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**Clackamas County**  
[www.clackamas.us](http://www.clackamas.us)



**DAN JOHNSON**  
DIRECTOR

DEPARTMENT OF TRANSPORTATION AND DEVELOPMENT  
DEVELOPMENT SERVICES BUILDING  
150 BEAVERCREEK ROAD OREGON CITY, OR 97045

May 14, 2026

BCC Agenda Date/Item: \_\_\_\_\_

Board of County Commissioners  
Clackamas County

**Approval of Funding Agreements with American Metal Specialties, Batish Home Bake, Benchmade Knife Company, Optimize Technologies, and Rogue Fabrication for Business Development Grant Program awards. Total Award Value of five agreements is \$440,000. Funding is through Lottery Dollars. No County General Funds are involved.**

### Previous Board Action/Review

1. April 17, 2024: Board of County Commissioners (Board) directed the Office of Economic Development (OED) to develop a Business Development Grant Awards program in the amount of \$600,000 to invest in local businesses to ensure their ongoing success in the County.
2. June 10, 2025: Board approval of a second year of the grant program in the amount of \$650,000 for FY25-26.
3. January 20, 2026: Board approval of grant funding for 12 applicants as recommended by the Business Development Grant Review & Recommendation Committee.
4. On April 9, 2026, the Board approved the first four (4) of these grant funding agreements for signature.
5. On April 23, 2026, the Board approved the next three (3) of these grant funding agreements for signature.

**Performance Clackamas:** Vibrant Economy

**Counsel Review:** Yes

**Procurement Review:** N/A

**Contact Person:** Laura Edmonds 503-742-4366

**EXECUTIVE SUMMARY:** In April 2024, at the direction of the Board, the Office of Economic Development (OED) developed a Business Development Grant Program to invest \$650,000 in local businesses to ensure their ongoing success in the County. The grant program provides funding to existing traded sector businesses of various sizes to relocate to or expand operations in Clackamas County. In June of 2025, the Board directed staff to advance a second year of the program.

Businesses applied for funding to support Capital or Workforce Development projects, with a maximum award for any individual project capped at \$100,000. The program received 24 total applications, 15 of which met the base eligibility criteria. A Review & Recommendation Committee (R&RC) was formed to evaluate eligible applications and determine final project funding recommendations.

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On January 20, 2026, staff presented the R&RC's funding recommendations to the Board. The R&RC recommended funding 12 projects for a total of \$650,000. The Board approved the funding recommendations as presented and directed staff to create Funding Agreements for final Board approval.

This packet contains the remaining funding agreements for the final five (5) of the 12 approved projects.

**RECOMMENDATION:** Staff respectfully recommend approval of the Funding Agreements between Clackamas County and American Metal Specialties, Batish Home Bake LLC, Benchmade Knife Company, Optimize Technologies, and Rogue Fabrication LLC.

Respectfully submitted,

*Dan Johnson*

Dan Johnson, Director  
Department of Transportation & Development

**GRANT AGREEMENT**

**Program Name:** Business Development Grant Program  
**Program Number:** 600406

This Grant Agreement (this "Agreement") is between **Clackamas County**, a political subdivision of the State of Oregon ("County"), acting by and through its Office of Economic Development, and **American Metal Specialties Inc.**, an Oregon for-profit entity ("Recipient").

**County Information**

**Grant Administrator:**

**Program Manager:** Julia McCotter

Clackamas County Office of Economic Development  
150 Beaver Creek Road  
Oregon City, OR 97045  
503-742-4238  
4biz@clackamas.us

Clackamas County Office of Economic Development  
150 Beaver Creek Road  
Oregon City, OR 97045  
503-742-4399  
JMcCotter@clackamas.us

**Recipient Information**

**Finance/Fiscal Representative:**

**Owner:**

Davis Hayter -- GC; Project Manager  
2480 NE Century Blvd.  
Hillsboro, OR 97124  
(503) 803-3170 // dhayter@apiams.com

Chris Hayter -- President & Owner  
5226 SE International Way  
Milwaukie, OR 97222  
(503) 352-1861 // chayter@apiams.com

**State of Oregon Business Registry Number:**

249777-87

**RECITALS**

County seeks to promote economic development by investing in capital, capacity, and workforce development projects for traded-sector businesses operating in Clackamas County.

On April 17, 2024, the Clackamas County Board of Commissioners ("Board") approved a Business Development Grant program with the goals of using lottery dollars to support business and workforce development activities, retaining Clackamas-County-based operations, and attracting businesses looking to relocate into Clackamas County.

On January 20, 2026, the Board approved the Business Development Grants, as recommended by the Review and Recommendation Committee, and instructed the Office of Economic Development to finalize funding agreements with the approved Recipients.

The total investment in the Business Development Grant Program from County's restricted fund allocation of lottery dollars in the 2025-26 fiscal year is \$650,000. The maximum lottery dollar funding for each grant is \$100,000. Grants may be for lesser amounts, and no single grant may exceed \$100,000.

Recipient submitted an application, attached as Exhibit B, for grant funds to be used for a Capital Project. County has agreed to award Recipient a portion of the requested grant funds to perform the work described in Exhibit A (the "Project").

**AMERICAN METAL SPECIALTIES, INC.**

Grant Agreement – Business Development Grant Program FY25/26

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NOW, THEREFORE, the parties agree as follows:

**AGREEMENT**

1. **Term.** This Agreement shall become effective on the date it is fully executed and shall expire on June 30, 2028, unless sooner terminated or extended pursuant to the terms hereof.
2. **Grant Funds.**
  - a. **Payment.** County agrees to pay Recipient a one-time lump sum not to exceed eighty-five thousand dollars (\$85,000.00) (the "Grant Funds"). Such payment is contingent on County receiving appropriations or other expenditure authority sufficient to allow County, in the exercise of its sole discretion, to make the payment.
  - b. **Use.** Recipient shall use the Grant Funds solely to complete the Project as described in Exhibit A, subject to the terms of this Agreement, the attached Exhibits, and all applicable laws and regulations including, but not limited to, the limitations set forth in Article XV, section 4, of the Oregon Constitution and ORS 461.540 for use of lottery dollars, which is the source of funds under this Agreement. Recipient shall use the Grant Funds solely for Project costs incurred during the period beginning **January 20, 2026** and ending **December 31, 2027** (the "Grant Period"), unless this Agreement is sooner terminated or the Grant Period is sooner extended pursuant to the terms hereof.
  - c. **Allowable Costs.** Recipient will incur only allowable costs in connection with the Project under this Agreement. A cost is allowable if it is reasonable and allocable, as described below.
    - i. **Reasonable.**
      1. A cost is reasonable if, in its nature and amount, it does not exceed that which would be incurred by a prudent person in the conduct of competitive business. Reasonableness of specific costs must be examined with particular care in connection with firms or their separate divisions that may not be subject to effective competitive restraints. No presumption of reasonableness shall be attached to the incurrence of costs by Recipient. If an initial review of the facts results in a challenge to a specific cost by County, the burden of proof shall be upon Recipient to establish that such cost is reasonable.
      2. What is reasonable depends upon a variety of considerations and circumstances, including:
        - Whether it is the type of cost generally recognized as ordinary and necessary for the completion of the Project;
        - Generally accepted sound business practices, arm's length bargaining, and federal and state laws and regulations;
        - Recipient's responsibilities to the government, other customers, its owners, its employees, and the public at large; and
        - Any significant deviations from Recipient's established practices.
    - ii. **Allocable.** A cost is allocable if it is assignable or chargeable to one or more cost objectives on the basis of relative benefits received or other equitable relationship. Subject to the foregoing, a cost is allocable under this Agreement if it:
      1. Is incurred specifically for the Project as described in Exhibit A; or
      2. Benefits both the Project and other work, and can be distributed among them in reasonable proportion to the benefits received.

**AMERICAN METAL SPECIALTIES, INC.**

Grant Agreement – Business Development Grant Program FY25/26

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- d. **Duplicate Funding.** Recipient may use funds other than the Grant Funds to complete the Project; provided, however, that Recipient may not use the Grant Funds for any Project costs that are budgeted to be or that have been paid for with other funds and would result in duplicate funding. The applicable portion of any rebate, allowance, or other credit relating to any Project costs received by or accruing to Recipient shall be credited to the Project either as a cost reduction or by cash refund to County.
  - e. **Return.** Any unspent Grant Funds must be returned to County within 30 days of the end of the Grant Period, the earlier termination of this Agreement, or the end of any extensions of the Grant Period. Unspent Grant Funds include those Grant Funds that have not been spent in accordance with the terms of this Agreement.
  - f. **Reimbursement.** County may require full or partial reimbursement of the Grant Funds if Recipient fails to deliver the Project as described in Exhibit A.
3. **Future Support.** County makes no commitment and assumes no obligation for future support of the Project.
  4. **Matching Funds.** Recipient is required to provide matching funds in the amounts specified in Exhibit A.
  5. **Amendments.** The terms of this Agreement may not be waived, altered, modified, supplemented, or amended, in any manner whatsoever, except by written instrument signed by both parties. Recipient must submit a written request for any amendment, including justification, to County at least forty-five (45) calendar days before expiration of this Agreement.
  6. **Termination.** This Agreement may be terminated prior to its expiration as follows:
    - a. At County's discretion, upon thirty (30) days' advance written notice to Recipient.
    - b. Upon a party's default under this Agreement, following thirty (30) days' written notice to the party with an opportunity to cure.
    - c. At any time upon mutual agreement by the parties.
    - d. Immediately upon written notice to Recipient that County lacks sufficient funds, as determined by County in its sole discretion, to continue to perform under this Agreement.

The termination of this Agreement, for any reason, shall not release Recipient from any obligation that has already accrued or that comes into effect due to such termination.

7. **Default.**
  - a. **Recipient's Default.** Recipient will be in default under this Agreement upon the occurrence of any of the following:
    - i. Recipient fails to use the Grant Funds for eligible purposes described in Exhibit A;
    - ii. Any representation, warranty, or statement made by Recipient in this Agreement or in any documents or reports relied upon by County to measure the Business Development Grant Program, the expenditure of the Grant Funds, or the performance by Recipient is untrue in any material respect when made;
    - iii. Recipient fails to comply with any term or condition set forth in this Agreement;
    - iv. A petition, proceeding, or case is filed by or against Recipient under federal or state bankruptcy, insolvency, receivership, or other law; or

**AMERICAN METAL SPECIALTIES, INC.**

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- v. Recipient fails to make sufficient progress on the Project as determined by County in its sole discretion.
  - b. **County's Default.** County will be in default under this Agreement if County fails to perform a material obligation under this Agreement; provided, however, that failure to pay the Grant Funds due to lack of appropriation shall not constitute a default of County.
8. **Remedies.**
- a. **County's Remedies.** In the event of Recipient's default, County may, at its option, pursue any or all remedies available to it under this Agreement, at law or in equity, including, but not limited to, (1) withholding the Grant Funds until compliance is achieved; (2) requiring reimbursement of the Grant Funds in the case of omissions or misrepresentations in financial or programmatic reporting; (3) requiring the return of any Grant Funds used by Recipient in violation of this Agreement; (4) terminating this Agreement, following thirty (30) days' written notice to Recipient with an opportunity to cure; (5) declaring Recipient ineligible to receive future awards from County; or (6) initiating an action or proceeding for damages or for declaratory or injunctive relief.
  - b. **Recipient's Remedies.** In the event of County's default, Recipient may, at its option, (1) terminate this Agreement, following thirty (30) days' written notice to County with an opportunity to cure, and/or, (2) subject to the limits of applicable law and this Agreement, require reimbursement of eligible costs incurred in accordance with this Agreement, less any claims County may have against Recipient. In no event will County be liable to Recipient for expenses related to termination of this Agreement or for any indirect, incidental, consequential, or special damages.
9. **Administrative Requirements.**
- a. **Accounting.** All costs incurred by recipient under this Agreement should be recorded in compliance with generally accepted accounting principles, international financial reporting standards, and/or governmental accounting standards.
  - b. **Monitoring.** County and its duly authorized representatives shall have access to the financial records, books, documents, papers, plans, records of shipments, payments, and writings of Recipient that are pertinent to this Agreement, whether in paper, electronic, or other form, to perform examinations and audits and make excerpts and transcripts. County and its duly authorized representatives shall also have access to conduct onsite or offsite visits for the purpose of monitoring. County may take photographs of funded items during such visits.
  - c. **Record Retention.** Recipient will retain and keep accessible all financial records, books, documents, papers, plans, records of shipments, payments, and writings for a minimum of six (6) years, or such longer period as may be required by applicable state law, following expiration or termination of this Agreement, or until the conclusion of any audit, controversy, or litigation arising out of or related to this Agreement, whichever date is later.
  - d. **Change in Ownership.** Recipient is required to notify County, in writing, if Recipient intends to sell its business to another entity or otherwise transfer ownership during the term of this Agreement.
  - e. **Closeout.** County will closeout this award when County determines that all applicable administrative actions and all required work have been completed by Recipient.
10. **Compliance with Applicable Law.** Recipient shall comply with all applicable federal, state, and local laws, regulations, executive orders, and ordinances applicable to this Agreement, as they may be amended from time to time, including, but not limited to, (i) Titles VI and VII of the Civil Rights Act of

**AMERICAN METAL SPECIALTIES, INC.**

Grant Agreement – Business Development Grant Program FY25/26

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1964, as amended; (ii) Sections 503 and 504 of the Rehabilitation Act of 1973, as amended; (iii) the Americans with Disabilities Act of 1990, as amended; (iv) Executive Order 11246, "Equal Employment Opportunity," as amended; (v) the Health Insurance Portability and Accountability Act of 1996; (vi) the Age Discrimination in Employment Act of 1967, as amended, and the Age Discrimination Act of 1975, as amended; (vii) the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended; (viii) all regulations and administrative rules established pursuant to the foregoing laws; and (ix) all other applicable requirements of federal and state civil rights and rehabilitation statutes, rules, and regulations.

**11. General Provisions.**

- a. **Indemnification.** Recipient agrees to indemnify and hold County and its elected officials, officers, employees, and agents harmless with respect to any claim, cause, damage, action, penalty, or other cost (including attorney and expert fees) arising from or related to (i) the negligent or willful acts of Recipient or its employees, its agents, or those under its control; or (ii) the acts or omissions of Recipient in performing under this Agreement including, but not limited to, any claim by state or federal funding sources that Recipient used funds for an ineligible purpose. Recipient is responsible for the acts of its agents and employees, and County assumes no liability or responsibility with respect to the acts of Recipient or its employees, its agents, or those under its control.
- b. **Assignment.** This Agreement may not be assigned in whole or in part without the prior express written approval of County.
- c. **Independent Status.** Recipient is independent of County and will be responsible for any federal, state, or local taxes and fees applicable to the Grant Funds. Recipient is not an agent of County and, except as set forth herein, undertakes this work independent of the control and direction of County. Recipient shall not seek or have the power to bind County in any transaction or activity.
- d. **Notices.** Any notice provided for under this Agreement shall be deemed given if it is in writing and (1) delivered personally to the addressee; (2) sent by certified mail, return receipt requested; (3) sent by commercial delivery service (such as Federal Express); (4) sent by electronic mail with confirmation (such as a return receipt) that it was delivered, accessed, downloaded, or printed.
- e. **Dispute Resolution.** The parties will attempt in good faith to informally resolve any dispute arising out of this Agreement. This may be done at any management level, including at a level higher than persons directly responsible for administration of this Agreement. In addition, the parties may agree to utilize a jointly selected mediator to resolve the dispute short of litigation. Each party will bear its own costs incurred for any mediation.
- f. **Governing Law.** This Agreement, and all rights, obligations, and disputes arising out of it, shall be governed and construed in accordance with the laws of the State of Oregon and the ordinances of Clackamas County without regard to conflict of law principles. Any claim, action, or suit between the parties that arises out of or relates to this Agreement shall be brought and conducted solely and exclusively in the Circuit Court of the State of Oregon for Clackamas County; provided, however, that, if any such claim, action, or suit may be brought in a federal forum, it shall be brought and conducted solely and exclusively in the United States District Court for the District of Oregon. In no event shall this section be construed as a waiver by County of any form of defense or immunity, whether sovereign immunity, governmental immunity, immunity based on the Eleventh Amendment to the United States Constitution, or otherwise, from any claim or from the jurisdiction of any court. Recipient consents to the personal jurisdiction of the courts referenced in this section.
- g. **Severability.** If any provision of this Agreement is found to be illegal or unenforceable, this Agreement nevertheless shall remain in full force and effect, and the offending provision shall be stricken.

**AMERICAN METAL SPECIALTIES, INC.**

Grant Agreement – Business Development Grant Program FY25/26

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- h. **Counterparts.** This Agreement may be executed in any number of counterparts, all of which together will constitute one and the same agreement. Facsimile or electronic signatures shall be valid as original signatures.
  - i. **Third-Party Beneficiaries.** Except as expressly provided in this Agreement, there are no third-party beneficiaries to this Agreement. The terms of this Agreement may be enforced only by the parties.
  - j. **Binding Effect.** This Agreement shall be binding on the parties and their successors.
  - k. **Integration.** This Agreement contains the entire agreement between the parties and supersedes all prior written or oral discussions or agreements.
  - l. **No Attorney Fees.** In the event any arbitration, action, or proceeding, including any bankruptcy proceeding, is instituted to enforce any term of this Agreement, each party shall be responsible for its own attorney fees and expenses.
  - m. **Debt Limitation.** This Agreement is subject to the county debt limitation set forth in Article XI, section 10, of the Oregon Constitution, and is contingent upon funds being appropriated to carry out its provisions.
  - n. **Necessary Acts.** Each party shall execute and deliver to the other all such further instruments and documents as may be reasonably necessary to carry out this Agreement.
12. **Insurance.** Recipient shall secure at its own expense and keep in effect during the term of this Agreement the insurance type and minimum coverage indicated below. These requirements do not in any way limit the amount or scope of Recipient's liability under this Agreement. Recipient shall provide proof of said insurance and name County as an additional insured on all required liability policies. Proof of insurance and notice of any material change should be submitted to the Grant Administrator or Program Manager at the contact information listed above.

<input checked="" type="checkbox"/> Required – Workers' Compensation: Recipient shall comply with the statutory workers' compensation requirements in ORS 656.017, unless exempt under ORS 656.027 or 656.126.
<input checked="" type="checkbox"/> Required – Commercial General Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence, with an annual aggregate limit of \$2,000,000 for Bodily Injury and Property Damage.
<input type="checkbox"/> Required – Professional Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per claim, with an annual aggregate limit of \$2,000,000 for damages caused by error, omission, or negligent acts.
<input checked="" type="checkbox"/> Required – Automobile Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per accident for bodily injury and property damage.
<input type="checkbox"/> Required – Abuse & Molestation endorsement with limits not less than \$1,000,000 per occurrence if not included in the Commercial General Liability policy.

13. **Agreement Documents.**

The following documents are attached to this Agreement and incorporated herein:

- Exhibit A: Approved Scope of Work: Project Description, Budget, Performance Outcomes, and Reporting

**AMERICAN METAL SPECIALTIES, INC.**

Grant Agreement – Business Development Grant Program FY25/26

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- Exhibit B: Original Application, Budget, and Required Submission Documents
- Exhibit C: Original County Notice of Funding Opportunity (NOFO) and related FAQs

In the event of a conflict between the terms of this Agreement and/or any of the attached Exhibits, interpretations shall be based on the following order of precedence:

- This Agreement
- Exhibit A
- Exhibit B
- Exhibit C

*(Signature Page Follows)*

**AMERICAN METAL SPECIALTIES, INC.**

Grant Agreement – Business Development Grant Program FY25/26

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IN WITNESS WHEREOF, the parties have caused this Agreement to be executed by their duly authorized officers.

CLACKAMAS COUNTY

AMERICAN METAL SPECIALTIES, INC.


By: \_\_\_\_\_  
Craig Roberts, Chair

By:  \_\_\_\_\_  
Davis Hayter, General Counsel; Project Manager

Dated: \_\_\_\_\_

Dated: 4/7/26

Approved as to form:

By:  \_\_\_\_\_  
County Counsel

Dated: April 27, 2026

## EXHIBIT A – SCOPE OF WORK

### Clackamas County Office of Economic Development Business Development Grant Program FY 2025-26

#### Grant Award Information

**RECIPIENT:**

American Metal Specialties, Inc.  
5226 SE International Way  
Milwaukie, OR 97222

**AMOUNT:**

\$85,000

#### Use of Grant Funds

The Grant Funds under this Agreement are lottery dollars. As such, they are subject to the limitations set forth in Article XV, section 4, of the Oregon Constitution and ORS 461.540. Use of lottery dollars is restricted to the following:

- (a) Creating jobs;
- (b) Furthering economic development in Oregon; or
- (c) Financing public education.

**The Grant Funds under this Agreement may be used for the following purposes:**

#### Project Scope

American Metal Specialties, Inc. is awarded a grant in the amount of \$85,000 to support a Capital project. Project activities and reported outcomes will occur at 5272 SE International Way, Milwaukie, OR 97222. Grant Funds will support building upgrades, including buildout of new office space. The goals of this project are to:

- Hire new employees
- Increase production
- Increase production efficiency
- Increase business spending on local inputs
- Increase revenue

## Project Budget

PROJECT BUDGET					
Line	Item Description	Quantity	Unit Price	Cost Basis	Total
1	Equipment: Air Compressor	1.00	\$ 26,163.00	EA	\$ 26,163.00
	Labor & Wages: Air Compressor Installation, Electrical	1.00	\$ 3,400.00	EA	\$ 3,400.00
2	Labor & Wages: Air Compressor Installation, Mechanical	1.00	\$ 10,400.00	EA	\$ 10,400.00
3	Rental Compressor Assembly & Freight	1.00	\$ 4,746.60	EA	\$ 4,746.60
4	Office Renovation: Architectural & Engineering	1.00	\$ 7,000.00	EA	\$ 7,000.00
5	Office Renovation: Building Fees & Permits	1.00	\$ 5,000.00	EA	\$ 5,000.00
6	Office Renovation: Testing & Safety Equipment / Requirements	1.00	\$ 2,025.00	EA	\$ 2,025.00
7	Miscellaneous (fees, materials)	1.00	\$ 3,289.00	EA	\$ 3,289.00
8	Contingency Allowance (allocable to items listed on budget)	1.00	\$ 10,000.00	EA	\$ 10,000.00
9	Site Work: Selective Demolition	1.00	\$ 7,200.00	EA	\$ 7,200.00
10	Site Work: Concrete	1.00	\$ 1,700.00	EA	\$ 1,700.00
11	Site Work: Thermal & Moisture Protection / Insulation	1.00	\$ 1,458.00	EA	\$ 1,458.00
12	Site Work: Doors & Windows	1.00	\$ 11,913.00	EA	\$ 11,913.00
13	Site Work: Finishes	1.00	\$ 26,497.00	EA	\$ 26,497.00
14	Site Work: Mechanical / HVAC	1.00	\$ 4,000.00	EA	\$ 4,000.00
15	Site Work: Electrical	1.00	\$ 11,768.00	EA	\$ 11,768.00
16	Site Work: Project Management	1.00	\$ 21,340.00	EA	\$ 21,340.00
17	Site Work: Cleaning / Other	1.00	\$ 1,346.00	EA	\$ 1,346.00
18	Contractor Fees	1.00	\$ 14,194.00	EA	\$ 14,194.00
<b>TOTAL PROJECT COST</b>					<b>\$ 173,439.60</b>
<i>Grant funds:</i>					\$ 85,000.00
<i>Matching funds:</i>					\$ 88,439.60

Recipient is committed to carrying out Project activities, as defined in the above scope and budget, in Clackamas County. Recipient is committed to maintaining business operations in Clackamas County for the term of this Agreement.

## Request for Grant Funds

Upon full execution of this Agreement, Recipient must submit all paperwork required by County to be paid as a vendor and remit an invoice for full payment of the Grant Funds.

## Reporting

During the term of this Agreement, Recipient shall provide, at minimum, one progress report and two outcomes reports using County-provided templates. These reports are due on the following schedule:

**September 25, 2026** – Progress Report Due

Reporting period: *Date of agreement signature – September 18, 2026*

**April 30, 2027** – Year 1 Outcomes Report Due

Reporting period: *Date of agreement signature – March 31, 2027*

**April 30, 2028** – Year 2 Outcomes Report Due

Reporting period: *April 1, 2027 – March 31, 2028*

Recipient may also be asked to provide supplemental narrative information on Project activities and outcomes for use in public reports and marketing initiatives.

Reports shall be submitted to the following address:

Julia McCotter  
Clackamas County Office of Economic Development  
150 Beavercreek Road  
Oregon City, OR 97045  
503-742-4399  
jmccotter@clackamas.us

## Detailed Eligibility

**Legal business name**

American Metal Specialties, Inc.

**Business DBA**

N/A

**Business Website**

N/A

**Oregon Secretary of State ID number**

249777-87

**Incorporation date**

1991-05-30

**Corporate structure**

Corporation (s-corp)

**North American Industry Classification System (NAICS) code**

332322

**Industry name**

Custom metal manufacturing / fabrication

**Primary business address**

5226 SE International Way Milwaukee, OR 97222

**Project location address**

5272 SE International Way Milwaukee, OR 97222

**How does your business meet the criteria for a traded-sector business?**

American Metal Specialties, Inc. ("AMS") meets the definition of a "traded-sector business" for the following reasons: (1) AMS is a "Clackamas County business" because it has maintained its' principal place of business within the county (specifically, the city of Milwaukee) for over 34 years, (2) AMS "produces or manufactures goods in Clackamas County" because it manufactures and produces metal goods and related components for

## EXHIBIT B: Original Application, Budget, and Required Submission Documents

it's customers from its place of business in Milwaukee, and (3) AMS "sells or exports those goods outside the county and its immediate surroundings" because AMS primarily ships completed manufactured goods to customers that are located in other states (e.g., Texas) and countries (e.g., Korea).

### **Total project budget**

\$616,440.00

### **Total grant funds requested**

\$100,000.00

### **What is the source of your matching funds for this project?**

Grant funds will be matched with a combination of company capital reserves and reallocated monthly net income proceeds. The attached proof of funds shows a recent bank statement balance for the company's checking account. However, AMS also maintains capital reserves in savings and a money markets account in order to preserve operations during industry slowdowns and/or pursue operational investment opportunities (e.g., purchasing new equipment).

**If awarded, grant funds will not be disbursed until Spring 2026. Grant funds can not be used to reimburse previous spending. Is your project feasible given this funding timeline?**

Yes

## Applicant Information

### **Full name(s) of business owner(s)**

Christopher G Hayter; Jeremy S Hayter

### **Full name of applicant contact**

Davis C Hayter

### **Title of applicant contact**

General Consultant

### **Email address of applicant contact**

dhayter@apiams.com

### **Primary phone number of applicant contact**

## EXHIBIT B: Original Application, Budget, and Required Submission Documents

503-803-3170

### **Brief summary of the business**

AMS is an ISO certified and ITAR compliant precision sheet metal fabrication and manufacturing company located in Milwaukie, Oregon. For the over 30 years it has been in business, AMS has provided high-quality and competitively-priced sheet metal manufacturing solutions with short lead times to customers operating in a variety of global industries such as aerospace, medical, semiconductor, and renewable energy sectors. AMS utilizes a range of equipment and machinery (e.g., CNC lasers, press brakes, welders, debur, etc.) and a workforce of over 50 employees to support its customers. AMS has continued to invest in increasing capacity and capabilities to maintain its competitive position in a dynamic and constantly-innovating industry. For example, AMS has recently built out an assembly division of its operations in the last few years increasing company employee count as a result and now delivers pre-assembled electrical and mechanical components to customers.

### **Grant Project Information**

#### **Please select your Project Type**

Capital project

#### **Project Category**

Physical Expansion

Production Expansion

County Business Retention

#### **Please provide a narrative summary of your project**

AMS seeks to build out offices in its facility located at 5272 SE International Way, Milwaukie, OR (Building #2), which is next door to AMS's primary building at 5226 SE International Way. This project would provide AMS with the work space needed to hire additional management, sales, strategy, and other administrative personnel to support existing and future operations. The Building #2 office improvements project includes renovating approximately 2,572 square feet of building space to incorporate a new entry vestibule with aluminum storefront, multiple offices, a conference room, an employee breakroom, and updated restrooms. These improvements would allow for the prospective hiring of 5-10 new employees over the next year including administrative staff and additional production workers to support AMS production operations. AMS currently uses Building #2's floorspace for laser cutting, bending, assembly, sanding, and

## EXHIBIT B: Original Application, Budget, and Required Submission Documents

inventory storage. However, Building #2 lacks the office space AMS needs for managerial, planning, and other administrative functions to support expanding company operations. Given the capital-intensive nature of AMS's business sector, company resources have predominantly been diverted to purchasing equipment and other investments directly related to production. Therefore, if awarded grant proceeds, AMS would be able to create the space the aforementioned administrative personnel would need while retaining capital for production investments (e.g., future equipment and/or additional personnel) to ensure it maintains its competitive position within the industry.

### **Please describe the business need for grant funding to assist your project**

Grant funding is crucial to bridge the financial gap for this capital-intensive renovation and hiring initiative. As indicated in prior answers, company resources are primarily allocated to investing in core manufacturing processes. However, the grant award would allow AMS to complete the Building #2 project in the immediate future using existing company reserves aligning with the grant's 100% match requirement leading to an accelerated project timeline, which would enable quicker hiring of additional company workforce and expedited ramp up of production. Without the grant support, the Building #2 project will be, at a minimum, delayed until greater company reserves can be accumulated and AMS will be forced to spend greater sums on this project instead of investing in production and workforce, ultimately risking competitive positioning in a fast-evolving industry while located in a state that increasingly has become more expensive to do business in. In essence, the grant funding would go toward ensuring AMS retains operations in Clackamas County, creates additional jobs, and contributes to local economic growth.

### **What outcomes do you expect to achieve as a result of this project?**

- Hire new employees
- Increase production
- Increase production efficiency
- Increase your business' spending on local inputs
- Increase revenue

### **Elaborating on your selected outcomes**

1. Hire New Employees: Completing Building #2 renovations will enable AMS to hire additional employees to fill the new office space because it would create the space needed to accommodate the additional workforce.
2. Increase Production + Production Efficiency: New office space in Building #2 allows hiring production support personnel, alleviating existing management personnel from managing all aspects of day-to-day

## EXHIBIT B: Original Application, Budget, and Required Submission Documents

operations to focus on company growth strategy and optimizations. This will enhance AMS capacity and output, reduce customer lead times, improve general production efficiencies, thereby leading to more customer purchases, expanded operations, and ultimately economic growth within the trade sector. 3. Increase Business Spending on Local Inputs: This project will directly increase business spending on local inputs via hiring local project contractors and engineers and sourcing project materials (e.g., lumber, paint, etc.) from local building supply vendors. Additionally, post-completion, AMS will buy office equipment locally and hire area residents for additional workforce roles, further stimulating local supply chains while creating employment opportunities in the local job market. 4. Increase Revenue: Offsetting project renovation costs with grant award proceeds would free up capital for AMS to invest in its workforce, R&D, and equipment--areas of operations that directly contribute to increasing company revenues.

**How many months do you expect it will take to fully implement your project? \***

16

**Please describe your project timeline in more detail**

AMS expects the renovations project to take 12-18 months. Assuming AMS is awarded grant funds in Spring of 2026, and absent delays with e.g., permit approvals and/or contractor lead times, AMS anticipates project completion in June/July of 2027. This project can be generally separated into two phases: (1) planning and permitting and (2) project work. The first phase of the project, starting approximately March of 2026 and ending in June of 2026, would consist primarily of permitting and planning. Specifically, AMS would curate finalized architectural plans, select a winning contractor proposal, and apply for required building permits and approvals. AMS expects to have an accurate forecast of the remaining time to completion upon completion of this first planning and finalization phase. Phase 2 will consist of contractor project work to complete the scope of renovations finalized and approved in Phase 1, which is roughly estimated to take 12 months.

**If your project is awarded partial funding, what project activities and costs would you prioritize to achieve your desired outcomes?**

AMS would prioritize building out offices (likely lesser in quantity/scope of work) and a conference room area to still create a space for AMS's sought additional workforce to occupy and be able to work.

**Attestation**

Yes

EXHIBIT B: Original Application, Budget, and Required Submission Documents

**Name of Attesting Corporate Officer \***

Chris G Hayter

EXHIBIT B: Original Application, Budget, and Required Submission Documents

INFORMATION				
Business name:	American Metal Specialties, Inc.			
Project type:	Capital Project			
Grant funding request:	\$100,000.00			
Matching funds provided:	\$516,440.00			
BUDGET ATTESTATIONS (select from dropdown)				
I understand that my business is responsible for sourcing funds outside of this grant request to pay for at least half of my total project costs.	Yes			
I understand that any awarded grant funds will not be disbursed until Spring/Summer 2026, and that grant funds can not be used to reimburse costs that are incurred before grant funds are approved and disbursed.	Yes			
I attest that this project budget does not include any line items that have already been purchased, nor can it include line items that will be purchased prior to the grant application deadline.	Yes			
I attest that funds included in this project budget will be spent on Clackamas County-based activities, assets, and/or workforce. I understand that no project funds may be spent on workforce or capital assets based in a non-Clackamas County business location.	Yes			
PROJECT BUDGET				
Line Item Description	Quantity	Unit Price	Cost Basis	Total
1 Construction -- Labor & Wages	1.00	\$ 98,000.00		\$ 98,000.00
2 Construction -- Material	1.00	\$ 18,326.00		\$ 18,326.00
3 Construction -- Subcontractor Services	1.00	\$ 410,977.00		\$ 410,977.00
4 Construction -- Equipment	1.00	\$ 1,865.00		\$ 1,865.00
5 Construction -- Other	1.00	\$ 5,120.00		\$ 5,120.00
6 Construction -- General Contractor Fees	1.00	\$ 62,152.00		\$ 62,152.00
7 Architectural & Engineering Services (Allowance)	1.00	\$ 10,000.00		\$ 10,000.00
8 Building Permits (Allowance)	1.00	\$ 10,000.00		\$ 10,000.00
<b>TOTAL PROJECT COST</b>				<b>\$ 616,440.00</b>
<i>Maximum grant funding request for this project:</i>				\$ 100,000.00



P.O. Box 1000  
Saint Paul, Minnesota 55101-0000

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AMERICAN METAL SPECIALTIES INC  
2400 NE CENTURY BLVD  
HILLSBORO OR 97124-6593



**Business Statement**

Account Number: [REDACTED]

Statement Period:  
Sep 2, 2025  
through  
Sep 30, 2025

Page 1 of 23

To Contact U.S. Bank

24-Hour Business Solutions: 800-673-3555

U.S. Bank accepts Relay Calls  
Internet: usbank.com

**U.S. BANK PLATINUM - BUSINESS CHECKING**

U.S. Bank National Association

Member FDIC

Account Number [REDACTED]

**Account Summary**

	# Items	\$		Number of Days in Statement Period	
Beginning Balance on Sep 2		\$	614,861.68		30
Customer Deposits	8		183,545.23		
Other Deposits	50		551,316.33		
Other Withdrawals	12		483,113.10		
Checks Paid	144		435,558.97		
<b>Ending Balance on Sep 30, 2025</b>		<b>\$</b>	<b>431,051.17</b>		

**Customer Deposits**

Number	Date	Ref Number	Amount	Number	Date	Ref Number	Amount
	Sep 2	8316205368	15,801.43		Sep 16	8015494575	7,790.10
	Sep 8	8015589025	38,147.09		Sep 22	8015353675	39,399.90
	Sep 9	8314874484	20,130.82		Sep 26	9212333904	22,792.05
	Sep 12	9213601917	14,774.40		Sep 29	8015219812	24,709.44
				<b>Total Customer Deposits</b>			<b>\$ 183,545.23</b>

**Other Deposits**

Date	Description of Transaction	Ref Number	Amount
Sep 2	Electronic Deposit REF=252410152642210N00	From [REDACTED] 0462850888PAYMENT 45830	\$ 282.50
Sep 2	Electronic Deposit REF=252410109658320N00	From [REDACTED] 24166626CORPPAY 4292	700.00
Sep 2	Electronic Deposit REF=252410095807320N00	From [REDACTED] 132327000PAYMENTS 550006348010241	789.00
Sep 2	Electronic Deposit REF=252410130397830N00	From [REDACTED] 7010532275PAYMENT PMX0149304	37,601.30
Sep 3	Electronic Deposit REF=252460073564490N00SD	From [REDACTED] 293037030450002447220020095856	493.75
Sep 3	Electronic Deposit REF=252460013975090N00	From [REDACTED] 9200502235ACH Pmt 11186106886	495.20
Sep 3	Electronic Deposit REF=252460120597030N00SD	From [REDACTED] 3300819956100431212000200138442025	3,036.00
Sep 3	Electronic Deposit REF=252410082337390N00	From [REDACTED] P980602831ACH PAY AMS INVOICES	37,820.50
Sep 4	Electronic Deposit REF=252470152544510N00SD	From [REDACTED] 3270980504CORP PMT 3000054053	9,364.95
Sep 5	Electronic Deposit REF=252470190538070N00	From [REDACTED] 2144920359CNX US ACHUS22-2000007104	54.72
Sep 5	Electronic Deposit REF=252480087088400N00SD	From [REDACTED] 1930600424ACH PMT 00AMER ME	1,265.00

Products and services available in U.S. only. Eligibility requirements and restrictions apply. For additional information, contact a U.S. Bank branch or call 800-872-2657.



