90089
Phone: (213) 740-2311

Research Centers by Subject Area:
[www.usc.edu/research/centers/
subject/](http://www.usc.edu/research/centers/subject/)

Alphabetized List of Research Centers:
www.usc.edu/research/centers/az/

The University of Southern California is one of a small number of premier research institutions on which the nation depends for a steady stream of new knowledge, art and technology. USC has over \$508 million in annual research expenditures. In 2007, they ranked 19th among all American universities and 10th among private universities, in federal research support.

USC is rapidly expanding its research activity through a strategy that emphasizes collaboration across multiple disciplines and meeting societal needs. Students at all levels are provided opportunities to participate in research projects and other creative endeavors, and to interact with a faculty that is distinguished for the impact of its research.

The University of Southern California has also established the USC Stevens Institute for Innovation to support our students and faculty in the translation of inventions and discoveries into practice, so that we are not only at the forefront of creative research, we are also making a meaningful difference in the health and welfare of society. Through this strategy and others, USC has become one of the most influential and productive research universities in the world.

Centers and Institutes

The University of Southern California is home to research centers and institutes spanning the arts and humanities, social and natural sciences, and engineering and technology. These centers and institutes are the focus of research for collaborative groups of investigators pushing the frontiers of knowledge forward.

The various schools of USC also host a broad array of individual faculty members' laboratories and research units.

Laboratory Facilities

USC's core laboratories support the conduct of research through services in critical areas such as high performance computing, genomics, biomedical imaging, nanoscience, and digital media. Its core laboratories offer shared-use research facilities and provide technological support for research projects carried out by faculty across academic disciplines and clinical specialties.

- Biomedical Imaging
- Other Biomedical Resources
- Computing and Statistics
- Digital Archive and Media Resources
- Engineering and Science Resources
- Genomics
- Machine Shops

OTHER RESOURCES

WWW.EVENTURING.ORG

A project of the Ewing Marion
Kauffman Foundation

4801 Rockhill Road
Kansas City, MO 64110

To help entrepreneurs start and manage businesses, the Kauffman Foundation recently launched Kauffman eVenturing™. Designed for growth-oriented entrepreneurs, the new website provides access to current information, organized around key subjects such as finance and accounting, people and human resources, sales and marketing, products and services, operations, and the entrepreneur. New collections of articles will be featured monthly, including original material and an aggregation of “the best of the best” existing articles. Fresh content also will be added through a link-blog to articles and tools on a variety of subjects.

The Ewing Marion Kauffman Foundation is a nonprofit organization dedicated to furthering the development of the art and science of entrepreneurship.

WWW.SOCALTECH.COM

4607 Lakeview Canyon Road, Suite 290
Westlake Village, CA 91361
Phone: (888) 412-6831
Fax: (888) 412-6831
Email: info@socaltech.com

SocalTECH has been dedicated to promoting the technology industry in Southern California since 1998, and provides the most in-depth, up-to-date, and focused view of high tech in the Southern California area.

SocalTECH provides breaking news coverage of Southern California tech companies, including venture funding, business news, and interviews with local technology entrepreneurs and industry luminaries. The SoCal TechNews is published daily, and is available on the web or delivered via email.

The SocalTECH.com website also offers directories of local high tech companies, venture capital and private equity firms, incubators, and service providers.

The SocalTECH.com offers a searchable Venture Database of Southern California venture deals, companies, and venture capitalists. The database features full profiles of local venture-backed companies, including contact info, names and biographies of key executives, and links to their investors. The database also includes listings of venture firms who invest in, and their portfolio companies. The database is up-to-date with the latest venture rounds, accessible 24/7 from your web browser. SocalTECH has been dedicated to promoting the technology industry in Southern California since 1998, and provides the most in-depth, up-to-date, and focused view of high tech in the Southern California area.



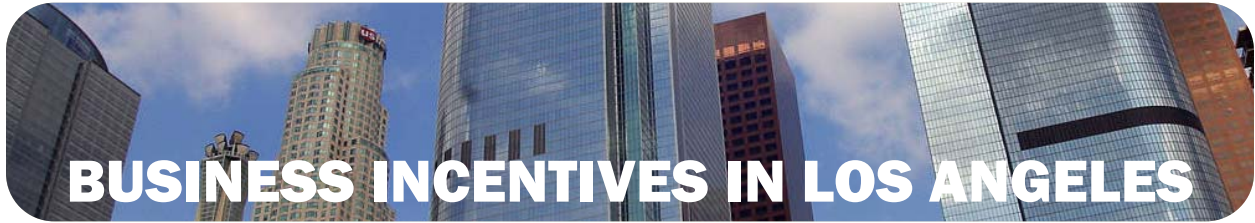
*Note: Events are routinely modified or changed. This listing is intended to identify the annual events held in the Los Angeles Region. Please verify schedules or changes by visiting the website of the host organization.

ORGANIZATION	EVENT
<p>GROWTH CAPITAL INSTITUTE www.GCC2000.org Online Only</p>	<p>GROWTH CAPITAL CONFERENCE (QUARTERLY)</p> <p>Hosts quarterly conferences designed for networking and focus is on providing information and access to early stage financing. Capital sources typically include representatives from local investor angel organizations, venture capital, investment bankers and private equity sources. Growth Capital Conference also invites companies to submit their deals online to be selected as a 'display deal' and presented at the conference to all attendees.</p>
<p>INTERNATIONAL SATELLITE AND COMMUNICATIONS EXCHANGE (ISCE) www.isce.com</p> <p>100 West Broadway, Suite 210 Long Beach, CA 90802 Phone: (562) 901-9191 Fax: (562) 901-9192 Email: info@isce.com</p>	<p>ANNUAL CONFERENCE</p> <p>ISCe is the premier West Coast satellite and communications event, which highlights satellite-based services, technologies and solutions for the commercial, consumer, civil and military industries. The ISCE Conference has made its mark as the premier conference focusing on the US Military and government SATCOM marketplace. This annual event brings together the military, government, satellite engineering, and business development communities to interact and discuss key issues, policies, challenges, and opportunities. The conference is held annually in June.</p>
<p>LOS ANGELES COUNTY ECONOMIC DEVELOPMENT CORPORATION (LAEDC) www.laedc.org/forecast</p> <p>444 South Flower Street, 34th Floor Los Angeles, CA 90071 Phone: (213) 622-4300 Fax: (213) 622-7100</p>	<p>ANNUAL ECONOMIC FORECAST AND MID-YEAR UPDATE</p> <p>The LAEDC's Forecast events, held in February and July, are attended by several hundred of the region's top business, education, civic, and government leaders. The LAEDC's economic research reports are broadly used by the media, government, and private industry organizations, and have been ranked #1 by the Wall Street Journal.</p>

