

# CITY OF LOS ANGELES

CALIFORNIA

CAROLYN M. HULL  
GENERAL MANAGER



KAREN BASS  
MAYOR

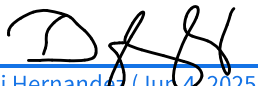
ECONOMIC AND WORKFORCE  
DEVELOPMENT DEPARTMENT

444 S. FLOWER ST., 14TH FLOOR  
LOS ANGELES, CA 90017

**DATE:** June 4, 2025

**TO:** All Economic Development Division Subrecipients

**FROM:** Daysi Hernandez, Chief Grants Administrator  
Economic Development Division

  
Daysi Hernandez (Jun 4, 2025 10:23 PDT)

**SUBJECT: DIRECTIVE NO. 25-03  
NEW PROGRAM FORMS FOR ECONOMIC DEVELOPMENT SERVICE  
PROVIDERS WITH A NATIONAL OBJECTIVE OF LOW/MOD JOBS**

## EFFECTIVE DATE

This bulletin is effective immediately.

## PURPOSE

The purpose of this Directive is to provide Economic Development Service Providers (Subrecipients) with Low- and Moderate-Income Jobs as their National Objective with new Program Forms to be used for all files in conjunction with utilization of Community Development Block Grants (CDBG) funds. This Directive and attachments set out the program requirements and identify documents that must be utilized and saved in client files to maintain contract compliance.

All agencies operating Los Angeles BusinessSource Centers must upload all files and their supporting documentation into Salesforce.

### 1. Individual Business Service Agreement (IBSA)

This document is required to enroll businesses in your program. The IBSA must be accompanied with eligibility document(s). This form must document the number and types of jobs that exist prior to receiving services, if any, and the number of jobs to be created. The IBSA is valid for two years. If the client continues to receive services after two years or returns for additional services two years after signing the IBSA, then a new application needs to be completed.

### 2. Business Needs Assessment

A business needs assessment must be completed and documented in the client's file in Salesforce prior to providing any services. Based on the answers provided, Subrecipient must create an action plan with their client to ensure the client's business needs and milestones will be addressed and met.

### 3. Business Service Notes

Subrecipients must keep detailed case notes for every client enrolled in your program. Be sure to document how the services provided led to meeting the National Objective

of creating and/or retaining low/moderate income jobs.

All agencies operating Los Angeles BusinessSource Centers must input the business service notes directly into Salesforce. Please refer to the LABSC Business Services Notes Instructions (Attachment 3) for more information.

#### **4. HUD Self-Certification Job Forms**

##### **Assisted Activity Job Creation Certification Form**

Use this form if you have assisted your client with creating a job. In order to meet these criteria, the job must be created with the direct assistance of the Subrecipient as evidenced in the Business Service Notes and supporting documents. Note that 51% of the jobs created must be available to or held by LMI persons. Jobs created can be part-time however, jobs are counted on a full-time equivalent (FTE) basis.

As of July 1, 2021, when counting jobs for the job performance goal exclude any positions held by the business owners and any other having a substantial equity (20%) in the business.

##### **Assisted Activity Job Retention Certification Form**

Use this form if you have assisted your client with retaining a job. In order to meet these criteria, the job must be retained with the direct assistance of the Subrecipient as evidenced in the Business Service Notes and supporting documents. Note that 51% of the jobs retained must be available to or held by LMI persons and documentation that jobs would have been lost without the Subrecipient's program services includes the following:

- Documentation of services provided through the Subrecipient, which directly prevented the loss of jobs - **and-**
- Current profit and loss statement(s) evidencing losses in business income with insufficient funds to meet payroll and credit responsibilities -**or-**
- Bank statements evidencing decreasing balances and challenges meeting credit and payroll responsibilities -**or-**
- Business Tax Returns for the previous two years, evidencing a decreasing business income, thereby creating challenges in meeting credit and payroll responsibilities -**or-**
- A news or online article stating the business is about to close or move out of the city -**or-**
- Documentation showing regulatory non-compliance by the client and a threat to jobs as a result of not satisfying requirements.

Other situations can be evaluated on a case by case basis by the program monitor if requested by the Subrecipient.

As of July 1, 2021, when counting jobs for the job performance goal, exclude any positions held by the business owners and any others with substantial equity (20%) in the business.

#### **5. Assisted Activity Job Information Report**

This form documents the number and types of jobs that exist after receiving services and is used as back-up documentation for the Job Creation/Retention forms. The report must be signed by the client or their designee. In lieu of the Assisted Activity Job Information Report, payroll records may be collected. If the number of jobs on the Assisted Activity Job Information Report or payroll records does not tie to the number of job forms collected, then the Subrecipient must remove the excess jobs.

#### **6. Business Referral Form**

This form is used for client referrals to any EWDD system based on your business needs assessment. A descriptive list of services provided by BusinessSource Centers, EWDD Partners, and WorkSource Centers is also provided.

It is critical that all clients enrolled in the program are referred to the local WorkSource Center for an introduction to available services. EWDD will continue to monitor referrals to the WorkSource Centers in Salesforce for LA BusinessSource Centers.

Any document attached to this Directive shall not be altered without prior City approval.

#### **EDD CONTACT**

Questions or concerns should be directly addressed to their program monitor, with a copy to [labusinesssourceadmin@lacity.org](mailto:labusinesssourceadmin@lacity.org).

#### **Attachments:**

1. Individual Business Services Agreement 2025 - LMJ (English)
2. Individual Business Services Agreement 2025 - LMJ (Spanish)
3. LABSC Business Service Notes Instructions
4. Assisted Activity Job Creation Certification Form 2025
5. Assisted Activity Job Retention Certification Form 2025
6. Assisted Activity Job Information Report
7. Assisted Activity Job Information Report - Sample Scenarios
8. Business Referral Form
9. List of Services Provided by EWDD Systems