## Notice of Funding Opportunity (NOFO)

# Clackamas County Office of Economic Development

## Business Development Grant Program

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### Program Description

Traded sector businesses—those competing in markets beyond the local area—are invited to apply for funding designated to help them grow!

In April 2024, the Clackamas County Board of Commissioners approved the Business Development Grant Program with the goals of supporting traded-sector business activity (e.g. expansion of operations, efficiencies, technological advancements, etc.), retaining Clackamas County-based operations for existing businesses, and/or attracting new businesses to relocate operations to Clackamas County. Funding will be provided for either capital investments or workforce development projects and must be matched 100% or more by the awardee.

### Award Information

Funding Source:	State lottery dollars
Funding Amount:	Individual Award Maximum \$100,000 (awards may be less); \$650,000 total funding available this cycle. Funding is contingent upon the execution of a grant agreement. If an approved recipient cannot finalize their agreement, funds may be offered to approved alternates.
Grant Period of Performance:	Approximately 6-18 months from agreement execution (execution estimated Spring 2026), depending on project. Some projects may be longer.
Reporting Requirements:	Reporting requirements will vary by project type and will be negotiated with each awardee prior to agreement execution. Reporting will be sufficient to ensure awarded amounts are expended on eligible costs and that the project, as described in the agreement, has been completed.
Submission Method:	Complete and submit application electronically via the <a href="#">official web form</a> . Paper applications will not be accepted.
Application Open Period:	September 4, 2025 at 9am Pacific Time – October 13, 2025 at 5pm Pacific Time.



	Complete submissions, including all required documents, must be received by 5pm on October 13 <sup>th</sup> to be considered responsive. Complete submissions include all required supporting documentation in addition to the application. Incomplete applications will not be considered.
Program Contact:	4biz@clackamas.us, (503) 742-4BIZ (4249)
Informational Webinar:	September 16, 2025 at 3:30pm Pacific Time <u>Registration required</u>
Match Requirement:	100% or more

## Background

Clackamas County was allocated State lottery dollars for economic development and this Business Development Grant Program is an expression of that constitutional purpose for State lottery funds.

## Eligibility & General Requirements

The following criteria must be met in order for your application to be deemed eligible for review. This is a competitive grant program; not all eligible applications will be funded.

### **Location and Age.**

Your business must have operations within Clackamas County or seek to relocate to or establish additional operations within Clackamas County. The business must be “established,” which means it is at least two years old, though it needn’t have been located in Clackamas County for two years if seeking to move existing operations into the county.

### **Traded Sector**

Your business must be a *traded-sector business*, defined as *Clackamas County businesses producing or manufacturing goods in Clackamas County AND selling or exporting those goods outside the county and its immediate surroundings (e.g. manufacturing, food processing, etc.).*

### **Project Types**

Your proposal must be for a capital project or for a workforce development project. No other project types will be considered.

Capital projects may include:

- Purchase of capital assets that meet a business need, expand production, increase efficiency, or otherwise lead to business growth. Capital assets may include machinery, equipment, software, etc.
- Site development, improvement, or other construction that is directly related to relocation, expansion, and/or business growth.



Capital project requests may also include any fees, licenses, delivery costs, taxes, installation, utility hookups, etc. directly associated with the purchase to bring the capital project online operationally and these costs should be broken out in your budget.

Workforce development projects include the training, hiring, and/or retention of employees. Examples of workforce development projects include but are not limited to:

- Training for employees to learn a new or updated technology, equipment or process, employer-specified or industry-specific skills;
- Train-the-trainer instruction to build the capacity of businesses;
- Permanent hiring of new employee(s) to increase production, expand product lines, bring outsourced work in-house, or otherwise meet existing and future demand.

#### ***Match Requirements***

You must provide proof of secured match of at least 100% of the amount requested, meaning that only half of the funding for your proposed project may come from this grant. Your business must pay the other half of your project costs.

Match may come from:

- Existing business cash
- A loan or investor commitment (with documentation)
- A separate, already awarded grant

#### ***Secretary of State Registration***

Your business must have an active business registration with the Oregon Secretary of State. You will need your Oregon Secretary of State identification number to complete this application. This requirement includes business applicants looking to move operations or establish operations into Clackamas County from outside of Oregon.

#### ***Code compliance***

You may be disqualified from this program if the County finds you are out of compliance with any applicable business codes or owe back taxes without an approved payment plan.

#### ***Participation Restrictions***

Each business may only apply once per application cycle and may not apply to this grant program again if you have previously received an award funded with lottery dollars of any amount. Previous grant recipients may not apply for additional funding.

#### ***Trade secrets and your application***

Since applications submitted under this NOFO are subject to public records requests, please clearly mark any included trade secrets as '(TRADE SECRET)' in your responses. All identified trade secrets will be redacted when responding to public records requests.



***Only business applicants***

Grants will be awarded to businesses, not individuals, so please apply with the official name of your business as registered with the Oregon Secretary of State.

***Unallowable costs***

Indirect costs are not funded through these awards and should not be part of your budget request. Existing staff costs (wages, benefits) are not allowable grant expenses, except for those hours spent in grant-funded training (e.g. training or skill development for a workforce development project, training on new equipment for a capital project).

***Debt(s)***

This grant may not be used to pay debts on already-implemented projects. This grant is intended for new projects only.

## Application and Submission Information

To apply, complete the [official online application](#). Applications sent through mail or email will not be accepted. The full list of application questions is provided at the end of this NOFO. In your application, provide as much information as needed to thoroughly answer questions and convey information; however, please keep answers as clear and concise as possible. The application is broken up into the following sections:

***Base Eligibility***

On the first page of the application, you will be required to complete a basic eligibility screening questionnaire. The main application will load for any applicants who meet the base eligibility criteria. Answer these questions honestly – you will be required to support your statements with documentation in the main application.

***Detailed Eligibility***

In this section of the application, you will be asked to provide more information to validate your eligibility for funding. It is possible for an applicant to be deemed ineligible even if they appear to meet the base eligibility criteria in the screening questionnaire before this section of the application. Full eligibility requirements are listed in this NOFO, above.

***Application Information***

In this section, you will provide your contact information and summary information about your business.

***Grant Project Information***

In this section, you will provide detailed information about the project for which you are seeking grant funding. You will select your project type and categories, describe your need for grant funding, select and discuss your expected outcomes, provide your project timeline, and explain more about your project budget. This section is your primary opportunity to make a compelling case for getting your project funded.



### ***Attachments***

You will need to provide your project budget, using the required budget template. The template must remain in .xlsx file format in order for your file to upload.

You will also need to provide up to 5 pages of documentation to prove the source(s) and availability of your matching funds. Matching funds are an eligibility requirement; applications that do not sufficiently prove source and availability of matching funds will not be deemed eligible for this program.

### ***Attestation***

You'll be required to sign the attestation on the application. Only a corporate officer who is authorized to legally bind the business may sign the attestation. It is your responsibility to carefully review the attestations before signing. Fraudulent applications will be referred to law enforcement.

## Evaluation

Your application will be evaluated by a review committee comprised of Clackamas County staff. Based on the criteria outlined in this NOFO, the review committee will score applications for Project Fit, Need for Funding, Economic Impact, and Project Feasibility. The review committee will recommend projects to the Board of County Commissioners (BCC) for funding and will also propose an alternates list of the top applications that did not make the initial funding cut. The alternates list will serve as a waitlist in the event a BCC-approved grant recipient is unable to finalize their funding agreement due to unforeseen changes in the business, external factors rendering a project unfeasible, or other extenuating circumstances.

**The BCC has sole authority to determine funded projects and the alternates list.** The BCC may choose to disregard or modify the recommendations of the review committee for funded projects or alternates at its discretion. The funding recommendation packet presented to the BCC will include both the proposed awardees and the alternates list for simultaneous review and approval. The BCC-approved alternates list remains valid until all funds are awarded or the funding cycle closes, at the discretion of the Clackamas County issuing department.

Only applications considered responsive will be evaluated. "Responsive" applications are those which comply with the requirements in this NOFO. Applications that do not meet the eligibility requirements or applications that are received late and/or incomplete will not be considered.

**Timeline.** Applications will be reviewed in November/December 2025, with recommendations for funding and the alternates list made to the BCC by January/February 2026. Awardees and alternates will be notified by email only after the BCC has finalized their decisions. In the event an approved grant recipient cannot finalize their funding agreement, the County will contact the next alternate(s) on the BCC-approved list, in ranked order, to negotiate a funding agreement. This process will continue until all allocated funds are awarded or the alternates list is exhausted.



## Notification of Applicants

Applicants selected for funding will be notified by email only after the Board of County Commissioners (BCC) has finalized its decisions. Applicants placed on the alternates list will also be notified by email, informing them of their status as potential awardees should funding become available. The notification will clarify that placement on the alternates list does not guarantee funding and that alternates will be contacted in ranked order only if an approved grant recipient is unable to finalize their funding agreement. All other applicants will receive a courtesy email notifying them that their application was not selected for funding or the alternates list.

Applicants on the alternates list may be asked to provide updated information (e.g., proof of match or project status) if contacted to finalize a funding agreement, to ensure the project remains viable.

After County staff have notified awardees, staff and awardees will negotiate a final scope of work for the project, including timelines for the grant period specific to each project. County Finance, County Counsel, and the BCC will approve final grant documents.

Applicants placed on the alternates list who do not receive funding will be notified after all awardee funding agreements have been finalized. Applicants placed on the alternates list who do not receive funding may apply for future grant cycles and will not receive priority status in any future applications.

## Non-discrimination

Per the Civil Rights Act of 1964, no person shall, on the basis of race, color, or national origin, be excluded from participation, be denied the benefits of, or be subjected to discrimination under any County program, service or activity.



## Application Questions

### Base Eligibility Screening Questionnaire

1. How many years has your business been operating?
2. Does your business have an operating location in Clackamas County?
3. Does your business produce / manufacture goods in Clackamas County?
4. Does your business sell / export goods OUTSIDE of Clackamas County?
5. Is your business registered and current with the Oregon Secretary of State?
6. This grant program requires a 100% match on all grant funds, meaning that only half of the funding for your proposed project may come from this grant. Your business must pay the other half of your project costs. Are you able and prepared to meet this match requirement?

### Detailed Eligibility

1. Legal business name:
2. Business DBA (if applicable):
3. Business website (if applicable):
4. Oregon Secretary of State ID number (this is different from your federal EIN):
5. Incorporation date:
6. Corporate structure:
7. North American Industry Classification System (NAICS) code:
8. Industry name:
9. Primary business address:
10. Project location address:
11. How does your business meet the criteria for a traded-sector business? *1,000 character limit*
12. Total project budget (pull this directly from your completed budget template):
13. Total grant funds requested:
14. What is the source of your matching funds for this project? *1,000 character limit*
15. If awarded, grant funds will not be disbursed until Spring 2026. Grant funds can not be used to reimburse previous spending. Is your project feasible given this funding timeline?

### Applicant Information

16. Full name(s) of business owner(s):
17. Full name of applicant contact:
18. Title of applicant contact:
19. Email address of applicant contact:
20. Primary phone number of applicant contact:
21. Brief summary of the business *1,000 character limit*

### Grant Project Information

22. Please select your Project Type:



- Workforce Development Project
  - Capital Project
23. Project Category (*please select all that apply*):
- Multi-site Development Assistance: Your business does not have a location in Clackamas County and seeks to establish a new location in Clackamas County
  - Relocation: You seek to relocate your existing business into Clackamas County
  - Physical Expansion: Your business is currently located in Clackamas County and seeks to relocate to a larger facility within the county or expand your existing facilities in the county
  - Production Expansion: Your business seeks to expand production capacity through purchasing new equipment, hiring additional employees, providing employee technical training, and/or other capital investment(s)
  - County Business Retention: Your business is currently located in Clackamas County and seeks funds to assist with a project intended to retain operations in the county
24. Please provide a narrative summary of your project (*2,000 character limit*)
25. Please describe the business need for grant funding to assist your project (*2,000 character limit*)
26. What outcomes do you expect to achieve as a result of this project? Expected outcomes will be included in grantee funding agreements and tracked throughout grant projects. Select all that apply:
- Hire new employees
  - Increase production
  - Increase production efficiency
  - Decrease production waste
  - Improve environmental efficiency of production (e.g. decrease water usage, lower carbon footprint, etc.)
  - Increase your business' spending on local inputs
  - Expand product line / offer additional products
  - Increase revenue
27. Elaborating on your selected outcomes, please describe in more detail the expected local economic impacts of your project (*2,000 character limit*)
28. How many months do you expect it will take to fully implement your project?
29. Please describe your project timeline in more detail (*1,000 character limit*)
30. If your project is awarded partial funding, what project activities and costs would you prioritize to achieve your desired outcomes? *1,000 character limit*

## Upload Attachments

31. Using the required template, please attach your project budget below. You may find the required budget template [HERE](#).
32. Please attach your proof of matching funds below (PDF format only). Please exclude any private information that is not necessary for assessing your match (e.g. full bank account numbers, full routing numbers, check numbers, social security numbers, etc.) You may



upload multiple PDFs, but please limit your submission(s) to 5 pages TOTAL across all uploads.

## Attestation

33. By signing this application, I affirm:

- I am legally authorized to bind the applicant business; and
- The information provided in this application, and any supporting documents provided (if applicable), are true and complete to the best of my knowledge; and
- I understand I may be contacted by CCOED staff to provide additional information or documentation which CCOED, in its sole discretion, may require to complete my application and/or establish my eligibility; and
- I do not owe back taxes to any governmental agency or, if back taxes are owed, a written agency payment plan is in place; and
- I understand any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to law enforcement referral for further investigation or result in the disqualification of my application as unresponsive.
- I understand my application may be denied if it's determined that there are current code violations, or that I have received warnings to rectify code violations that are deemed hazardous or unsafe to my business, its employees or the community.
- I understand I may be required to refund or reimburse all or part of the grant proceeds not used for their intended purposes, as stated in the Application, Scope of Work and/or Funding Agreement.

Name of Attesting Corporate Officer:

**APPLY HERE**

## Frequently Asked Questions (FAQ)

# Clackamas County Office of Economic Development

## Business Development Grant Program

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### **1. What is the purpose of the county grant funding program?**

The county grant funding program is designed to provide funding for capital, capacity or workforce development projects to various sized traded sector businesses looking to relocate, expand or retain their operations in Clackamas County.

### **2. Who is eligible to apply for a grant?**

To be eligible to apply, a business must:

- Be a traded sector business – a business producing or manufacturing goods in Clackamas County and selling those goods *outside* of Clackamas County and its immediate surroundings
- Have been a registered business for at least two years
- Be in good standing with the State
- Provide proof of at least 100% match for their funding request

For full details on eligibility and requirements, refer to the [Notice of Funding Opportunity \(NOFO\)](#).

### **3. What types of projects or activities can be funded?**

Eligible projects must:

- Increase production of locally-manufactured goods;
- Fund either a capital project or a workforce development project;
- Support business improvement, relocation, retention and/or expansion efforts, and
- Contribute to the Clackamas County's economic development.

Eligible business costs include only those costs required to carry out a project as determined in the application process.

For full details on project and application requirements, including Project Types and Project Categories, refer to the [Notice of Funding Opportunity \(NOFO\)](#).

#### **4. How do I apply for a grant?**

To apply:

1. Review the grant guidelines and eligibility requirements outlined in the [Notice of Funding Opportunity \(NOFO\)](#) to ensure your business and project are eligible for funding. The full list of application questions can be found at the end of the NOFO.
2. Prepare your application, including:
  - a. Responses to the application questions (it's recommended that you prepare these in a separate document as the application form does not allow you to save a draft)
  - b. Project budget using the required template in .xlsx format (located alongside other program documents [here](#))
  - c. Proof of matching funds, as detailed under *Match Requirements* on page 3 of the NOFO (please be prepared to upload in PDF format, with a maximum of 5 pages total)
3. Submit your complete application via the [official web form](#) by 5pm on October 13, 2025, along with any required supporting documents. Late and incomplete applications will not be considered for funding. Application materials sent by post, email, or any means other than the official application web form will not be considered for funding.

For questions or general assistance, contact us at 503-742-4329 or at [4Biz@clacakamascounty.us](mailto:4Biz@clacakamascounty.us)

#### **5. What is the application deadline?**

Complete applications (including required documents) must be submitted via the official web form by 5pm on October 13, 2025.

It is highly recommended that you plan ahead and submit your application with enough time before the deadline to troubleshoot any technology, internet, and/or file issues – **late and/or incomplete applications will not be accepted for any reason.**

#### **6. What is the timeline for this program?**

Applications open on Thursday, September 4, 2025 at 9:00 AM Pacific Time.

Applications close at 5:00 PM Pacific Time on Monday, October 13, 2025.

Final award decisions are subject to the schedule of the Board of County Commissioners, and are anticipated to be announced by February 2026.

Funding agreements will be finalized in Spring 2026.

Funding will be deployed no later than June 30, 2026.

Program Period of Performance will begin at the execution of the grant funding agreement (Spring 2026) and run for approximately 6-18 months, depending on the unique project. Some projects may run longer.

Final Outcome Reports will be due approximately 24 months after the execution of the grant funding agreement.

### **7. How much funding can I apply for?**

You may request up to \$100,000 of funding through this program.

You will be required to provide proof of at least 100% matching funds from another source in order for your funding request to be considered. This means that only half of the funding for your proposed project may come from this grant. Your business must pay the other half of your project costs.

The County reserves the right to award partial funding. You will be asked in the application to list the project activities and costs which you would prioritize in the event your project is awarded partial funding.

### **8. How will grant applications be reviewed?**

Eligible grant applications will be reviewed by a committee comprised of Clackamas County staff. Eligible applications will be evaluated based on criteria such as:

- Alignment with program goals
- Project viability
- Economic impact of project
- Need for funding

After evaluating eligible applications, the Clackamas County staff review committee will recommend projects to the Board of County Commissioners (BCC) for final funding decisions. **The BCC has sole authority to determine funded projects.**

For more information on the evaluation criteria and process, refer to the [NOFO](#).

### **9. When will I be notified of the decision?**

Final award decisions are subject to the schedule of the Board of County Commissioners, and are anticipated to be announced by February 2026.

#### **10. What happens next if my application is approved?**

Awardees will be notified by email once the Board of County Commissioners (BCC) has finalized their funding decisions.

After County staff have notified awardees, staff and awardees will negotiate a Funding Agreement. The Funding Agreement is a contract between the County and the awardee, and includes elements such as a final scope of work for the project, approved project budget, timelines, and reporting requirements for the grant period specific to each project. County Finance, County Counsel, and the BCC will approve final funding agreements.

#### **11. What are the reporting requirements for grant recipients?**

Grant recipients will be required to submit progress reports and a final report at the end of the grant period. Receipts and other supporting documentation will be required to prove how the funds were used and the outcomes achieved. Depending on the unique nature of the project, other requirements will be discussed and stated in the grant funding agreement.

Specific reporting requirements for each awardee will be outlined in the awardee grant funding agreement based on project type, project categories, and the anticipated outcomes detailed in project applications.

#### **13. Where can I find more information about the grant program?**

The **Notice of Funding Opportunity (NOFO)** can be found on the Clackamas County Procurement page for Open Grant Opportunities:

<https://www.clackamas.us/procurement-process#opengrantopportunities>

The **application questions** can be found at the end of the NOFO, which is located on the Clackamas County Procurement page for Open Grant Opportunities:

<https://www.clackamas.us/procurement-process#opengrantopportunities>

The **application budget template** can be found on the Clackamas County Procurement page for Open Grant Opportunities: <https://www.clackamas.us/procurement-process#opengrantopportunities>

The **official application web form** can be found at:

<https://apps.clackamas.us/businessdevelopmentgrants/>

For more information, visit our website or contact The Office of Economic Development directly at 503-742-4biz or [4Biz@clacakamascounty.us](mailto:4Biz@clacakamascounty.us). We provide resources such as grant guidelines, application forms, and contact information for assistance.

**14. Whom should I contact if I have more questions?**

If you have additional questions or need further assistance, please contact us at 503-742-4biz or [4Biz@clacakamascounty.us](mailto:4Biz@clacakamascounty.us). We are available to answer clarifying questions and/or resolve technical issues with the application form.

**15. Can software count as a capital asset under the capital project type?**

Yes, purchases of non-physical capital assets such as software can qualify under the capital project type.

Qualifying capital projects involve capital purchases that meet a business need by contributing to business expansion, projected growth strategies, etc. (as stated in the Notice of Funding Opportunity).

**16. Is the matching funds commitment the same as a business collateral requirement?**

No, matching funds are not the same as collateral. The 100% match commitment requires that an applicant contribute their own dollars to pay for at least half of their project costs.

For example, if an applicant is proposing a project with a total cost of \$50,000, the maximum amount of grant funding that they can request in their application is \$25,000. The rest of the project costs must be covered by another source of funds which must already have been secured by the applicant.

Sources of matching funds may include existing cash on hand, pre-approved loans, already awarded grant funds, etc. Applicants must provide up to 5 pages of documentation to show the source and availability of their matching funds. Documentation must be submitted in PDF format, and should not include personal information that is not required to prove matching funds (i.e. applicants should redact any full account numbers, SSN, check numbers, etc.)

**17. Can I use another grant as my source of matching funds?**

You may use a separate, *already awarded* grant as a source of matching funds. You must explain in your application how your awarded grant funds are set to be used and any restrictions on those funds. You must clearly demonstrate how both the awarded grant funds and the funds you are applying for fit into one cohesive project.

Other grants which you have applied for but have not been awarded can not be used as a source of matching funds.

**18. Can I apply for a capital project if I am purchasing multiple pieces of equipment?**

Yes, if you are purchasing multiple pieces of equipment for a specific project you may include costs related to that equipment in your project budget. It is up to the applicant to clearly explain why each equipment purchase is related to the project, and ensure that the project narrative, expected outcomes, and budget all support this.

**19. Can I include money I've already spent on a project in my match commitment?**

No. Project budgets may only include expenses that have not yet been incurred.

If your application is for a phase or portion of a larger ongoing project, you *may* include information about the full project in your project narrative, expected outcomes, and other narrative sections of the application. In this case, it is still up to you to describe the need and impact of the portion of the project that is reflected in the budget.

**20. Can I include money in my match commitment that I *plan* to spend on a project before the funding agreements are finalized (estimated May 2026)?**

Yes. You may include in your **project match commitment** money that you plan to spend on the described project, so long as that spending is clearly detailed in the project budget and timeline, and so long as the spending occurs after the grant application deadline on 10/13/25. You will be required to submit financial documentation to show when project funds were spent.

Because grant funds can not be used for reimbursement or to pay off debt, you may not include in your **grant request** any money that will be spent before the funding agreements are finalized.

**21. Can home-based businesses apply for funds to make property improvements or building expansions?**

Property improvements and/or construction projects on privately owned residential properties (i.e. homes and properties which are zoned as residential) **do not** qualify for funding under this program.

**22. Why isn't my application going through when I click 'Submit application'?**

Before reaching out to County staff about an issue with the form, please do the following:

- Double-check that you have completed all required questions.

- Double-check that you have successfully uploaded your project budget in .xlsx format.
- Double-check that you have successfully uploaded your proof of matching funds in PDF file format.
- Confirm that your uploaded files do not exceed 10 MB in size.
- Confirm that your question responses do not exceed the stated character limit (including spaces).

To ensure that you do not lose your work in the event of a form error, please write your responses to the application questions in a separate, saved document prior to filling out the application form.

**23. Does software count as a “good” under the traded-sector definition?**

Yes, software that is produced in Clackamas County and sold outside of the county and its immediate surroundings would qualify as a traded-sector line of business.

**24. Are services that are sold outside of Clackamas County considered traded-sector?**

No, purely service-based businesses do not qualify as traded-sector under this program.

## GRANT AGREEMENT

**Program Name:** Business Development Grant Program  
**Program Number:** 600406

This Grant Agreement (this "Agreement") is between **Clackamas County**, a political subdivision of the State of Oregon ("County"), acting by and through its Office of Economic Development, and **Batish Home Bake LLC**, an Oregon for-profit entity ("Recipient").

### County Information

**Grant Administrator:**

Clackamas County Office of Economic Development  
150 Beavercreek Road  
Oregon City, OR 97045  
503-742-4238  
4biz@clackamas.us

**Program Manager:** Julia McCotter

Clackamas County Office of Economic Development  
150 Beavercreek Road  
Oregon City, OR 97045  
503-742-4399  
JMcCotter@clackamas.us

### Recipient Information

**Finance/Fiscal Representative:**

Sumeet Batish  
6005 Duniway Ave,  
Gladstone, OR, 97027  
503-816-6674

**Owner:**

Sumeet Batish  
6005 Duniway Ave,  
Gladstone, OR, 97027  
503-816-6674

**State of Oregon Business Registry Number:**

2321849-94

## RECITALS

County seeks to promote economic development by investing in capital, capacity, and workforce development projects for traded-sector businesses operating in Clackamas County.

On April 17, 2024, the Clackamas County Board of Commissioners ("Board") approved a Business Development Grant program with the goals of using lottery dollars to support business and workforce development activities, retaining Clackamas-County-based operations, and attracting businesses looking to relocate into Clackamas County.

On January 20, 2026, the Board approved the Business Development Grants, as recommended by the Review and Recommendation Committee, and instructed the Office of Economic Development to finalize funding agreements with the approved Recipients.

The total investment in the Business Development Grant Program from County's restricted fund allocation of lottery dollars in the 2025-26 fiscal year is \$650,000. The maximum lottery dollar funding for each grant is \$100,000. Grants may be for lesser amounts, and no single grant may exceed \$100,000.

Recipient submitted an application, attached as Exhibit B, for grant funds to be used for a Capital Project. County has agreed to award Recipient a portion of the requested grant funds to perform the work described in Exhibit A (the "Project").

NOW, THEREFORE, the parties agree as follows:

**AGREEMENT**

1. **Term.** This Agreement shall become effective on the date it is fully executed and shall expire on June 30, 2028, unless sooner terminated or extended pursuant to the terms hereof.

2. **Grant Funds.**

a. **Payment.** County agrees to pay Recipient a one-time lump sum not to exceed eighty-five thousand dollars (\$85,000.00) (the “Grant Funds”). Such payment is contingent on County receiving appropriations or other expenditure authority sufficient to allow County, in the exercise of its sole discretion, to make the payment.

b. **Use.** Recipient shall use the Grant Funds solely to complete the Project as described in Exhibit A, subject to the terms of this Agreement, the attached Exhibits, and all applicable laws and regulations including, but not limited to, the limitations set forth in Article XV, section 4, of the Oregon Constitution and ORS 461.540 for use of lottery dollars, which is the source of funds under this Agreement. Recipient shall use the Grant Funds solely for Project costs incurred during the period beginning **January 20, 2026** and ending **December 31, 2027** (the “Grant Period”), unless this Agreement is sooner terminated or the Grant Period is sooner extended pursuant to the terms hereof.

c. **Allowable Costs.** Recipient will incur only allowable costs in connection with the Project under this Agreement. A cost is allowable if it is reasonable and allocable, as described below.

i. **Reasonable.**

1. A cost is reasonable if, in its nature and amount, it does not exceed that which would be incurred by a prudent person in the conduct of competitive business. Reasonableness of specific costs must be examined with particular care in connection with firms or their separate divisions that may not be subject to effective competitive restraints. No presumption of reasonableness shall be attached to the incurrence of costs by Recipient. If an initial review of the facts results in a challenge to a specific cost by County, the burden of proof shall be upon Recipient to establish that such cost is reasonable.

2. What is reasonable depends upon a variety of considerations and circumstances, including:

- Whether it is the type of cost generally recognized as ordinary and necessary for the completion of the Project;
- Generally accepted sound business practices, arm's length bargaining, and federal and state laws and regulations;
- Recipient's responsibilities to the government, other customers, its owners, its employees, and the public at large; and
- Any significant deviations from Recipient's established practices.

ii. **Allocable.** A cost is allocable if it is assignable or chargeable to one or more cost objectives on the basis of relative benefits received or other equitable relationship. Subject to the foregoing, a cost is allocable under this Agreement if it:

1. Is incurred specifically for the Project as described in Exhibit A; or

2. Benefits both the Project and other work, and can be distributed among them in reasonable proportion to the benefits received.

- d. **Duplicate Funding.** Recipient may use funds other than the Grant Funds to complete the Project; provided, however, that Recipient may not use the Grant Funds for any Project costs that are budgeted to be or that have been paid for with other funds and would result in duplicate funding. The applicable portion of any rebate, allowance, or other credit relating to any Project costs received by or accruing to Recipient shall be credited to the Project either as a cost reduction or by cash refund to County.
  - e. **Return.** Any unspent Grant Funds must be returned to County within 30 days of the end of the Grant Period, the earlier termination of this Agreement, or the end of any extensions of the Grant Period. Unspent Grant Funds include those Grant Funds that have not been spent in accordance with the terms of this Agreement.
  - f. **Reimbursement.** County may require full or partial reimbursement of the Grant Funds if Recipient fails to deliver the Project as described in Exhibit A.
3. **Future Support.** County makes no commitment and assumes no obligation for future support of the Project.
  4. **Matching Funds.** Recipient is required to provide matching funds in the amounts specified in Exhibit A.
  5. **Amendments.** The terms of this Agreement may not be waived, altered, modified, supplemented, or amended, in any manner whatsoever, except by written instrument signed by both parties. Recipient must submit a written request for any amendment, including justification, to County at least forty-five (45) calendar days before expiration of this Agreement.
  6. **Termination.** This Agreement may be terminated prior to its expiration as follows:
    - a. At County's discretion, upon thirty (30) days' advance written notice to Recipient.
    - b. Upon a party's default under this Agreement, following thirty (30) days' written notice to the party with an opportunity to cure.
    - c. At any time upon mutual agreement by the parties.
    - d. Immediately upon written notice to Recipient that County lacks sufficient funds, as determined by County in its sole discretion, to continue to perform under this Agreement.

The termination of this Agreement, for any reason, shall not release Recipient from any obligation that has already accrued or that comes into effect due to such termination.

7. **Default.**

- a. **Recipient's Default.** Recipient will be in default under this Agreement upon the occurrence of any of the following:
  - i. Recipient fails to use the Grant Funds for eligible purposes described in Exhibit A;
  - ii. Any representation, warranty, or statement made by Recipient in this Agreement or in any documents or reports relied upon by County to measure the Business Development Grant Program, the expenditure of the Grant Funds, or the performance by Recipient is untrue in any material respect when made;
  - iii. Recipient fails to comply with any term or condition set forth in this Agreement;
  - iv. A petition, proceeding, or case is filed by or against Recipient under federal or state bankruptcy, insolvency, receivership, or other law; or

v. Recipient fails to make sufficient progress on the Project as determined by County in its sole discretion.

b. **County's Default.** County will be in default under this Agreement if County fails to perform a material obligation under this Agreement; provided, however, that failure to pay the Grant Funds due to lack of appropriation shall not constitute a default of County.

**8. Remedies.**

a. **County's Remedies.** In the event of Recipient's default, County may, at its option, pursue any or all remedies available to it under this Agreement, at law or in equity, including, but not limited to, (1) withholding the Grant Funds until compliance is achieved; (2) requiring reimbursement of the Grant Funds in the case of omissions or misrepresentations in financial or programmatic reporting; (3) requiring the return of any Grant Funds used by Recipient in violation of this Agreement; (4) terminating this Agreement, following thirty (30) days' written notice to Recipient with an opportunity to cure; (5) declaring Recipient ineligible to receive future awards from County; or (6) initiating an action or proceeding for damages or for declaratory or injunctive relief.

b. **Recipient's Remedies.** In the event of County's default, Recipient may, at its option, (1) terminate this Agreement, following thirty (30) days' written notice to County with an opportunity to cure, and/or, (2) subject to the limits of applicable law and this Agreement, require reimbursement of eligible costs incurred in accordance with this Agreement, less any claims County may have against Recipient. In no event will County be liable to Recipient for expenses related to termination of this Agreement or for any indirect, incidental, consequential, or special damages.

**9. Administrative Requirements.**

a. **Accounting.** All costs incurred by recipient under this Agreement should be recorded in compliance with generally accepted accounting principles, international financial reporting standards, and/or governmental accounting standards.

b. **Monitoring.** County and its duly authorized representatives shall have access to the financial records, books, documents, papers, plans, records of shipments, payments, and writings of Recipient that are pertinent to this Agreement, whether in paper, electronic, or other form, to perform examinations and audits and make excerpts and transcripts. County and its duly authorized representatives shall also have access to conduct onsite or offsite visits for the purpose of monitoring. County may take photographs of funded items during such visits.

c. **Record Retention.** Recipient will retain and keep accessible all financial records, books, documents, papers, plans, records of shipments, payments, and writings for a minimum of six (6) years, or such longer period as may be required by applicable state law, following expiration or termination of this Agreement, or until the conclusion of any audit, controversy, or litigation arising out of or related to this Agreement, whichever date is later.

d. **Change in Ownership.** Recipient is required to notify County, in writing, if Recipient intends to sell its business to another entity or otherwise transfer ownership during the term of this Agreement.

e. **Closeout.** County will closeout this award when County determines that all applicable administrative actions and all required work have been completed by Recipient.