ORGANIZATION	EVENT
<p>LOS ANGELES REGIONAL TECHNOLOGY ALLIANCE (LARTA) www.larta.org</p> <p>Los Angeles, CA Office 606 South Olive Street, Suite 650 Los Angeles, CA 90014 Phone: (213) 694-2826 Fax: (213) 622-6230 Email: info@larta.org</p>	<p>LARTA VENTURE FORUM (ANNUAL)</p> <p>The Venture Forum is the largest-and longest running showcase of early stage innovation and entrepreneurship. It is the must-attend event for those seeking access to untapped quality deal flow from around the world. Venture Forum presenting companies are drawn from LARTA's robust pipeline, and prepared by world-class mentors to deliver presentations focused on a solid business proposition, excellent science, and strong growth potential for an audience of investors, partners and customers. LARTA Institute's commercialization practice advises hundreds of innovative companies with breakthrough technologies funded by or spinning out of U.S. Federal Agencies, universities and research institutes, and innovative regions from across the globe.</p>
<p>LOS ANGELES VENTURE ASSOCIATION (LAVA) www.lava.org</p> <p>Los Angeles Venture Association 11301 Olympic Boulevard, Suite376 Los Angeles, CA 90064 Phone: (310) 450-9544 Fax: (866) 276-1712 Email: info@lava.org</p>	<p>LAVA INVESTMENT CAPITAL CONFERENCE (ANNUAL)</p> <p>For 15 years it has been the annual signature event of the Los Angeles Venture Association, the region's oldest, most successful organization focused on the financing of growth. The conference features a unique content-rich program, and top level and effective networking. It is structured to deliver unique, uncommon and essential knowledge and contacts to executives from early-stage to middle-market companies, and is marketed to senior executives and capital providers throughout the region. The conference is held annually in May.</p>
<p>ORANGE COUNTY VENTURE GROUP (OCVG) www.ocvg.org</p> <p>5405 Alton Parkway., Suite A-710 Irvine, CA 92604 Phone: (714) 768-8580 Email: info@ocvg.com</p>	<p>VC IN THE OC (ANNUAL)</p> <p>VC in the OC is Orange County's premier annual event for venture education, deal-making and networking. During the event a line-up of Orange County's hottest start-ups will be presenting 15-minute pitches in back-to-back sessions following the main presentations. This event attracts individuals interested in acquiring or investing in hot entrepreneurial businesses, in addition to early stage entrepreneurs who want to see the pitch styles of other emerging businesses.</p>

ORGANIZATION	EVENT
<p>SOUTHERN CALIFORNIA VENTURE NETWORK (SCVN) www.scvn.org Online Only</p>	<p>NETWORKING (MONTHLY)</p> <p>The Mission of the Southern California Venture Network (SCVN) is to increase the entrepreneurial velocity of both start-up and emerging growth companies by encouraging entrepreneurs to take advantage of our network of skilled professionals, high-level business contacts, and on occasion funding sources to help navigate the many road blocks that often prevent early-stage and late-stage entrepreneurial companies from reaching their full potential in a timely manner. The SCVN Board of Directors holds networking events on the last Tuesday of the month.</p>
<p>TECH COAST ANGELS www.techcoastangels.com Online Only</p>	<p>TECH COAST ANGELES FAST PITCH COMPETITION (ANNUAL)</p> <p>Each competition consists of 12 entrepreneurs giving 60-second pitches to a panel of investors and other members of Southern California's entrepreneurial community. Each pitch is judged for the quality of the presentation and its investment potential. The three winners – for Best of Best, Best Presentation, and Best Investment Opportunity – will be automatically invited to make presentations at Tech Coast Angels deal-review screening sessions. The event ends with a networking event where idea generators, Tech Coast Angels members, angel investors, venture capitalists, and other interested parties to meet over delicious food and beverages. Several hundred people attend each competition.</p>
<p>TECHNOLOGY COUNCIL OF SOUTHERN CALIFORNIA www.venturenet.org</p> <p>2537-D Pacific Coast Highway, Suite 348 Torrance, CA 90505 Phone (310) 325-4000 Fax (310) 878-0358</p>	<p>VENTURENET™ (ANNUAL)</p> <p>VentureNet™ is Southern California's primary technology capital conference where the region's most promising companies mingle with investors, strategic partners and business leaders from around the country.</p> <p>One day. One event. One chance to see the most innovative emerging technology companies in the entire Southern California region strut their stuff. Where else can you find companies that will leverage technology to:</p>

ORGANIZATION	EVENT
	<ul style="list-style-type: none"> • Personalization and optimization platform for SEO and multi-channel marketers • Collaboratively manage meeting information and action items online in real time • Destination site for information about the post-secondary education market • Suite of hosted software services for online publishers, using natural language processing • Manage and organize all email, IM, social networking, chat and SMS accounts in a single interface • Media search and discovers site allowing users to view and share audio and video media files • Pay-per-call platform that handles calls like clicks • Online shopping network that connects buyers and sellers of high performance auto parts • Enterprise software that allows IT to manage the cost and deployment of server infrastructure • Adding dynamic, relevant visual information to tradition phone calls • Only integrated lender management SaaS application • An intelligent container that allows the user to maintain one profile across all social networking and blog sites • A social networking site with tools and features that allow families to share and archive important milestones
<p>WORLD TRADE CENTER ASSOCIATION LOS ANGELES - LONG BEACH www.laedc.org/tradeoutlook</p> <p>World Trade Center Los Angeles 350 South Figueroa Stree, Suite 272 Los Angeles, CA 90071 Phone: (213) 680-1888 Fax: (213) 680-1878 info@wtca-lalb.org</p> <p>World Trade Center Long Beach One World Trade Center, Suite 410 Long Beach, CA 90831 Phone: (562) 495-6075 Fax: (562) 495-1501 info@wtca-lalb.org</p>	<p>INTERNATIONAL TRADE OUTLOOK (ANNUAL)</p> <p>The International Trade Trends & Impacts event is held annually in Long Beach each May, and updates the public about trends and statistics in the international trade industry. The International Trade Trends report, produced by the Kyser Center for Economic Research at the LAEDC, is provided to the public by the LAEDC and its subsidiary the World Trade Center Association LA-Long Beach.</p>



BUSINESS INCENTIVES OVERVIEW

Los Angeles County has a variety of incentive programs available to both small and large businesses. However, the majority of bigger incentives are targeted, but not limited, to manufacturing companies (manufacturing, high tech manufacturing, and R&D) which plan to utilize large numbers of employees in the targeted community. Incentives should not be the only reason why one should consider a location, but could be one of many factors that could help lead to a final location decision. Potential business incentives may be offered at the federal, state and local level. Of the 88 cities in Los Angeles County, the City of Los Angeles offers the most in terms of incentive programs.

Incentives typically fall into two categories: legislated and discretionary. State and federal legislated incentives are "on the books" and available to any business that meets stated criteria. Discretionary incentives are customized and provided by certain cities and only for specific projects on a case-by- case basis. In almost every case, discretionary incentives come into play when a community is trying to attract a large business operation that brings significant investment into that community and will have a substantial impact on jobs created.

Rarely will either legislated or discretionary incentives turn a poor location into an acceptable one. Therefore, they should be considered only after a number of locations have been identified that satisfies a company's key operation requirements. But among roughly equal alternatives, incentives can represent a decisive factor. Incentives should be combined with other factors as part of a strategic comparison of contending site locations.

Financial incentive availability depends on a variety of factors including the state or community's needs and the project's economic impact. In general, incentives are likely to be minimal in prosperous areas unless the project is viewed as highly desirable by local authorities. On the other hand, areas in dire need of new jobs and tax revenue are more likely to offer larger packages. Until all parties meet to discuss the potential size and economic impact of the project it is difficult to offer a preliminary estimate of incentives to be offered.

Sometimes just being in LA (Los Angeles County) and being identified with LA (the creative LA Brand) is a major incentive that is often overlooked.

DISCLAIMER: This guide is not all-inclusive and the criteria included may change after its release. The intent of this guide serves to provide an overview of programs and incentives that may be available to qualifying businesses physically located in the County of Los Angeles. Not all programs apply to all businesses. The information contained in this guide is not a substitute for legal counsel or for information provided by the agency administering the program.

STATE OF CALIFORNIA INCENTIVES

ENTERPRISE ZONE CREDITS

Enterprise zones are specific areas in the community where the state & local government partner and offer a variety of incentives to attract private business investment.