**10. Compliance with Applicable Law.** Recipient shall comply with all applicable federal, state, and local laws, regulations, executive orders, and ordinances applicable to this Agreement, as they may be amended from time to time, including, but not limited to, (i) Titles VI and VII of the Civil Rights Act of

1964, as amended; (ii) Sections 503 and 504 of the Rehabilitation Act of 1973, as amended; (iii) the Americans with Disabilities Act of 1990, as amended; (iv) Executive Order 11246, "Equal Employment Opportunity," as amended; (v) the Health Insurance Portability and Accountability Act of 1996; (vi) the Age Discrimination in Employment Act of 1967, as amended, and the Age Discrimination Act of 1975, as amended; (vii) the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended; (viii) all regulations and administrative rules established pursuant to the foregoing laws; and (ix) all other applicable requirements of federal and state civil rights and rehabilitation statutes, rules, and regulations.

**11. General Provisions.**

- a. **Indemnification.** Recipient agrees to indemnify and hold County and its elected officials, officers, employees, and agents harmless with respect to any claim, cause, damage, action, penalty, or other cost (including attorney and expert fees) arising from or related to (i) the negligent or willful acts of Recipient or its employees, its agents, or those under its control; or (ii) the acts or omissions of Recipient in performing under this Agreement including, but not limited to, any claim by state or federal funding sources that Recipient used funds for an ineligible purpose. Recipient is responsible for the acts of its agents and employees, and County assumes no liability or responsibility with respect to the acts of Recipient or its employees, its agents, or those under its control.
- b. **Assignment.** This Agreement may not be assigned in whole or in part without the prior express written approval of County.
- c. **Independent Status.** Recipient is independent of County and will be responsible for any federal, state, or local taxes and fees applicable to the Grant Funds. Recipient is not an agent of County and, except as set forth herein, undertakes this work independent of the control and direction of County. Recipient shall not seek or have the power to bind County in any transaction or activity.
- d. **Notices.** Any notice provided for under this Agreement shall be deemed given if it is in writing and (1) delivered personally to the addressee; (2) sent by certified mail, return receipt requested; (3) sent by commercial delivery service (such as Federal Express); (4) sent by electronic mail with confirmation (such as a return receipt) that it was delivered, accessed, downloaded, or printed.
- e. **Dispute Resolution.** The parties will attempt in good faith to informally resolve any dispute arising out of this Agreement. This may be done at any management level, including at a level higher than persons directly responsible for administration of this Agreement. In addition, the parties may agree to utilize a jointly selected mediator to resolve the dispute short of litigation. Each party will bear its own costs incurred for any mediation.
- f. **Governing Law.** This Agreement, and all rights, obligations, and disputes arising out of it, shall be governed and construed in accordance with the laws of the State of Oregon and the ordinances of Clackamas County without regard to conflict of law principles. Any claim, action, or suit between the parties that arises out of or relates to this Agreement shall be brought and conducted solely and exclusively in the Circuit Court of the State of Oregon for Clackamas County; provided, however, that, if any such claim, action, or suit may be brought in a federal forum, it shall be brought and conducted solely and exclusively in the United States District Court for the District of Oregon. In no event shall this section be construed as a waiver by County of any form of defense or immunity, whether sovereign immunity, governmental immunity, immunity based on the Eleventh Amendment to the United States Constitution, or otherwise, from any claim or from the jurisdiction of any court. Recipient consents to the personal jurisdiction of the courts referenced in this section.
- g. **Severability.** If any provision of this Agreement is found to be illegal or unenforceable, this Agreement nevertheless shall remain in full force and effect, and the offending provision shall be stricken.

- h. **Counterparts.** This Agreement may be executed in any number of counterparts, all of which together will constitute one and the same agreement. Facsimile or electronic signatures shall be valid as original signatures.
  - i. **Third-Party Beneficiaries.** Except as expressly provided in this Agreement, there are no third-party beneficiaries to this Agreement. The terms of this Agreement may be enforced only by the parties.
  - j. **Binding Effect.** This Agreement shall be binding on the parties and their successors.
  - k. **Integration.** This Agreement contains the entire agreement between the parties and supersedes all prior written or oral discussions or agreements.
  - l. **No Attorney Fees.** In the event any arbitration, action, or proceeding, including any bankruptcy proceeding, is instituted to enforce any term of this Agreement, each party shall be responsible for its own attorney fees and expenses.
  - m. **Debt Limitation.** This Agreement is subject to the county debt limitation set forth in Article XI, section 10, of the Oregon Constitution, and is contingent upon funds being appropriated to carry out its provisions.
  - n. **Necessary Acts.** Each party shall execute and deliver to the other all such further instruments and documents as may be reasonably necessary to carry out this Agreement.
12. **Insurance.** Recipient shall secure at its own expense and keep in effect during the term of this Agreement the insurance type and minimum coverage indicated below. These requirements do not in any way limit the amount or scope of Recipient’s liability under this Agreement. Recipient shall provide proof of said insurance and name County as an additional insured on all required liability policies. Proof of insurance and notice of any material change should be submitted to the Grant Administrator or Program Manager at the contact information listed above.

<input checked="" type="checkbox"/> Required – Workers’ Compensation: Recipient shall comply with the statutory workers’ compensation requirements in ORS 656.017, unless exempt under ORS 656.027 or 656.126.
<input checked="" type="checkbox"/> Required – Commercial General Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence, with an annual aggregate limit of \$2,000,000 for Bodily Injury and Property Damage.
<input type="checkbox"/> Required – Professional Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per claim, with an annual aggregate limit of \$2,000,000 for damages caused by error, omission, or negligent acts.
<input checked="" type="checkbox"/> Required – Automobile Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per accident for bodily injury and property damage.
<input type="checkbox"/> Required – Abuse & Molestation endorsement with limits not less than \$1,000,000 per occurrence if not included in the Commercial General Liability policy.

13. **Agreement Documents.**

The following documents are attached to this Agreement and incorporated herein:

- Exhibit A: Approved Scope of Work: Project Description, Budget, Performance Outcomes, and Reporting

**BATISH HOME BAKE LLC**

Grant Agreement – Business Development Grant Program FY25/26

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- Exhibit B: Original Application, Budget, and Required Submission Documents
- Exhibit C: Original County Notice of Funding Opportunity (NOFO) and related FAQs

In the event of a conflict between the terms of this Agreement and/or any of the attached Exhibits, interpretations shall be based on the following order of precedence:

- This Agreement
- Exhibit A
- Exhibit B
- Exhibit C

*(Signature Page Follows)*

**BATISH HOME BAKE LLC**

Grant Agreement – Business Development Grant Program FY25/26

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IN WITNESS WHEREOF, the parties have caused this Agreement to be executed by their duly authorized officers.

CLACKAMAS COUNTY

BATISH HOME BAKE LLC

By: \_\_\_\_\_  
Craig Roberts, Chair

By: Sumeet Batish  
Sumeet Batish (Apr 23, 2026 13:30:03 PDT)  
Sumeet Batish, Owner & CEO

Dated: \_\_\_\_\_

Dated: 4/23/26

Approved as to form:

By:   
County Counsel

Dated: April 27, 2026

# EXHIBIT A – SCOPE OF WORK

## Clackamas County Office of Economic Development Business Development Grant Program FY 2025-26

### Grant Award Information

**RECIPIENT:**

Batish Home Bake LLC  
6005 Duniway Ave  
Gladstone, OR 97027

**AMOUNT:**

\$85,000

### Use of Grant Funds

The Grant Funds under this Agreement are lottery dollars. As such, they are subject to the limitations set forth in Article XV, section 4, of the Oregon Constitution and ORS 461.540. Use of lottery dollars is restricted to the following:

- (a) Creating jobs;
- (b) Furthering economic development in Oregon; or
- (c) Financing public education.

**The Grant Funds under this Agreement may be used for the following purposes:**

### Project Scope

Batish Home Bake LLC, DBA Roadrunner Pizza, is awarded a grant in the amount of \$85,000 to support a Capital project. Project activities and reported outcomes will occur at 6005 Duniway Ave, Gladstone, OR, 97027. Grant Funds will support construction to expand production and cold storage areas, and purchasing new equipment. The goals of this project are to:

- Hire new employees
- Increase production
- Increase production efficiency
- Decrease production waste
- Improve environmental efficiency of production
- Increase business spending on local inputs
- Expand product line or offer additional products
- Increase revenue

## Project Budget

PROJECT BUDGET					
	Line Item Description	Quantity	Unit Price	Cost Basis	Total
1	Equipment- Dough Divider	1	\$ 80,000	total	\$ 80,000.00
2	Additional Equipment - Production, Packaging	1	\$ 90,000	total	\$ 90,000.00
3	Storage Equipment	1	\$ 62,000	total	\$ 62,000.00
4	Facilities Improvement- Workflow Layout Changes	1	\$ 60,000	total	\$ 60,000.00
<b>TOTAL PROJECT COST</b>					<b>\$ 292,000.00</b>

Recipient is committed to carrying out Project activities, as defined in the above scope and budget, in Clackamas County. Recipient is committed to maintaining business operations in Clackamas County for the term of this Agreement.

## Request for Grant Funds

Upon full execution of this Agreement, Recipient must submit all paperwork required by County to be paid as a vendor and remit an invoice for full payment of the Grant Funds.

## Reporting

During the term of this Agreement, Recipient shall provide, at minimum, one progress report and two outcomes reports using County-provided templates. These reports are due on the following schedule:

**September 25, 2026** – Progress Report Due

Reporting period: *Date of agreement signature – September 18, 2026*

**April 30, 2027** – Year 1 Outcomes Report Due

Reporting period: *Date of agreement signature – March 31, 2027*

**April 30, 2028** – Year 2 Outcomes Report Due

Reporting period: *April 1, 2027 – March 31, 2028*

Recipient may also be asked to provide supplemental narrative information on Project activities and outcomes for use in public reports and marketing initiatives.

Reports shall be submitted to the following address:

Julia McCotter  
Clackamas County Office of Economic Development  
150 Beaver Creek Road  
Oregon City, OR 97045

503-742-4399  
jmccotter@clackamas.us

## Detailed Eligibility

### **Legal business name**

Batish Home Bake LLC

### **Business DBA**

Roadrunner Pizza

### **Business Website**

<https://roadrunnerpizza.net/>

### **Oregon Secretary of State ID number**

2321849-94

### **Incorporation date**

2024-10-21

### **Corporate structure**

Sole proprietorship

### **North American Industry Classification System (NAICS) code**

311412

### **Industry name**

Food Production (Frozen Pizzas)

### **Primary business address**

6005 Duniway Ave, Gladstone, OR, 97027

### **Project location address**

6005 Duniway Ave, Gladstone, OR, 97027

### **How does your business meet the criteria for a traded-sector business?**

Our business qualifies as a traded-sector company because we produce fresh-dough frozen pizzas, dough balls, crusts, and calzones that are distributed far beyond Clackamas County. We supply grocery chains, schools, casinos, and foodservice partners across Oregon, Washington, California, Idaho and Nevada. Unlike local-only businesses, our products are sold regionally and out-of-state, bringing new dollars back into the county economy. By manufacturing in Clackamas and selling into broader markets, we strengthen

the traded-sector base, create jobs, and expand economic activity that would not otherwise occur locally.

**Total project budget**

\$400,000

**Total grant funds requested**

100,000.00

**What is the source of your matching funds for this project?**

Our matching funds will come directly from company operating revenue generated through ongoing sales to our existing customers across Oregon, Washington, and other regions. Roadrunner Pizza has maintained steady growth and profitability, allowing us to allocate internal funds toward this expansion. Additional matching support will include owner investment, in-kind contributions such as facility improvements, and staff time dedicated to implementation and training. These combined sources demonstrate our strong financial commitment to the project

**If awarded, grant funds will not be disbursed until Spring 2026. Grant funds can not be used to reimburse previous spending. Is your project feasible given this funding timeline?**

Yes

## Applicant Information

**Full name(s) of business owner(s)**

Sumeet Batish

**Full name of applicant contact**

Sumeet Batish

**Title of applicant contact**

CEO/Owner

**Email address of applicant contact**

sumeet.batish@roadrunnerpizza.net

**Primary phone number of applicant contact**

5038166674

### **Brief summary of the business**

Roadrunner Pizza specializes in fresh dough pizzas, dough balls, crusts, and calzones made with live yeast — never par-baked. We supply grocery stores, schools, restaurants, and convenience stores across the Pacific Northwest and beyond. Our products are featured in Haggen, A1, and Thriftway stores, and we've been a trusted supplier for major Oregon school districts for over two decades. We recently expanded into Washington (including Vancouver School District) and California schools. Known for our premium quality and consistency, we make it easy for operators to serve truly fresh pizza without the hassle of dough prep.

## **Grant Project Information**

### **Please select your Project Type**

Capital project

### **Project Category**

Physical Expansion

Production Expansion

County Business Retention

### **Please provide a narrative summary of your project**

Roadrunner Pizza is a locally owned, Oregon-based food manufacturer specializing in high-quality, fresh-dough pizzas, crusts, dough balls, and calzones. For over two decades, we have supplied grocery stores, schools, restaurants, and food service partners across the Pacific Northwest with premium, never par-baked products that stand out for their freshness and consistency. As demand for our products continues to grow, we are seeking support to expand our production capacity and storage infrastructure. Our current production area and freezer storage are operating at near-maximum capacity, creating a significant bottleneck that limits our ability to scale and meet new customer demand. The project will focus on three key areas: **New Equipment:** Investing in upgraded dough processing and packaging machinery to improve efficiency, reduce manual handling, and increase daily production output. **Production Area Expansion:** Expanding our current production footprint to allow for better workflow, improved food safety, and the addition of new product lines. **Freezer Storage Expansion:** Increasing our cold storage capacity, which is currently one of our biggest constraints. Expanded freezer space will allow us to build inventory more efficiently, handle larger institutional and retail orders, and reduce logistical strain. These improvements will not only support our business growth but also create additional local jobs, strengthen our partnerships with regional distributors, and enable us

to serve more schools and food service providers with consistent, high-quality products made right here in Oregon. By investing in this project, we aim to position Roadrunner Pizza for long-term sustainability, operational efficiency, and continued contribution to the local economy.

**Please describe the business need for grant funding to assist your project**

Roadrunner Pizza has experienced consistent growth over the past several years as demand for our fresh-dough pizzas, crusts, and calzones continues to expand across grocery, school, and food service channels. However, our ability to keep pace with this growth is being severely constrained by space limitations and aging equipment. Our current production facility is operating near full capacity, and our freezer storage area is essential for maintaining product quality and meeting large orders is at its limit. This limitation forces us to turn down new opportunities and restricts our ability to build inventory ahead of seasonal peaks or large institutional contracts. Additionally, some of our existing production equipment is outdated and requires frequent maintenance, reducing overall efficiency and increasing downtime. Grant funding is essential to help us overcome these challenges. With assistance, we plan to invest in modern production equipment that will increase efficiency, reduce waste, and improve product consistency. We also plan to expand our production and freezer storage areas to accommodate growing demand and improve workflow. Without this support, our ability to expand into new markets such as additional school districts, regional grocery chains, and food service programs will remain limited. This project will not only enhance operational efficiency and create new local jobs but also strengthen our position as a regional producer of high-quality, Oregon-made food products. Grant funding will allow us to move forward faster and more effectively, transforming current limitations into opportunities for growth, stability, and long-term community impact.

**What outcomes do you expect to achieve as a result of this project?**

- Hire new employees
- Increase production
- Increase production efficiency
- Decrease production waste
- Improve environmental efficiency of production (e.g. decrease water usage, lower carbon footprint, etc.)
- Increase your business' spending on local inputs
- Expand product line / offer additional products
- Increase revenue

**Elaborating on your selected outcomes**

Our project focuses on expanding Roadrunner Pizza's capacity to produce and distribute fresh-dough pizzas, dough balls, crusts, and calzones to a growing base of regional and out-of-state customers. We are not a local restaurant—we are a traded-sector food manufacturer based in Clackamas County and ship products to schools, grocery chains, casinos, and foodservice operators across Oregon, Washington, and beyond. We specialize in using live-yeast dough, never par-baked, which sets us apart in quality and freshness. Demand for our products continues to rise, especially from institutions and retailers who are seeking convenient, consistent, and high-quality pizza solutions. To meet this demand, we must invest in efficiency, capacity, and operational upgrades that allow us to scale responsibly. This grant will help us strengthen operations by adding equipment, refining workflow, and upgrading infrastructure so we can serve larger accounts without compromising quality. The result will be higher throughput in both our dough and USDA rooms, greater reliability for our partners, and the ability to bring more outside revenue into Clackamas County. Equally important, Roadrunner Pizza is proud to be a participant in Oregon's Second Chance program, which provides employment opportunities for individuals who are reentering the workforce. By offering stable jobs, training, and career growth, we not only expand our production capabilities but also create meaningful community impact by giving people a path to success. Through this project, we will create new jobs, reduce production bottlenecks, and strengthen long-term stability. We aim to position Clackamas County as a hub for innovative food manufacturing while also serving as an example of inclusive, community-minded business growth.

**How many months do you expect it will take to fully implement your project? \***

5

**Please describe your project timeline in more detail**

Our project will be completed within 6 months in three phases. Phase 1 (Month 1-2): purchase and install new equipment, make facility adjustments, and plan workflow improvements. Phase 2 (Month 3-4): integrate equipment into daily operations, provide staff training, and refine processes in the dough and USDA rooms to eliminate bottlenecks. Phase 3 (Month 5-6): scale up production to meet growing demand, add new employees as needed, and evaluate efficiencies to ensure sustainable growth. During all phases we will continue fulfilling current orders while building capacity to serve new regional and out-of-state

**If your project is awarded partial funding, what project activities and costs would you prioritize to achieve your desired outcomes?**

If awarded partial funding, we would prioritize activities that directly increase production efficiency and capacity. The first priority would be purchasing and installing key equipment that allows our dough and USDA rooms to eliminate bottlenecks and increase throughput. Next, we would focus on workflow improvements and staff training to maximize the impact of those upgrades. While facility enhancements and broader expansion plans may be delayed, ensuring that critical equipment and process improvements are implemented will allow us to continue meeting rising demand, create new jobs, and generate additional revenue for Clackamas County.

## Attestation

Yes

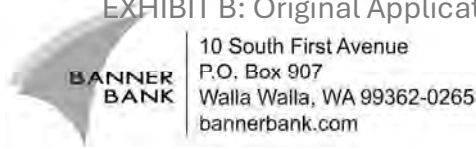
### **Name of Attesting Corporate Officer \***

Sumeet Batish- CEO

EXHIBIT B: Original Application, Budget, and Required Submission Documents

INFORMATION				
Batish Home Bake LLC DBA Roadrunner Pizza				
Capital Project				
\$100,000.00				
Checking/Savings Account ( Possibly some Loan also)				
BUDGET ATTESTATIONS (select from dropdown)				
Business is responsible for sourcing funds outside of this grant to cover the remainder of my total project costs.	Yes			
Requested grant funds will not be disbursed until Spring/Summer and cannot be used to reimburse costs that are incurred before the funds are disbursed.	Yes			
Project budget does not include any line items that have already been purchased or line items that will be purchased prior to the grant	Yes			
100% of this project budget will be spent on Clackamas County-located equipment, materials, or workforce. I understand that no project funds may be used for assets based in a non-Clackamas County business location.	Yes			
PROJECT BUDGET				
	Quantity	Unit Price	Cost Basis	Total
High Divider, Cheese Waterfall and Packaging Equipment			200,000	\$ -
Facilities Improvement- Workflow Layout Changes				\$ -
Materials, Supplies.			200,000	\$ -
			<b>TOTAL PROJECT COST</b>	<b>\$ -</b>
			<i>Maximum grant funding request for this project:</i>	<b>\$ -</b>

**Statement of Account**



Statement Date	09/30/25
Page	1 of 3
Account Number	XXXXXXXXXXXX1220

(509) 527-3636 | (800) 272-9933 Toll-Free

Batish Home Bake LLC  
6005 Duniway Ave  
Gladstone OR 97027



**Join Us in Feeding Those in Need. Fall Food Drive on Now.**

We're collecting food and cash donations October 1-31, to help local families and seniors in need. Our Annual Fall Food Drive helps stock local food pantries so your neighbors don't go without. Bring your donations to any branch.

**SUMMARY OF ACCOUNTS**

Complete Plus Business Ckg      XXXXXXXXXXXXXXX1220      \$406,852.53

**CHECKING ACCOUNT** XXXXXXXXXXXX1220

**Complete Plus Business Ckg**

Account Title: Batish Home Bake LLC		Statement Dates	9/03/25 thru 9/30/25
Account Number	XXXXXXXXXXXX1220	Days in the statement period	28
Previous Balance	375,203.38	Average Ledger	371,493.45
12 Deposits/Credits	175,808.60	Average Collected	368,020.04
37 Debits	103,019.05		
20 Checks	41,140.40		
Service Charge	.00		
Interest Paid	.00		
Current Balance	406,852.53		

**Deposits and Additions**

Date	Description	Amount
9/03	SYSCO      PAYMENTS CCD 052CA000967535 0522002081	4,134.24
9/04	SYSCO      PAYMENTS CCD 055CA000277566 0552002081	5,494.32
9/08	HARBORWHLSALEFDS    CORP PAY CCD V14623 9872063001	13,446.48
9/09	Deposit	30,129.26
9/10	PAYCHEX-RCX      PAYROLL CCD 13536900000311X 1161124166	548.82





EXHIBIT B: Original Application, Budget, and Required Submission Documents  
 10 South First Avenue  
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**Statement of Account**

Statement Date	09/30/25
Page	2 of 3
Account Number	XXXXXXXXXXXX1220

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9/17	HARBORWHLSALEFDS CORP PAY CCD V14623 9872063001	11,198.04
9/22	HARBORWHLSALEFDS CORP PAY CCD V14623 9872063001	14,406.12
9/23	Deposit	67,326.24
9/24	SYSCO PAYMENTS CCD 052CA000968114 0522002081	5,059.80
9/24	SYSCO PAYMENTS CCD 055CA000278155 0552002081	5,896.80
9/24	HARBORWHLSALEFDS CORP PAY CCD V14623 9872063001	11,470.08
9/26	THE PETERSON COM PAYMENTJNL CTX 1910935816 V	6,698.40

**Withdrawals and Deductions**

Date	Description	Amount
9/03	COMCAST CORP CABLE SVCS CCD 6849000 0000213249	-154.56
9/04	MASTERCARD PAYMENT WEB 1465106539 S 553249XXXXX7101	-2,264.84
9/05	Transfer to Loan Acct No. XXXXXXXXXXXXX7908	-15,904.64
9/05	PAYCHEX CGS GARNISH CCD COL0122316368 1161124166	-48.46
9/05	PAYCHEX TPS TAXES CCD 13490700004032X 1161124166	-4,906.07
9/05	PAYCHEX PAYROLL CCD 13492300000052X 1161124166	-10,068.80
9/08	PAYCHEX EIB INVOICE CCD X13496200007388 1161124166	-210.30
9/09	AMERICAN FUNDS INVESTMENT CCD BRK185426250906 1954797716	-683.19
9/09	AMERICAN FUNDS INVESTMENT CCD BRK185426250906 1954797716	-708.37
9/11	PORTLAND GENERAL BILLPAY PPD 0000000160	-4,532.65
9/12	PAYCHEX CGS GARNISH CCD COL0122413079 1161124166	-48.46
9/12	PAYCHEX TPS TAXES CCD 13576900006156X 1161124166	-5,972.22
9/12	PAYCHEX-RCX PAYROLL CCD 13577300000135X 1161124166	-12,005.50
9/15	PAYCHEX EIB INVOICE CCD X13580700015985 1161124166	-112.40
9/16	COMPLETE TM BUNDLES CHARGE	-30.00
9/19	PAYCHEX CGS GARNISH CCD COL0122511821 1161124166	-48.46
9/19	COMCAST-XFINITY CABLE SVCS PPD 0000213249	-353.07
9/19	PAYCHEX TPS TAXES CCD 13668000003937X 1161124166	-4,517.99
9/19	PAYCHEX - RCX PAYROLL CCD 13668300000060X 1161124166	-9,369.47
9/22	PAYCHEX EIB INVOICE CCD X13671300017731 1161124166	-108.20
9/22	PAYCHEX-OAB INVOICE CCD ATsFHpQhTgE7I48 1161124166	-327.00
9/22	CHASE CREDIT CRD EPAY WEB 5760039224 S 8741024372	-2,678.33
9/22	MASTERCARD PAYMENT WEB 1465106539 S 553249XXXXX7101	-5,427.45
9/23	Nationwide PAYMENTS PPD 9762787002	-90.56
9/23	AMERICAN FUNDS INVESTMENT CCD BRK185426250919 1954797716	-687.11
9/23	AMERICAN FUNDS INVESTMENT CCD BRK185426250919 1954797716	-733.99
9/26	PAYCHEX CGS GARNISH CCD COL0122606826 1161124166	-112.84
9/26	WA DEPT REVENUE TAX PYMT CCD 16240871 9916001118	-129.69
9/26	CHASE CREDIT CRD EPAY WEB 5760039224 S 8748970741	-541.84
9/26	PAYCHEX TPS TAXES CCD 13757300003175X 1161124166	-4,841.25
9/26	PAYCHEX PAYROLL CCD 13756900000003X 1161124166	-9,784.06
9/29	DBT CRD 2333 09/27/25 64 TRAVELERS BUS AR 9954 Mayland Dr, St 800-252-2268VA C# *1199	-3,188.10
9/29	PAYCHEX EIB INVOICE CCD X13761200033130 1161124166	-113.30
9/29	Delta Dental OR Health Ins CCD XXXXXXXXXXX 3930989307	-203.39
9/29	MASTERCARD PAYMENT WEB 1465106539 S 553249XXXXX7101	-1,345.26
9/30	NORTHWEST NATURA BILLPAY PPD 0000000160	-53.84
9/30	AMERICAN FUNDS INVESTMENT CCD BRK185426250927 1954797716	-713.39



EXHIBIT B: Original Application, Budget, and Required Submission Documents  
 10 South First Avenue  
 P.O. Box 907  
 Walla Walla, WA 99362-0265  
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**Statement of Account**

Statement Date	09/30/25
Page	3 of 3
Account Number	XXXXXXXXXXXX1220

(509) 527-3636 | (800) 272-9933 Toll-Free

**Checks In Number Order**

Date	Check No	Amount	Date	Check No	Amount
9/03	294	1,854.00	9/15	315	540.00
9/05	304*	325.00	9/16	316	230.00
9/04	305	10,000.00	9/16	318*	10,133.56
9/09	306	1,071.00	9/22	319	220.00
9/10	309*	417.03	9/16	320	342.50
9/12	310	601.48	9/17	321	4,727.58
9/09	311	311.38	9/24	322	1,283.73
9/11	312	292.42	9/25	323	193.00
9/15	313	1,511.00	9/29	324	4,580.65
9/18	314	548.82	9/29	325	1,957.25

\*Denotes missing check numbers.

**Daily Balance Summary**

Date	Balance	Date	Balance	Date	Balance
09/03	377,329.06	09/12	356,576.13	09/23	406,769.04
09/04	370,558.54	09/15	354,412.73	09/24	427,911.99
09/05	339,305.57	09/16	343,676.67	09/25	427,718.99
09/08	352,541.75	09/17	350,147.13	09/26	419,007.71
09/09	379,897.07	09/18	349,598.31	09/29	407,619.76
09/10	380,028.86	09/19	335,309.32	09/30	406,852.53
09/11	375,203.79	09/22	340,954.46		

\*\*\*\*\* END OF STATEMENT \*\*\*\*\*



10 South First Avenue  
 P.O. Box 907  
 Walla Walla, WA 99362-0265  
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Statement Date	09/30/25
Page	1 of 1
Account Number	XXXXXXXXXXXX2630

(509) 527-3636 | (800) 272-9933 Toll-Free

Batish Home Bake LLC  
 6005 Duniway Ave  
 Gladstone OR 97027



**Join Us in Feeding Those in Need. Fall Food Drive on Now.**

We're collecting food and cash donations October 1-31, to help local families and seniors in need. Our Annual Fall Food Drive helps stock local food pantries so your neighbors don't go without. Bring your donations to any branch.

**SUMMARY OF ACCOUNTS**

Business High Yield Rel Saving      XXXXXXXXXXXXXXX2630      \$83,633.84

**SAVINGS ACCOUNT** XXXXXXXXXXXX2630

**Business High Yield Rel Saving**

Account Title: Batish Home Bake LLC		Statement Dates	7/01/25 thru 9/30/25
Account Number	XXXXXXXXXXXX2630	Days in the statement period	92
Previous Balance	\$82,791.28	Average Ledger	\$82,791.28
Deposits/Credits	\$ .00	Average Collected	\$82,791.28
Checks/Debits	\$ .00	Interest Earned	\$842.56
Service Charge	\$ .00	Annual Percentage Yield Earned	4.10%
Interest Paid	\$842.56	2025 Interest Paid	\$2,488.62
Current Balance	\$83,633.84		

**Deposits and Additions**

Date	Description	Amount
9/30	Interest Deposit	842.56

\*\*\*\*\* END OF STATEMENT \*\*\*\*\*



## COUNTY STAFF NOTE ON THIS APPLICATION:

This applicant indicated on their pre-screening eligibility quiz that the business had been registered for more than 2 years, as is required to be considered for funding under this program. Both the application and OR Secretary of State listing for Batish Home Bake LLC (DBA Roadrunner Pizza) list the business incorporation date as 10/21/2024.

In conducting due diligence, staff confirmed that the business was acquired in 2024 and re-registered under its new parent company at that time; however, the business itself has existed since at least 2001 and was registered with the OR Secretary of State under the name Roadrunner Home Bake Inc. Previous registry number: 056770-91. The registered primary place of business has remained 6005 Duniway Ave, Gladstone, OR, 97027 since at least 2013 as noted in the available annual reports filed with the OR Secretary of State.

This application was deemed eligible for funding consideration.

## Notice of Funding Opportunity (NOFO)

# Clackamas County Office of Economic Development

### Business Development Grant Program

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## Program Description

Traded sector businesses—those competing in markets beyond the local area—are invited to apply for funding designated to help them grow!

In April 2024, the Clackamas County Board of Commissioners approved the Business Development Grant Program with the goals of supporting traded-sector business activity (e.g. expansion of operations, efficiencies, technological advancements, etc.), retaining Clackamas County-based operations for existing businesses, and/or attracting new businesses to relocate operations to Clackamas County. Funding will be provided for either capital investments or workforce development projects and must be matched 100% or more by the awardee.

## Award Information

Funding Source:	State lottery dollars
Funding Amount:	Individual Award Maximum \$100,000 (awards may be less); \$650,000 total funding available this cycle. Funding is contingent upon the execution of a grant agreement. If an approved recipient cannot finalize their agreement, funds may be offered to approved alternates.
Grant Period of Performance:	Approximately 6-18 months from agreement execution (execution estimated Spring 2026), depending on project. Some projects may be longer.
Reporting Requirements:	Reporting requirements will vary by project type and will be negotiated with each awardee prior to agreement execution. Reporting will be sufficient to ensure awarded amounts are expended on eligible costs and that the project, as described in the agreement, has been completed.
Submission Method:	Complete and submit application electronically via the <a href="#">official web form</a> . Paper applications will not be accepted.
Application Open Period:	September 4, 2025 at 9am Pacific Time – October 13, 2025 at 5pm Pacific Time.



	Complete submissions, including all required documents, must be received by 5pm on October 13 <sup>th</sup> to be considered responsive. Complete submissions include all required supporting documentation in addition to the application. Incomplete applications will not be considered.
Program Contact:	<a href="mailto:4biz@clackamas.us">4biz@clackamas.us</a> , (503) 742-4BIZ (4249)
Informational Webinar:	September 16, 2025 at 3:30pm Pacific Time <a href="#">Registration required</a>
Match Requirement:	100% or more

## Background

Clackamas County was allocated State lottery dollars for economic development and this Business Development Grant Program is an expression of that constitutional purpose for State lottery funds.

## Eligibility & General Requirements

The following criteria must be met in order for your application to be deemed eligible for review. This is a competitive grant program; not all eligible applications will be funded.

### **Location and Age.**

Your business must have operations within Clackamas County or seek to relocate to or establish additional operations within Clackamas County. The business must be “established,” which means it is at least two years old, though it needn’t have been located in Clackamas County for two years if seeking to move existing operations into the county.

### **Traded Sector**

Your business must be a *traded-sector business*, defined as *Clackamas County businesses producing or manufacturing goods in Clackamas County AND selling or exporting those goods outside the county and its immediate surroundings (e.g. manufacturing, food processing, etc.).*

### **Project Types**

Your proposal must be for a capital project or for a workforce development project. No other project types will be considered.

Capital projects may include:

- Purchase of capital assets that meet a business need, expand production, increase efficiency, or otherwise lead to business growth. Capital assets may include machinery, equipment, software, etc.
- Site development, improvement, or other construction that is directly related to relocation, expansion, and/or business growth.



Capital project requests may also include any fees, licenses, delivery costs, taxes, installation, utility hookups, etc. directly associated with the purchase to bring the capital project online operationally and these costs should be broken out in your budget.

Workforce development projects include the training, hiring, and/or retention of employees. Examples of workforce development projects include but are not limited to:

- Training for employees to learn a new or updated technology, equipment or process, employer-specified or industry-specific skills;
- Train-the-trainer instruction to build the capacity of businesses;
- Permanent hiring of new employee(s) to increase production, expand product lines, bring outsourced work in-house, or otherwise meet existing and future demand.

### ***Match Requirements***

You must provide proof of secured match of at least 100% of the amount requested, meaning that only half of the funding for your proposed project may come from this grant. Your business must pay the other half of your project costs.

Match may come from:

- Existing business cash
- A loan or investor commitment (with documentation)
- A separate, already awarded grant

### ***Secretary of State Registration***

Your business must have an [active business registration with the Oregon Secretary of State](#). You will need your Oregon Secretary of State identification number to complete this application. This requirement includes business applicants looking to move operations or establish operations into Clackamas County from outside of Oregon.

### ***Code compliance***

You may be disqualified from this program if the County finds you are out of compliance with any applicable business codes or owe back taxes without an approved payment plan.

### ***Participation Restrictions***

Each business may only apply once per application cycle and may not apply to this grant program again if you have previously received an award funded with lottery dollars of any amount. Previous grant recipients may not apply for additional funding.

### ***Trade secrets and your application***

Since applications submitted under this NOFO are subject to public records requests, please clearly mark any included trade secrets as '(TRADE SECRET)' in your responses. All identified trade secrets will be redacted when responding to public records requests.



**Only business applicants**

Grants will be awarded to businesses, not individuals, so please apply with the official name of your business as registered with the Oregon Secretary of State.

**Unallowable costs**

Indirect costs are not funded through these awards and should not be part of your budget request. Existing staff costs (wages, benefits) are not allowable grant expenses, except for those hours spent in grant-funded training (e.g. training or skill development for a workforce development project, training on new equipment for a capital project).

**Debt(s)**

This grant may not be used to pay debts on already-implemented projects. This grant is intended for new projects only.

## Application and Submission Information

To apply, complete the [official online application](#). Applications sent through mail or email will not be accepted. The full list of application questions is provided at the end of this NOFO. In your application, provide as much information as needed to thoroughly answer questions and convey information; however, please keep answers as clear and concise as possible. The application is broken up into the following sections:

**Base Eligibility**

On the first page of the application, you will be required to complete a basic eligibility screening questionnaire. The main application will load for any applicants who meet the base eligibility criteria. Answer these questions honestly – you will be required to support your statements with documentation in the main application.

**Detailed Eligibility**

In this section of the application, you will be asked to provide more information to validate your eligibility for funding. It is possible for an applicant to be deemed ineligible even if they appear to meet the base eligibility criteria in the screening questionnaire before this section of the application. Full eligibility requirements are listed in this NOFO, above.