There are 9 Enterprise Zone areas in Los Angeles County:

- Antelope Valley
- Compton
- Long Beach
- Los Angeles-East
- Los Angeles-Hollywood/Mid City
- Los Angeles-Central
- Los Angeles-San Fernando Valley
- Pasadena
- Santa Clarita
- South Gate-Lynwood

The Enterprise Zone Program spurs business development in designated communities through special zone incentives. Businesses located within the boundaries of an enterprise zone are eligible for tax credits against their California bank and corporation tax liability.

Sales and Use Tax Credit

The first major enterprise zone tax credit is equivalent to the sales and use tax paid on the first \$20 million of new or used manufacturing equipment purchased each year. Qualified machinery is the machinery or machinery parts used to:

- Manufacture, process, fabricate, or otherwise assemble a product;
- Produce renewable energy resources; or
- Control air or water pollution

The definition of “qualified property” has been expanded to include data processing and communications equipment including, but not limited to, computers, CAD systems, copy machines, telephones systems, and faxes. Equipment must be purchased in California unless equipment of comparable price and quality cannot be found in California.

Hiring Tax Credit

Secondly, businesses may claim a percentage of the wages paid to a qualified employee as a tax credit. The credit is based on the lesser of the actually hourly wage or 150% of the state established minimum wage.

The credit is provided over a five year period with 50% of the wages creditable in the first year of employment, 40% the second year, 30% the third year, 20% the fourth year, and 10% the fifth year. If the employee were to stay with the company for the entire 5-year period, the company would receive credits totaling nearly \$37,400 per qualified employee. If the employee is terminated prior to 270 days of employment the credit is recaptured.

Electrical Rate Discount

Enterprise Zone businesses in the City of Los Angeles also benefit from Department of Water & Power 5-Year Electrical Rate Discount. Save 35% in the first year as a rate reduction on electrical consumption- for new or expanding businesses. Over five years Enterprise Zone businesses average a 25% rate reduction.

OTHER CALIFORNIA INCENTIVES

Research and Development Tax Credit (R&D Tax Credit)

www.ftb.ca.gov/forms/misc/1082.pdf

Designed to encourage companies to increase their basic research and development activities in California, the research and development tax credit allows companies to receive a 15% credit against their bank and corporation tax liability for qualified in-house research expenses, and a 24% credit for basic research payments to an outside organization. It must not include research for the purpose of improving a commercial product for style, taste, cosmetic or seasonal design factors.

Net Operation Loss Carryover

California tax law allows business that experience a loss for the year to carry this loss forward to the next year in order to offset income in the following years. New businesses can carryover 100% of their losses for ten years if the loss is in their first year of operation, 100% over seven years if the loss is in their second year of operation, and 100% over six years if the loss is in their third year of operation. Existing California business can carryover 50% of their losses for five years.

Maps of Los Angeles County Enterprise Zones on the web:

City of Los Angeles

http://cdd.lacity.org/bus_statecred.html

Pasadena

www.cityofpasadena.net/planninganddevelopment/ezone/enterprisezone.asp

Long Beach

www.longbeach.gov/e.cd/enterprise_zone/default.asp

Santa Clarita

www.santaclaritaenterprisezone.com/index.asp

Compton

www.comptoncity.org/index.php/Planning-and-Economic-Development/enterprise-zone.html

South Gate/ Lynwood

www.sogate.org/index.cfm/fuseaction/DetailGroup/navid/1/cid/637/

Antelope Valley (City of Lancaster & City of Palmdale)

www.cityofpalmdale.org/business/enterprise.html

FEDERAL INCENTIVES

FEDERAL EMPOWERMENT ZONE

Employer Wage Credit

Federal tax credits of up to \$3,000 for hiring employees in the Empowerment Zone

Benefits:

The Empowerment Zone employer wage credit provides an incentive to hire individuals who both live in the Empowerment Zone and work for an Empowerment Zone business.

The wage tax credit is 20% of the first \$15,000 in wages paid to an individual who resides in the Empowerment Zone and works for an Empowerment Zone business, or up to \$3,000 yearly, from 2000 to 2009.

Section 179 Deduction

www.hud.gov/offices/cpd/economicdevelopment/programs/rc/

Section 179 property deduction increases up to an additional \$35,000 for Empowerment Zone businesses

Benefits:

Section 179 Deduction allows businesses to deduct all or part of the cost of eligible property in the year the property is purchased and used. Businesses in an Empowerment Zone can increase their Section 179 deduction up to \$35,000 on this qualifying property. This deduction is taken instead of taking depreciation deductions over a specific recovery period.

Eligibility:

Any depreciable property that is necessary for production of the business' income is eligible except inventory and real estate. Examples of qualifying depreciable property include; machinery, furniture, equipment, computers.

FOREIGN TRADE ZONES (FTZ)

www.ia.ita.doc.gov/ftzpage

www.portoflosangeles.org/

www.polb.com/

Deferral, reduction or elimination of US Customs duties for importers and exporters. Foreign Trade Zones allow business to postpone customs payments on imported goods until the product is shipped out of the zone. Foreign trade zones are secured areas legally outside of U.S. customs territory usually located in or near customs points of entry.

Foreign trade zones allow entry of foreign or domestic merchandise without formal customs entry or government excise taxes. Merchandise entering a zone may be stored, tested, sampled, re-labeled, repackaged, displayed, repaired, manipulated, mixed, cleaned, assembled, manufactured, salvaged, destroyed or processed. Products exported from or imported into foreign trade zones are excluded from customs duty and excise taxes until the time of transfer from the foreign trade zone.

General Purpose Foreign Trade Zones in Los Angeles County:

Zone No. 50, Long Beach

California Grantee: Board of Harbor Commissioners of the Port of Long Beach, P.O. Box 570, Long Beach, CA 90801-0570. Larry Ditchkus (562) 590-4162.

Zone No. 191, Palmdale

www.cityofpalmdale.org/business/foreign.html

California Grantee: City of Palmdale 38300 North Sierra Highway, Palmdale, CA 93550-4798. (661) 267-5125.

Zone No. 202, Los Angeles

www.portoflosangeles.org/facilities/ftz_202.asp

California Grantee: Board of Harbor Commissioners of the City of Los Angeles, 425 South Palos Verdes Street, San Pedro, CA 90731. Masashi Morimoto, (310) 732-3843.

Zone No. 243, City of Industry

Contact the David Harlow of International Trade Consultants at (626) 333- 3822. Email to drharlow@ftzconsultants.com.

WORLD TRADE CENTER ASSOCIATION

WTCA helps businesses with Trade Leads, Business Contacts, Market Assessments, Information on Economic Conditions by Country, Information on Government Regulations by Country and Trade Mission Assistance.

WORLD TRADE CENTER ASSOCIATION LOS ANGELES – LONG BEACH

www.wtca-lalb.org

The World Trade Center Association Los Angeles – Long Beach, through its two World Trade Center locations, promotes international trade and foreign direct investment as the leading international trade and investment resource organization in Los Angeles County.

Through its network of local business providers and a global network of 288 affiliated World Trade Centers, the World Trade Center Association Los Angeles-Long Beach offers a variety of assistance services to help you grow your business:

- Investment Attraction
- Trade Financing Assistance
- Export/Import Training
- Network for Trade Opportunities
- Marketing Support

Los Angeles Office

350 S. Figueroa Street, Suite 272
Los Angeles, CA 90071
Tel: (213) 680-1888
Fax: (213) 680-1878

Long Beach Office

One World Trade Center, Suite 410
Long Beach, CA 90831
Tel: (562) 495-6075
Fax: (562) 495-1501

NEW MARKET TAX CREDITS

www.cdfifund.gov/what_we_do/programs_id.asp?programID=5

The New Market Tax Credit (NMTC) Program permits taxpayers to receive a credit against Federal income taxes for making qualified equity investments in designated Community Development Entities (CDEs). Substantially all of the qualified equity investment must in turn be used by the CDE to provide investments in low-income communities. The credit provided to the investor totals 39% of the cost of the investment and is claimed over a 7-year credit allowance period.

JOINT STRIKE FIGHTER INCOME TAX CREDITS

The JSF is the next-generation air combat strike aircraft developed and produced under the JSF Program. The JSF Credits provide for a wage and a property credit under both the Personal Income Tax Law (PITL) and the Corporation Tax Law (CTL). These credits apply to qualified taxpayers under initial contract or subcontract to manufacture property for ultimate use in a JSF. The credits are available for taxable years beginning on or after January 1, 2001, and before January 1, 2006. Any excess credit can be carried forward for up to eight years from the year in which the credits are incurred. No credits are allowed unless the credit is reflected within the bid upon which the JSF contract or subcontract is based.

LOS ANGELES COUNTY RECYCLING MARKET DEVELOPMENT ZONE (RMDZ)

<http://dpw.lacounty.gov/epd/rmdz/>

The RMDZ is a low-interest loan program & technical assistance for manufacturers who use recycled material or process recycled material into a form usable to manufacture a new product. It also helps businesses that reuse post-consumer secondary materials and add value to recycled materials.

Zone areas are unincorporated LA County & the Cities of Burbank, Carson, Commerce, Compton, El Monte, Glendale, Inglewood, Palmdale, South Gate, Torrance, Vernon.

CITY OF LOS ANGELES INCENTIVES

Additional incentives for businesses locating in the City of Los Angeles:

CITY OF LOS ANGELES SECTION 108 LOAN PROGRAM

www.ci.la.ca.us/Cdd/bus_fin.html

This loan program has been established to facilitate larger real estate based projects that will result in the economic and physical revitalization of the City of Los Angeles. Funds are intended to finance real estate acquisition, construction or other related project costs whose objective will benefit low and moderate income communities through job creation or retention.

CITY OF LOS ANGELES RENEWAL COMMUNITY

www.lacity.org/Cdd/bus_ren.html

The Renewal Community creates business and community revitalization through Federal tax credits and incentives. The Renewal Community covers 9.5 sq. miles inclusive of Pico Union, Chinatown, Downtown's garment and jewelry districts, and South Central Los Angeles.

UTILITY PROGRAMS

Energy Conservation & Rebate Programs

www.ladwp.com/ladwp/cms/ladwp008889.jsp

Southern California Edison offers a number of programs to help qualifying businesses reduce energy usage and lower electricity costs; SCE energy efficiency & Savings By Design, (www.sce.com , click on rebates & offers)

Los Angeles Department of Water & Power offers a variety of rate reduction programs for qualifying businesses in the City of Los Angeles

EMPLOYEE TRAINING

EMPLOYMENT TRAINING PANEL

www.etp.ca.gov

The Employment Training Panel (ETP) assists businesses in acquiring and retraining a highly skilled work force with expertise in very specific fields in order to increase competitiveness and productivity. ETP will enter into a performance-based customized training contract, for new or existing employees, which are performed by either an approved training agency or the company itself.

As the training is completed, the costs for developing, implementing, and completing the training are reimbursed. Ranging from about \$1,500 to \$2,000 per employee, reimbursements are made to the company for each employee that completes training and remains on the job for 90 days. The program is open to all California companies that face out-of-state competition and one or more of the following conditions:

- A need to retrain current employees to prevent layoffs
- A need to upgrade workers in areas where there are skills shortages
- A desire to hire and train unemployed workers eligible to receive unemployment insurance
- Special or unique training needs in industries related to defense conversion or emerging technologies

WORKSOURCE CALIFORNIA (WORKFORCE INVESTMENT BOARD)

www.WorkSourceCalifornia.com

WorkSource California is the name for the network of full-service business centers located throughout Los Angeles County. Each WorkSource center offers efficient, cost-effective hiring, downsizing, training, and technology services to employers and businesses of all sizes. These centers offer qualified candidate listings, employee training sessions, conference room and meeting space, free job postings, and a fully equipped office center with computer, fax, and Internet access. Small business owners can also take advantage of specialized workshops and seminars related to recruitment and other human resources issues.

For more information, call the toll-free number (888) 226-6300.

FINANCING ASSISTANCE

There are a variety of State, County and Local financing assistance programs available.

INDUSTRIAL DEVELOPMENT BONDS

www.ibank.ca.gov/Programs/industrial.html

California cities, counties and state government have the authority to offer low interest financing to businesses locating in their communities through the use of tax-exempt industrial revenue bonds. An eligible bond project can be the construction of a new plant, or replacement of all or part of an existing plant. Industrial activities eligible for financing include assembly, fabrication, manufacturing and processing.

The primary advantage of industrial development bonds is that the financing provided bears an interest rate significantly lower than conventional methods (the lower interest rate is the result of the tax exempt status of the securities), the bonds are long term 15-30 years maturity, and are assumable.

Companies taking advantage of industrial bond financing receive approval for a project through a local industrial development authority or the California Economic Development Financing Authority. The authority makes findings regarding eligibility and public benefits pertaining to the project before authorizing the tax-exempt status of the bonds.

To qualify for industrial development bonds a borrower needs to meet certain eligibility criteria: 1) the firm must be engaged in a manufacturing, processing or value-added industry, 2) the total project cost should be at least \$1 million and may not exceed \$10 million, 3) the borrower must secure a standby letter of credit for 100 percent of the issue value from a bank with a substantial credit base, 4) the capital expansion must provide a public benefit such as creating new jobs; and 5) the project must have city or county support.

The proceeds from a bond issue can be used to pay for virtually all costs incurred by the company for its project including the financing of land acquisition, building construction, machinery and equipment, and other incidental costs as well as all expenses associated with the financing and issuance of the bonds. In addition, 5 percent of the net proceeds of the bond sale can be set aside for the working capital needs of the business.

COUNTY OF LOS ANGELES COMMUNITY DEVELOPMENT COMMISSION (LACDC) FINANCIAL ASSISTANCE PROGRAMS

www.lacdc.org/CDCWebsite/ER/BusinessLoans.aspx

County Business Loan Program

Loans for business and nonprofit expansion and development.

Use: real estate, construction, equipment, working capital.

Amount: \$25,000 to \$1 million.

Current rate: 1% below prime, loan fee of 2 points.

Term: 5 to 25 years.

County Development Loan Program

Loans for business and nonprofit expansion and development.

Use: real estate, construction, equipment, working capital.

Amount: \$100,000 to \$1 million.

County Earthquake Loan Program

The County Earthquake Loan Program (CELP) provides financing for firms impacted by Presidentially declared disasters, such as the Northridge Earthquake, or to finance hazard mitigation efforts, such as seismic retrofitting. Amount \$25,000 to \$1,000,000.

County Float Loan Program

Short-term loans for land acquisition, construction, equipment, and working capital for businesses, private developers and public agencies.

Amount: \$1 million to \$25 million.

Rate: below market, repayable as negotiated.

County Technology Loan Program

Loans for start-up, early state high technology firms located in participating incubators.

Use: equipment, working capital.

Amount: \$10,000 to \$100,000.

County Utility Loan Program

The County Utility Loan Program (CULP) provides financing for private and municipal water companies to upgrade and improve service in Los Angeles County.