**Application Information**

In this section, you will provide your contact information and summary information about your business.

**Grant Project Information**

In this section, you will provide detailed information about the project for which you are seeking grant funding. You will select your project type and categories, describe your need for grant funding, select and discuss your expected outcomes, provide your project timeline, and explain more about your project budget. This section is your primary opportunity to make a compelling case for getting your project funded.



### ***Attachments***

You will need to provide your project budget, using the required budget template. The template must remain in .xlsx file format in order for your file to upload.

You will also need to provide up to 5 pages of documentation to prove the source(s) and availability of your matching funds. Matching funds are an eligibility requirement; applications that do not sufficiently prove source and availability of matching funds will not be deemed eligible for this program.

### ***Attestation***

You'll be required to sign the attestation on the application. Only a corporate officer who is authorized to legally bind the business may sign the attestation. It is your responsibility to carefully review the attestations before signing. Fraudulent applications will be referred to law enforcement.

## Evaluation

Your application will be evaluated by a review committee comprised of Clackamas County staff. Based on the criteria outlined in this NOFO, the review committee will score applications for Project Fit, Need for Funding, Economic Impact, and Project Feasibility. The review committee will recommend projects to the Board of County Commissioners (BCC) for funding and will also propose an alternates list of the top applications that did not make the initial funding cut. The alternates list will serve as a waitlist in the event a BCC-approved grant recipient is unable to finalize their funding agreement due to unforeseen changes in the business, external factors rendering a project unfeasible, or other extenuating circumstances.

**The BCC has sole authority to determine funded projects and the alternates list.** The BCC may choose to disregard or modify the recommendations of the review committee for funded projects or alternates at its discretion. The funding recommendation packet presented to the BCC will include both the proposed awardees and the alternates list for simultaneous review and approval. The BCC-approved alternates list remains valid until all funds are awarded or the funding cycle closes, at the discretion of the Clackamas County issuing department.

Only applications considered responsive will be evaluated. "Responsive" applications are those which comply with the requirements in this NOFO. Applications that do not meet the eligibility requirements or applications that are received late and/or incomplete will not be considered.

**Timeline.** Applications will be reviewed in November/December 2025, with recommendations for funding and the alternates list made to the BCC by January/February 2026. Awardees and alternates will be notified by email only after the BCC has finalized their decisions. In the event an approved grant recipient cannot finalize their funding agreement, the County will contact the next alternate(s) on the BCC-approved list, in ranked order, to negotiate a funding agreement. This process will continue until all allocated funds are awarded or the alternates list is exhausted.



## Notification of Applicants

Applicants selected for funding will be notified by email only after the Board of County Commissioners (BCC) has finalized its decisions. Applicants placed on the alternates list will also be notified by email, informing them of their status as potential awardees should funding become available. The notification will clarify that placement on the alternates list does not guarantee funding and that alternates will be contacted in ranked order only if an approved grant recipient is unable to finalize their funding agreement. All other applicants will receive a courtesy email notifying them that their application was not selected for funding or the alternates list.

Applicants on the alternates list may be asked to provide updated information (e.g., proof of match or project status) if contacted to finalize a funding agreement, to ensure the project remains viable.

After County staff have notified awardees, staff and awardees will negotiate a final scope of work for the project, including timelines for the grant period specific to each project. County Finance, County Counsel, and the BCC will approve final grant documents.

Applicants placed on the alternates list who do not receive funding will be notified after all awardee funding agreements have been finalized. Applicants placed on the alternates list who do not receive funding may apply for future grant cycles and will not receive priority status in any future applications.

## Non-discrimination

Per the Civil Rights Act of 1964, no person shall, on the basis of race, color, or national origin, be excluded from participation, be denied the benefits of, or be subjected to discrimination under any County program, service or activity.



## Application Questions

### Base Eligibility Screening Questionnaire

1. How many years has your business been operating?
2. Does your business have an operating location in Clackamas County?
3. Does your business produce / manufacture goods in Clackamas County?
4. Does your business sell / export goods OUTSIDE of Clackamas County?
5. Is your business registered and current with the Oregon Secretary of State?
6. This grant program requires a 100% match on all grant funds, meaning that only half of the funding for your proposed project may come from this grant. Your business must pay the other half of your project costs. Are you able and prepared to meet this match requirement?

### Detailed Eligibility

1. Legal business name:
2. Business DBA (if applicable):
3. Business website (if applicable):
4. Oregon Secretary of State ID number (this is different from your federal EIN):
5. Incorporation date:
6. Corporate structure:
7. North American Industry Classification System (NAICS) code:
8. Industry name:
9. Primary business address:
10. Project location address:
11. How does your business meet the criteria for a traded-sector business? *1,000 character limit*
12. Total project budget (pull this directly from your completed budget template):
13. Total grant funds requested:
14. What is the source of your matching funds for this project? *1,000 character limit*
15. If awarded, grant funds will not be disbursed until Spring 2026. Grant funds can not be used to reimburse previous spending. Is your project feasible given this funding timeline?

### Applicant Information

16. Full name(s) of business owner(s):
17. Full name of applicant contact:
18. Title of applicant contact:
19. Email address of applicant contact:
20. Primary phone number of applicant contact:
21. Brief summary of the business *1,000 character limit*

### Grant Project Information

22. Please select your Project Type:



- Workforce Development Project
  - Capital Project
23. Project Category (*please select all that apply*):
- Multi-site Development Assistance: Your business does not have a location in Clackamas County and seeks to establish a new location in Clackamas County
  - Relocation: You seek to relocate your existing business into Clackamas County
  - Physical Expansion: Your business is currently located in Clackamas County and seeks to relocate to a larger facility within the county or expand your existing facilities in the county
  - Production Expansion: Your business seeks to expand production capacity through purchasing new equipment, hiring additional employees, providing employee technical training, and/or other capital investment(s)
  - County Business Retention: Your business is currently located in Clackamas County and seeks funds to assist with a project intended to retain operations in the county
24. Please provide a narrative summary of your project (*2,000 character limit*)
25. Please describe the business need for grant funding to assist your project (*2,000 character limit*)
26. What outcomes do you expect to achieve as a result of this project? Expected outcomes will be included in grantee funding agreements and tracked throughout grant projects. Select all that apply:
- Hire new employees
  - Increase production
  - Increase production efficiency
  - Decrease production waste
  - Improve environmental efficiency of production (e.g. decrease water usage, lower carbon footprint, etc.)
  - Increase your business' spending on local inputs
  - Expand product line / offer additional products
  - Increase revenue
27. Elaborating on your selected outcomes, please describe in more detail the expected local economic impacts of your project (*2,000 character limit*)
28. How many months do you expect it will take to fully implement your project?
29. Please describe your project timeline in more detail (*1,000 character limit*)
30. If your project is awarded partial funding, what project activities and costs would you prioritize to achieve your desired outcomes? *1,000 character limit*

## Upload Attachments

31. Using the required template, please attach your project budget below. You may find the required budget template [HERE](#).
32. Please attach your proof of matching funds below (PDF format only). Please exclude any private information that is not necessary for assessing your match (e.g. full bank account numbers, full routing numbers, check numbers, social security numbers, etc.) You may



upload multiple PDFs, but please limit your submission(s) to 5 pages TOTAL across all uploads.

## Attestation

33. By signing this application, I affirm:

- I am legally authorized to bind the applicant business; and
- The information provided in this application, and any supporting documents provided (if applicable), are true and complete to the best of my knowledge; and
- I understand I may be contacted by CCOED staff to provide additional information or documentation which CCOED, in its sole discretion, may require to complete my application and/or establish my eligibility; and
- I do not owe back taxes to any governmental agency or, if back taxes are owed, a written agency payment plan is in place; and
- I understand any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to law enforcement referral for further investigation or result in the disqualification of my application as unresponsive.
- I understand my application may be denied if it's determined that there are current code violations, or that I have received warnings to rectify code violations that are deemed hazardous or unsafe to my business, its employees or the community.
- I understand I may be required to refund or reimburse all or part of the grant proceeds not used for their intended purposes, as stated in the Application, Scope of Work and/or Funding Agreement.

Name of Attesting Corporate Officer:

[APPLY HERE](#)

## Frequently Asked Questions (FAQ)

# Clackamas County Office of Economic Development

### Business Development Grant Program

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#### **1. What is the purpose of the county grant funding program?**

The county grant funding program is designed to provide funding for capital, capacity or workforce development projects to various sized traded sector businesses looking to relocate, expand or retain their operations in Clackamas County.

#### **2. Who is eligible to apply for a grant?**

To be eligible to apply, a business must:

- Be a traded sector business – a business producing or manufacturing goods in Clackamas County and selling those goods *outside* of Clackamas County and its immediate surroundings
- Have been a registered business for at least two years
- Be in good standing with the State
- Provide proof of at least 100% match for their funding request

For full details on eligibility and requirements, refer to the [Notice of Funding Opportunity \(NOFO\)](#).

#### **3. What types of projects or activities can be funded?**

Eligible projects must:

- Increase production of locally-manufactured goods;
- Fund either a capital project or a workforce development project;
- Support business improvement, relocation, retention and/or expansion efforts, and
- Contribute to the Clackamas County's economic development.

Eligible business costs include only those costs required to carry out a project as determined in the application process.

For full details on project and application requirements, including Project Types and Project Categories, refer to the [Notice of Funding Opportunity \(NOFO\)](#).

#### **4. How do I apply for a grant?**

To apply:

1. Review the grant guidelines and eligibility requirements outlined in the [Notice of Funding Opportunity \(NOFO\)](#) to ensure your business and project are eligible for funding. The full list of application questions can be found at the end of the NOFO.
2. Prepare your application, including:
  - a. Responses to the application questions (it's recommended that you prepare these in a separate document as the application form does not allow you to save a draft)
  - b. Project budget using the required template in .xlsx format (located alongside other program documents [here](#))
  - c. Proof of matching funds, as detailed under *Match Requirements* on page 3 of the NOFO (please be prepared to upload in PDF format, with a maximum of 5 pages total)
3. Submit your complete application via the [official web form](#) by 5pm on October 13, 2025, along with any required supporting documents. Late and incomplete applications will not be considered for funding. Application materials sent by post, email, or any means other than the official application web form will not be considered for funding.

For questions or general assistance, contact us at 503-742-4329 or at [4Biz@clacakamascounty.us](mailto:4Biz@clacakamascounty.us)

#### **5. What is the application deadline?**

Complete applications (including required documents) must be submitted via the official web form by 5pm on October 13, 2025.

It is highly recommended that you plan ahead and submit your application with enough time before the deadline to troubleshoot any technology, internet, and/or file issues – **late and/or incomplete applications will not be accepted for any reason.**

#### **6. What is the timeline for this program?**

Applications open on Thursday, September 4, 2025 at 9:00 AM Pacific Time.

Applications close at 5:00 PM Pacific Time on Monday, October 13, 2025.

Final award decisions are subject to the schedule of the Board of County Commissioners, and are anticipated to be announced by February 2026.

Funding agreements will be finalized in Spring 2026.

Funding will be deployed no later than June 30, 2026.

Program Period of Performance will begin at the execution of the grant funding agreement (Spring 2026) and run for approximately 6-18 months, depending on the unique project. Some projects may run longer.

Final Outcome Reports will be due approximately 24 months after the execution of the grant funding agreement.

## **7. How much funding can I apply for?**

You may request up to \$100,000 of funding through this program.

You will be required to provide proof of at least 100% matching funds from another source in order for your funding request to be considered. This means that only half of the funding for your proposed project may come from this grant. Your business must pay the other half of your project costs.

The County reserves the right to award partial funding. You will be asked in the application to list the project activities and costs which you would prioritize in the event your project is awarded partial funding.

## **8. How will grant applications be reviewed?**

Eligible grant applications will be reviewed by a committee comprised of Clackamas County staff. Eligible applications will be evaluated based on criteria such as:

- Alignment with program goals
- Project viability
- Economic impact of project
- Need for funding

After evaluating eligible applications, the Clackamas County staff review committee will recommend projects to the Board of County Commissioners (BCC) for final funding decisions. **The BCC has sole authority to determine funded projects.**

For more information on the evaluation criteria and process, refer to the [NOFO](#).

## **9. When will I be notified of the decision?**

Final award decisions are subject to the schedule of the Board of County Commissioners, and are anticipated to be announced by February 2026.

### **10. What happens next if my application is approved?**

Awardees will be notified by email once the Board of County Commissioners (BCC) has finalized their funding decisions.

After County staff have notified awardees, staff and awardees will negotiate a Funding Agreement. The Funding Agreement is a contract between the County and the awardee, and includes elements such as a final scope of work for the project, approved project budget, timelines, and reporting requirements for the grant period specific to each project. County Finance, County Counsel, and the BCC will approve final funding agreements.

### **11. What are the reporting requirements for grant recipients?**

Grant recipients will be required to submit progress reports and a final report at the end of the grant period. Receipts and other supporting documentation will be required to prove how the funds were used and the outcomes achieved. Depending on the unique nature of the project, other requirements will be discussed and stated in the grant funding agreement.

Specific reporting requirements for each awardee will be outlined in the awardee grant funding agreement based on project type, project categories, and the anticipated outcomes detailed in project applications.

### **13. Where can I find more information about the grant program?**

The **Notice of Funding Opportunity (NOFO)** can be found on the Clackamas County Procurement page for Open Grant Opportunities:

<https://www.clackamas.us/procurement-process#opengrantopportunities>

The **application questions** can be found at the end of the NOFO, which is located on the Clackamas County Procurement page for Open Grant Opportunities:

<https://www.clackamas.us/procurement-process#opengrantopportunities>

The **application budget template** can be found on the Clackamas County Procurement page for Open Grant Opportunities: <https://www.clackamas.us/procurement-process#opengrantopportunities>

The **official application web form** can be found at:

<https://apps.clackamas.us/businessdevelopmentgrants/>

For more information, visit our website or contact The Office of Economic Development directly at 503-742-4biz or [4Biz@clacakamascounty.us](mailto:4Biz@clacakamascounty.us). We provide resources such as grant guidelines, application forms, and contact information for assistance.

**14. Whom should I contact if I have more questions?**

If you have additional questions or need further assistance, please contact us at 503-742-4biz or [4Biz@clacakamascounty.us](mailto:4Biz@clacakamascounty.us). We are available to answer clarifying questions and/or resolve technical issues with the application form.

**15. Can software count as a capital asset under the capital project type?**

Yes, purchases of non-physical capital assets such as software can qualify under the capital project type.

Qualifying capital projects involve capital purchases that meet a business need by contributing to business expansion, projected growth strategies, etc. (as stated in the Notice of Funding Opportunity).

**16. Is the matching funds commitment the same as a business collateral requirement?**

No, matching funds are not the same as collateral. The 100% match commitment requires that an applicant contribute their own dollars to pay for at least half of their project costs.

For example, if an applicant is proposing a project with a total cost of \$50,000, the maximum amount of grant funding that they can request in their application is \$25,000. The rest of the project costs must be covered by another source of funds which must already have been secured by the applicant.

Sources of matching funds may include existing cash on hand, pre-approved loans, already awarded grant funds, etc. Applicants must provide up to 5 pages of documentation to show the source and availability of their matching funds. Documentation must be submitted in PDF format, and should not include personal information that is not required to prove matching funds (i.e. applicants should redact any full account numbers, SSN, check numbers, etc.)

**17. Can I use another grant as my source of matching funds?**

You may use a separate, *already awarded* grant as a source of matching funds. You must explain in your application how your awarded grant funds are set to be used and any restrictions on those funds. You must clearly demonstrate how both the awarded grant funds and the funds you are applying for fit into one cohesive project.

Other grants which you have applied for but have not been awarded can not be used as a source of matching funds.

**18. Can I apply for a capital project if I am purchasing multiple pieces of equipment?**

Yes, if you are purchasing multiple pieces of equipment for a specific project you may include costs related to that equipment in your project budget. It is up to the applicant to clearly explain why each equipment purchase is related to the project, and ensure that the project narrative, expected outcomes, and budget all support this.

**19. Can I include money I've already spent on a project in my match commitment?**

No. Project budgets may only include expenses that have not yet been incurred.

If your application is for a phase or portion of a larger ongoing project, you *may* include information about the full project in your project narrative, expected outcomes, and other narrative sections of the application. In this case, it is still up to you to describe the need and impact of the portion of the project that is reflected in the budget.

**20. Can I include money in my match commitment that I *plan* to spend on a project before the funding agreements are finalized (estimated May 2026)?**

Yes. You may include in your **project match commitment** money that you plan to spend on the described project, so long as that spending is clearly detailed in the project budget and timeline, and so long as the spending occurs after the grant application deadline on 10/13/25. You will be required to submit financial documentation to show when project funds were spent.

Because grant funds can not be used for reimbursement or to pay off debt, you may not include in your **grant request** any money that will be spent before the funding agreements are finalized.

**21. Can home-based businesses apply for funds to make property improvements or building expansions?**

Property improvements and/or construction projects on privately owned residential properties (i.e. homes and properties which are zoned as residential) **do not** qualify for funding under this program.

**22. Why isn't my application going through when I click 'Submit application'?**

Before reaching out to County staff about an issue with the form, please do the following:

- Double-check that you have completed all required questions.

- Double-check that you have successfully uploaded your project budget in .xlsx format.
- Double-check that you have successfully uploaded your proof of matching funds in PDF file format.
- Confirm that your uploaded files do not exceed 10 MB in size.
- Confirm that your question responses do not exceed the stated character limit (including spaces).

To ensure that you do not lose your work in the event of a form error, please write your responses to the application questions in a separate, saved document prior to filling out the application form.

**23. Does software count as a “good” under the traded-sector definition?**

Yes, software that is produced in Clackamas County and sold outside of the county and its immediate surroundings would qualify as a traded-sector line of business.

**24. Are services that are sold outside of Clackamas County considered traded-sector?**

No, purely service-based businesses do not qualify as traded-sector under this program.

<b>GRANT AGREEMENT</b>	
<b>Program Name:</b> Business Development Grant Program <b>Program Number:</b> 600406	
This Grant Agreement (this "Agreement") is between <b>Clackamas County</b> , a political subdivision of the State of Oregon ("County"), acting by and through its Office of Economic Development, and <b>Benchmade Knife Company</b> , an Oregon for-profit entity ("Recipient").	
<b>County Information</b>	
<b>Grant Administrator:</b>	<b>Program Manager:</b> Julia McCotter
Clackamas County Office of Economic Development 150 Beaver creek Road Oregon City, OR 97045 503-742-4238 4biz@clackamas.us	Clackamas County Office of Economic Development 150 Beaver creek Road Oregon City, OR 97045 503-742-4399 JMcCotter@clackamas.us
<b>Recipient Information</b>	
<b>Finance/Fiscal Representative:</b>	<b>Owner:</b>
Powers Schurrer, Sr. Director of Finance pschurrer@benchmade.com 300 Beaver creek Rd. Oregon City, OR 97045	Jon deAsis, President/CEO jdeasis@benchmade.com 300 Beaver creek Rd. Oregon City, OR 97045
<b>State of Oregon Business Registry Number:</b>	1446858-98

**RECITALS**

County seeks to promote economic development by investing in capital, capacity, and workforce development projects for traded-sector businesses operating in Clackamas County.

On April 17, 2024, the Clackamas County Board of Commissioners ("Board") approved a Business Development Grant program with the goals of using lottery dollars to support business and workforce development activities, retaining Clackamas-County-based operations, and attracting businesses looking to relocate into Clackamas County.

On January 20, 2026, the Board approved the Business Development Grants, as recommended by the Review and Recommendation Committee, and instructed the Office of Economic Development to finalize funding agreements with the approved Recipients.

The total investment in the Business Development Grant Program from County's restricted fund allocation of lottery dollars in the 2025-26 fiscal year is \$650,000. The maximum lottery dollar funding for each grant is \$100,000. Grants may be for lesser amounts, and no single grant may exceed \$100,000.

Recipient submitted an application, attached as Exhibit B, for grant funds to be used for a Capital Project. County has agreed to award Recipient a portion of the requested grant funds to perform the work described in Exhibit A (the "Project").

**BENCHMADE KNIFE COMPANY**

Grant Agreement – Business Development Grant Program FY25/26

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NOW, THEREFORE, the parties agree as follows:

**AGREEMENT**

1. **Term.** This Agreement shall become effective on the date it is fully executed and shall expire on June 30, 2028, unless sooner terminated or extended pursuant to the terms hereof.
2. **Grant Funds.**
  - a. **Payment.** County agrees to pay Recipient a one-time lump sum not to exceed seventy thousand dollars (\$70,000.00) (the “Grant Funds”). Such payment is contingent on County receiving appropriations or other expenditure authority sufficient to allow County, in the exercise of its sole discretion, to make the payment.
  - b. **Use.** Recipient shall use the Grant Funds solely to complete the Project as described in Exhibit A, subject to the terms of this Agreement, the attached Exhibits, and all applicable laws and regulations including, but not limited to, the limitations set forth in Article XV, section 4, of the Oregon Constitution and ORS 461.540 for use of lottery dollars, which is the source of funds under this Agreement. Recipient shall use the Grant Funds solely for Project costs incurred during the period beginning **January 20, 2026** and ending **December 31, 2027** (the “Grant Period”), unless this Agreement is sooner terminated or the Grant Period is sooner extended pursuant to the terms hereof.
  - c. **Allowable Costs.** Recipient will incur only allowable costs in connection with the Project under this Agreement. A cost is allowable if it is reasonable and allocable, as described below.
    - i. **Reasonable.**
      1. A cost is reasonable if, in its nature and amount, it does not exceed that which would be incurred by a prudent person in the conduct of competitive business. Reasonableness of specific costs must be examined with particular care in connection with firms or their separate divisions that may not be subject to effective competitive restraints. No presumption of reasonableness shall be attached to the incurrence of costs by Recipient. If an initial review of the facts results in a challenge to a specific cost by County, the burden of proof shall be upon Recipient to establish that such cost is reasonable.
      2. What is reasonable depends upon a variety of considerations and circumstances, including:
        - Whether it is the type of cost generally recognized as ordinary and necessary for the completion of the Project;
        - Generally accepted sound business practices, arm's length bargaining, and federal and state laws and regulations;
        - Recipient's responsibilities to the government, other customers, its owners, its employees, and the public at large; and
        - Any significant deviations from Recipient's established practices.
    - ii. **Allocable.** A cost is allocable if it is assignable or chargeable to one or more cost objectives on the basis of relative benefits received or other equitable relationship. Subject to the foregoing, a cost is allocable under this Agreement if it:
      1. Is incurred specifically for the Project as described in Exhibit A; or
      2. Benefits both the Project and other work, and can be distributed among them in reasonable proportion to the benefits received.

**BENCHMADE KNIFE COMPANY**

Grant Agreement – Business Development Grant Program FY25/26

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- d. **Duplicate Funding.** Recipient may use funds other than the Grant Funds to complete the Project; provided, however, that Recipient may not use the Grant Funds for any Project costs that are budgeted to be or that have been paid for with other funds and would result in duplicate funding. The applicable portion of any rebate, allowance, or other credit relating to any Project costs received by or accruing to Recipient shall be credited to the Project either as a cost reduction or by cash refund to County.
  - e. **Return.** Any unspent Grant Funds must be returned to County within 30 days of the end of the Grant Period, the earlier termination of this Agreement, or the end of any extensions of the Grant Period. Unspent Grant Funds include those Grant Funds that have not been spent in accordance with the terms of this Agreement.
  - f. **Reimbursement.** County may require full or partial reimbursement of the Grant Funds if Recipient fails to deliver the Project as described in Exhibit A.
3. **Future Support.** County makes no commitment and assumes no obligation for future support of the Project.
  4. **Matching Funds.** Recipient is required to provide matching funds in the amounts specified in Exhibit A.
  5. **Amendments.** The terms of this Agreement may not be waived, altered, modified, supplemented, or amended, in any manner whatsoever, except by written instrument signed by both parties. Recipient must submit a written request for any amendment, including justification, to County at least forty-five (45) calendar days before expiration of this Agreement.
  6. **Termination.** This Agreement may be terminated prior to its expiration as follows:
    - a. At County's discretion, upon thirty (30) days' advance written notice to Recipient.
    - b. Upon a party's default under this Agreement, following thirty (30) days' written notice to the party with an opportunity to cure.
    - c. At any time upon mutual agreement by the parties.
    - d. Immediately upon written notice to Recipient that County lacks sufficient funds, as determined by County in its sole discretion, to continue to perform under this Agreement.

The termination of this Agreement, for any reason, shall not release Recipient from any obligation that has already accrued or that comes into effect due to such termination.

7. **Default.**

- a. **Recipient's Default.** Recipient will be in default under this Agreement upon the occurrence of any of the following:
  - i. Recipient fails to use the Grant Funds for eligible purposes described in Exhibit A;
  - ii. Any representation, warranty, or statement made by Recipient in this Agreement or in any documents or reports relied upon by County to measure the Business Development Grant Program, the expenditure of the Grant Funds, or the performance by Recipient is untrue in any material respect when made;
  - iii. Recipient fails to comply with any term or condition set forth in this Agreement;
  - iv. A petition, proceeding, or case is filed by or against Recipient under federal or state bankruptcy, insolvency, receivership, or other law; or

**BENCHMADE KNIFE COMPANY**

Grant Agreement – Business Development Grant Program FY25/26

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v. Recipient fails to make sufficient progress on the Project as determined by County in its sole discretion.

b. **County's Default.** County will be in default under this Agreement if County fails to perform a material obligation under this Agreement; provided, however, that failure to pay the Grant Funds due to lack of appropriation shall not constitute a default of County.

**8. Remedies.**

a. **County's Remedies.** In the event of Recipient's default, County may, at its option, pursue any or all remedies available to it under this Agreement, at law or in equity, including, but not limited to, (1) withholding the Grant Funds until compliance is achieved; (2) requiring reimbursement of the Grant Funds in the case of omissions or misrepresentations in financial or programmatic reporting; (3) requiring the return of any Grant Funds used by Recipient in violation of this Agreement; (4) terminating this Agreement, following thirty (30) days' written notice to Recipient with an opportunity to cure; (5) declaring Recipient ineligible to receive future awards from County; or (6) initiating an action or proceeding for damages or for declaratory or injunctive relief.

b. **Recipient's Remedies.** In the event of County's default, Recipient may, at its option, (1) terminate this Agreement, following thirty (30) days' written notice to County with an opportunity to cure, and/or, (2) subject to the limits of applicable law and this Agreement, require reimbursement of eligible costs incurred in accordance with this Agreement, less any claims County may have against Recipient. In no event will County be liable to Recipient for expenses related to termination of this Agreement or for any indirect, incidental, consequential, or special damages.

**9. Administrative Requirements.**

a. **Accounting.** All costs incurred by recipient under this Agreement should be recorded in compliance with generally accepted accounting principles, international financial reporting standards, and/or governmental accounting standards.

b. **Monitoring.** County and its duly authorized representatives shall have access to the financial records, books, documents, papers, plans, records of shipments, payments, and writings of Recipient that are pertinent to this Agreement, whether in paper, electronic, or other form, to perform examinations and audits and make excerpts and transcripts. County and its duly authorized representatives shall also have access to conduct onsite or offsite visits for the purpose of monitoring. County may take photographs of funded items during such visits.

c. **Record Retention.** Recipient will retain and keep accessible all financial records, books, documents, papers, plans, records of shipments, payments, and writings for a minimum of six (6) years, or such longer period as may be required by applicable state law, following expiration or termination of this Agreement, or until the conclusion of any audit, controversy, or litigation arising out of or related to this Agreement, whichever date is later.

d. **Change in Ownership.** Recipient is required to notify County, in writing, if Recipient intends to sell its business to another entity or otherwise transfer ownership during the term of this Agreement.

e. **Closeout.** County will closeout this award when County determines that all applicable administrative actions and all required work have been completed by Recipient.

**10. Compliance with Applicable Law.** Recipient shall comply with all applicable federal, state, and local laws, regulations, executive orders, and ordinances applicable to this Agreement, as they may be amended from time to time, including, but not limited to, (i) Titles VI and VII of the Civil Rights Act of

**BENCHMADE KNIFE COMPANY**

Grant Agreement – Business Development Grant Program FY25/26

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1964, as amended; (ii) Sections 503 and 504 of the Rehabilitation Act of 1973, as amended; (iii) the Americans with Disabilities Act of 1990, as amended; (iv) Executive Order 11246, "Equal Employment Opportunity," as amended; (v) the Health Insurance Portability and Accountability Act of 1996; (vi) the Age Discrimination in Employment Act of 1967, as amended, and the Age Discrimination Act of 1975, as amended; (vii) the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended; (viii) all regulations and administrative rules established pursuant to the foregoing laws; and (ix) all other applicable requirements of federal and state civil rights and rehabilitation statutes, rules, and regulations.

**11. General Provisions.**

- a. **Indemnification.** Recipient agrees to indemnify and hold County and its elected officials, officers, employees, and agents harmless with respect to any claim, cause, damage, action, penalty, or other cost (including attorney and expert fees) arising from or related to (i) the negligent or willful acts of Recipient or its employees, its agents, or those under its control; or (ii) the acts or omissions of Recipient in performing under this Agreement including, but not limited to, any claim by state or federal funding sources that Recipient used funds for an ineligible purpose. Recipient is responsible for the acts of its agents and employees, and County assumes no liability or responsibility with respect to the acts of Recipient or its employees, its agents, or those under its control.
- b. **Assignment.** This Agreement may not be assigned in whole or in part without the prior express written approval of County.
- c. **Independent Status.** Recipient is independent of County and will be responsible for any federal, state, or local taxes and fees applicable to the Grant Funds. Recipient is not an agent of County and, except as set forth herein, undertakes this work independent of the control and direction of County. Recipient shall not seek or have the power to bind County in any transaction or activity.
- d. **Notices.** Any notice provided for under this Agreement shall be deemed given if it is in writing and (1) delivered personally to the addressee; (2) sent by certified mail, return receipt requested; (3) sent by commercial delivery service (such as Federal Express); (4) sent by electronic mail with confirmation (such as a return receipt) that it was delivered, accessed, downloaded, or printed.
- e. **Dispute Resolution.** The parties will attempt in good faith to informally resolve any dispute arising out of this Agreement. This may be done at any management level, including at a level higher than persons directly responsible for administration of this Agreement. In addition, the parties may agree to utilize a jointly selected mediator to resolve the dispute short of litigation. Each party will bear its own costs incurred for any mediation.
- f. **Governing Law.** This Agreement, and all rights, obligations, and disputes arising out of it, shall be governed and construed in accordance with the laws of the State of Oregon and the ordinances of Clackamas County without regard to conflict of law principles. Any claim, action, or suit between the parties that arises out of or relates to this Agreement shall be brought and conducted solely and exclusively in the Circuit Court of the State of Oregon for Clackamas County; provided, however, that, if any such claim, action, or suit may be brought in a federal forum, it shall be brought and conducted solely and exclusively in the United States District Court for the District of Oregon. In no event shall this section be construed as a waiver by County of any form of defense or immunity, whether sovereign immunity, governmental immunity, immunity based on the Eleventh Amendment to the United States Constitution, or otherwise, from any claim or from the jurisdiction of any court. Recipient consents to the personal jurisdiction of the courts referenced in this section.
- g. **Severability.** If any provision of this Agreement is found to be illegal or unenforceable, this Agreement nevertheless shall remain in full force and effect, and the offending provision shall be stricken.

**BENCHMADE KNIFE COMPANY**

Grant Agreement – Business Development Grant Program FY25/26

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- h. **Counterparts.** This Agreement may be executed in any number of counterparts, all of which together will constitute one and the same agreement. Facsimile or electronic signatures shall be valid as original signatures.
  - i. **Third-Party Beneficiaries.** Except as expressly provided in this Agreement, there are no third-party beneficiaries to this Agreement. The terms of this Agreement may be enforced only by the parties.
  - j. **Binding Effect.** This Agreement shall be binding on the parties and their successors.
  - k. **Integration.** This Agreement contains the entire agreement between the parties and supersedes all prior written or oral discussions or agreements.
  - l. **No Attorney Fees.** In the event any arbitration, action, or proceeding, including any bankruptcy proceeding, is instituted to enforce any term of this Agreement, each party shall be responsible for its own attorney fees and expenses.
  - m. **Debt Limitation.** This Agreement is subject to the county debt limitation set forth in Article XI, section 10, of the Oregon Constitution, and is contingent upon funds being appropriated to carry out its provisions.
  - n. **Necessary Acts.** Each party shall execute and deliver to the other all such further instruments and documents as may be reasonably necessary to carry out this Agreement.
12. **Insurance.** Recipient shall secure at its own expense and keep in effect during the term of this Agreement the insurance type and minimum coverage indicated below. These requirements do not in any way limit the amount or scope of Recipient’s liability under this Agreement. Recipient shall provide proof of said insurance and name County as an additional insured on all required liability policies. Proof of insurance and notice of any material change should be submitted to the Grant Administrator or Program Manager at the contact information listed above.

<input checked="" type="checkbox"/> Required – Workers’ Compensation: Recipient shall comply with the statutory workers’ compensation requirements in ORS 656.017, unless exempt under ORS 656.027 or 656.126.
<input checked="" type="checkbox"/> Required – Commercial General Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence, with an annual aggregate limit of \$2,000,000 for Bodily Injury and Property Damage.
<input type="checkbox"/> Required – Professional Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per claim, with an annual aggregate limit of \$2,000,000 for damages caused by error, omission, or negligent acts.
<input checked="" type="checkbox"/> Required – Automobile Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per accident for bodily injury and property damage.
<input type="checkbox"/> Required – Abuse & Molestation endorsement with limits not less than \$1,000,000 per occurrence if not included in the Commercial General Liability policy.

13. **Agreement Documents.**

The following documents are attached to this Agreement and incorporated herein:

- Exhibit A: Approved Scope of Work: Project Description, Budget, Performance Outcomes, and Reporting

**BENCHMADE KNIFE COMPANY**

Grant Agreement – Business Development Grant Program FY25/26

Page 7 of 8

- Exhibit B: Original Application, Budget, and Required Submission Documents
- Exhibit C: Original County Notice of Funding Opportunity (NOFO) and related FAQs

In the event of a conflict between the terms of this Agreement and/or any of the attached Exhibits, interpretations shall be based on the following order of precedence:

- This Agreement
- Exhibit A
- Exhibit B
- Exhibit C

*(Signature Page Follows)*

**BENCHMADE KNIFE COMPANY**

Grant Agreement – Business Development Grant Program FY25/26

Page 8 of 8

IN WITNESS WHEREOF, the parties have caused this Agreement to be executed by their duly authorized officers.

CLACKAMAS COUNTY

BENCHMADE KNIFE COMPANY

By: \_\_\_\_\_  
Craig Roberts, Chair

Signed by:  
By: Joel Kershaw  
Joel Kershaw, Vice President of Operations

Dated: \_\_\_\_\_

Dated: 4/14/2026

Approved as to form:

By:   
County Counsel

Dated: April 28, 2026

## EXHIBIT A – SCOPE OF WORK

Clackamas County Office of Economic Development  
Business Development Grant Program FY 2025-26

### Grant Award Information

**RECIPIENT:**

Benchmade Knife Company  
300 Beaver Creek Road  
Oregon City, OR 97045

**AMOUNT:**

\$70,000

### Use of Grant Funds

The Grant Funds under this Agreement are lottery dollars. As such, they are subject to the limitations set forth in Article XV, section 4, of the Oregon Constitution and ORS 461.540. Use of lottery dollars is restricted to the following:

- (a) Creating jobs;
- (b) Furthering economic development in Oregon; or
- (c) Financing public education.