Amount \$25,000 to \$1,000,000.

RENEWABLE ENERGY INCENTIVES

FEDERAL INCENTIVES

Business Energy Investment Tax Credit (ITC) & U.S. Department of Treasury - Renewable Energy Grants

The credit is equal to 30% of expenditures (for Solar, Fuel Cells and Small Wind Turbine) or 10% of the expenditures (for Combined Heat and Power, Geothermal Systems and Microturbines), with no maximum credit. Eligible solar energy property includes equipment that uses solar energy to generate electricity, to heat or cool (or provide hot water for use in) a structure, or to provide solar process heat. Hybrid solar lighting systems, which use solar energy to illuminate the inside of a structure using fiber-optic distributed sunlight, are eligible. Passive solar systems and solar pool-heating systems are not eligible.

Energy-Efficient Appliance Tax Credit for Manufacturers

The Energy Policy Act of 2005 established tax credits for manufacturers of high-efficiency residential clothes washers, refrigerators, and dishwashers produced in calendar years 2006 and 2007. Each manufacturer is limited to a total of \$75 million for all credits under this provision.

Renewable Electricity Production Tax Credit (PTC)

The federal renewable electricity production tax credit (PTC) is a per-kilowatt-hour tax credit for electricity generated by qualified energy resources and sold by the taxpayer to an unrelated person during the taxable year.

The February 2009 legislation revised the credit by: (1) extending the in-service deadline for most eligible technologies by three years (two years for marine and hydrokinetic resources); and (2) allowing facilities that qualify for the PTC to opt instead to take the federal business energy investment credit (ITC) or an equivalent cash grant from the U.S. Department of Treasury. The ITC or grant for PTC-eligible technologies is generally equal to 30% of eligible costs.

In addition, the tax credit is reduced for projects that receive other federal tax credits, grants, tax-exempt financing, or subsidized energy financing. The credit is claimed by completing Form 8835, "Renewable Electricity Production Credit," and Form 3800, "General Business Credit"

Note: The American Recovery and Reinvestment Act of 2009 (H.R. 1) allows taxpayers eligible for the federal renewable electricity production tax credit (PTC) to take the federal business energy investment tax credit (ITC) or to receive a grant from the U.S. Treasury Department instead of taking the PTC for new installations. The new law also allows taxpayers eligible for the business ITC to receive a grant from the U.S. Treasury Department instead of taking the business ITC for new installations. The Treasury Department issued Notice 2009-52 in June 2009, giving limited guidance on how to take the federal business energy investment tax credit instead of the federal renewable electricity production tax credit. The Treasury Department will issue more extensive guidance at a later time.

U.S. Department of Energy - Loan Guarantee Program

Innovative Technology Loan Guarantee Program:

DOE actively promotes projects in three categories: (1) manufacturing projects, (2) stand-alone projects, and (3) large-scale integration projects that may combine multiple eligible renewable energy, energy efficiency and transmission technologies in accordance with a staged development scheme. Under the original authorization,

loan guarantees were intended to encourage early commercial use of new or significantly improved technologies in energy projects. The loan guarantee program generally does not support research and development projects.

Temporary Loan Guarantee Program:

The American Recovery and Reinvestment Act of 2009 (ARRA) (H.R. 1), enacted in February 2009, extended the authority of the DOE to issue loan guarantees and appropriated \$6 billion for this program. Under this act, the DOE may enter into guarantees until September 30, 2011. The act amended EAct 2005 by adding a new section defining eligible technologies for new loan guarantees. Eligible projects include renewable energy projects that generate electricity or thermal energy and facilities that manufacture related components, electric power transmission systems, and innovative biofuels projects. Funding for biofuels projects is limited to \$500 million. Davis-Bacon wage requirements apply to any project receiving a loan guarantee.

In October 2009, the U.S. DOE issued a new solicitation for traditional renewable energy generation projects. The solicitation is funded with \$750 million in ARRA funding and is expected to support as much as \$4 to 8 billion in lending to eligible projects. The initial deadline for submissions under this solicitation is November 23, 2009.

Qualifying Advanced Energy Manufacturing Investment Tax Credit

The American Recovery and Reinvestment Act of 2009 (H.R. 1), enacted in February 2009, established a new investment tax credit to encourage the development of a U.S.-based renewable energy manufacturing sector. In any taxable year, the investment tax credit is equal to 30% of the qualified investment required for an advanced energy project that establishes, re-equips or expands a manufacturing facility that produces any of the following:

- Equipment and/or technologies used to produced energy from the sun, wind, geothermal or "other" renewable resources
- Fuel cells, microturbines or energy-storage systems for use with electric or hybrid-electric motor vehicles
- Equipment used to refine or blend renewable fuels
- Equipment and/or technologies to produce energy-conservation technologies (including energy-conserving lighting technologies and smart grid technologies)*

Qualified investments generally include personal tangible property that is depreciable and required for the production process. Other tangible property may be considered a qualified investment only if it is an essential part of the facility, excluding buildings and structural components.

Modified Accelerated Cost-Recovery System (MACRS) + Bonus Depreciation (2008-2009)

A number of renewable energy technologies are classified as five-year property under the MACRS often known as the energy investment tax credit or ITC to define eligible property. Such property currently includes:

- a variety of solar electric and solar thermal technologies
- fuel cells and micro turbines
- geothermal electric
- direct-use geothermal and geothermal heat pumps
- small wind (100 kW or less)
- combined heat and power (CHP).
- The provision which defines ITC technologies as eligible also adds the general term "wind" as an eligible technology, extending the five-year schedule to large wind facilities as well.

To qualify for bonus depreciation, a project must satisfy these criteria:

- the property must have a recovery period of 20 years or less under normal federal tax depreciation rules;
- the original use of the property must commence with the taxpayer claiming the deduction;
- the property generally must have been acquired during 2008 or 2009; and
- the property must have been placed in service during 2008 or 2009

U.S. Department of Treasury - Renewable Energy Grants

Grants are available to eligible property placed in service in 2009 or 2010, or placed in service by the specified credit termination date, if construction began in 2009 or 2010. The guidelines include a "safe harbor" provision that sets the beginning of construction at the point where the applicant has incurred or paid at least 5% of the total cost of the property, excluding land and certain preliminary planning activities. Below is a list of important program details as they apply to each different eligible technology.

Solar

The grant is equal to 30% of the basis of the property for solar energy. Eligible solar-energy property includes equipment that uses solar energy to generate electricity, to heat or cool (or provide hot water for use in) a structure, or to provide solar process heat. Passive solar systems and solar pool-heating systems are not eligible. Hybrid solar-lighting systems, which use solar energy to illuminate the inside of a structure using fiber-optic distributed sunlight, are eligible.

Fuel Cells

The grant is equal to 30% of the basis of the property for fuel cells. The grant for fuel cells is capped at \$1,500 per 0.5 kilowatt (kW) in capacity. Eligible property includes fuel cells with a minimum capacity of 0.5 kW that have an electricity-only generation efficiency of 30% or higher.

Small Wind Turbines

The grant is equal to 30% of the basis of the property for small wind turbines. Eligible small wind property includes wind turbines up to 100 kW in capacity.

Qualified Facilities

The grant is equal to 30% of the basis of the property for qualified facilities that produce electricity. Qualified facilities include wind energy facilities, closed-loop biomass facilities, open-loop biomass facilities, geothermal energy facilities, landfill gas facilities, trash facilities, qualified hydropower facilities, and marine and hydrokinetic renewable energy facilities.