**The Grant Funds under this Agreement may be used for the following purposes:**

### Project Scope

Benchmade Knife Company is awarded a grant in the amount of \$70,000 to support a Capital project. Project activities and reported outcomes will occur at 300 Beaver Creek Road, Oregon City, OR 97045. Grant Funds will support purchase and installation of new production equipment. The goals of this capital purchase are to:

- Increase production
- Increase production efficiency
- Decrease production waste

## Project Budget

PROJECT BUDGET					
	Line Item Description	Quantity	Unit Price	Cost Basis	Total
1	C&B Machinery Model CB2H-RE-36-GI Double Disc Grinder with Reciprocator Tooling	1.00	\$ 831,407.00	Each	\$ 831,407.00
2	Electrical Contract Work	1.00	\$ 19,276.00	Each	\$ 19,276.00
3	Mist Collector	1.00	\$ 4,136.00	Each	\$ 4,136.00
4	Building Modification for Connection	1.00	\$ 18,000.00	Each	\$ 18,000.00
5	Gantry Crane System	1.00	\$ 90,000.00	Each	\$ 90,000.00
6	Grinding Wheel Startup set	1.00	\$ 6,720.00	Each	\$ 6,720.00
7	Moving/Machine Storage/Rigging/Machine Installation	1.00	\$ 16,635.00	Each	\$ 16,635.00
8	Factory Acceptance Test (FAT) Travel Expenses	1.00	\$ 4,500.00	Each	\$ 4,500.00
9	Parts for testing	1.00	\$ 16,579.00	Each	\$ 16,579.00
10	Mechanical Contract Work	1.00	\$ 6,000.00	Each	\$ 6,000.00
11	Workstation setup supplies	1.00	\$ 2,000.00	Each	\$ 2,000.00
12	Storage Shelving Move	1.00	\$ 1,495.00	Each	\$ 1,495.00
<b>TOTAL PROJECT COST</b>					<b>\$ 1,016,748.00</b>
<i>Grant funds:</i>					\$ 70,000.00
<i>Matching funds:</i>					\$ 946,748.00

Recipient is committed to carrying out Project activities, as defined in the above scope and budget, in Clackamas County. Recipient is committed to maintaining business operations in Clackamas County for the term of this Agreement.

## Request for Grant Funds

Upon full execution of this Agreement, Recipient must submit all paperwork required by County to be paid as a vendor and remit an invoice for full payment of the Grant Funds.

## Reporting

During the term of this Agreement, Recipient shall provide, at minimum, one progress report and two outcomes reports using County-provided templates. These reports are due on the following schedule:

**September 25, 2026** – Progress Report Due

Reporting period: *Date of agreement signature – September 18, 2026*

**April 30, 2027** – Year 1 Outcomes Report Due

Reporting period: *Date of agreement signature – March 31, 2027*

**April 30, 2028** – Year 2 Outcomes Report Due

Reporting period: *April 1, 2027 – March 31, 2028*

Recipient may also be asked to provide supplemental narrative information on Project activities and outcomes for use in public reports and marketing initiatives.

Reports shall be submitted to the following address:

Julia McCotter  
Clackamas County Office of Economic Development  
150 Beavercreek Road  
Oregon City, OR 97045  
503-742-4399  
jmccotter@clackamas.us

## Detailed Eligibility

**Legal business name**

BENCHMADE KNIFE COMPANY

**Business DBA**

N/A

**Business Website**

www.benchmade.com

**Oregon Secretary of State ID number**

1446858-98

**Incorporation date**

1989-10-12

**Corporate structure**

Corporation (c-corp)

**North American Industry Classification System (NAICS) code**

34210104

**Industry name**

Manufacturing

**Primary business address**

300 Beaver Creek Road, Oregon City, OR 97045

**Project location address**

300 Beaver Creek Road, Oregon City, OR 97045

**How does your business meet the criteria for a traded-sector business?**

We manufacture premium knives in Clackamas county, and ship product all over the USA as well as internationally.

**Total project budget**

1016748

**Total grant funds requested**

100000

**What is the source of your matching funds for this project?**

Company funded.

**If awarded, grant funds will not be disbursed until Spring 2026. Grant funds can not be used to reimburse previous spending. Is your project feasible given this funding timeline?**

Yes

**Applicant Information**

**Full name(s) of business owner(s)**

Jon DeAsis, Roberta DeAsis

**Full name of applicant contact**

Soham Banerjee

**Title of applicant contact**

Process Engineering Manager

**Email address of applicant contact**

sbanerjee@benchmade.com

**Primary phone number of applicant contact**

5712257364

**Brief summary of the business**

Design and manufacture sports cutlery and edged tools

**Grant Project Information**

**Please select your Project Type**

Capital project

**Project Category**

Production Expansion

**Please provide a narrative summary of your project**

This project is to purchase a new grinding machine to revolutionize the way we perform our surface grinding operation for knife blades. The current machinery we use results in a high rate of scrap, is unreliable in terms of breakdowns, and lacks the technical support needed from the vendor. The business has decided to shift the grinding operation to a "Double Disc" style grinder, which is a proven technology in the knife industry and will result in a more consistent process.

**Please describe the business need for grant funding to assist your project**

Current grinding process results in production losses and inefficiencies that need to be addressed. Receiving this funding would stabilize cash flow for the business and will help us continue to invest funding into our facility located in Clackamas County.

**What outcomes do you expect to achieve as a result of this project?**

Increase production  
Increase production efficiency  
Decrease production waste

**Elaborating on your selected outcomes**

The current machinery's maintenance activities require production workers to perform tasks that are not ideal from an ergonomic perspective. With the implementation of this project, we will be purchasing crane systems and mechanically-assisted material handling solutions to improve the quality of life and safety of production workers. The current machinery used for the grinding process experience 1000 hours of downtime annually. This represents a lost opportunity of processing almost 150,000 blades per year. The purchase of this new asset, will drastically reduce the downtime we experience and enable us to process more blades to meet our production targets; this in turn should result in increased production capacity to meet higher demand.

**How many months do you expect it will take to fully implement your project? \***

12

**Please describe your project timeline in more detail**

5 months for design+engineering work and purchasing material. 2 months for machine build and assembly. 2 months for machine startup, debug, and qualification. 3 months for startup at factory, workcenter setup, and machine programming. During the machine build timeline, we will be implementing facility modifications in preparation for machine arrival.

**If your project is awarded partial funding, what project activities and costs would you prioritize to achieve your desired outcomes?**

This project isn't reliant on receiving grant funding. But the funding will help offset the cost allowing us to reinvest the funds in our employees and facilities.

**Attestation**

Yes

**Name of Attesting Corporate Officer \***

Powers Schurrer

## EXHIBIT B: Original Application, Budget, and Required Submission Documents

INFORMATION				
BENCHMADE KNIFE COMPANY				
Capital Project				
\$100,000.00				
\$916,748.00				
BUDGET ATTESTATIONS (select from dropdown)				
Who is responsible for sourcing funds outside of this grant	Yes			
Half of my total project costs.				
Unexpended grant funds will not be disbursed until Spring/Summer	Yes			
and cannot be used to reimburse costs that are incurred before				
and disbursed.				
The budget does not include any line items that have already been	Yes			
or line items that will be purchased prior to the grant				
None of the money in this project budget will be spent on Clackamas County-	Yes			
owned or workforce. I understand that no project funds may be				
used to purchase assets based in a non-Clackamas County business location.				
PROJECT BUDGET				
	Quantity	Unit Price	Cost Basis	Total
Model CB2H-RE-36-GI Double Disc Grinder with Reciprocator	1.00	\$ 831,407.00	Each	\$ 831,407.00
Electrical Contract Work	1.00	\$ 19,276.00	Each	\$ 19,276.00
Mist Collector	1.00	\$ 4,136.00	Each	\$ 4,136.00
Concrete Floor Modification	1.00	\$ 18,000.00	Each	\$ 18,000.00
Gantry Crane System	1.00	\$ 90,000.00	Each	\$ 90,000.00
Grinding Wheel Startup set	1.00	\$ 6,720.00	Each	\$ 6,720.00
Machine Storage/Rigging/Machine Installation	1.00	\$ 16,635.00	Each	\$ 16,635.00
FAT Travel Expenses	1.00	\$ 4,500.00	Each	\$ 4,500.00
Parts for testing	1.00	\$ 16,579.00	Each	\$ 16,579.00
Mechanical Contract Work	1.00	\$ 6,000.00	Each	\$ 6,000.00
Workstation setup supplies	1.00	\$ 2,000.00	Each	\$ 2,000.00
Storage Shelving Move	1.00	\$ 1,495.00	Each	\$ 1,495.00
<b>TOTAL PROJECT COST</b>				<b>\$ 1,016,748.00</b>
<i>Maximum grant funding request for this project:</i>				<b>\$ 100,000.00</b>

## EXHIBIT B: Original Application, Budget, and Required Submission Documents

WELLS FARGO
Support | Sign Off

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Credit Management
[Return to CFO Home](#)

### Commitment Details

Commitment:

#### Customer

Customer Name: \*BENCHMADE KNIFE CO., INC.  
Customer Number: ...4043

#### Commitment

Commitment: 0000000059  
Commitment Type: Line of Credit  
Maturity Date: 04/10/2027  
Origination Date: 04/10/2025

#### Balances

Commitment Amount	13,000,000.00 USD
Amount Available	9,681,910.13 USD
Amount Used	3,318,089.87 USD
Outstanding Principal	3,318,089.87 USD

Credit Management

[Return to CEO Home](#)

### Home

Expand table rows to view key dates.

As of 10/13/2025 08:39 am PT

+	Commitment	Nickname	Customer	Commitment Type	Commitment Amount USD	Amount Used USD	Amount Available USD	Action
+	<a href="#">0000000059</a>		*BENCHMADE KNIFE CO., INC. ...4043	Line of Credit	13,000,000.00	3,318,089.87	9,681,910.13	Select



EXHIBIT C

Notice of Funding Opportunity (NOFO)

Clackamas County Office of Economic Development

Business Development Grant Program

Program Description

Traded sector businesses—those competing in markets beyond the local area—are invited to apply for funding designated to help them grow!

In April 2024, the Clackamas County Board of Commissioners approved the Business Development Grant Program with the goals of supporting traded-sector business activity (e.g. expansion of operations, efficiencies, technological advancements, etc.), retaining Clackamas County-based operations for existing businesses, and/or attracting new businesses to relocate operations to Clackamas County. Funding will be provided for either capital investments or workforce development projects and must be matched 100% or more by the awardee.

Award Information

Funding Source:	State lottery dollars
Funding Amount:	Individual Award Maximum \$100,000 (awards may be less); \$650,000 total funding available this cycle. Funding is contingent upon the execution of a grant agreement. If an approved recipient cannot finalize their agreement, funds may be offered to approved alternates.
Grant Period of Performance:	Approximately 6-18 months from agreement execution (execution estimated Spring 2026), depending on project. Some projects may be longer.
Reporting Requirements:	Reporting requirements will vary by project type and will be negotiated with each awardee prior to agreement execution. Reporting will be sufficient to ensure awarded amounts are expended on eligible costs and that the project, as described in the agreement, has been completed.
Submission Method:	Complete and submit application electronically via the <a href="#">official web form</a> . Paper applications will not be accepted.
Application Open Period:	September 4, 2025 at 9am Pacific Time – October 13, 2025 at 5pm Pacific Time.



	Complete submissions, including all required documents, must be received by 5pm on October 13 <sup>th</sup> to be considered responsive. Complete submissions include all required supporting documentation in addition to the application. Incomplete applications will not be considered.
Program Contact:	<a href="mailto:4biz@clackamas.us">4biz@clackamas.us</a> , (503) 742-4BIZ (4249)
Informational Webinar:	September 16, 2025 at 3:30pm Pacific Time <a href="#">Registration required</a>
Match Requirement:	100% or more

## Background

Clackamas County was allocated State lottery dollars for economic development and this Business Development Grant Program is an expression of that constitutional purpose for State lottery funds.

## Eligibility & General Requirements

The following criteria must be met in order for your application to be deemed eligible for review. This is a competitive grant program; not all eligible applications will be funded.

### **Location and Age.**

Your business must have operations within Clackamas County or seek to relocate to or establish additional operations within Clackamas County. The business must be “established,” which means it is at least two years old, though it needn’t have been located in Clackamas County for two years if seeking to move existing operations into the county.

### **Traded Sector**

Your business must be a *traded-sector business*, defined as *Clackamas County businesses producing or manufacturing goods in Clackamas County AND selling or exporting those goods outside the county and its immediate surroundings (e.g. manufacturing, food processing, etc.).*

### **Project Types**

Your proposal must be for a capital project or for a workforce development project. No other project types will be considered.

Capital projects may include:

- Purchase of capital assets that meet a business need, expand production, increase efficiency, or otherwise lead to business growth. Capital assets may include machinery, equipment, software, etc.
- Site development, improvement, or other construction that is directly related to relocation, expansion, and/or business growth.



Capital project requests may also include any fees, licenses, delivery costs, taxes, installation, utility hookups, etc. directly associated with the purchase to bring the capital project online operationally and these costs should be broken out in your budget.

Workforce development projects include the training, hiring, and/or retention of employees. Examples of workforce development projects include but are not limited to:

- Training for employees to learn a new or updated technology, equipment or process, employer-specified or industry-specific skills;
- Train-the-trainer instruction to build the capacity of businesses;
- Permanent hiring of new employee(s) to increase production, expand product lines, bring outsourced work in-house, or otherwise meet existing and future demand.

***Match Requirements***

You must provide proof of secured match of at least 100% of the amount requested, meaning that only half of the funding for your proposed project may come from this grant. Your business must pay the other half of your project costs.

Match may come from:

- Existing business cash
- A loan or investor commitment (with documentation)
- A separate, already awarded grant

***Secretary of State Registration***

Your business must have an [active business registration with the Oregon Secretary of State](#). You will need your Oregon Secretary of State identification number to complete this application. This requirement includes business applicants looking to move operations or establish operations into Clackamas County from outside of Oregon.

***Code compliance***

You may be disqualified from this program if the County finds you are out of compliance with any applicable business codes or owe back taxes without an approved payment plan.

***Participation Restrictions***

Each business may only apply once per application cycle and may not apply to this grant program again if you have previously received an award funded with lottery dollars of any amount. Previous grant recipients may not apply for additional funding.

***Trade secrets and your application***

Since applications submitted under this NOFO are subject to public records requests, please clearly mark any included trade secrets as '(TRADE SECRET)' in your responses. All identified trade secrets will be redacted when responding to public records requests.



***Only business applicants***

Grants will be awarded to businesses, not individuals, so please apply with the official name of your business as registered with the Oregon Secretary of State.

***Unallowable costs***

Indirect costs are not funded through these awards and should not be part of your budget request. Existing staff costs (wages, benefits) are not allowable grant expenses, except for those hours spent in grant-funded training (e.g. training or skill development for a workforce development project, training on new equipment for a capital project).

***Debt(s)***

This grant may not be used to pay debts on already-implemented projects. This grant is intended for new projects only.

## Application and Submission Information

To apply, complete the [official online application](#). Applications sent through mail or email will not be accepted. The full list of application questions is provided at the end of this NOFO. In your application, provide as much information as needed to thoroughly answer questions and convey information; however, please keep answers as clear and concise as possible. The application is broken up into the following sections:

***Base Eligibility***

On the first page of the application, you will be required to complete a basic eligibility screening questionnaire. The main application will load for any applicants who meet the base eligibility criteria. Answer these questions honestly – you will be required to support your statements with documentation in the main application.

***Detailed Eligibility***

In this section of the application, you will be asked to provide more information to validate your eligibility for funding. It is possible for an applicant to be deemed ineligible even if they appear to meet the base eligibility criteria in the screening questionnaire before this section of the application. Full eligibility requirements are listed in this NOFO, above.

***Application Information***

In this section, you will provide your contact information and summary information about your business.

***Grant Project Information***

In this section, you will provide detailed information about the project for which you are seeking grant funding. You will select your project type and categories, describe your need for grant funding, select and discuss your expected outcomes, provide your project timeline, and explain more about your project budget. This section is your primary opportunity to make a compelling case for getting your project funded.



### ***Attachments***

You will need to provide your project budget, using the required budget template. The template must remain in .xlsx file format in order for your file to upload.

You will also need to provide up to 5 pages of documentation to prove the source(s) and availability of your matching funds. Matching funds are an eligibility requirement; applications that do not sufficiently prove source and availability of matching funds will not be deemed eligible for this program.

### ***Attestation***

You'll be required to sign the attestation on the application. Only a corporate officer who is authorized to legally bind the business may sign the attestation. It is your responsibility to carefully review the attestations before signing. Fraudulent applications will be referred to law enforcement.

## Evaluation

Your application will be evaluated by a review committee comprised of Clackamas County staff. Based on the criteria outlined in this NOFO, the review committee will score applications for Project Fit, Need for Funding, Economic Impact, and Project Feasibility. The review committee will recommend projects to the Board of County Commissioners (BCC) for funding and will also propose an alternates list of the top applications that did not make the initial funding cut. The alternates list will serve as a waitlist in the event a BCC-approved grant recipient is unable to finalize their funding agreement due to unforeseen changes in the business, external factors rendering a project unfeasible, or other extenuating circumstances.

**The BCC has sole authority to determine funded projects and the alternates list.** The BCC may choose to disregard or modify the recommendations of the review committee for funded projects or alternates at its discretion. The funding recommendation packet presented to the BCC will include both the proposed awardees and the alternates list for simultaneous review and approval. The BCC-approved alternates list remains valid until all funds are awarded or the funding cycle closes, at the discretion of the Clackamas County issuing department.

Only applications considered responsive will be evaluated. "Responsive" applications are those which comply with the requirements in this NOFO. Applications that do not meet the eligibility requirements or applications that are received late and/or incomplete will not be considered.

**Timeline.** Applications will be reviewed in November/December 2025, with recommendations for funding and the alternates list made to the BCC by January/February 2026. Awardees and alternates will be notified by email only after the BCC has finalized their decisions. In the event an approved grant recipient cannot finalize their funding agreement, the County will contact the next alternate(s) on the BCC-approved list, in ranked order, to negotiate a funding agreement. This process will continue until all allocated funds are awarded or the alternates list is exhausted.



## Notification of Applicants

Applicants selected for funding will be notified by email only after the Board of County Commissioners (BCC) has finalized its decisions. Applicants placed on the alternates list will also be notified by email, informing them of their status as potential awardees should funding become available. The notification will clarify that placement on the alternates list does not guarantee funding and that alternates will be contacted in ranked order only if an approved grant recipient is unable to finalize their funding agreement. All other applicants will receive a courtesy email notifying them that their application was not selected for funding or the alternates list.

Applicants on the alternates list may be asked to provide updated information (e.g., proof of match or project status) if contacted to finalize a funding agreement, to ensure the project remains viable.

After County staff have notified awardees, staff and awardees will negotiate a final scope of work for the project, including timelines for the grant period specific to each project. County Finance, County Counsel, and the BCC will approve final grant documents.

Applicants placed on the alternates list who do not receive funding will be notified after all awardee funding agreements have been finalized. Applicants placed on the alternates list who do not receive funding may apply for future grant cycles and will not receive priority status in any future applications.

## Non-discrimination

Per the Civil Rights Act of 1964, no person shall, on the basis of race, color, or national origin, be excluded from participation, be denied the benefits of, or be subjected to discrimination under any County program, service or activity.



## Application Questions

### Base Eligibility Screening Questionnaire

1. How many years has your business been operating?
2. Does your business have an operating location in Clackamas County?
3. Does your business produce / manufacture goods in Clackamas County?
4. Does your business sell / export goods OUTSIDE of Clackamas County?
5. Is your business registered and current with the Oregon Secretary of State?
6. This grant program requires a 100% match on all grant funds, meaning that only half of the funding for your proposed project may come from this grant. Your business must pay the other half of your project costs. Are you able and prepared to meet this match requirement?

### Detailed Eligibility

1. Legal business name:
2. Business DBA (if applicable):
3. Business website (if applicable):
4. Oregon Secretary of State ID number (this is different from your federal EIN):
5. Incorporation date:
6. Corporate structure:
7. North American Industry Classification System (NAICS) code:
8. Industry name:
9. Primary business address:
10. Project location address:
11. How does your business meet the criteria for a traded-sector business? *1,000 character limit*
12. Total project budget (pull this directly from your completed budget template):
13. Total grant funds requested:
14. What is the source of your matching funds for this project? *1,000 character limit*
15. If awarded, grant funds will not be disbursed until Spring 2026. Grant funds can not be used to reimburse previous spending. Is your project feasible given this funding timeline?

### Applicant Information

16. Full name(s) of business owner(s):
17. Full name of applicant contact:
18. Title of applicant contact:
19. Email address of applicant contact:
20. Primary phone number of applicant contact:
21. Brief summary of the business *1,000 character limit*

### Grant Project Information

22. Please select your Project Type:



- Workforce Development Project
  - Capital Project
23. Project Category (*please select all that apply*):
- Multi-site Development Assistance: Your business does not have a location in Clackamas County and seeks to establish a new location in Clackamas County
  - Relocation: You seek to relocate your existing business into Clackamas County
  - Physical Expansion: Your business is currently located in Clackamas County and seeks to relocate to a larger facility within the county or expand your existing facilities in the county
  - Production Expansion: Your business seeks to expand production capacity through purchasing new equipment, hiring additional employees, providing employee technical training, and/or other capital investment(s)
  - County Business Retention: Your business is currently located in Clackamas County and seeks funds to assist with a project intended to retain operations in the county
24. Please provide a narrative summary of your project (*2,000 character limit*)
25. Please describe the business need for grant funding to assist your project (*2,000 character limit*)
26. What outcomes do you expect to achieve as a result of this project? Expected outcomes will be included in grantee funding agreements and tracked throughout grant projects. Select all that apply:
- Hire new employees
  - Increase production
  - Increase production efficiency
  - Decrease production waste
  - Improve environmental efficiency of production (e.g. decrease water usage, lower carbon footprint, etc.)
  - Increase your business' spending on local inputs
  - Expand product line / offer additional products
  - Increase revenue
27. Elaborating on your selected outcomes, please describe in more detail the expected local economic impacts of your project (*2,000 character limit*)
28. How many months do you expect it will take to fully implement your project?
29. Please describe your project timeline in more detail (*1,000 character limit*)
30. If your project is awarded partial funding, what project activities and costs would you prioritize to achieve your desired outcomes? *1,000 character limit*

## Upload Attachments

31. Using the required template, please attach your project budget below. You may find the required budget template [HERE](#).
32. Please attach your proof of matching funds below (PDF format only). Please exclude any private information that is not necessary for assessing your match (e.g. full bank account numbers, full routing numbers, check numbers, social security numbers, etc.) You may



upload multiple PDFs, but please limit your submission(s) to 5 pages TOTAL across all uploads.

## Attestation

33. By signing this application, I affirm:

- I am legally authorized to bind the applicant business; and
- The information provided in this application, and any supporting documents provided (if applicable), are true and complete to the best of my knowledge; and
- I understand I may be contacted by CCOED staff to provide additional information or documentation which CCOED, in its sole discretion, may require to complete my application and/or establish my eligibility; and
- I do not owe back taxes to any governmental agency or, if back taxes are owed, a written agency payment plan is in place; and
- I understand any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to law enforcement referral for further investigation or result in the disqualification of my application as unresponsive.
- I understand my application may be denied if it's determined that there are current code violations, or that I have received warnings to rectify code violations that are deemed hazardous or unsafe to my business, its employees or the community.
- I understand I may be required to refund or reimburse all or part of the grant proceeds not used for their intended purposes, as stated in the Application, Scope of Work and/or Funding Agreement.

Name of Attesting Corporate Officer:

[APPLY HERE](#)

## Frequently Asked Questions (FAQ)

# Clackamas County Office of Economic Development

### Business Development Grant Program

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#### **1. What is the purpose of the county grant funding program?**

The county grant funding program is designed to provide funding for capital, capacity or workforce development projects to various sized traded sector businesses looking to relocate, expand or retain their operations in Clackamas County.

#### **2. Who is eligible to apply for a grant?**

To be eligible to apply, a business must:

- Be a traded sector business – a business producing or manufacturing goods in Clackamas County and selling those goods *outside* of Clackamas County and its immediate surroundings
- Have been a registered business for at least two years
- Be in good standing with the State
- Provide proof of at least 100% match for their funding request

For full details on eligibility and requirements, refer to the [Notice of Funding Opportunity \(NOFO\)](#).

#### **3. What types of projects or activities can be funded?**

Eligible projects must:

- Increase production of locally-manufactured goods;
- Fund either a capital project or a workforce development project;
- Support business improvement, relocation, retention and/or expansion efforts, and
- Contribute to the Clackamas County's economic development.

Eligible business costs include only those costs required to carry out a project as determined in the application process.

For full details on project and application requirements, including Project Types and Project Categories, refer to the [Notice of Funding Opportunity \(NOFO\)](#).

#### **4. How do I apply for a grant?**

To apply:

1. Review the grant guidelines and eligibility requirements outlined in the [Notice of Funding Opportunity \(NOFO\)](#) to ensure your business and project are eligible for funding. The full list of application questions can be found at the end of the NOFO.
2. Prepare your application, including:
  - a. Responses to the application questions (it's recommended that you prepare these in a separate document as the application form does not allow you to save a draft)
  - b. Project budget using the required template in .xlsx format (located alongside other program documents [here](#))
  - c. Proof of matching funds, as detailed under *Match Requirements* on page 3 of the NOFO (please be prepared to upload in PDF format, with a maximum of 5 pages total)
3. Submit your complete application via the [official web form](#) by 5pm on October 13, 2025, along with any required supporting documents. Late and incomplete applications will not be considered for funding. Application materials sent by post, email, or any means other than the official application web form will not be considered for funding.

For questions or general assistance, contact us at 503-742-4329 or at [4Biz@clacakamascounty.us](mailto:4Biz@clacakamascounty.us)

#### **5. What is the application deadline?**

Complete applications (including required documents) must be submitted via the official web form by 5pm on October 13, 2025.

It is highly recommended that you plan ahead and submit your application with enough time before the deadline to troubleshoot any technology, internet, and/or file issues – **late and/or incomplete applications will not be accepted for any reason.**

#### **6. What is the timeline for this program?**

Applications open on Thursday, September 4, 2025 at 9:00 AM Pacific Time.

Applications close at 5:00 PM Pacific Time on Monday, October 13, 2025.

Final award decisions are subject to the schedule of the Board of County Commissioners, and are anticipated to be announced by February 2026.

Funding agreements will be finalized in Spring 2026.

Funding will be deployed no later than June 30, 2026.

Program Period of Performance will begin at the execution of the grant funding agreement (Spring 2026) and run for approximately 6-18 months, depending on the unique project. Some projects may run longer.

Final Outcome Reports will be due approximately 24 months after the execution of the grant funding agreement.

### **7. How much funding can I apply for?**

You may request up to \$100,000 of funding through this program.

You will be required to provide proof of at least 100% matching funds from another source in order for your funding request to be considered. This means that only half of the funding for your proposed project may come from this grant. Your business must pay the other half of your project costs.

The County reserves the right to award partial funding. You will be asked in the application to list the project activities and costs which you would prioritize in the event your project is awarded partial funding.

### **8. How will grant applications be reviewed?**

Eligible grant applications will be reviewed by a committee comprised of Clackamas County staff. Eligible applications will be evaluated based on criteria such as:

- Alignment with program goals
- Project viability
- Economic impact of project
- Need for funding

After evaluating eligible applications, the Clackamas County staff review committee will recommend projects to the Board of County Commissioners (BCC) for final funding decisions. **The BCC has sole authority to determine funded projects.**

For more information on the evaluation criteria and process, refer to the [NOFO](#).

### **9. When will I be notified of the decision?**

Final award decisions are subject to the schedule of the Board of County Commissioners, and are anticipated to be announced by February 2026.

### **10. What happens next if my application is approved?**

Awardees will be notified by email once the Board of County Commissioners (BCC) has finalized their funding decisions.

After County staff have notified awardees, staff and awardees will negotiate a Funding Agreement. The Funding Agreement is a contract between the County and the awardee, and includes elements such as a final scope of work for the project, approved project budget, timelines, and reporting requirements for the grant period specific to each project. County Finance, County Counsel, and the BCC will approve final funding agreements.

### **11. What are the reporting requirements for grant recipients?**

Grant recipients will be required to submit progress reports and a final report at the end of the grant period. Receipts and other supporting documentation will be required to prove how the funds were used and the outcomes achieved. Depending on the unique nature of the project, other requirements will be discussed and stated in the grant funding agreement.

Specific reporting requirements for each awardee will be outlined in the awardee grant funding agreement based on project type, project categories, and the anticipated outcomes detailed in project applications.

### **13. Where can I find more information about the grant program?**

The **Notice of Funding Opportunity (NOFO)** can be found on the Clackamas County Procurement page for Open Grant Opportunities:

<https://www.clackamas.us/procurement-process#opengrantopportunities>

The **application questions** can be found at the end of the NOFO, which is located on the Clackamas County Procurement page for Open Grant Opportunities:

<https://www.clackamas.us/procurement-process#opengrantopportunities>

The **application budget template** can be found on the Clackamas County Procurement page for Open Grant Opportunities: <https://www.clackamas.us/procurement-process#opengrantopportunities>

The **official application web form** can be found at:

<https://apps.clackamas.us/businessdevelopmentgrants/>

For more information, visit our website or contact The Office of Economic Development directly at 503-742-4biz or [4Biz@clacakamascounty.us](mailto:4Biz@clacakamascounty.us). We provide resources such as grant guidelines, application forms, and contact information for assistance.

**14. Whom should I contact if I have more questions?**

If you have additional questions or need further assistance, please contact us at 503-742-4biz or [4Biz@clacakamascounty.us](mailto:4Biz@clacakamascounty.us). We are available to answer clarifying questions and/or resolve technical issues with the application form.

**15. Can software count as a capital asset under the capital project type?**

Yes, purchases of non-physical capital assets such as software can qualify under the capital project type.

Qualifying capital projects involve capital purchases that meet a business need by contributing to business expansion, projected growth strategies, etc. (as stated in the Notice of Funding Opportunity).

**16. Is the matching funds commitment the same as a business collateral requirement?**

No, matching funds are not the same as collateral. The 100% match commitment requires that an applicant contribute their own dollars to pay for at least half of their project costs.

For example, if an applicant is proposing a project with a total cost of \$50,000, the maximum amount of grant funding that they can request in their application is \$25,000. The rest of the project costs must be covered by another source of funds which must already have been secured by the applicant.

Sources of matching funds may include existing cash on hand, pre-approved loans, already awarded grant funds, etc. Applicants must provide up to 5 pages of documentation to show the source and availability of their matching funds. Documentation must be submitted in PDF format, and should not include personal information that is not required to prove matching funds (i.e. applicants should redact any full account numbers, SSN, check numbers, etc.)

**17. Can I use another grant as my source of matching funds?**

You may use a separate, *already awarded* grant as a source of matching funds. You must explain in your application how your awarded grant funds are set to be used and any restrictions on those funds. You must clearly demonstrate how both the awarded grant funds and the funds you are applying for fit into one cohesive project.

Other grants which you have applied for but have not been awarded can not be used as a source of matching funds.

**18. Can I apply for a capital project if I am purchasing multiple pieces of equipment?**

Yes, if you are purchasing multiple pieces of equipment for a specific project you may include costs related to that equipment in your project budget. It is up to the applicant to clearly explain why each equipment purchase is related to the project, and ensure that the project narrative, expected outcomes, and budget all support this.

**19. Can I include money I've already spent on a project in my match commitment?**

No. Project budgets may only include expenses that have not yet been incurred.

If your application is for a phase or portion of a larger ongoing project, you *may* include information about the full project in your project narrative, expected outcomes, and other narrative sections of the application. In this case, it is still up to you to describe the need and impact of the portion of the project that is reflected in the budget.

**20. Can I include money in my match commitment that I *plan* to spend on a project before the funding agreements are finalized (estimated May 2026)?**

Yes. You may include in your **project match commitment** money that you plan to spend on the described project, so long as that spending is clearly detailed in the project budget and timeline, and so long as the spending occurs after the grant application deadline on 10/13/25. You will be required to submit financial documentation to show when project funds were spent.

Because grant funds can not be used for reimbursement or to pay off debt, you may not include in your **grant request** any money that will be spent before the funding agreements are finalized.

**21. Can home-based businesses apply for funds to make property improvements or building expansions?**

Property improvements and/or construction projects on privately owned residential properties (i.e. homes and properties which are zoned as residential) **do not** qualify for funding under this program.

**22. Why isn't my application going through when I click 'Submit application'?**

Before reaching out to County staff about an issue with the form, please do the following:

- Double-check that you have completed all required questions.

- Double-check that you have successfully uploaded your project budget in .xlsx format.
- Double-check that you have successfully uploaded your proof of matching funds in PDF file format.
- Confirm that your uploaded files do not exceed 10 MB in size.
- Confirm that your question responses do not exceed the stated character limit (including spaces).

To ensure that you do not lose your work in the event of a form error, please write your responses to the application questions in a separate, saved document prior to filling out the application form.

**23. Does software count as a “good” under the traded-sector definition?**

Yes, software that is produced in Clackamas County and sold outside of the county and its immediate surroundings would qualify as a traded-sector line of business.

**24. Are services that are sold outside of Clackamas County considered traded-sector?**

No, purely service-based businesses do not qualify as traded-sector under this program.

## GRANT AGREEMENT

**Program Name:** Business Development Grant Program  
**Program Number:** 600406

This Grant Agreement (this "Agreement") is between **Clackamas County**, a political subdivision of the State of Oregon ("County"), acting by and through its Office of Economic Development, and **Optimize Technologies**, an Oregon for-profit entity ("Recipient").

### County Information

**Grant Administrator:**

**Program Manager:** Julia McCotter

Clackamas County Office of Economic Development  
150 Beavercreek Road  
Oregon City, OR 97045  
503-742-4238  
4biz@clackamas.us

Clackamas County Office of Economic Development  
150 Beavercreek Road  
Oregon City, OR 97045  
503-742-4399  
JMcCotter@clackamas.us

### Recipient Information

**Finance/Fiscal Representative:**

**Owner:**

Steve Sakaguchi  
13993 Fir St. Oregon City, OR 97045  
503-557-9994  
steve@optimizetech.com

Doug and Lisa Ford  
13993 Fir St. Oregon City, OR 97045  
503-557-9994  
ford@optimizetech.com

**State of Oregon Business Registry Number:**

005341-80

## RECITALS

County seeks to promote economic development by investing in capital, capacity, and workforce development projects for traded-sector businesses operating in Clackamas County.

On April 17, 2024, the Clackamas County Board of Commissioners ("Board") approved a Business Development Grant program with the goals of using lottery dollars to support business and workforce development activities, retaining Clackamas-County-based operations, and attracting businesses looking to relocate into Clackamas County.

On January 20, 2026, the Board approved the Business Development Grants, as recommended by the Review and Recommendation Committee, and instructed the Office of Economic Development to finalize funding agreements with the approved Recipients.

The total investment in the Business Development Grant Program from County's restricted fund allocation of lottery dollars in the 2025-26 fiscal year is \$650,000. The maximum lottery dollar funding for each grant is \$100,000. Grants may be for lesser amounts, and no single grant may exceed \$100,000.