Geothermal Heat Pumps

The grant is equal to 10% of the basis of the property for geothermal heat pumps.

Microturbines

The grant is equal to 10% of the basis of the property for microturbines. The grant for microturbines is capped at \$200 per kW of capacity. Eligible property includes microturbines up to two megawatts (MW) in capacity that have an electricity-only generation efficiency of 26% or higher.

Combined Heat and Power (CHP)

The grant is equal to 10% of the basis of the property for CHP. Eligible CHP property generally includes systems up to 50 MW in capacity that exceed 60% energy efficiency, subject to certain limitations and reductions for large systems. The efficiency requirement does not apply to CHP systems that use biomass for at least 90% of the system's energy source, but the grant may be reduced for less-efficient systems.

It is important to note that only tax-paying entities are eligible for this grant. Federal, state and local government bodies, non-profits, qualified energy tax credit bond lenders, and cooperative electric companies are not eligible to receive this grant. Partnerships or pass-thru entities for the organizations described above are also not eligible to receive this grant, except in cases where the ineligible party only owns an indirect interest in the applicant through a taxable C corporation. Grant applications must be submitted by October 1, 2011.

Note: The American Recovery and Reinvestment Act of 2009 (H.R. 1) allows taxpayers eligible for the federal business energy investment tax credit (ITC) to take this credit or to receive a grant from the U.S. Treasury Department instead of taking the business ITC for new installations. The new law also allows taxpayers eligible for the renewable electricity production tax credit (PTC) to receive a grant from the U.S. Treasury Department instead of taking the PTC for new installations. (It does not allow taxpayers eligible for the residential renewable energy tax credit to receive a grant instead of taking this credit.) Taxpayers may not use more than one of these incentives. Tax credits allowed under the ITC with respect to progress expenditures on eligible energy property will be recaptured if the project receives a grant. The grant is not included in the gross income of the taxpayer.

Clean Renewable Energy Bonds (CREBs)

Clean renewable energy bonds (CREBs) may be used by certain entities – primarily in the public sector – to finance renewable energy projects.

The federal Energy Policy Act of 2005 (EPA 2005) established Clean Energy Renewable Bonds (CREBs) as a financing mechanism for public sector renewable energy projects. Of the \$1.2 billion total of tax-credit bond volume cap allocated to fund renewable-energy projects, state and local government borrowers were limited to \$750 million of the volume cap, with the rest reserved for qualified mutual or cooperative electric companies.

Qualified Energy Conservation Bonds (QECBs)

The Energy Improvement and Extension Act of 2008, enacted in October 2008, authorized the issuance of Qualified Energy Conservation Bonds (QECBs) that may be used by state, local and tribal governments to finance certain types of energy projects. QECBs are qualified tax credit bonds, and in this respect are similar to new Clean Renewable Energy Bonds or CREBs.

Tribal Energy Program Grant

The U.S. Department of Energy's (DOE) Tribal Energy Program promotes tribal energy sufficiency, economic growth and employment on tribal lands through the development of renewable energy and energy efficiency technologies. The program provides financial assistance, technical assistance, education and training to tribes for the evaluation and development of renewable energy resources and energy efficiency measures.

Energy-Efficient Commercial Buildings Tax Deduction

The federal Energy Policy Act of 2005 established a tax deduction for energy-efficient commercial buildings applicable to qualifying systems and buildings placed in service from January 1, 2006, through December 31, 2007. This deduction was subsequently extended through 2008, and then again through 2013 by Section 303 of the federal Energy Improvement and Extension Act of 2008 (H.R. 1424, Division B), enacted in October 2008. A tax deduction of \$1.80 per square foot is available to owners of new or existing buildings who install (1) interior lighting; (2) building envelope, or (3) heating, cooling, ventilation, or hot water systems that reduce the building's total energy and power cost by 50% or more in comparison to a building meeting minimum requirements set by ASHRAE Standard 90.1-2001.

Deductions of \$0.60 per square foot are available to owners of buildings in which individual lighting, building envelope, or heating and cooling systems meet target levels that would reasonably contribute to an overall building savings of 50% if additional systems were installed.

The deductions are available primarily to building owners, although tenants may be eligible if they make construction expenditures. In the case of energy efficient systems installed on or in government property, tax deductions will be given to the person primarily responsible for the systems' design. Deductions are taken in the year when construction is completed.

Residential Energy Efficiency Tax Credit

The federal tax credit for energy-efficient home improvements was established by the Energy Policy Act of 2005. The credit now applies to eligible equipment purchased between January 1, 2009, and December 31, 2010.

The credit applies to energy efficiency improvements in the building envelope of existing homes and for the purchase of high-efficiency heating, cooling and water-heating equipment. Efficiency improvements or equipment must serve a dwelling in the United States that is owned and used by the taxpayer as a primary residence. The maximum amount of homeowner credit for all improvements combined is \$1,500 for equipment purchased during the two-year period of 2009 and 2010.

Heating, Cooling and Water-Heating Equipment:

Taxpayers who purchase qualified residential energy-efficient property are eligible for a tax credit worth 30% of the system cost, including labor costs. The credit may also be applied to labor costs for assembly and original installation of eligible property. The following types of equipment are eligible:

- Electric heat pump water heaters
- Electric heat pumps
- Central air conditioners
- Natural gas, propane or oil water heaters
- Natural gas, propane or oil furnace or hot water boilers
- Advanced main air circulating fans
- Biomass stoves that use "plant-derived fuel available on a renewable or recurring basis, including agricultural crops and trees, wood and wood waste and residues (including wood pellets), plants (including aquatic plants), grasses, residues, and fibers"

Geothermal heat pumps were originally eligible for this credit, with a \$300 cap. However, geothermal heat pumps

are now eligible for the residential renewable energy tax credit, with no cap.

Residential Renewable Energy Tax Credit

A taxpayer may claim a credit of 30% of qualified expenditures for a system that serves a dwelling unit located in the United States and used as a residence by the taxpayer. Expenditures with respect to the equipment are treated as made when the installation is completed. If the installation is on a new home, the "placed in service" date is the date of occupancy by the homeowner. Expenditures include labor costs for onsite preparation, assembly or original system installation, and for piping or wiring to interconnect a system to the home. If the federal tax credit exceeds tax liability, the excess amount may be carried forward to the succeeding taxable year. The excess credit can be carried forward until 2016, but it is unclear whether the unused tax credit can be carried forward after then. The maximum allowable credit, equipment requirements and other details vary by technology, as outlined below.

Solar-electric property

- There is no maximum credit for systems placed in service after 2008. The maximum credit is \$2,000 for systems placed in service before January 1, 2009.
- Systems must be placed in service on or after January 1, 2006, and on or before December 31, 2016.
- The home served by the system does not have to be the taxpayer's principal residence.

Solar water-heating property

- There is no maximum credit for systems placed in service after 2008. The maximum credit is \$2,000 for systems placed in service before January 1, 2009.
- Systems must be placed in service on or after January 1, 2006, and on or before December 31, 2016.
- Equipment must be certified for performance by the Solar Rating Certification Corporation (SRCC) or a comparable entity endorsed by the government of the state in which the property is installed.
- At least half the energy used to heat the dwelling's water must be from solar in order for the solar water-heating property expenditures to be eligible.
- The tax credit does not apply to solar water-heating property for swimming pools or hot tubs.
- The home served by the system does not have to be the taxpayer's principal residence.
- Note that the Solar Energy Industries Association (SEIA) has published a three-page document that provides answers to frequently asked questions regarding the federal tax credits for solar energy.

Fuel cell property

- The maximum credit is \$500 per half kilowatt (kW).
- Systems must be placed in service on or after January 1, 2006, and on or before December 31, 2016.
- The fuel cell must have a nameplate capacity of at least 0.5 kW of electricity using an electrochemical process and an electricity-only generation efficiency greater than 30%.
- In case of joint occupancy, the maximum qualifying costs that can be taken into account by all occupants for figuring the credit is \$1,667 per half kilowatt. This does not apply to married individuals filing a joint return. The credit that may be claimed by each individual is proportional to the costs he or she paid.
- The home served by the system must be the taxpayer's principal residence.

Small wind-energy property

- There is no maximum credit for systems placed in service after 2008. The maximum credit is \$500 per half kilowatt, not to exceed \$4,000, for systems placed in service in 2008.
- Systems must be placed in service on or after January 1, 2008, and on or before December 31, 2016.
- The home served by the system does not have to be the taxpayer's principal residence.

Geothermal heat pumps

- There is no maximum credit for systems placed in service after 2008. The maximum credit is \$2,000 for systems placed in service in 2008.
- Systems must be placed in service on or after January 1, 2008, and on or before December 31, 2016.
- The geothermal heat pump must meet federal Energy Star program requirements in effect at the time the installation is completed.
- The home served by the system does not have to be the taxpayer's principal residence.

Renewable Energy Production Incentive (REPI)

Established by the federal Energy Policy Act of 1992, the federal Renewable Energy Production Incentive (REPI) provides incentive payments for electricity generated and sold by new qualifying renewable energy facilities. Qualifying systems are eligible for annual incentive payments of 1.5¢ per kilowatt-hour in 1993 dollars (indexed for inflation) for the first 10-year period of their operation, subject to the availability of annual appropriations in each federal fiscal year of operation. REPI was designed to complement the federal renewable energy production tax credit (PTC), which is available only to businesses that pay federal corporate taxes.

Qualifying systems must generate electricity using solar, wind, geothermal (with certain restrictions), biomass (excluding municipal solid waste), landfill gas, livestock methane, or ocean resources (including tidal, wave, current and thermal). The production payment applies only to the electricity sold to another entity. Eligible electric production facilities include not-for-profit electrical cooperatives, public utilities, state governments and political subdivisions thereof, commonwealths, territories and possessions of the United States, the District of Columbia, Indian tribal governments or political subdivisions thereof, and Native Corporations.

Residential Energy Conservation Subsidy Exclusion (Corporate)

According to Section 136 of the U.S. Code, energy conservation subsidies provided by public utilities, either directly or indirectly, are nontaxable. Given the definition of "energy conservation measure," there is strong evidence that utility rebates for residential solar-thermal projects and solar-electric systems may be nontaxable. However, the IRS has not ruled definitively on this issue. For taxpayers considering using this provision for renewable energy systems, consultation with a tax professional is advised.

Residential Energy Conservation Subsidy Exclusion (Personal)

According to Section 136 of the U.S. Code, energy conservation subsidies provided by public utilities, either directly or indirectly, are nontaxable. The term "energy conservation measure" includes installations or modifications primarily designed to reduce consumption of electricity or natural gas, or improve the management of energy demand. Eligible dwelling units include houses, apartments, condominiums, mobile homes, boats and similar properties. If a building or structure contains both dwelling and other units, any subsidy must be properly allocated.

Given the definition of "energy conservation measure," there is strong evidence that utility rebates for residential

solar-thermal projects and solar-electric systems may be nontaxable. However, the IRS has not ruled definitively on this issue. For taxpayers considering using this provision for renewable energy systems, consultation with a tax professional is advised.

Residential Energy-Efficient Mortgages

Homeowners can take advantage of energy efficient mortgages (EEM) to finance a variety of energy efficiency measures, including renewable energy technologies, in a new or existing home. The U.S. federal government supports these loans by insuring them through Federal Housing Authority (FHA) or Veterans Affairs (VA) programs. This allows borrowers who might otherwise be denied loans to pursue energy efficiency improvements, and it secures lenders against loan default.

STATE INCENTIVES

California Solar Initiative

The California Solar Initiative Program was established by Senate Bill 1 (SB 1) and in a series of decisions from the California Public Utilities Commission (CPUC) in collaboration with the California Energy Commission (CEC).

In January 2006, the California Public Utilities Commission (CPUC) adopted a program – the California Solar Initiative (CSI) – to provide more than \$3 billion in incentives for solar-energy projects with the objective of providing 3,000 megawatts (MW) of solar capacity by 2016. The CPUC manages the solar program for non-residential projects and projects on existing homes (\$2+ billion), while the CEC oversees the New Solar Homes Partnership, targeting the residential new construction market (~\$400 million). Together, these two programs comprise the effort to expand the presence of photovoltaics (PV) throughout the state, Go Solar California.

CSI Incentives for Non-residential Buildings and Existing Homes

The CSI includes a transition to performance-based and expected performance-based incentives (as opposed to capacity-based buydowns), with the aim of promoting effective system design and installation.

California Energy Commission (CEC) - New Solar Homes Partnership

New Solar Homes Partnership (NSHP), is administered by the CEC and provides incentives for solar on new home construction. The NSHP specifically targets the market-rate and affordable housing single-family and multifamily sectors, with the goal of achieving 400 MW of installed solar electric capacity on new homes, and to have solar electric systems on 50% of all new homes built in California by the end of 2016.

Incentives are determined by the housing type and the expected performance of the system, which depends on factors like equipment efficiency, geographic location, orientation, tilt, shading, and time-dependent valuation. To qualify for incentives, the residential dwelling unit must be achieve at least 15% higher energy efficiency than the current Title 24 Building Energy Efficiency Standards (please refer to the New Solar Homes Partnership Guidebook for specific details and program requirements). The incentive is paid once the system is installed, operational, and has met all program requirements.

Low-Income Programs

10% of the CSI Program budget (\$216 million) has been allocated to two low-income solar incentive programs. As of March 2009, the single family low income program is still being developed; but SCE, PG&E and CCSE are accepting applications for Track 1 of the multi-family affordable solar housing (MASH) program. Rebates are available through Track 1 in the amount of \$3.30/W for PV systems offsetting common area loads, and \$4.00/W

for systems offsetting tenant loads.

Multi-Family Affordable Solar Housing (MASH) Program

MASH incentives will be available through two separate tracks. Track 2 will offer higher competitive incentives to applicants who provide quantifiable "direct tenant benefits". Track 1 provides an incentive of \$3.30/W for PV systems that serve common area loads, and \$4.00/W for PV systems serving tenant loads. These incentive amounts are based on expected performance. Incentives are awarded to owners or operators of existing multifamily affordable housing that meets the definition of low-income residential housing in Pub. Util. Code § 2852.8. In general, a multifamily housing complex fits the definition if it is financed with low-income housing tax credits, tax-exempt mortgage revenue bonds, general obligation bonds, or local, state or federal loans or grants. Qualifying affordable housing properties must also have an occupancy permit for at least two years prior to applying for MASH incentives.

Single-Family Affordable Solar Housing (SASH) Program

In general, the household's total income must be 80% of the area median income (AMI) or less.

Incentives for Other Solar Electric Generating Technologies

The CSI Handbook released in January 2008 clarified the eligibility of other solar electric generating technologies which either produce electricity or displace electricity. Incentives for other solar electric generating technologies are available for CSI incentives effective October 1, 2008. The CPUC specifically recognizes electric generating solar thermal as including dish stirling, solar trough, and concentrating solar technologies, while technologies that displace electricity include solar forced air heating, and solar cooling or air conditioning.