Recipient submitted an application, attached as Exhibit B, for grant funds to be used for a Capital Project. County has agreed to award Recipient the requested grant funds to perform the work described in Exhibit A (the "Project").

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NOW, THEREFORE, the parties agree as follows:

### AGREEMENT

1. **Term.** This Agreement shall become effective on the date it is fully executed and shall expire on June 30, 2028, unless sooner terminated or extended pursuant to the terms hereof.
2. **Grant Funds.**
  - a. **Payment.** County agrees to pay Recipient a one-time lump sum not to exceed one hundred thousand dollars (\$100,000.00) (the “Grant Funds”). Such payment is contingent on County receiving appropriations or other expenditure authority sufficient to allow County, in the exercise of its sole discretion, to make the payment.
  - b. **Use.** Recipient shall use the Grant Funds solely to complete the Project as described in Exhibit A, subject to the terms of this Agreement, the attached Exhibits, and all applicable laws and regulations including, but not limited to, the limitations set forth in Article XV, section 4, of the Oregon Constitution and ORS 461.540 for use of lottery dollars, which is the source of funds under this Agreement. Recipient shall use the Grant Funds solely for Project costs incurred during the period beginning **January 20, 2026** and ending **December 31, 2027** (the “Grant Period”), unless this Agreement is sooner terminated or the Grant Period is sooner extended pursuant to the terms hereof.
  - c. **Allowable Costs.** Recipient will incur only allowable costs in connection with the Project under this Agreement. A cost is allowable if it is reasonable and allocable, as described below.
    - i. **Reasonable.**
      1. A cost is reasonable if, in its nature and amount, it does not exceed that which would be incurred by a prudent person in the conduct of competitive business. Reasonableness of specific costs must be examined with particular care in connection with firms or their separate divisions that may not be subject to effective competitive restraints. No presumption of reasonableness shall be attached to the incurrence of costs by Recipient. If an initial review of the facts results in a challenge to a specific cost by County, the burden of proof shall be upon Recipient to establish that such cost is reasonable.
      2. What is reasonable depends upon a variety of considerations and circumstances, including:
        - Whether it is the type of cost generally recognized as ordinary and necessary for the completion of the Project;
        - Generally accepted sound business practices, arm's length bargaining, and federal and state laws and regulations;
        - Recipient's responsibilities to the government, other customers, its owners, its employees, and the public at large; and
        - Any significant deviations from Recipient's established practices.
    - ii. **Allocable.** A cost is allocable if it is assignable or chargeable to one or more cost objectives on the basis of relative benefits received or other equitable relationship. Subject to the foregoing, a cost is allocable under this Agreement if it:
      1. Is incurred specifically for the Project as described in Exhibit A; or
      2. Benefits both the Project and other work, and can be distributed among them in reasonable proportion to the benefits received.

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- d. **Duplicate Funding.** Recipient may use funds other than the Grant Funds to complete the Project; provided, however, that Recipient may not use the Grant Funds for any Project costs that are budgeted to be or that have been paid for with other funds and would result in duplicate funding. The applicable portion of any rebate, allowance, or other credit relating to any Project costs received by or accruing to Recipient shall be credited to the Project either as a cost reduction or by cash refund to County.
  - e. **Return.** Any unspent Grant Funds must be returned to County within 30 days of the end of the Grant Period, the earlier termination of this Agreement, or the end of any extensions of the Grant Period. Unspent Grant Funds include those Grant Funds that have not been spent in accordance with the terms of this Agreement.
  - f. **Reimbursement.** County may require full or partial reimbursement of the Grant Funds if Recipient fails to deliver the Project as described in Exhibit A.
3. **Future Support.** County makes no commitment and assumes no obligation for future support of the Project.
  4. **Matching Funds.** Recipient is required to provide matching funds in the amounts specified in Exhibit A.
  5. **Amendments.** The terms of this Agreement may not be waived, altered, modified, supplemented, or amended, in any manner whatsoever, except by written instrument signed by both parties. Recipient must submit a written request for any amendment, including justification, to County at least forty-five (45) calendar days before expiration of this Agreement.
  6. **Termination.** This Agreement may be terminated prior to its expiration as follows:
    - a. At County's discretion, upon thirty (30) days' advance written notice to Recipient.
    - b. Upon a party's default under this Agreement, following thirty (30) days' written notice to the party with an opportunity to cure.
    - c. At any time upon mutual agreement by the parties.
    - d. Immediately upon written notice to Recipient that County lacks sufficient funds, as determined by County in its sole discretion, to continue to perform under this Agreement.

The termination of this Agreement, for any reason, shall not release Recipient from any obligation that has already accrued or that comes into effect due to such termination.

### 7. Default.

- a. **Recipient's Default.** Recipient will be in default under this Agreement upon the occurrence of any of the following:
  - i. Recipient fails to use the Grant Funds for eligible purposes described in Exhibit A;
  - ii. Any representation, warranty, or statement made by Recipient in this Agreement or in any documents or reports relied upon by County to measure the Business Development Grant Program, the expenditure of the Grant Funds, or the performance by Recipient is untrue in any material respect when made;
  - iii. Recipient fails to comply with any term or condition set forth in this Agreement;
  - iv. A petition, proceeding, or case is filed by or against Recipient under federal or state bankruptcy, insolvency, receivership, or other law; or

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v. Recipient fails to make sufficient progress on the Project as determined by County in its sole discretion.

b. **County's Default.** County will be in default under this Agreement if County fails to perform a material obligation under this Agreement; provided, however, that failure to pay the Grant Funds due to lack of appropriation shall not constitute a default of County.

### 8. Remedies.

a. **County's Remedies.** In the event of Recipient's default, County may, at its option, pursue any or all remedies available to it under this Agreement, at law or in equity, including, but not limited to, (1) withholding the Grant Funds until compliance is achieved; (2) requiring reimbursement of the Grant Funds in the case of omissions or misrepresentations in financial or programmatic reporting; (3) requiring the return of any Grant Funds used by Recipient in violation of this Agreement; (4) terminating this Agreement, following thirty (30) days' written notice to Recipient with an opportunity to cure; (5) declaring Recipient ineligible to receive future awards from County; or (6) initiating an action or proceeding for damages or for declaratory or injunctive relief.

b. **Recipient's Remedies.** In the event of County's default, Recipient may, at its option, (1) terminate this Agreement, following thirty (30) days' written notice to County with an opportunity to cure, and/or, (2) subject to the limits of applicable law and this Agreement, require reimbursement of eligible costs incurred in accordance with this Agreement, less any claims County may have against Recipient. In no event will County be liable to Recipient for expenses related to termination of this Agreement or for any indirect, incidental, consequential, or special damages.

### 9. Administrative Requirements.

a. **Accounting.** All costs incurred by recipient under this Agreement should be recorded in compliance with generally accepted accounting principles, international financial reporting standards, and/or governmental accounting standards.

b. **Monitoring.** County and its duly authorized representatives shall have access to the financial records, books, documents, papers, plans, records of shipments, payments, and writings of Recipient that are pertinent to this Agreement, whether in paper, electronic, or other form, to perform examinations and audits and make excerpts and transcripts. County and its duly authorized representatives shall also have access to conduct onsite or offsite visits for the purpose of monitoring. County may take photographs of funded items during such visits.

c. **Record Retention.** Recipient will retain and keep accessible all financial records, books, documents, papers, plans, records of shipments, payments, and writings for a minimum of six (6) years, or such longer period as may be required by applicable state law, following expiration or termination of this Agreement, or until the conclusion of any audit, controversy, or litigation arising out of or related to this Agreement, whichever date is later.

d. **Change in Ownership.** Recipient is required to notify County, in writing, if Recipient intends to sell its business to another entity or otherwise transfer ownership during the term of this Agreement.

e. **Closeout.** County will closeout this award when County determines that all applicable administrative actions and all required work have been completed by Recipient.

10. **Compliance with Applicable Law.** Recipient shall comply with all applicable federal, state, and local laws, regulations, executive orders, and ordinances applicable to this Agreement, as they may be amended from time to time, including, but not limited to, (i) Titles VI and VII of the Civil Rights Act of

1964, as amended; (ii) Sections 503 and 504 of the Rehabilitation Act of 1973, as amended; (iii) the Americans with Disabilities Act of 1990, as amended; (iv) Executive Order 11246, "Equal Employment Opportunity," as amended; (v) the Health Insurance Portability and Accountability Act of 1996; (vi) the Age Discrimination in Employment Act of 1967, as amended, and the Age Discrimination Act of 1975, as amended; (vii) the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended; (viii) all regulations and administrative rules established pursuant to the foregoing laws; and (ix) all other applicable requirements of federal and state civil rights and rehabilitation statutes, rules, and regulations.

#### 11. General Provisions.

- a. **Indemnification.** Recipient agrees to indemnify and hold County and its elected officials, officers, employees, and agents harmless with respect to any claim, cause, damage, action, penalty, or other cost (including attorney and expert fees) arising from or related to (i) the negligent or willful acts of Recipient or its employees, its agents, or those under its control; or (ii) the acts or omissions of Recipient in performing under this Agreement including, but not limited to, any claim by state or federal funding sources that Recipient used funds for an ineligible purpose. Recipient is responsible for the acts of its agents and employees, and County assumes no liability or responsibility with respect to the acts of Recipient or its employees, its agents, or those under its control.
- b. **Assignment.** This Agreement may not be assigned in whole or in part without the prior express written approval of County.
- c. **Independent Status.** Recipient is independent of County and will be responsible for any federal, state, or local taxes and fees applicable to the Grant Funds. Recipient is not an agent of County and, except as set forth herein, undertakes this work independent of the control and direction of County. Recipient shall not seek or have the power to bind County in any transaction or activity.
- d. **Notices.** Any notice provided for under this Agreement shall be deemed given if it is in writing and (1) delivered personally to the addressee; (2) sent by certified mail, return receipt requested; (3) sent by commercial delivery service (such as Federal Express); (4) sent by electronic mail with confirmation (such as a return receipt) that it was delivered, accessed, downloaded, or printed.
- e. **Dispute Resolution.** The parties will attempt in good faith to informally resolve any dispute arising out of this Agreement. This may be done at any management level, including at a level higher than persons directly responsible for administration of this Agreement. In addition, the parties may agree to utilize a jointly selected mediator to resolve the dispute short of litigation. Each party will bear its own costs incurred for any mediation.
- f. **Governing Law.** This Agreement, and all rights, obligations, and disputes arising out of it, shall be governed and construed in accordance with the laws of the State of Oregon and the ordinances of Clackamas County without regard to conflict of law principles. Any claim, action, or suit between the parties that arises out of or relates to this Agreement shall be brought and conducted solely and exclusively in the Circuit Court of the State of Oregon for Clackamas County; provided, however, that, if any such claim, action, or suit may be brought in a federal forum, it shall be brought and conducted solely and exclusively in the United States District Court for the District of Oregon. In no event shall this section be construed as a waiver by County of any form of defense or immunity, whether sovereign immunity, governmental immunity, immunity based on the Eleventh Amendment to the United States Constitution, or otherwise, from any claim or from the jurisdiction of any court. Recipient consents to the personal jurisdiction of the courts referenced in this section.
- g. **Severability.** If any provision of this Agreement is found to be illegal or unenforceable, this Agreement nevertheless shall remain in full force and effect, and the offending provision shall be stricken.

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- h. **Counterparts.** This Agreement may be executed in any number of counterparts, all of which together will constitute one and the same agreement. Facsimile or electronic signatures shall be valid as original signatures.
  - i. **Third-Party Beneficiaries.** Except as expressly provided in this Agreement, there are no third-party beneficiaries to this Agreement. The terms of this Agreement may be enforced only by the parties.
  - j. **Binding Effect.** This Agreement shall be binding on the parties and their successors.
  - k. **Integration.** This Agreement contains the entire agreement between the parties and supersedes all prior written or oral discussions or agreements.
  - l. **No Attorney Fees.** In the event any arbitration, action, or proceeding, including any bankruptcy proceeding, is instituted to enforce any term of this Agreement, each party shall be responsible for its own attorney fees and expenses.
  - m. **Debt Limitation.** This Agreement is subject to the county debt limitation set forth in Article XI, section 10, of the Oregon Constitution, and is contingent upon funds being appropriated to carry out its provisions.
  - n. **Necessary Acts.** Each party shall execute and deliver to the other all such further instruments and documents as may be reasonably necessary to carry out this Agreement.
12. **Insurance.** Recipient shall secure at its own expense and keep in effect during the term of this Agreement the insurance type and minimum coverage indicated below. These requirements do not in any way limit the amount or scope of Recipient’s liability under this Agreement. Recipient shall provide proof of said insurance and name County as an additional insured on all required liability policies. Proof of insurance and notice of any material change should be submitted to the Grant Administrator or Program Manager at the contact information listed above.

<input checked="" type="checkbox"/> Required – Workers’ Compensation: Recipient shall comply with the statutory workers’ compensation requirements in ORS 656.017, unless exempt under ORS 656.027 or 656.126.
<input checked="" type="checkbox"/> Required – Commercial General Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence, with an annual aggregate limit of \$2,000,000 for Bodily Injury and Property Damage.
<input type="checkbox"/> Required – Professional Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per claim, with an annual aggregate limit of \$2,000,000 for damages caused by error, omission, or negligent acts.
<input checked="" type="checkbox"/> Required – Automobile Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per accident for bodily injury and property damage.
<input type="checkbox"/> Required – Abuse & Molestation endorsement with limits not less than \$1,000,000 per occurrence if not included in the Commercial General Liability policy.

13. **Agreement Documents.**

The following documents are attached to this Agreement and incorporated herein:

- Exhibit A: Approved Scope of Work: Project Description, Budget, Performance Outcomes, and Reporting

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- Exhibit B: Original Application, Budget, and Required Submission Documents
- Exhibit C: Original County Notice of Funding Opportunity (NOFO) and related FAQs

In the event of a conflict between the terms of this Agreement and/or any of the attached Exhibits, interpretations shall be based on the following order of precedence:

- This Agreement
- Exhibit A
- Exhibit B
- Exhibit C

*(Signature Page Follows)*

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IN WITNESS WHEREOF, the parties have caused this Agreement to be executed by their duly authorized officers.

CLACKAMAS COUNTY

By: \_\_\_\_\_  
Craig Roberts, Chair


Dated: \_\_\_\_\_

Approved as to form:

By:  \_\_\_\_\_  
County Counsel

Dated: April 27, 2026

OPTIMIZE TECHNOLOGIES

By:  \_\_\_\_\_  
Amanda Ford, Global Marketing and Sales

Dated: 4/10/26

# EXHIBIT A – SCOPE OF WORK

Clackamas County Office of Economic Development  
Business Development Grant Program FY 2025-26

## Grant Award Information

### RECIPIENT:

Optimize Technologies  
13993 Fir Street  
Oregon City, OR 97045

### AMOUNT:

\$100,000

## Use of Grant Funds

The Grant Funds under this Agreement are lottery dollars. As such, they are subject to the limitations set forth in Article XV, section 4, of the Oregon Constitution and ORS 461.540. Use of lottery dollars is restricted to the following:

- (a) Creating jobs;
- (b) Furthering economic development in Oregon; or
- (c) Financing public education.

**The Grant Funds under this Agreement may be used for the following purposes:**

## Project Scope

Optimize Technologies is awarded a grant in the amount of \$100,000 to support a Capital project. Project activities and reported outcomes will occur at 13993 Fir St, Oregon City, OR 97045. Grant Funds will support facility and equipment upgrades. The goals of this project are to:

- Hire new employees
- Increase production
- Increase production efficiency
- Decrease production waste
- Improve environmental efficiency of production
- Increase spending on local inputs
- Expand product line or offer additional products
- Increase revenue

## Project Budget

PROJECT BUDGET					
	Line Item Description	Quantity	Unit Price	Cost Basis	Total
1	Compaction Tooling Package	1.00	\$ 40,000.00	Total	\$ 40,000.00
2	UHPLC - Fused Silica Optical Laser Cutter	1.00	\$ 45,000.00	Each	\$ 45,000.00
3	Facility preparation - Demolition	1.00	\$ 7,300.00	Total	\$ 7,300.00
4	Casework build and install	1.00	\$ 54,000.00	Total	\$ 54,000.00
5	Flooring and Installation	1.00	\$ 21,000.00	Total	\$ 21,000.00
6	Painting	1.00	\$ 9,000.00	Total	\$ 9,000.00
7	Production Room Expansion	1.00	\$ 38,000.00	Total	\$ 38,000.00
<b>TOTAL PROJECT COST</b>					<b>\$ 214,300.00</b>
Grant Funds:					\$ 100,000.00
Matching Funds:					\$ 114,300.00

Recipient is committed to carrying out Project activities, as defined in the above scope and budget, in Clackamas County. Recipient is committed to maintaining business operations in Clackamas County for the term of this Agreement.

## Request for Grant Funds

Upon full execution of this Agreement, Recipient must submit all paperwork required by County to be paid as a vendor and remit an invoice for full payment of the Grant Funds.

## Reporting

During the term of this Agreement, Recipient shall provide, at minimum, one progress report and two outcomes reports using County-provided templates. These reports are due on the following schedule:

**September 25, 2026** – Progress Report Due

Reporting period: *Date of agreement signature – September 18, 2026*

**April 30, 2027** – Year 1 Outcomes Report Due

Reporting period: *Date of agreement signature – March 31, 2027*

**April 30, 2028** – Year 2 Outcomes Report Due

Reporting period: *April 1, 2027 – March 31, 2028*

Recipient may also be asked to provide supplemental narrative information on Project activities and outcomes for use in public reports and marketing initiatives.

Reports shall be submitted to the following address:

Julia McCotter  
Clackamas County Office of Economic Development  
150 Beavercreek Road  
Oregon City, OR 97045  
503-742-4399  
jmccotter@clackamas.us

## Detailed Eligibility

**Legal business name**

Optimize Technologies

**Business DBA**

N/A

**Business Website**

www.optimizech.com

**Oregon Secretary of State ID number**

534180

**Incorporation date**

1985-10-14

**Corporate structure**

Corporation (s-corp)

**North American Industry Classification System (NAICS) code**

334516

**Industry name**

Biotechnology / Separation Science

**Primary business address**

13993 Fir Street

**Project location address**

13993 Fir Street

**How does your business meet the criteria for a traded-sector business?**

Optimize Technologies is a globally recognized manufacturer of advanced scientific components, designed and produced entirely in Oregon City, Oregon. Over 99% of sales are to customers outside Oregon, reaching more than 65 countries and consistently contributing new revenue to the local economy. We supply laboratories, universities, and research facilities worldwide, as well as OEM partners in Germany, Japan, Switzerland, and

other regions. By exporting Oregon-made products, we generate a steady income that supports skilled manufacturing jobs and regional suppliers. While competitors face challenges sourcing materials and maintaining production quality abroad, our US-based manufacturing and advanced capabilities enable us to meet global demand at a level of precision few can match. By continuing to expand, Optimize strengthens the traded-sector economy—creating stable, high-wage jobs, attracting outside capital, and fostering local innovation that anchors advanced manufacturing growth.

**Total project budget**

200,000.00

**Total grant funds requested**

100,000.00

**What is the source of your matching funds for this project?**

Optimize Technologies will provide a 1:1 match for the \$100,000 grant request through existing company resources. Current cash reserves will cover matching funds or, if preferred, through an established line of credit with Bank of America. A letter from our Bank of America representative will be included as proof of available funds. This ensures that the whole project budget is secured and ready to deploy upon award, demonstrating both financial stability and immediate capacity to complete the proposed business development project.

**If awarded, grant funds will not be disbursed until Spring 2026. Grant funds can not be used to reimburse previous spending. Is your project feasible given this funding timeline?**

Yes

## Applicant Information

**Full name(s) of business owner(s)**

Doug and Lisa Ford

**Full name of applicant contact**

Amanda Ford

**Title of applicant contact**

Global Marketing and Sales

**Email address of applicant contact**

amanda@optimizetech.com

**Primary phone number of applicant contact**

5035579994

**Brief summary of the business**

Founded in 1985 in Clackamas County, Optimize Technologies designs and manufactures products for advanced scientific applications, including liquid chromatography—the process used to separate, identify, and analyze chemical compounds down to parts per quadrillion. From our Oregon City facility, we produce precision-engineered fittings, filters, packed beds, and instrument parts for HPLC, UHPLC, and LC/MS systems. Our top-selling EXPÂ® product line features hand-tight holders rated to 20,000+ psi, enabling tool-free performance at extreme pressures and conditions. We provide custom design and manufacturing for OEM, B2B, and research institutions worldwide, serving customers from Pfizer to NASA. Each product is designed, machined, and assembled locally, supporting skilled jobs, supplier networks, and innovation that strengthen Clackamas County’s advanced manufacturing economy.

**Grant Project Information**

**Please select your Project Type**

Capital project

**Project Category**

Production Expansion

County Business Retention

**Please provide a narrative summary of your project**

Optimize Technologies is launching a dedicated production line for OPTI-FRITâ€¢, a premium line of porous materials used in chromatography and mass spectrometry. This project represents phase 1 of a larger on-shoring initiative designed to vertically integrate and expand our manufacturing capabilities in Oregon City. The grant will fund equipment and facility upgrades required to bring porous material manufacturing to full-scale production, including tooling for our new compaction press, laser cutting for fused-silica tubing, laboratory testing equipment, and modifications to retrofit our existing Agilent 1290 UHPLC system with new control and valve components for high-volume QC and pressure testing. The project will be housed within our current facility, utilizing an existing production

area to be upgraded with electrical, ventilation, and safety improvements. These investments will allow Optimize to produce high-precision porous materials domestically, strengthening supply-chain resilience and ensuring consistent quality that both domestic and international suppliers have been unable to deliver. Expanding porous material production will also drive growth across complementary product lines, increasing throughput and efficiency company-wide. This project will create new skilled manufacturing positions and expand opportunities for local suppliers while keeping production and innovation rooted in Clackamas County. Phase 1 establishes the foundation for continued scale-up and future capital investment, positioning Optimize Technologies as the only U.S.-based manufacturer capable of producing high-quality porous material at volume. Completion is expected within six months of funding.

**Please describe the business need for grant funding to assist your project**

Grant funding is essential to accelerate our transition from pilot-scale to full-scale manufacturing. While we have systematically proven the OPTI-FRIT process and demonstrated strong market demand, the capital required to complete production expansion—tooling, testing equipment, and facility upgrades—exceeds what can be supported internally without delaying growth. With interest rates high and multiple modernization initiatives underway, including ERP implementation and infrastructure upgrades, Optimize continues to reinvest steadily but cautiously. Grant support will enable us to move forward responsibly, ensuring timely execution without diverting resources from current operations or workforce development. This project represents a strategic opportunity to strengthen Oregon's role in advanced manufacturing. Global supply instability and tariffs on imported goods have made domestic production a priority for customers seeking consistent, high-quality U.S.-made components. Optimize has built a reputation as one of the most innovative and dependable suppliers in the chromatography industry, trusted by partners across more than 65 countries. The ability to onshore frit production now—while competitors struggle with foreign sourcing—positions Optimize as a global leader in precision frit manufacturing, delivering a level of consistency and performance unmatched anywhere in the world. Without the grant, expansion would be significantly delayed, limiting our capacity to meet customer demand, create new skilled jobs, and deliver the broader economic benefits this project can generate in Clackamas County. Each dollar will be matched directly by private investment, resulting in higher local procurement and sustained manufacturing growth. With the County's support, Optimize Technologies can move forward with a project that not only advances our business but also reinforces Oregon's standing as a center for scientific innovation and resilient, high-value production.

**What outcomes do you expect to achieve as a result of this project?**

- Hire new employees
- Increase production
- Increase production efficiency
- Decrease production waste
- Improve environmental efficiency of production (e.g. decrease water usage, lower carbon footprint, etc.)
- Increase your business' spending on local inputs
- Expand product line / offer additional products
- Increase revenue

**Elaborating on your selected outcomes**

The OPTI-FRIT project will deliver substantial and lasting economic benefits to Clackamas County through job creation, local investment, and advanced manufacturing expansion. Within the first year of full-scale production, Optimize expects to add new skilled positions in manufacturing, quality control, and engineering, with continued hiring as output scales. Bring porous material manufacturing entirely in-house increases production capacity more than ten-fold and establishes a complete, end-to-end process from design to production to mass spectrometry validation within our Oregon City facility. This vertical integration will dramatically improve efficiency, reduce lead times, and eliminate dependency on foreign suppliers. By performing all testing and validation on-site, we will cut waste, lower scrap, and reduce our carbon footprint by eliminating external processing and overseas shipments. The project also strengthens local industry ties: all raw materials are sourced from a local supplier, and Clackamas County contractors and service providers will complete every facility improvement. Our policy is to source hyper-locally whenever possible, creating a sustained multiplier effect for nearby businesses. Expanding porous material production will diversify our product line, fuel innovation across complementary technologies, and enable Optimize to meet growing global demand. Increased revenue from these exports will flow directly back into Oregon's economy through payroll, local vendor spending, and future capital investment. This project represents a high-value, low-risk opportunity for the County turning every public dollar into enduring economic growth, skilled employment, and global recognition for Oregon's manufacturing excellence.

**How many months do you expect it will take to fully implement your project? \***

6

**Please describe your project timeline in more detail**

The project will begin immediately upon disbursement of grant funds, with completion expected within six months. Month 1: Finalize vendor agreements, order tooling, and initiate building retrofits for the dedicated production space. Months 2-3: Complete building refresh; receive and install new equipment, including laser cutting and UHPLC system retrofits for QC and pressure testing. Months 4-5: Conduct validation, process optimization, and pilot runs. Month 6: Launch full-scale frit production and certify initial production lots. This timeline reflects our current understanding of vendor and contractor lead times. A complementary mass spectrometer purchase funded separately will enhance QC and testing integration. If unforeseen delays or changes occur, Optimize will adjust sequencing and scope in coordination with the County to ensure project continuity and full completion.

**If your project is awarded partial funding, what project activities and costs would you prioritize to achieve your desired outcomes?**

If the project receives partial funding, we would prioritize the foundational elements required to bring porous material production online safely and effectively—the building refresh, facility preparation, and essential tooling for the press. These steps would allow us to maintain some project continuity. That said, each component of the project is closely connected; the building upgrades, laser cutter, and UHPLC retrofits together form a complete, validated production workflow. Without full funding, the project's capacity, efficiency, and local economic impact would be significantly reduced. Full funding ensures we can execute the project as designed—creating new skilled jobs, increasing local contractor engagement, and positioning Clackamas County as a hub for advanced scientific manufacturing. Optimize has structured this plan carefully to maximize every dollar of public and private investment, and full support will yield the strongest return for both the County and the community.

**Attestation**

Yes

**Name of Attesting Corporate Officer \***

Amanda Ford



EXHIBIT B: Original Application, Budget, and Required Submission Documents

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Budget Line Item	Notes
Demolition, stainless steel casework build and install	Preparation and reconfiguration of dedicated production space, including demolition, installation of stainless steel casework, and workflow layout for production area.
Flooring and Installation	Replacement of worn flooring with chemical-resistant Forbo flooring to meet clean manufacturing standards and support long-term maintenance efficiency.
Painting	Interior surface refinishing to meet cleanroom-adjacent lab standards and ensure safety compliance.
Production Room Expansion Compaction Tooling Package	Expansion and reconfiguration of existing production space to accommodate dedicated frit manufacturing, testing, and workflow integration within the Oregon City facility. Tooling package for compaction press, enabling full production scale.
Fused Silica Tubing Optical Laser Cutter	Laser cutting system for precision cutting and preparation of fused-silica tubing assemblies used in frit integration and advanced product configurations.
UHPLC System Retrofit – Valve Drive	Retrofit of existing Agilent 1290 UHPLC system with new valve drive to enable high-throughput QC and pressure testing of frits.
UHPLC System Retrofit – Solvent Selection Valve Head	Additional retrofit component allowing automated multi-solvent testing, ensuring consistent pore performance and flow validation.
Mass Spectrometer - QTOF Series	A complementary mass spectrometer (funded separately) will be used to integrate testing and validation processes, ensuring cohesive production and QC operations within the upgraded frit manufacturing line.
NanoFlow UHPLC System	

**Bank of America.**



10/09/2025

To whom it may concern,

I confirm that Optimize Technologies, Inc. has a checking account with Bank of America and has sufficient funds to provide a \$100,000 match for the Clackamas County Business Development Grant.

Dalibor Simlesa

VP / Sr. Relationship Manager

Business Banking

1211 SW 5<sup>th</sup> Ave, 25<sup>th</sup> Floor

Portland OR 97204

971-378-7724

Dalibor.simlesa@bofa.com

## Notice of Funding Opportunity (NOFO)

# Clackamas County Office of Economic Development

### Business Development Grant Program

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## Program Description

Traded sector businesses—those competing in markets beyond the local area—are invited to apply for funding designated to help them grow!

In April 2024, the Clackamas County Board of Commissioners approved the Business Development Grant Program with the goals of supporting traded-sector business activity (e.g. expansion of operations, efficiencies, technological advancements, etc.), retaining Clackamas County-based operations for existing businesses, and/or attracting new businesses to relocate operations to Clackamas County. Funding will be provided for either capital investments or workforce development projects and must be matched 100% or more by the awardee.

## Award Information

Funding Source:	State lottery dollars
Funding Amount:	Individual Award Maximum \$100,000 (awards may be less); \$650,000 total funding available this cycle. Funding is contingent upon the execution of a grant agreement. If an approved recipient cannot finalize their agreement, funds may be offered to approved alternates.
Grant Period of Performance:	Approximately 6-18 months from agreement execution (execution estimated Spring 2026), depending on project. Some projects may be longer.
Reporting Requirements:	Reporting requirements will vary by project type and will be negotiated with each awardee prior to agreement execution. Reporting will be sufficient to ensure awarded amounts are expended on eligible costs and that the project, as described in the agreement, has been completed.
Submission Method:	Complete and submit application electronically via the <a href="#">official web form</a> . Paper applications will not be accepted.
Application Open Period:	September 4, 2025 at 9am Pacific Time – October 13, 2025 at 5pm Pacific Time.



	Complete submissions, including all required documents, must be received by 5pm on October 13 <sup>th</sup> to be considered responsive. Complete submissions include all required supporting documentation in addition to the application. Incomplete applications will not be considered.
Program Contact:	<a href="mailto:4biz@clackamas.us">4biz@clackamas.us</a> , (503) 742-4BIZ (4249)
Informational Webinar:	September 16, 2025 at 3:30pm Pacific Time <a href="#">Registration required</a>
Match Requirement:	100% or more

## Background

Clackamas County was allocated State lottery dollars for economic development and this Business Development Grant Program is an expression of that constitutional purpose for State lottery funds.

## Eligibility & General Requirements

The following criteria must be met in order for your application to be deemed eligible for review. This is a competitive grant program; not all eligible applications will be funded.

### **Location and Age.**

Your business must have operations within Clackamas County or seek to relocate to or establish additional operations within Clackamas County. The business must be “established,” which means it is at least two years old, though it needn’t have been located in Clackamas County for two years if seeking to move existing operations into the county.

### **Traded Sector**

Your business must be a *traded-sector business*, defined as *Clackamas County businesses producing or manufacturing goods in Clackamas County AND selling or exporting those goods outside the county and its immediate surroundings (e.g. manufacturing, food processing, etc.).*

### **Project Types**

Your proposal must be for a capital project or for a workforce development project. No other project types will be considered.

Capital projects may include:

- Purchase of capital assets that meet a business need, expand production, increase efficiency, or otherwise lead to business growth. Capital assets may include machinery, equipment, software, etc.
- Site development, improvement, or other construction that is directly related to relocation, expansion, and/or business growth.



Capital project requests may also include any fees, licenses, delivery costs, taxes, installation, utility hookups, etc. directly associated with the purchase to bring the capital project online operationally and these costs should be broken out in your budget.

Workforce development projects include the training, hiring, and/or retention of employees. Examples of workforce development projects include but are not limited to:

- Training for employees to learn a new or updated technology, equipment or process, employer-specified or industry-specific skills;
- Train-the-trainer instruction to build the capacity of businesses;
- Permanent hiring of new employee(s) to increase production, expand product lines, bring outsourced work in-house, or otherwise meet existing and future demand.

### ***Match Requirements***

You must provide proof of secured match of at least 100% of the amount requested, meaning that only half of the funding for your proposed project may come from this grant. Your business must pay the other half of your project costs.

Match may come from:

- Existing business cash
- A loan or investor commitment (with documentation)
- A separate, already awarded grant

### ***Secretary of State Registration***

Your business must have an [active business registration with the Oregon Secretary of State](#). You will need your Oregon Secretary of State identification number to complete this application. This requirement includes business applicants looking to move operations or establish operations into Clackamas County from outside of Oregon.

### ***Code compliance***

You may be disqualified from this program if the County finds you are out of compliance with any applicable business codes or owe back taxes without an approved payment plan.

### ***Participation Restrictions***

Each business may only apply once per application cycle and may not apply to this grant program again if you have previously received an award funded with lottery dollars of any amount. Previous grant recipients may not apply for additional funding.

### ***Trade secrets and your application***

Since applications submitted under this NOFO are subject to public records requests, please clearly mark any included trade secrets as '(TRADE SECRET)' in your responses. All identified trade secrets will be redacted when responding to public records requests.



***Only business applicants***

Grants will be awarded to businesses, not individuals, so please apply with the official name of your business as registered with the Oregon Secretary of State.

***Unallowable costs***

Indirect costs are not funded through these awards and should not be part of your budget request. Existing staff costs (wages, benefits) are not allowable grant expenses, except for those hours spent in grant-funded training (e.g. training or skill development for a workforce development project, training on new equipment for a capital project).

***Debt(s)***

This grant may not be used to pay debts on already-implemented projects. This grant is intended for new projects only.

## Application and Submission Information

To apply, complete the [official online application](#). Applications sent through mail or email will not be accepted. The full list of application questions is provided at the end of this NOFO. In your application, provide as much information as needed to thoroughly answer questions and convey information; however, please keep answers as clear and concise as possible. The application is broken up into the following sections:

***Base Eligibility***

On the first page of the application, you will be required to complete a basic eligibility screening questionnaire. The main application will load for any applicants who meet the base eligibility criteria. Answer these questions honestly – you will be required to support your statements with documentation in the main application.

***Detailed Eligibility***

In this section of the application, you will be asked to provide more information to validate your eligibility for funding. It is possible for an applicant to be deemed ineligible even if they appear to meet the base eligibility criteria in the screening questionnaire before this section of the application. Full eligibility requirements are listed in this NOFO, above.

***Application Information***

In this section, you will provide your contact information and summary information about your business.

***Grant Project Information***

In this section, you will provide detailed information about the project for which you are seeking grant funding. You will select your project type and categories, describe your need for grant funding, select and discuss your expected outcomes, provide your project timeline, and explain more about your project budget. This section is your primary opportunity to make a compelling case for getting your project funded.



### ***Attachments***

You will need to provide your project budget, using the required budget template. The template must remain in .xlsx file format in order for your file to upload.

You will also need to provide up to 5 pages of documentation to prove the source(s) and availability of your matching funds. Matching funds are an eligibility requirement; applications that do not sufficiently prove source and availability of matching funds will not be deemed eligible for this program.

### ***Attestation***

You'll be required to sign the attestation on the application. Only a corporate officer who is authorized to legally bind the business may sign the attestation. It is your responsibility to carefully review the attestations before signing. Fraudulent applications will be referred to law enforcement.

## Evaluation

Your application will be evaluated by a review committee comprised of Clackamas County staff. Based on the criteria outlined in this NOFO, the review committee will score applications for Project Fit, Need for Funding, Economic Impact, and Project Feasibility. The review committee will recommend projects to the Board of County Commissioners (BCC) for funding and will also propose an alternates list of the top applications that did not make the initial funding cut. The alternates list will serve as a waitlist in the event a BCC-approved grant recipient is unable to finalize their funding agreement due to unforeseen changes in the business, external factors rendering a project unfeasible, or other extenuating circumstances.

**The BCC has sole authority to determine funded projects and the alternates list.** The BCC may choose to disregard or modify the recommendations of the review committee for funded projects or alternates at its discretion. The funding recommendation packet presented to the BCC will include both the proposed awardees and the alternates list for simultaneous review and approval. The BCC-approved alternates list remains valid until all funds are awarded or the funding cycle closes, at the discretion of the Clackamas County issuing department.

Only applications considered responsive will be evaluated. "Responsive" applications are those which comply with the requirements in this NOFO. Applications that do not meet the eligibility requirements or applications that are received late and/or incomplete will not be considered.

**Timeline.** Applications will be reviewed in November/December 2025, with recommendations for funding and the alternates list made to the BCC by January/February 2026. Awardees and alternates will be notified by email only after the BCC has finalized their decisions. In the event an approved grant recipient cannot finalize their funding agreement, the County will contact the next alternate(s) on the BCC-approved list, in ranked order, to negotiate a funding agreement. This process will continue until all allocated funds are awarded or the alternates list is exhausted.



## Notification of Applicants

Applicants selected for funding will be notified by email only after the Board of County Commissioners (BCC) has finalized its decisions. Applicants placed on the alternates list will also be notified by email, informing them of their status as potential awardees should funding become available. The notification will clarify that placement on the alternates list does not guarantee funding and that alternates will be contacted in ranked order only if an approved grant recipient is unable to finalize their funding agreement. All other applicants will receive a courtesy email notifying them that their application was not selected for funding or the alternates list.

Applicants on the alternates list may be asked to provide updated information (e.g., proof of match or project status) if contacted to finalize a funding agreement, to ensure the project remains viable.

After County staff have notified awardees, staff and awardees will negotiate a final scope of work for the project, including timelines for the grant period specific to each project. County Finance, County Counsel, and the BCC will approve final grant documents.

Applicants placed on the alternates list who do not receive funding will be notified after all awardee funding agreements have been finalized. Applicants placed on the alternates list who do not receive funding may apply for future grant cycles and will not receive priority status in any future applications.

## Non-discrimination

Per the Civil Rights Act of 1964, no person shall, on the basis of race, color, or national origin, be excluded from participation, be denied the benefits of, or be subjected to discrimination under any County program, service or activity.



## Application Questions

### Base Eligibility Screening Questionnaire

1. How many years has your business been operating?
2. Does your business have an operating location in Clackamas County?
3. Does your business produce / manufacture goods in Clackamas County?
4. Does your business sell / export goods OUTSIDE of Clackamas County?
5. Is your business registered and current with the Oregon Secretary of State?
6. This grant program requires a 100% match on all grant funds, meaning that only half of the funding for your proposed project may come from this grant. Your business must pay the other half of your project costs. Are you able and prepared to meet this match requirement?

### Detailed Eligibility

1. Legal business name:
2. Business DBA (if applicable):
3. Business website (if applicable):
4. Oregon Secretary of State ID number (this is different from your federal EIN):
5. Incorporation date:
6. Corporate structure:
7. North American Industry Classification System (NAICS) code:
8. Industry name:
9. Primary business address:
10. Project location address:
11. How does your business meet the criteria for a traded-sector business? *1,000 character limit*
12. Total project budget (pull this directly from your completed budget template):
13. Total grant funds requested:
14. What is the source of your matching funds for this project? *1,000 character limit*
15. If awarded, grant funds will not be disbursed until Spring 2026. Grant funds can not be used to reimburse previous spending. Is your project feasible given this funding timeline?

### Applicant Information

16. Full name(s) of business owner(s):
17. Full name of applicant contact:
18. Title of applicant contact:
19. Email address of applicant contact:
20. Primary phone number of applicant contact:
21. Brief summary of the business *1,000 character limit*

### Grant Project Information

22. Please select your Project Type:



- Workforce Development Project
  - Capital Project
23. Project Category (*please select all that apply*):
- Multi-site Development Assistance: Your business does not have a location in Clackamas County and seeks to establish a new location in Clackamas County
  - Relocation: You seek to relocate your existing business into Clackamas County
  - Physical Expansion: Your business is currently located in Clackamas County and seeks to relocate to a larger facility within the county or expand your existing facilities in the county
  - Production Expansion: Your business seeks to expand production capacity through purchasing new equipment, hiring additional employees, providing employee technical training, and/or other capital investment(s)
  - County Business Retention: Your business is currently located in Clackamas County and seeks funds to assist with a project intended to retain operations in the county
24. Please provide a narrative summary of your project (*2,000 character limit*)
25. Please describe the business need for grant funding to assist your project (*2,000 character limit*)
26. What outcomes do you expect to achieve as a result of this project? Expected outcomes will be included in grantee funding agreements and tracked throughout grant projects. Select all that apply:
- Hire new employees
  - Increase production
  - Increase production efficiency
  - Decrease production waste
  - Improve environmental efficiency of production (e.g. decrease water usage, lower carbon footprint, etc.)
  - Increase your business' spending on local inputs
  - Expand product line / offer additional products
  - Increase revenue
27. Elaborating on your selected outcomes, please describe in more detail the expected local economic impacts of your project (*2,000 character limit*)
28. How many months do you expect it will take to fully implement your project?
29. Please describe your project timeline in more detail (*1,000 character limit*)
30. If your project is awarded partial funding, what project activities and costs would you prioritize to achieve your desired outcomes? *1,000 character limit*

## Upload Attachments

31. Using the required template, please attach your project budget below. You may find the required budget template [HERE](#).
32. Please attach your proof of matching funds below (PDF format only). Please exclude any private information that is not necessary for assessing your match (e.g. full bank account numbers, full routing numbers, check numbers, social security numbers, etc.) You may



upload multiple PDFs, but please limit your submission(s) to 5 pages TOTAL across all uploads.

## Attestation

33. By signing this application, I affirm:

- I am legally authorized to bind the applicant business; and
- The information provided in this application, and any supporting documents provided (if applicable), are true and complete to the best of my knowledge; and
- I understand I may be contacted by CCOED staff to provide additional information or documentation which CCOED, in its sole discretion, may require to complete my application and/or establish my eligibility; and
- I do not owe back taxes to any governmental agency or, if back taxes are owed, a written agency payment plan is in place; and
- I understand any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to law enforcement referral for further investigation or result in the disqualification of my application as unresponsive.
- I understand my application may be denied if it's determined that there are current code violations, or that I have received warnings to rectify code violations that are deemed hazardous or unsafe to my business, its employees or the community.
- I understand I may be required to refund or reimburse all or part of the grant proceeds not used for their intended purposes, as stated in the Application, Scope of Work and/or Funding Agreement.

Name of Attesting Corporate Officer:

**APPLY HERE**

## Frequently Asked Questions (FAQ)

# Clackamas County Office of Economic Development

### Business Development Grant Program

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#### **1. What is the purpose of the county grant funding program?**

The county grant funding program is designed to provide funding for capital, capacity or workforce development projects to various sized traded sector businesses looking to relocate, expand or retain their operations in Clackamas County.

#### **2. Who is eligible to apply for a grant?**

To be eligible to apply, a business must:

- Be a traded sector business – a business producing or manufacturing goods in Clackamas County and selling those goods *outside* of Clackamas County and its immediate surroundings
- Have been a registered business for at least two years
- Be in good standing with the State
- Provide proof of at least 100% match for their funding request

For full details on eligibility and requirements, refer to the [Notice of Funding Opportunity \(NOFO\)](#).

#### **3. What types of projects or activities can be funded?**

Eligible projects must:

- Increase production of locally-manufactured goods;
- Fund either a capital project or a workforce development project;
- Support business improvement, relocation, retention and/or expansion efforts, and
- Contribute to the Clackamas County's economic development.

Eligible business costs include only those costs required to carry out a project as determined in the application process.

For full details on project and application requirements, including Project Types and Project Categories, refer to the [Notice of Funding Opportunity \(NOFO\)](#).

#### **4. How do I apply for a grant?**

To apply:

1. Review the grant guidelines and eligibility requirements outlined in the [Notice of Funding Opportunity \(NOFO\)](#) to ensure your business and project are eligible for funding. The full list of application questions can be found at the end of the NOFO.
2. Prepare your application, including:
  - a. Responses to the application questions (it's recommended that you prepare these in a separate document as the application form does not allow you to save a draft)
  - b. Project budget using the required template in .xlsx format (located alongside other program documents [here](#))
  - c. Proof of matching funds, as detailed under *Match Requirements* on page 3 of the NOFO (please be prepared to upload in PDF format, with a maximum of 5 pages total)
3. Submit your complete application via the [official web form](#) by 5pm on October 13, 2025, along with any required supporting documents. Late and incomplete applications will not be considered for funding. Application materials sent by post, email, or any means other than the official application web form will not be considered for funding.

For questions or general assistance, contact us at 503-742-4329 or at [4Biz@clacakamascounty.us](mailto:4Biz@clacakamascounty.us)

#### **5. What is the application deadline?**

Complete applications (including required documents) must be submitted via the official web form by 5pm on October 13, 2025.

It is highly recommended that you plan ahead and submit your application with enough time before the deadline to troubleshoot any technology, internet, and/or file issues – **late and/or incomplete applications will not be accepted for any reason.**

#### **6. What is the timeline for this program?**

Applications open on Thursday, September 4, 2025 at 9:00 AM Pacific Time.

Applications close at 5:00 PM Pacific Time on Monday, October 13, 2025.

Final award decisions are subject to the schedule of the Board of County Commissioners, and are anticipated to be announced by February 2026.

Funding agreements will be finalized in Spring 2026.

Funding will be deployed no later than June 30, 2026.

Program Period of Performance will begin at the execution of the grant funding agreement (Spring 2026) and run for approximately 6-18 months, depending on the unique project. Some projects may run longer.

Final Outcome Reports will be due approximately 24 months after the execution of the grant funding agreement.

### **7. How much funding can I apply for?**

You may request up to \$100,000 of funding through this program.

You will be required to provide proof of at least 100% matching funds from another source in order for your funding request to be considered. This means that only half of the funding for your proposed project may come from this grant. Your business must pay the other half of your project costs.

The County reserves the right to award partial funding. You will be asked in the application to list the project activities and costs which you would prioritize in the event your project is awarded partial funding.

### **8. How will grant applications be reviewed?**

Eligible grant applications will be reviewed by a committee comprised of Clackamas County staff. Eligible applications will be evaluated based on criteria such as:

- Alignment with program goals
- Project viability
- Economic impact of project
- Need for funding

After evaluating eligible applications, the Clackamas County staff review committee will recommend projects to the Board of County Commissioners (BCC) for final funding decisions. **The BCC has sole authority to determine funded projects.**

For more information on the evaluation criteria and process, refer to the [NOFO](#).

### **9. When will I be notified of the decision?**

Final award decisions are subject to the schedule of the Board of County Commissioners, and are anticipated to be announced by February 2026.

### **10. What happens next if my application is approved?**

Awardees will be notified by email once the Board of County Commissioners (BCC) has finalized their funding decisions.

After County staff have notified awardees, staff and awardees will negotiate a Funding Agreement. The Funding Agreement is a contract between the County and the awardee, and includes elements such as a final scope of work for the project, approved project budget, timelines, and reporting requirements for the grant period specific to each project. County Finance, County Counsel, and the BCC will approve final funding agreements.

### **11. What are the reporting requirements for grant recipients?**

Grant recipients will be required to submit progress reports and a final report at the end of the grant period. Receipts and other supporting documentation will be required to prove how the funds were used and the outcomes achieved. Depending on the unique nature of the project, other requirements will be discussed and stated in the grant funding agreement.

Specific reporting requirements for each awardee will be outlined in the awardee grant funding agreement based on project type, project categories, and the anticipated outcomes detailed in project applications.

### **13. Where can I find more information about the grant program?**

The **Notice of Funding Opportunity (NOFO)** can be found on the Clackamas County Procurement page for Open Grant Opportunities:

<https://www.clackamas.us/procurement-process#opengrantopportunities>

The **application questions** can be found at the end of the NOFO, which is located on the Clackamas County Procurement page for Open Grant Opportunities:

<https://www.clackamas.us/procurement-process#opengrantopportunities>

The **application budget template** can be found on the Clackamas County Procurement page for Open Grant Opportunities: <https://www.clackamas.us/procurement-process#opengrantopportunities>

The **official application web form** can be found at:

<https://apps.clackamas.us/businessdevelopmentgrants/>

For more information, visit our website or contact The Office of Economic Development directly at 503-742-4biz or [4Biz@clacakamascounty.us](mailto:4Biz@clacakamascounty.us). We provide resources such as grant guidelines, application forms, and contact information for assistance.

**14. Whom should I contact if I have more questions?**

If you have additional questions or need further assistance, please contact us at 503-742-4biz or [4Biz@clacakamascounty.us](mailto:4Biz@clacakamascounty.us). We are available to answer clarifying questions and/or resolve technical issues with the application form.

**15. Can software count as a capital asset under the capital project type?**

Yes, purchases of non-physical capital assets such as software can qualify under the capital project type.

Qualifying capital projects involve capital purchases that meet a business need by contributing to business expansion, projected growth strategies, etc. (as stated in the Notice of Funding Opportunity).

**16. Is the matching funds commitment the same as a business collateral requirement?**

No, matching funds are not the same as collateral. The 100% match commitment requires that an applicant contribute their own dollars to pay for at least half of their project costs.

For example, if an applicant is proposing a project with a total cost of \$50,000, the maximum amount of grant funding that they can request in their application is \$25,000. The rest of the project costs must be covered by another source of funds which must already have been secured by the applicant.

Sources of matching funds may include existing cash on hand, pre-approved loans, already awarded grant funds, etc. Applicants must provide up to 5 pages of documentation to show the source and availability of their matching funds. Documentation must be submitted in PDF format, and should not include personal information that is not required to prove matching funds (i.e. applicants should redact any full account numbers, SSN, check numbers, etc.)

**17. Can I use another grant as my source of matching funds?**

You may use a separate, *already awarded* grant as a source of matching funds. You must explain in your application how your awarded grant funds are set to be used and any restrictions on those funds. You must clearly demonstrate how both the awarded grant funds and the funds you are applying for fit into one cohesive project.

Other grants which you have applied for but have not been awarded can not be used as a source of matching funds.

**18. Can I apply for a capital project if I am purchasing multiple pieces of equipment?**

Yes, if you are purchasing multiple pieces of equipment for a specific project you may include costs related to that equipment in your project budget. It is up to the applicant to clearly explain why each equipment purchase is related to the project, and ensure that the project narrative, expected outcomes, and budget all support this.

**19. Can I include money I've already spent on a project in my match commitment?**

No. Project budgets may only include expenses that have not yet been incurred.

If your application is for a phase or portion of a larger ongoing project, you *may* include information about the full project in your project narrative, expected outcomes, and other narrative sections of the application. In this case, it is still up to you to describe the need and impact of the portion of the project that is reflected in the budget.

**20. Can I include money in my match commitment that I *plan* to spend on a project before the funding agreements are finalized (estimated May 2026)?**

Yes. You may include in your **project match commitment** money that you plan to spend on the described project, so long as that spending is clearly detailed in the project budget and timeline, and so long as the spending occurs after the grant application deadline on 10/13/25. You will be required to submit financial documentation to show when project funds were spent.

Because grant funds can not be used for reimbursement or to pay off debt, you may not include in your **grant request** any money that will be spent before the funding agreements are finalized.

**21. Can home-based businesses apply for funds to make property improvements or building expansions?**

Property improvements and/or construction projects on privately owned residential properties (i.e. homes and properties which are zoned as residential) **do not** qualify for funding under this program.

**22. Why isn't my application going through when I click 'Submit application'?**

Before reaching out to County staff about an issue with the form, please do the following:

- Double-check that you have completed all required questions.

- Double-check that you have successfully uploaded your project budget in .xlsx format.
- Double-check that you have successfully uploaded your proof of matching funds in PDF file format.
- Confirm that your uploaded files do not exceed 10 MB in size.
- Confirm that your question responses do not exceed the stated character limit (including spaces).

To ensure that you do not lose your work in the event of a form error, please write your responses to the application questions in a separate, saved document prior to filling out the application form.

**23. Does software count as a “good” under the traded-sector definition?**

Yes, software that is produced in Clackamas County and sold outside of the county and its immediate surroundings would qualify as a traded-sector line of business.

**24. Are services that are sold outside of Clackamas County considered traded-sector?**

No, purely service-based businesses do not qualify as traded-sector under this program.

## GRANT AGREEMENT

**Program Name:** Business Development Grant Program  
**Program Number:** 600406

This Grant Agreement (this "Agreement") is between **Clackamas County**, a political subdivision of the State of Oregon ("County"), acting by and through its Office of Economic Development, and **Rogue Fabrication LLC**, an Oregon for-profit entity ("Recipient").

### County Information

**Grant Administrator:**

**Program Manager:** Julia McCotter

Clackamas County Office of Economic Development  
150 Beaver Creek Road  
Oregon City, OR 97045  
503-742-4238  
4biz@clackamas.us

Clackamas County Office of Economic Development  
150 Beaver Creek Road  
Oregon City, OR 97045  
503-742-4399  
JMcCotter@clackamas.us

### Recipient Information

**Finance/Fiscal Representative:**

**Owner:**

Joseph Gambino  
Rogue Fabrication, LLC  
42335 SE Marmot Rd  
Sandy OR 97055

Joseph Gambino  
Rogue Fabrication, LLC  
42335 SE Marmot Rd  
Sandy OR 97055

**State of Oregon Business Registry Number:**

896978-91

## RECITALS

County seeks to promote economic development by investing in capital, capacity, and workforce development projects for traded-sector businesses operating in Clackamas County.

On April 17, 2024, the Clackamas County Board of Commissioners ("Board") approved a Business Development Grant program with the goals of using lottery dollars to support business and workforce development activities, retaining Clackamas-County-based operations, and attracting businesses looking to relocate into Clackamas County.

On January 20, 2026, the Board approved the Business Development Grants, as recommended by the Review and Recommendation Committee, and instructed the Office of Economic Development to finalize funding agreements with the approved Recipients.

The total investment in the Business Development Grant Program from County's restricted fund allocation of lottery dollars in the 2025-26 fiscal year is \$650,000. The maximum lottery dollar funding for each grant is \$100,000. Grants may be for lesser amounts, and no single grant may exceed \$100,000.

Recipient submitted an application, attached as Exhibit B, for grant funds to be used for a Capital Project. County has agreed to award Recipient the requested grant funds to perform the work described in Exhibit A (the "Project").

NOW, THEREFORE, the parties agree as follows:

**AGREEMENT**

1. **Term.** This Agreement shall become effective on the date it is fully executed and shall expire on December 31, 2028, unless sooner terminated or extended pursuant to the terms hereof.
2. **Grant Funds.**
  - a. **Payment.** County agrees to pay Recipient a one-time lump sum not to exceed one hundred thousand dollars (\$100,000.00) (the “Grant Funds”). Such payment is contingent on County receiving appropriations or other expenditure authority sufficient to allow County, in the exercise of its sole discretion, to make the payment.
  - b. **Use.** Recipient shall use the Grant Funds solely to complete the Project as described in Exhibit A, subject to the terms of this Agreement, the attached Exhibits, and all applicable laws and regulations including, but not limited to, the limitations set forth in Article XV, section 4, of the Oregon Constitution and ORS 461.540 for use of lottery dollars, which is the source of funds under this Agreement. Recipient shall use the Grant Funds solely for Project costs incurred during the period beginning **January 20, 2026** and ending **June 30, 2028** (the “Grant Period”), unless this Agreement is sooner terminated or the Grant Period is sooner extended pursuant to the terms hereof.
  - c. **Allowable Costs.** Recipient will incur only allowable costs in connection with the Project under this Agreement. A cost is allowable if it is reasonable and allocable, as described below.
    - i. **Reasonable.**
      1. A cost is reasonable if, in its nature and amount, it does not exceed that which would be incurred by a prudent person in the conduct of competitive business. Reasonableness of specific costs must be examined with particular care in connection with firms or their separate divisions that may not be subject to effective competitive restraints. No presumption of reasonableness shall be attached to the incurrence of costs by Recipient. If an initial review of the facts results in a challenge to a specific cost by County, the burden of proof shall be upon Recipient to establish that such cost is reasonable.
      2. What is reasonable depends upon a variety of considerations and circumstances, including:
        - Whether it is the type of cost generally recognized as ordinary and necessary for the completion of the Project;
        - Generally accepted sound business practices, arm's length bargaining, and federal and state laws and regulations;
        - Recipient's responsibilities to the government, other customers, its owners, its employees, and the public at large; and
        - Any significant deviations from Recipient's established practices.
    - ii. **Allocable.** A cost is allocable if it is assignable or chargeable to one or more cost objectives on the basis of relative benefits received or other equitable relationship. Subject to the foregoing, a cost is allocable under this Agreement if it:
      1. Is incurred specifically for the Project as described in Exhibit A; or
      2. Benefits both the Project and other work, and can be distributed among them in reasonable proportion to the benefits received.

## ROGUE FABRICATION, LLC

Grant Agreement – Business Development Grant Program FY25/26

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- d. **Duplicate Funding.** Recipient may use funds other than the Grant Funds to complete the Project; provided, however, that Recipient may not use the Grant Funds for any Project costs that are budgeted to be or that have been paid for with other funds and would result in duplicate funding. The applicable portion of any rebate, allowance, or other credit relating to any Project costs received by or accruing to Recipient shall be credited to the Project either as a cost reduction or by cash refund to County.
  - e. **Return.** Any unspent Grant Funds must be returned to County within 30 days of the end of the Grant Period, the earlier termination of this Agreement, or the end of any extensions of the Grant Period. Unspent Grant Funds include those Grant Funds that have not been spent in accordance with the terms of this Agreement.
  - f. **Reimbursement.** County may require full or partial reimbursement of the Grant Funds if Recipient fails to deliver the Project as described in Exhibit A.
3. **Future Support.** County makes no commitment and assumes no obligation for future support of the Project.
  4. **Matching Funds.** Recipient is required to provide matching funds in the amounts specified in Exhibit A.
  5. **Amendments.** The terms of this Agreement may not be waived, altered, modified, supplemented, or amended, in any manner whatsoever, except by written instrument signed by both parties. Recipient must submit a written request for any amendment, including justification, to County at least forty-five (45) calendar days before expiration of this Agreement.
  6. **Termination.** This Agreement may be terminated prior to its expiration as follows:
    - a. At County's discretion, upon thirty (30) days' advance written notice to Recipient.
    - b. Upon a party's default under this Agreement, following thirty (30) days' written notice to the party with an opportunity to cure.
    - c. At any time upon mutual agreement by the parties.
    - d. Immediately upon written notice to Recipient that County lacks sufficient funds, as determined by County in its sole discretion, to continue to perform under this Agreement.

The termination of this Agreement, for any reason, shall not release Recipient from any obligation that has already accrued or that comes into effect due to such termination.

### 7. **Default.**

- a. **Recipient's Default.** Recipient will be in default under this Agreement upon the occurrence of any of the following:
  - i. Recipient fails to use the Grant Funds for eligible purposes described in Exhibit A;
  - ii. Any representation, warranty, or statement made by Recipient in this Agreement or in any documents or reports relied upon by County to measure the Business Development Grant Program, the expenditure of the Grant Funds, or the performance by Recipient is untrue in any material respect when made;
  - iii. Recipient fails to comply with any term or condition set forth in this Agreement;
  - iv. A petition, proceeding, or case is filed by or against Recipient under federal or state bankruptcy, insolvency, receivership, or other law; or

- v. Recipient fails to make sufficient progress on the Project as determined by County in its sole discretion.
  - b. **County's Default.** County will be in default under this Agreement if County fails to perform a material obligation under this Agreement; provided, however, that failure to pay the Grant Funds due to lack of appropriation shall not constitute a default of County.
8. **Remedies.**
- a. **County's Remedies.** In the event of Recipient's default, County may, at its option, pursue any or all remedies available to it under this Agreement, at law or in equity, including, but not limited to, (1) withholding the Grant Funds until compliance is achieved; (2) requiring reimbursement of the Grant Funds in the case of omissions or misrepresentations in financial or programmatic reporting; (3) requiring the return of any Grant Funds used by Recipient in violation of this Agreement; (4) terminating this Agreement, following thirty (30) days' written notice to Recipient with an opportunity to cure; (5) declaring Recipient ineligible to receive future awards from County; or (6) initiating an action or proceeding for damages or for declaratory or injunctive relief.
  - b. **Recipient's Remedies.** In the event of County's default, Recipient may, at its option, (1) terminate this Agreement, following thirty (30) days' written notice to County with an opportunity to cure, and/or, (2) subject to the limits of applicable law and this Agreement, require reimbursement of eligible costs incurred in accordance with this Agreement, less any claims County may have against Recipient. In no event will County be liable to Recipient for expenses related to termination of this Agreement or for any indirect, incidental, consequential, or special damages.
9. **Administrative Requirements.**
- a. **Accounting.** All costs incurred by recipient under this Agreement should be recorded in compliance with generally accepted accounting principles, international financial reporting standards, and/or governmental accounting standards.
  - b. **Monitoring.** County and its duly authorized representatives shall have access to the financial records, books, documents, papers, plans, records of shipments, payments, and writings of Recipient that are pertinent to this Agreement, whether in paper, electronic, or other form, to perform examinations and audits and make excerpts and transcripts. County and its duly authorized representatives shall also have access to conduct onsite or offsite visits for the purpose of monitoring. County may take photographs of funded items during such visits.
  - c. **Record Retention.** Recipient will retain and keep accessible all financial records, books, documents, papers, plans, records of shipments, payments, and writings for a minimum of six (6) years, or such longer period as may be required by applicable state law, following expiration or termination of this Agreement, or until the conclusion of any audit, controversy, or litigation arising out of or related to this Agreement, whichever date is later.
  - d. **Change in Ownership.** Recipient is required to notify County, in writing, if Recipient intends to sell its business to another entity or otherwise transfer ownership during the term of this Agreement.
  - e. **Closeout.** County will closeout this award when County determines that all applicable administrative actions and all required work have been completed by Recipient.
10. **Compliance with Applicable Law.** Recipient shall comply with all applicable federal, state, and local laws, regulations, executive orders, and ordinances applicable to this Agreement, as they may be amended from time to time, including, but not limited to, (i) Titles VI and VII of the Civil Rights Act of

1964, as amended; (ii) Sections 503 and 504 of the Rehabilitation Act of 1973, as amended; (iii) the Americans with Disabilities Act of 1990, as amended; (iv) Executive Order 11246, "Equal Employment Opportunity," as amended; (v) the Health Insurance Portability and Accountability Act of 1996; (vi) the Age Discrimination in Employment Act of 1967, as amended, and the Age Discrimination Act of 1975, as amended; (vii) the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended; (viii) all regulations and administrative rules established pursuant to the foregoing laws; and (ix) all other applicable requirements of federal and state civil rights and rehabilitation statutes, rules, and regulations.

**11. General Provisions.**

- a. **Indemnification.** Recipient agrees to indemnify and hold County and its elected officials, officers, employees, and agents harmless with respect to any claim, cause, damage, action, penalty, or other cost (including attorney and expert fees) arising from or related to (i) the negligent or willful acts of Recipient or its employees, its agents, or those under its control; or (ii) the acts or omissions of Recipient in performing under this Agreement including, but not limited to, any claim by state or federal funding sources that Recipient used funds for an ineligible purpose. Recipient is responsible for the acts of its agents and employees, and County assumes no liability or responsibility with respect to the acts of Recipient or its employees, its agents, or those under its control.
- b. **Assignment.** This Agreement may not be assigned in whole or in part without the prior express written approval of County.
- c. **Independent Status.** Recipient is independent of County and will be responsible for any federal, state, or local taxes and fees applicable to the Grant Funds. Recipient is not an agent of County and, except as set forth herein, undertakes this work independent of the control and direction of County. Recipient shall not seek or have the power to bind County in any transaction or activity.
- d. **Notices.** Any notice provided for under this Agreement shall be deemed given if it is in writing and (1) delivered personally to the addressee; (2) sent by certified mail, return receipt requested; (3) sent by commercial delivery service (such as Federal Express); (4) sent by electronic mail with confirmation (such as a return receipt) that it was delivered, accessed, downloaded, or printed.
- e. **Dispute Resolution.** The parties will attempt in good faith to informally resolve any dispute arising out of this Agreement. This may be done at any management level, including at a level higher than persons directly responsible for administration of this Agreement. In addition, the parties may agree to utilize a jointly selected mediator to resolve the dispute short of litigation. Each party will bear its own costs incurred for any mediation.
- f. **Governing Law.** This Agreement, and all rights, obligations, and disputes arising out of it, shall be governed and construed in accordance with the laws of the State of Oregon and the ordinances of Clackamas County without regard to conflict of law principles. Any claim, action, or suit between the parties that arises out of or relates to this Agreement shall be brought and conducted solely and exclusively in the Circuit Court of the State of Oregon for Clackamas County; provided, however, that, if any such claim, action, or suit may be brought in a federal forum, it shall be brought and conducted solely and exclusively in the United States District Court for the District of Oregon. In no event shall this section be construed as a waiver by County of any form of defense or immunity, whether sovereign immunity, governmental immunity, immunity based on the Eleventh Amendment to the United States Constitution, or otherwise, from any claim or from the jurisdiction of any court. Recipient consents to the personal jurisdiction of the courts referenced in this section.
- g. **Severability.** If any provision of this Agreement is found to be illegal or unenforceable, this Agreement nevertheless shall remain in full force and effect, and the offending provision shall be stricken.

**ROGUE FABRICATION, LLC**

Grant Agreement – Business Development Grant Program FY25/26

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- h. **Counterparts.** This Agreement may be executed in any number of counterparts, all of which together will constitute one and the same agreement. Facsimile or electronic signatures shall be valid as original signatures.
  - i. **Third-Party Beneficiaries.** Except as expressly provided in this Agreement, there are no third-party beneficiaries to this Agreement. The terms of this Agreement may be enforced only by the parties.
  - j. **Binding Effect.** This Agreement shall be binding on the parties and their successors.
  - k. **Integration.** This Agreement contains the entire agreement between the parties and supersedes all prior written or oral discussions or agreements.
  - l. **No Attorney Fees.** In the event any arbitration, action, or proceeding, including any bankruptcy proceeding, is instituted to enforce any term of this Agreement, each party shall be responsible for its own attorney fees and expenses.
  - m. **Debt Limitation.** This Agreement is subject to the county debt limitation set forth in Article XI, section 10, of the Oregon Constitution, and is contingent upon funds being appropriated to carry out its provisions.
  - n. **Necessary Acts.** Each party shall execute and deliver to the other all such further instruments and documents as may be reasonably necessary to carry out this Agreement.
12. **Insurance.** Recipient shall secure at its own expense and keep in effect during the term of this Agreement the insurance type and minimum coverage indicated below. These requirements do not in any way limit the amount or scope of Recipient's liability under this Agreement. Recipient shall provide proof of said insurance and name County as an additional insured on all required liability policies. Proof of insurance and notice of any material change should be submitted to the Grant Administrator or Program Manager at the contact information listed above.

<input checked="" type="checkbox"/> Required – Workers' Compensation: Recipient shall comply with the statutory workers' compensation requirements in ORS 656.017, unless exempt under ORS 656.027 or 656.126.
<input checked="" type="checkbox"/> Required – Commercial General Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence, with an annual aggregate limit of \$2,000,000 for Bodily Injury and Property Damage.
<input type="checkbox"/> Required – Professional Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per claim, with an annual aggregate limit of \$2,000,000 for damages caused by error, omission, or negligent acts.
<input checked="" type="checkbox"/> Required – Automobile Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per accident for bodily injury and property damage.
<input type="checkbox"/> Required – Abuse & Molestation endorsement with limits not less than \$1,000,000 per occurrence if not included in the Commercial General Liability policy.

13. **Agreement Documents.**

The following documents are attached to this Agreement and incorporated herein:

- Exhibit A: Approved Scope of Work: Project Description, Budget, Performance Outcomes, and Reporting

**ROGUE FABRICATION, LLC**

Grant Agreement – Business Development Grant Program FY25/26

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- Exhibit B: Original Application, Budget, and Required Submission Documents
- Exhibit C: Original County Notice of Funding Opportunity (NOFO) and related FAQs

In the event of a conflict between the terms of this Agreement and/or any of the attached Exhibits, interpretations shall be based on the following order of precedence:

- This Agreement
- Exhibit A
- Exhibit B
- Exhibit C

*(Signature Page Follows)*

**ROGUE FABRICATION, LLC**

Grant Agreement – Business Development Grant Program FY25/26

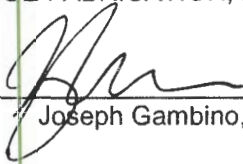
Page 8 of 8

IN WITNESS WHEREOF, the parties have caused this Agreement to be executed by their duly authorized officers.

CLACKAMAS COUNTY

ROGUE FABRICATION, LLC


By: \_\_\_\_\_  
Craig Roberts, Chair

By:  \_\_\_\_\_  
Joseph Gambino, Founder

Dated: \_\_\_\_\_

Dated: 4-2-2026

Approved as to form:

By:  \_\_\_\_\_  
County Counsel

Dated: April 27, 2026

## EXHIBIT A – SCOPE OF WORK

### Clackamas County Office of Economic Development Business Development Grant Program FY 2025-26

#### Grant Award Information

**RECIPIENT:**

Rogue Fabrication, LLC  
42335 SE Marmot Rd  
Sandy, OR 97055

**AMOUNT:**

\$100,000

#### Use of Grant Funds

The Grant Funds under this Agreement are lottery dollars. As such, they are subject to the limitations set forth in Article XV, section 4, of the Oregon Constitution and ORS 461.540. Use of lottery dollars is restricted to the following:

- (a) Creating jobs;
- (b) Furthering economic development in Oregon; or
- (c) Financing public education.

**The Grant Funds under this Agreement may be used for the following purposes:**

#### Project Scope

Rogue Fabrication, LLC is awarded a grant in the amount of \$100,000 to support Capital project. Project activities and reported outcomes will occur at 16620 Champion Way Sandy OR 97055. Grant Funds will support development of a new industrial site for business expansion. The goals of this project are to:

- Hire new employees
- Increase production
- Increase production efficiency
- Decrease production waste
- Improve environmental efficiency of production
- Increase business spending on local inputs
- Expand product line or offer additional products
- Increase revenue

## Project Budget

PROJECT BUDGET					
	Line Item Description	Quantity	Unit Price	Cost Basis	Total
1	Civil engineering, architectural review, surveying	1.00	\$ 46,345.00	Each	\$ 46,345.00
2	County Fees - design review	1.00	\$ 7,836.00	Each	\$ 7,836.00
3	Permitting and SDC	1.00	\$ 52,200.00	Each	\$ 52,200.00
4	Pre Engineered Building Kit (down payment only)	1.00	\$ 60,000.00	Each	\$ 60,000.00
5	Excavation + site prep (starting costs only)	1.00	\$ 35,000.00	Each	\$ 35,000.00
<b>TOTAL PROJECT COST</b>					<b>\$ 201,381.00</b>
<i>Grant funds:</i>					<i>\$ 100,000.00</i>
<i>Matching funds:</i>					<i>\$ 101,381.00</i>

Recipient is committed to carrying out Project activities, as defined in the above scope and budget, in Clackamas County. Recipient is committed to maintaining business operations in Clackamas County for the term of this Agreement.