Emerging Renewables Program

The California Energy Commission offers cash incentives to promote the installation of grid-connected small wind and fuel cell renewable energy electric-generating systems through its Emerging Renewables Program. Wind systems must be permanently interconnected to the electrical distribution grid of the utility serving the customer's electrical load, but fuel cells used for backup generation for emergency, safety, or telecommunication purposes do not need to be grid-connected.

Effective January 1, 2007, rebate levels for the Emerging Renewables Program are:

- Small Wind Turbines (up to 50 kW): \$2.50/W for first 7.5 kW and \$1.50/W for increments > 7.5 kW and < 30 kW
- Fuel cells (<30 kW) using renewable fuels: \$3.00/W for systems less than 30 kW

Rebates for eligible renewable energy systems installed on affordable housing projects are available at 25% above the standard rebate level up to 75% of the system's installed cost.

Incentives received from sources other than this program, such as other utility incentive programs, a State of California sponsored incentive program, or a federal government sponsored incentive program, other than tax credits, will reduce the amount of the Emerging Renewables Program rebate by no less than 5% to prevent total incentives from exceeding total system costs.

Self-Generation Incentive Program

The Self-Generation Incentive Program (SGIP) offers incentives to customers who produce electricity with wind turbines and fuel cells. The incentive payments range from \$1/W - \$4.50/W for renewable energy systems depending on the type of system.

The following technologies and corresponding incentive amounts apply to the SGIP:

Technologies using renewable fuels:

- Wind turbines (minimum of 30 kW) - \$1.50/W
- Fuel cells (minimum of 30 kW) - \$4.50/W
- Advanced Energy Storage coupled with an eligible SGIP technology and four hour discharge period at rated capacity: \$2.00/W

Technologies using non-renewable fuels:

- Fuel cells - \$2.50/W
- Advanced Energy Storage coupled with an eligible SGIP technology and four hour discharge period at rated capacity: \$2.00/W

The maximum eligible system size is 5 MW, although the incentive payment is capped at 3 MW. (On April 24, 2008, the CPUC raised the cap on cash incentives for individual clean energy projects available through its SGIP from 1 MW to 3 MW, but systems greater than 1 MW receive reduced incentive rates.) Projects receiving incentives based on future performance of the system are not eligible to receive a SGIP rebate.

For projects that receive other incentives funded by California investor-owned utility ratepayers, the SGIP incentive is discounted by the amount of the other incentive. For projects that receive other incentives funded by non-IOU (e.g., municipal utility) rate payers, the SGIP incentive is discounted by 50% of the other incentive. Projects that utilize systems manufactured in California are eligible for an additional incentive worth 20 percent of the base incentive.

Energy Efficiency Financing Program

www.energy.ca.gov/efficiency/financing/index.html

The California Energy Commission will provide up to \$21 million in loans to schools, hospitals, and local governments for the installation of energy-saving measures or for energy audits and studies. Interest rates are fixed at 3.00% for the term of the loan. The maximum loan amount is \$3 million and there is no minimum loan. Loans must be paid back within 15 years from energy costs savings, or in 2 years for energy audits. Common projects include lighting and equipment upgrades and heating systems, but can also include other energy-saving measures and renewable energy systems. (More information:)

California Feed-In Tariff

The California feed-in tariff allows eligible customer-generators to enter into 10-, 15- or 20-year standard contracts with their utilities to sell the electricity produced by small renewable energy systems – up to 1.5 megawatt (MW) – at time-differentiated market-based prices.

Property Tax Exclusion for Solar Energy Systems

Section 73 of the California Revenue and Taxation Code allows a property tax exclusion for certain types of solar energy systems installed between January 1, 1999, and December 31, 2016. This section was amended in 2008 to include the construction of an active solar energy system incorporated by an owner-builder in the initial construction of a new building that the owner-builder does not intend to occupy or use. This only applies if the owner-builder did not already receive an exclusion for the same active solar energy system and only if the initial purchaser purchased the new building prior to that building becoming subject to reassessment to the owner-builder.

Property Tax Financing Authorization

"Property tax financing" allows property owners to borrow money to pay for energy improvements. The amount borrowed is repaid through an increased property tax assessment over a period of years. California has authorized cities, counties and areas within cities to provide financing for the installation of renewable-energy systems, energy-efficiency improvements and water-efficiency improvements to residential, commercial, industrial or other real property.

School Facility Program - Modernization Grants

The School Facility Program (SFP) provides funding assistance to school districts for the modernization of school facilities. The assistance is in the form of grants approved by the State Allocation Board (SAB), and requires a 40 percent local contribution. A district is eligible for grants when students are housed in permanent buildings 25 years old or older and relocatable classrooms 20 years old or older and the buildings have not been previously modernized with State funds.

Other State Grants

www.energy.ca.gov/recovery/documents/FUNDING_SUMMARY.PDF

Please refer to the other energy fund allocation for California from American Recovery and Reinvestment Act of 2009.

CITY INCENTIVES

Los Angeles Department of Water and Power (LADWP) - Solar Incentive Program

The LADWP Solar Incentive Program began in 2000, with a funding level of \$150 million. The revised program, effective October 1, 2007, provides rebates to residential, commercial, non-profit and governmental customers of LADWP based on a photovoltaic (PV) system's expected performance in kilowatt hours (kWh) rather than the system's capacity. The expected performance is determined by using the National Renewable Energy Laboratory's PV Watts Version 2 Program. The incentive is paid up-front on a per-kWh-basis for the estimated production over 20 years.

The Solar Incentive Program has 10 phases with declining incentive levels as certain installed megawatt (MW) targets are met. There are separate goals for residential and non-residential participants, and the incentive levels for each will decline irrespective of the other. As of July 2009, incentive levels are as follows:

- Residential \$0.13 per kWh
- Businesses: \$0.10 per kWh
- Non-profit and governmental participants: \$0.13 per kWh

All incentives are adjusted for expected performance. Bonus incentives of \$0.02 per kilowatt-hour are available if the installed system was manufactured in Los Angeles or if the system is a building integrated photovoltaic systems (BIPV). Incentive levels will decrease by one cent (\$0.01) every time a MW goal is reached.

Azusa, Burbank, Glendale and Pasadena Water and Power – Solar incentives Programs

See the Water and Power of each city for more information.

LADWP – Green Building Program

The Los Angeles Department of Water and Power (LADWP) is offering cash incentives to owners and developers wishing to build new energy efficient buildings.

LADWP - Small Business Direct Install Lighting Program

The Los Angeles Department of Water and Power (LADWP) offers up to \$2,500 in free efficient lighting upgrades through their Small Business Direct Install (SBDI) Program. Small businesses on rate schedule A1 are eligible to participate in the SBDI program and receive energy saving lighting system upgrades for equipment, such as fluorescent lighting and energy efficient exit signs.

Water and Power of Burbank, Los Angeles, Glendale and Pasadena – Residential and Commercial Energy Efficiency Rebate Program

See the Water and Power of each city for more information.

Santa Monica - Building Permit Fee Waiver for Solar Projects

In early 2002, the City of Santa Monica began waiving building permit fees for solar energy systems.

Santa Monica - Expedited Permitting for Green Buildings

The City of Santa Monica adopted an ordinance in August 2005 to encourage the construction of sustainable buildings. The ordinance, incorporated into the Municipal Code of Santa Monica, allows for priority plan check processing for building projects that are registered with the United States Green Building Council for certification under the Leadership in Energy and Environmental Design (LEED*) Green Building Rating System. The ordinance applies to all new buildings and major renovations which total an amount exceeding fifty percent of their replacement cost.