## Request for Grant Funds

Upon full execution of this Agreement, Recipient must submit all paperwork required by County to be paid as a vendor and remit an invoice for full payment of the Grant Funds.

## Reporting

During the term of this Agreement, Recipient shall provide, at minimum, one progress report and three outcomes reports using County-provided templates. These reports are due on the following schedule:

**September 25, 2026** – Progress Report Due

Reporting period: *Date of agreement signature – September 18, 2026*

**April 30, 2027** – Year 1 Outcomes Report Due

Reporting period: *Date of agreement signature – March 31, 2027*

**April 30, 2028** – Year 2 Outcomes Report Due

Reporting period: *April 1, 2027 – March 31, 2028*

**October 31, 2028** – Final Outcomes Report Due

Reporting period: *April 1, 2028 – September 30, 2028*

Recipient may also be asked to provide supplemental narrative information on Project activities and outcomes for use in public reports and marketing initiatives.

Reports shall be submitted to the following address:

Julia McCotter  
Clackamas County Office of Economic Development  
150 Beaver Creek Road  
Oregon City, OR 97045  
503-742-4399  
jmccotter@clackamas.us

## Detailed Eligibility

**Legal business name**

Rogue fabrication LLC

**Business DBA**

N/A

**Business Website**

www.RogueFab.com

**Oregon Secretary of State ID number**

896978-91

**Incorporation date**

2012-11-26

**Corporate structure**

LLC, single member

**North American Industry Classification System (NAICS) code**

333517

**Industry name**

Machine Tool Manufacturing industry

**Primary business address**

42335 SE Marmot Rd

**Project location address**

16620 Champion Way Sandy OR 97055

**How does your business meet the criteria for a traded-sector business?**

Our business meets the required criteria by exporting goods we manufacture. We produce metal fabrication tools in a small shop in rural Clackamas County, and distribute them via shipping and will-call pickup. Less than 2% of our orders are picked up, which leaves 98%+ being shipped. These goods are shipped all over the U.S., and a small percentage are shipped internationally.

**Total project budget**

1103430

**Total grant funds requested**

100000

**What is the source of your matching funds for this project?**

Bank funds (415,000), Money market (297,000), Business Loan (291,430)

**If awarded, grant funds will not be disbursed until Spring 2026. Grant funds can not be used to reimburse previous spending. Is your project feasible given this funding timeline?**

Yes

**Applicant Information**

**Full name(s) of business owner(s)**

Joseph Gambino

**Full name of applicant contact**

Joseph Gambino

**Title of applicant contact**

Founder

**Email address of applicant contact**

Joe@roguefab.com

**Primary phone number of applicant contact**

971-322-0243

**Brief summary of the business**

Our business designs, produces, and sells tubing benders and other associated fabrication tools and equipment. We sell to both private users as well as businesses. Other equipment we produce include tubing notchers (used to cut tubing to fit it together for welding), and hydraulic presses and press brakes. We also build our own hydraulics systems for these machines in-house. We do welding, cutting, assembly, and other processes. With a new

location, we would also add CNC machining and robot welding technologies, bringing even more modern manufacturing to Sandy.

## Grant Project Information

### Please select your Project Type

Capital project

### Project Category

Physical Expansion

### Please provide a narrative summary of your project

We have outgrown our small shop in farm country and need more room. We purchased 1.69 acres in the city of Sandy and re-zoned the property with the City to be Industrial Zone 2. This site will be developed with at least 15,000 square feet of modern manufacturing space (steel building, but much prettier than an average industrial development). We have held a pre-design review meeting with the City and have been waiting several years for sewer capacity to be able to submit design review, which will be followed by permitting. This type of construction takes a very long time, and may stretch the timelines for this program, though we intend to make consistent progress toward our goal.

### Please describe the business need for grant funding to assist your project

Our business has seen profit erosion from tariffs and material price increases, as well as sales volume decreasing in recent years. We continue to innovate, but profit (while healthy) has slowed down. This creates financial pressure on any capital project. On top of that, while we've waited for sewer capacity to open up in Sandy on the land we own, SDC rates have kept climbing, outpacing our savings. Every time we run the numbers, construction gets harder to justify. Our business provides "living wage jobs" as defined by MIT, and we have incredible and comprehensive benefits for our team. We want to expand that impact and value within this community. This grant would be a huge help.

### What outcomes do you expect to achieve as a result of this project?

Hire new employees

Increase production

Increase production efficiency

Decrease production waste

Improve environmental efficiency of production (e.g. decrease water usage, lower carbon footprint, etc.)

Increase your business' spending on local inputs

Expand product line / offer additional products

Increase revenue

**Elaborating on your selected outcomes**

We need more space to develop new products. We design larger and more complex machines every year. Our press brake was just released in 2025, and it is double the weight, size, and complexity of our tubing bender (which was released in 2010). Our next project is again at least double the weight and complexity of the press brake (it will be a larger tubing bender). This large bender will require new machinery, increased staff, and will rely heavily on local businesses and supply chains (steel cutting, powder coating, logistics, banking and trade compliance, and wood for pallets/crates to name a few). This new product line will increase revenue. With more room in our new building, we can streamline production and increase batch sizes, which will lead to higher production efficiency and lower material waste. One example is being able to nest steel parts for cutting across multiple product lines into a single steel sheet. This reduces metal between parts and machine time (waste and efficiency). We don't have room for the machine that cuts these parts in our current building.

**How many months do you expect it will take to fully implement your project? \***

24

**Please describe your project timeline in more detail**

Civil engineering work - 90 days Design review - 180 days Design work/revisions - 90 days Permitting and review - 180 days Construction - 120 to 200 days Total is 660 to 740 days, or 1.8 to 2 years. The first \$200k will be spent within a few months, so proving to Clackamas County that the grant funds (and matching funds from the business) are invested will not be an issue within the current grant timeline of 6-18 months.

**If your project is awarded partial funding, what project activities and costs would you prioritize to achieve your desired outcomes?**

We would have to evaluate financial limitations and the viability of a smaller structure. We could also delete the epoxy flooring and attempt to negotiate less expensive architectural requirements with the city as well. This project has already had all the "fat" trimmed out possible. It is incredibly lean for this capacity.

**Attestation**

Yes

**Name of Attesting Corporate Officer \***

Joseph Gambino

**EXHIBIT B: Original Application, Budget, and Required Submission Documents**

INFORMATION					
Business name:	Rogue Fabrication, LLC				
Project type:	Capital Project				
Grant funding request:	\$100,000.00				
Matching funds provided:	\$1,003,430.00				
BUDGET ATTESTATIONS (select from dropdown)					
I understand that my business is responsible for sourcing funds outside of this grant request to pay for at least half of my total project costs.	Yes				
I understand that any awarded grant funds will not be disbursed until Spring/Summer 2026, and that grant funds can not be used to reimburse costs that are incurred before grant funds are approved and disbursed.	Yes				
I attest that this project budget does not include any line items that have already been purchased, nor can it include line items that will be purchased prior to the grant application deadline.	Yes				
I attest that funds included in this project budget will be spent on Clackamas County-based activities, assets, and/or workforce. I understand that no project funds may be spent on workforce or capital assets based in a non-Clackamas County business location.	Yes				
PROJECT BUDGET					
Line Item Description	Quantity	Unit Price	Cost Basis	Total	
1 Civil engineering, architectural review, surveying	1.00	\$ 46,345.00	Each	\$ 46,345.00	
2 County Fees - design review	1.00	\$ 7,836.00	Each	\$ 7,836.00	
3 Permitting and SDC	1.00	\$ 52,200.00	Each	\$ 52,200.00	
4 Steel Building from US Metals in Sandy	1.00	\$ 399,000.00	Each	\$ 399,000.00	
5 Excavation + site prep	1.00	\$ 95,000.00	Each	\$ 95,000.00	
6 Concrete blocks for retaining walls	4476.00	\$ 5.25	Each	\$ 23,499.00	
7 Parking lot asphalt	24000.00	\$ 2.25	Per S.F.	\$ 54,000.00	
8 Concrete foundation and slab	15000.00	\$ 10.00	Per S.F.	\$ 150,000.00	
9 Utility work	1.00	\$ 15,000.00	Each	\$ 15,000.00	
10 Electrical Installation - 800A Panel	1.00	\$ 49,500.00	Each	\$ 49,500.00	
11 Plumbing - basic 2 bathroom plus eye wash/shower combo	1.00	\$ 9,500.00	Each	\$ 9,500.00	
12 Fire Sprinkler Install - pressurized/wet system	15000.00	\$ 4.00	Per S.F.	\$ 60,000.00	
13 Insulation (supplied by US Metals in Sandy)	1.00	\$ 51,000.00	Each	\$ 51,000.00	
14 Wall panels (28ga sheetmetal) - interior (material only, Rogue Fab Install)	1.25	\$ 9,800.00	Per S.F.	\$ 12,250.00	
15 Epoxy coating on floors (material only, Rogue Fab Install)	1.25	\$ 15,000.00	Per S.F.	\$ 18,750.00	
16 Windows	12.00	\$ 450.00	Each	\$ 5,400.00	
17 Man Door with Lock	5.00	\$ 350.00	Each	\$ 1,750.00	
18 Roll up doors (shop doors)	3.00	\$ 1,800.00	Each	\$ 5,400.00	
19 Lighting - Economy LED Hi-Bay 150W	25.00	\$ 80.00	Each	\$ 2,000.00	
20 Masonry/Awnings/Landscaping and other Sandy Style work	1.00	\$ 45,000.00	Each	\$ 45,000.00	
<b>TOTAL PROJECT COST</b>				<b>\$ 1,103,430.00</b>	
Maximum grant funding request for this project:				\$ 100,000.00	

EXHIBIT B: Original Application, Budget, and Required Submission Documents

onlinebanking.usbank.com/digital/servicing/shellapp/#/customer-dashboard

Welcome, Joseph.  
How can we support you today?

[Tax documents >](#)

**Accounts** [Customize account list](#)

Checking and savings

PERSONAL ...2787

JRG PROP MGMT LLC ...5020

Rogue Fab - Payroll ...9965

RogueFab NEW ...6880 **\$416,819.24 >**

Rogue ACH WIRE TT ...6429 **\$6,632.81 >**

Savings ...1566

Credit cards **\$485.32**

Credit Card ...5821 **\$485.32 >**

client.schwab.com/clientapps/accounts/summary/

- DFIEX 2  
DFA INTERNATIONAL CORE EQ
- DFMPX  
DFA MUNICIPAL BOND INSTITU
- DFUSX 2  
DFA US LARGE COMPANY I
- SGIIX  
FIRST EAGLE GLOBAL I
- HLMEX  
HARDING LOEVNER EMERGIN
- VCMDX 3  
VANGUARD COMMODITY STRA
- VTSAX  
VANGUARD TOTAL STOCK MKT ..
- VWSUX  
VANGUARD ULTRA SHORT-TEH..

**Mutual Funds Total** N/A

**Cash & Money Market**

Symbol / Name ▲	Quantity	Price	Price Change \$   %	Market Value	Day Change \$   %
SVVXX SCHWAB PRIME ADVANTAGE M					
SNSXX SCHWAB US TREASURY MONE	295,257.26	\$1.00	\$0.00	\$295,257.26 †	\$0.00
Cash & Cash Investments 4					\$0.00
<b>Cash &amp; Money Market Total</b>					<b>\$0.00</b>

† The value reported may not reflect the current price  
[Disclosures](#)

(0219-99781 0818 8X3C)

Today's Date: 02:34 PM ET, 08/30/2025

Check the background of Charles Schwab or one of its investment professionals on [FINRA'S BrokerCheck](#)



October 2, 2025

Attn: Interested Parties  
RE: Rogue Fabrication, LLC/16620 Champion Way

### Loan Pre-Approval

This letter is to inform all interested parties that the borrower, **Rogue Fabrication, LLC**, has been pre-approved for a construction loan of **\$450,000.00** for the commercial construction project at **16620 Champion Way, Sandy, OR 97055**. We have evaluated the borrower's qualifications and pre-approved the request for financing on this property. Any remaining funds needed for construction will be covered by the borrower.

Cetan Funds will be making a private/hard money loan to the borrower. Please note that Cetan Funds financing is conditioned upon title to the subject property being free of all liens and encumbrances (not approved by Cetan Funds in writing) at closing, the completion of final underwriting, and a satisfactory escrow closing. This will include the receipt of a satisfactory preliminary title report and wiring instructions. If any necessary documents are not received in a timely manner, funds may be delayed. Documents necessary for satisfying any conditions will be reviewed within 1-2 business days of receipt. After review and upon final approval, Cetan Funds will be prepared to fund and close within 2-3 business days.

If you have any questions regarding this statement, please contact Landon Matta at [REDACTED]

Sincerely,

[REDACTED]

Landon Matta  
Associate & Loan Officer  
NMLS #2524246

## Notice of Funding Opportunity (NOFO)

# Clackamas County Office of Economic Development

## Business Development Grant Program

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### Program Description

Traded sector businesses—those competing in markets beyond the local area—are invited to apply for funding designated to help them grow!

In April 2024, the Clackamas County Board of Commissioners approved the Business Development Grant Program with the goals of supporting traded-sector business activity (e.g. expansion of operations, efficiencies, technological advancements, etc.), retaining Clackamas County-based operations for existing businesses, and/or attracting new businesses to relocate operations to Clackamas County. Funding will be provided for either capital investments or workforce development projects and must be matched 100% or more by the awardee.

### Award Information

Funding Source:	State lottery dollars
Funding Amount:	Individual Award Maximum \$100,000 (awards may be less); \$650,000 total funding available this cycle. Funding is contingent upon the execution of a grant agreement. If an approved recipient cannot finalize their agreement, funds may be offered to approved alternates.
Grant Period of Performance:	Approximately 6-18 months from agreement execution (execution estimated Spring 2026), depending on project. Some projects may be longer.
Reporting Requirements:	Reporting requirements will vary by project type and will be negotiated with each awardee prior to agreement execution. Reporting will be sufficient to ensure awarded amounts are expended on eligible costs and that the project, as described in the agreement, has been completed.
Submission Method:	Complete and submit application electronically via the <a href="#">official web form</a> . Paper applications will not be accepted.
Application Open Period:	September 4, 2025 at 9am Pacific Time – October 13, 2025 at 5pm Pacific Time.

	Complete submissions, including all required documents, must be received by 5pm on October 13 <sup>th</sup> to be considered responsive. Complete submissions include all required supporting documentation in addition to the application. Incomplete applications will not be considered.
Program Contact:	<a href="mailto:4biz@clackamas.us">4biz@clackamas.us</a> , (503) 742-4BIZ (4249)
Informational Webinar:	September 16, 2025 at 3:30pm Pacific Time <a href="#">Registration required</a>
Match Requirement:	100% or more

## Background

Clackamas County was allocated State lottery dollars for economic development and this Business Development Grant Program is an expression of that constitutional purpose for State lottery funds.

## Eligibility & General Requirements

The following criteria must be met in order for your application to be deemed eligible for review. This is a competitive grant program; not all eligible applications will be funded.

### **Location and Age.**

Your business must have operations within Clackamas County or seek to relocate to or establish additional operations within Clackamas County. The business must be “established,” which means it is at least two years old, though it needn’t have been located in Clackamas County for two years if seeking to move existing operations into the county.

### **Traded Sector**

Your business must be a *traded-sector business*, defined as *Clackamas County businesses producing or manufacturing goods in Clackamas County AND selling or exporting those goods outside the county and its immediate surroundings (e.g. manufacturing, food processing, etc.).*

### **Project Types**

Your proposal must be for a capital project or for a workforce development project. No other project types will be considered.

Capital projects may include:

- Purchase of capital assets that meet a business need, expand production, increase efficiency, or otherwise lead to business growth. Capital assets may include machinery, equipment, software, etc.
- Site development, improvement, or other construction that is directly related to relocation, expansion, and/or business growth.

Capital project requests may also include any fees, licenses, delivery costs, taxes, installation, utility hookups, etc. directly associated with the purchase to bring the capital project online operationally and these costs should be broken out in your budget.

Workforce development projects include the training, hiring, and/or retention of employees. Examples of workforce development projects include but are not limited to:

- Training for employees to learn a new or updated technology, equipment or process, employer-specified or industry-specific skills;
- Train-the-trainer instruction to build the capacity of businesses;
- Permanent hiring of new employee(s) to increase production, expand product lines, bring outsourced work in-house, or otherwise meet existing and future demand.

### **Match Requirements**

You must provide proof of secured match of at least 100% of the amount requested, meaning that only half of the funding for your proposed project may come from this grant. Your business must pay the other half of your project costs.

Match may come from:

- Existing business cash
- A loan or investor commitment (with documentation)
- A separate, already awarded grant

### **Secretary of State Registration**

Your business must have an [active business registration with the Oregon Secretary of State](#). You will need your Oregon Secretary of State identification number to complete this application. This requirement includes business applicants looking to move operations or establish operations into Clackamas County from outside of Oregon.

### **Code compliance**

You may be disqualified from this program if the County finds you are out of compliance with any applicable business codes or owe back taxes without an approved payment plan.

### **Participation Restrictions**

Each business may only apply once per application cycle and may not apply to this grant program again if you have previously received an award funded with lottery dollars of any amount. Previous grant recipients may not apply for additional funding.

### **Trade secrets and your application**

Since applications submitted under this NOFO are subject to public records requests, please clearly mark any included trade secrets as '(TRADE SECRET)' in your responses. All identified trade secrets will be redacted when responding to public records requests.



**Only business applicants**

Grants will be awarded to businesses, not individuals, so please apply with the official name of your business as registered with the Oregon Secretary of State.

**Unallowable costs**

Indirect costs are not funded through these awards and should not be part of your budget request. Existing staff costs (wages, benefits) are not allowable grant expenses, except for those hours spent in grant-funded training (e.g. training or skill development for a workforce development project, training on new equipment for a capital project).

**Debt(s)**

This grant may not be used to pay debts on already-implemented projects. This grant is intended for new projects only.

## Application and Submission Information

To apply, complete the [official online application](#). Applications sent through mail or email will not be accepted. The full list of application questions is provided at the end of this NOFO. In your application, provide as much information as needed to thoroughly answer questions and convey information; however, please keep answers as clear and concise as possible. The application is broken up into the following sections:

**Base Eligibility**

On the first page of the application, you will be required to complete a basic eligibility screening questionnaire. The main application will load for any applicants who meet the base eligibility criteria. Answer these questions honestly – you will be required to support your statements with documentation in the main application.

**Detailed Eligibility**

In this section of the application, you will be asked to provide more information to validate your eligibility for funding. It is possible for an applicant to be deemed ineligible even if they appear to meet the base eligibility criteria in the screening questionnaire before this section of the application. Full eligibility requirements are listed in this NOFO, above.

**Application Information**

In this section, you will provide your contact information and summary information about your business.

**Grant Project Information**

In this section, you will provide detailed information about the project for which you are seeking grant funding. You will select your project type and categories, describe your need for grant funding, select and discuss your expected outcomes, provide your project timeline, and explain more about your project budget. This section is your primary opportunity to make a compelling case for getting your project funded.



### **Attachments**

You will need to provide your project budget, using the required budget template. The template must remain in .xlsx file format in order for your file to upload.

You will also need to provide up to 5 pages of documentation to prove the source(s) and availability of your matching funds. Matching funds are an eligibility requirement; applications that do not sufficiently prove source and availability of matching funds will not be deemed eligible for this program.

### **Attestation**

You'll be required to sign the attestation on the application. Only a corporate officer who is authorized to legally bind the business may sign the attestation. It is your responsibility to carefully review the attestations before signing. Fraudulent applications will be referred to law enforcement.

## Evaluation

Your application will be evaluated by a review committee comprised of Clackamas County staff. Based on the criteria outlined in this NOFO, the review committee will score applications for Project Fit, Need for Funding, Economic Impact, and Project Feasibility. The review committee will recommend projects to the Board of County Commissioners (BCC) for funding and will also propose an alternates list of the top applications that did not make the initial funding cut. The alternates list will serve as a waitlist in the event a BCC-approved grant recipient is unable to finalize their funding agreement due to unforeseen changes in the business, external factors rendering a project unfeasible, or other extenuating circumstances.

**The BCC has sole authority to determine funded projects and the alternates list.** The BCC may choose to disregard or modify the recommendations of the review committee for funded projects or alternates at its discretion. The funding recommendation packet presented to the BCC will include both the proposed awardees and the alternates list for simultaneous review and approval. The BCC-approved alternates list remains valid until all funds are awarded or the funding cycle closes, at the discretion of the Clackamas County issuing department.

Only applications considered responsive will be evaluated. "Responsive" applications are those which comply with the requirements in this NOFO. Applications that do not meet the eligibility requirements or applications that are received late and/or incomplete will not be considered.

**Timeline.** Applications will be reviewed in November/December 2025, with recommendations for funding and the alternates list made to the BCC by January/February 2026. Awardees and alternates will be notified by email only after the BCC has finalized their decisions. In the event an approved grant recipient cannot finalize their funding agreement, the County will contact the next alternate(s) on the BCC-approved list, in ranked order, to negotiate a funding agreement. This process will continue until all allocated funds are awarded or the alternates list is exhausted.



## Notification of Applicants

Applicants selected for funding will be notified by email only after the Board of County Commissioners (BCC) has finalized its decisions. Applicants placed on the alternates list will also be notified by email, informing them of their status as potential awardees should funding become available. The notification will clarify that placement on the alternates list does not guarantee funding and that alternates will be contacted in ranked order only if an approved grant recipient is unable to finalize their funding agreement. All other applicants will receive a courtesy email notifying them that their application was not selected for funding or the alternates list.

Applicants on the alternates list may be asked to provide updated information (e.g., proof of match or project status) if contacted to finalize a funding agreement, to ensure the project remains viable.

After County staff have notified awardees, staff and awardees will negotiate a final scope of work for the project, including timelines for the grant period specific to each project. County Finance, County Counsel, and the BCC will approve final grant documents.

Applicants placed on the alternates list who do not receive funding will be notified after all awardee funding agreements have been finalized. Applicants placed on the alternates list who do not receive funding may apply for future grant cycles and will not receive priority status in any future applications.

## Non-discrimination

Per the Civil Rights Act of 1964, no person shall, on the basis of race, color, or national origin, be excluded from participation, be denied the benefits of, or be subjected to discrimination under any County program, service or activity.

## Application Questions

### Base Eligibility Screening Questionnaire

1. How many years has your business been operating?
2. Does your business have an operating location in Clackamas County?
3. Does your business produce / manufacture goods in Clackamas County?
4. Does your business sell / export goods OUTSIDE of Clackamas County?
5. Is your business registered and current with the Oregon Secretary of State?
6. This grant program requires a 100% match on all grant funds, meaning that only half of the funding for your proposed project may come from this grant. Your business must pay the other half of your project costs. Are you able and prepared to meet this match requirement?

### Detailed Eligibility

1. Legal business name:
2. Business DBA (if applicable):
3. Business website (if applicable):
4. Oregon Secretary of State ID number (this is different from your federal EIN):
5. Incorporation date:
6. Corporate structure:
7. North American Industry Classification System (NAICS) code:
8. Industry name:
9. Primary business address:
10. Project location address:
11. How does your business meet the criteria for a traded-sector business? *1,000 character limit*
12. Total project budget (pull this directly from your completed budget template):
13. Total grant funds requested:
14. What is the source of your matching funds for this project? *1,000 character limit*
15. If awarded, grant funds will not be disbursed until Spring 2026. Grant funds can not be used to reimburse previous spending. Is your project feasible given this funding timeline?

### Applicant Information

16. Full name(s) of business owner(s):
17. Full name of applicant contact:
18. Title of applicant contact:
19. Email address of applicant contact:
20. Primary phone number of applicant contact:
21. Brief summary of the business *1,000 character limit*

### Grant Project Information

22. Please select your Project Type:

- Workforce Development Project
  - Capital Project
23. Project Category (*please select all that apply*):
- Multi-site Development Assistance: Your business does not have a location in Clackamas County and seeks to establish a new location in Clackamas County
  - Relocation: You seek to relocate your existing business into Clackamas County
  - Physical Expansion: Your business is currently located in Clackamas County and seeks to relocate to a larger facility within the county or expand your existing facilities in the county
  - Production Expansion: Your business seeks to expand production capacity through purchasing new equipment, hiring additional employees, providing employee technical training, and/or other capital investment(s)
  - County Business Retention: Your business is currently located in Clackamas County and seeks funds to assist with a project intended to retain operations in the county
24. Please provide a narrative summary of your project (*2,000 character limit*)
25. Please describe the business need for grant funding to assist your project (*2,000 character limit*)
26. What outcomes do you expect to achieve as a result of this project? Expected outcomes will be included in grantee funding agreements and tracked throughout grant projects. Select all that apply:
- Hire new employees
  - Increase production
  - Increase production efficiency
  - Decrease production waste
  - Improve environmental efficiency of production (e.g. decrease water usage, lower carbon footprint, etc.)
  - Increase your business' spending on local inputs
  - Expand product line / offer additional products
  - Increase revenue
27. Elaborating on your selected outcomes, please describe in more detail the expected local economic impacts of your project (*2,000 character limit*)
28. How many months do you expect it will take to fully implement your project?
29. Please describe your project timeline in more detail (*1,000 character limit*)
30. If your project is awarded partial funding, what project activities and costs would you prioritize to achieve your desired outcomes? *1,000 character limit*

## Upload Attachments

31. Using the required template, please attach your project budget below. You may find the required budget template [HERE](#).
32. Please attach your proof of matching funds below (PDF format only). Please exclude any private information that is not necessary for assessing your match (e.g. full bank account numbers, full routing numbers, check numbers, social security numbers, etc.) You may



upload multiple PDFs, but please limit your submission(s) to 5 pages TOTAL across all uploads.

## Attestation

33. By signing this application, I affirm:

- I am legally authorized to bind the applicant business; and
- The information provided in this application, and any supporting documents provided (if applicable), are true and complete to the best of my knowledge; and
- I understand I may be contacted by CCOED staff to provide additional information or documentation which CCOED, in its sole discretion, may require to complete my application and/or establish my eligibility; and
- I do not owe back taxes to any governmental agency or, if back taxes are owed, a written agency payment plan is in place; and
- I understand any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to law enforcement referral for further investigation or result in the disqualification of my application as unresponsive.
- I understand my application may be denied if it's determined that there are current code violations, or that I have received warnings to rectify code violations that are deemed hazardous or unsafe to my business, its employees or the community.
- I understand I may be required to refund or reimburse all or part of the grant proceeds not used for their intended purposes, as stated in the Application, Scope of Work and/or Funding Agreement.

Name of Attesting Corporate Officer:

[APPLY HERE](#)

## Frequently Asked Questions (FAQ)

# Clackamas County Office of Economic Development

## Business Development Grant Program

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### 1. What is the purpose of the county grant funding program?

The county grant funding program is designed to provide funding for capital, capacity or workforce development projects to various sized traded sector businesses looking to relocate, expand or retain their operations in Clackamas County.

### 2. Who is eligible to apply for a grant?

To be eligible to apply, a business must:

- Be a traded sector business – a business producing or manufacturing goods in Clackamas County and selling those goods *outside* of Clackamas County and its immediate surroundings
- Have been a registered business for at least two years
- Be in good standing with the State
- Provide proof of at least 100% match for their funding request

For full details on eligibility and requirements, refer to the [Notice of Funding Opportunity \(NOFO\)](#).

### 3. What types of projects or activities can be funded?

Eligible projects must:

- Increase production of locally-manufactured goods;
- Fund either a capital project or a workforce development project;
- Support business improvement, relocation, retention and/or expansion efforts, and
- Contribute to the Clackamas County's economic development.

Eligible business costs include only those costs required to carry out a project as determined in the application process.

For full details on project and application requirements, including Project Types and Project Categories, refer to the [Notice of Funding Opportunity \(NOFO\)](#).

#### **4. How do I apply for a grant?**

To apply:

1. Review the grant guidelines and eligibility requirements outlined in the [Notice of Funding Opportunity \(NOFO\)](#) to ensure your business and project are eligible for funding. The full list of application questions can be found at the end of the NOFO.
2. Prepare your application, including:
  - a. Responses to the application questions (it's recommended that you prepare these in a separate document as the application form does not allow you to save a draft)
  - b. Project budget using the required template in .xlsx format (located alongside other program documents [here](#))
  - c. Proof of matching funds, as detailed under *Match Requirements* on page 3 of the NOFO (please be prepared to upload in PDF format, with a maximum of 5 pages total)
3. Submit your complete application via the [official web form](#) by 5pm on October 13, 2025, along with any required supporting documents. Late and incomplete applications will not be considered for funding. Application materials sent by post, email, or any means other than the official application web form will not be considered for funding.

For questions or general assistance, contact us at 503-742-4329 or at [4Biz@clacakamascounty.us](mailto:4Biz@clacakamascounty.us)

#### **5. What is the application deadline?**

Complete applications (including required documents) must be submitted via the official web form by 5pm on October 13, 2025.

It is highly recommended that you plan ahead and submit your application with enough time before the deadline to troubleshoot any technology, internet, and/or file issues – **late and/or incomplete applications will not be accepted for any reason.**

#### **6. What is the timeline for this program?**

Applications open on Thursday, September 4, 2025 at 9:00 AM Pacific Time.

Applications close at 5:00 PM Pacific Time on Monday, October 13, 2025.

Final award decisions are subject to the schedule of the Board of County Commissioners, and are anticipated to be announced by February 2026.

Funding agreements will be finalized in Spring 2026.

Funding will be deployed no later than June 30, 2026.

Program Period of Performance will begin at the execution of the grant funding agreement (Spring 2026) and run for approximately 6-18 months, depending on the unique project. Some projects may run longer.

Final Outcome Reports will be due approximately 24 months after the execution of the grant funding agreement.

### **7. How much funding can I apply for?**

You may request up to \$100,000 of funding through this program.

You will be required to provide proof of at least 100% matching funds from another source in order for your funding request to be considered. This means that only half of the funding for your proposed project may come from this grant. Your business must pay the other half of your project costs.

The County reserves the right to award partial funding. You will be asked in the application to list the project activities and costs which you would prioritize in the event your project is awarded partial funding.

### **8. How will grant applications be reviewed?**

Eligible grant applications will be reviewed by a committee comprised of Clackamas County staff. Eligible applications will be evaluated based on criteria such as:

- Alignment with program goals
- Project viability
- Economic impact of project
- Need for funding

After evaluating eligible applications, the Clackamas County staff review committee will recommend projects to the Board of County Commissioners (BCC) for final funding decisions. **The BCC has sole authority to determine funded projects.**

For more information on the evaluation criteria and process, refer to the [NOFO](#).

### **9. When will I be notified of the decision?**

Final award decisions are subject to the schedule of the Board of County Commissioners, and are anticipated to be announced by February 2026.

### **10. What happens next if my application is approved?**

Awardees will be notified by email once the Board of County Commissioners (BCC) has finalized their funding decisions.

After County staff have notified awardees, staff and awardees will negotiate a Funding Agreement. The Funding Agreement is a contract between the County and the awardee, and includes elements such as a final scope of work for the project, approved project budget, timelines, and reporting requirements for the grant period specific to each project. County Finance, County Counsel, and the BCC will approve final funding agreements.

### **11. What are the reporting requirements for grant recipients?**

Grant recipients will be required to submit progress reports and a final report at the end of the grant period. Receipts and other supporting documentation will be required to prove how the funds were used and the outcomes achieved. Depending on the unique nature of the project, other requirements will be discussed and stated in the grant funding agreement.

Specific reporting requirements for each awardee will be outlined in the awardee grant funding agreement based on project type, project categories, and the anticipated outcomes detailed in project applications.

### **13. Where can I find more information about the grant program?**

The **Notice of Funding Opportunity (NOFO)** can be found on the Clackamas County Procurement page for Open Grant Opportunities:

<https://www.clackamas.us/procurement-process#opengrantopportunities>

The **application questions** can be found at the end of the NOFO, which is located on the Clackamas County Procurement page for Open Grant Opportunities:

<https://www.clackamas.us/procurement-process#opengrantopportunities>

The **application budget template** can be found on the Clackamas County Procurement page for Open Grant Opportunities: <https://www.clackamas.us/procurement-process#opengrantopportunities>

The **official application web form** can be found at:

<https://apps.clackamas.us/businessdevelopmentgrants/>

For more information, visit our website or contact The Office of Economic Development directly at 503-742-4biz or [4Biz@clacakamascounty.us](mailto:4Biz@clacakamascounty.us). We provide resources such as grant guidelines, application forms, and contact information for assistance.

**14. Whom should I contact if I have more questions?**

If you have additional questions or need further assistance, please contact us at 503-742-4biz or [4Biz@clacakamascounty.us](mailto:4Biz@clacakamascounty.us). We are available to answer clarifying questions and/or resolve technical issues with the application form.

**15. Can software count as a capital asset under the capital project type?**

Yes, purchases of non-physical capital assets such as software can qualify under the capital project type.

Qualifying capital projects involve capital purchases that meet a business need by contributing to business expansion, projected growth strategies, etc. (as stated in the Notice of Funding Opportunity).

**16. Is the matching funds commitment the same as a business collateral requirement?**

No, matching funds are not the same as collateral. The 100% match commitment requires that an applicant contribute their own dollars to pay for at least half of their project costs.

For example, if an applicant is proposing a project with a total cost of \$50,000, the maximum amount of grant funding that they can request in their application is \$25,000. The rest of the project costs must be covered by another source of funds which must already have been secured by the applicant.

Sources of matching funds may include existing cash on hand, pre-approved loans, already awarded grant funds, etc. Applicants must provide up to 5 pages of documentation to show the source and availability of their matching funds. Documentation must be submitted in PDF format, and should not include personal information that is not required to prove matching funds (i.e. applicants should redact any full account numbers, SSN, check numbers, etc.)

**17. Can I use another grant as my source of matching funds?**

You may use a separate, *already awarded* grant as a source of matching funds. You must explain in your application how your awarded grant funds are set to be used and any restrictions on those funds. You must clearly demonstrate how both the awarded grant funds and the funds you are applying for fit into one cohesive project.

Other grants which you have applied for but have not been awarded can not be used as a source of matching funds.

**18. Can I apply for a capital project if I am purchasing multiple pieces of equipment?**

Yes, if you are purchasing multiple pieces of equipment for a specific project you may include costs related to that equipment in your project budget. It is up to the applicant to clearly explain why each equipment purchase is related to the project, and ensure that the project narrative, expected outcomes, and budget all support this.

**19. Can I include money I've already spent on a project in my match commitment?**

No. Project budgets may only include expenses that have not yet been incurred.

If your application is for a phase or portion of a larger ongoing project, you *may* include information about the full project in your project narrative, expected outcomes, and other narrative sections of the application. In this case, it is still up to you to describe the need and impact of the portion of the project that is reflected in the budget.

**20. Can I include money in my match commitment that I *plan* to spend on a project before the funding agreements are finalized (estimated May 2026)?**

Yes. You may include in your **project match commitment** money that you plan to spend on the described project, so long as that spending is clearly detailed in the project budget and timeline, and so long as the spending occurs after the grant application deadline on 10/13/25. You will be required to submit financial documentation to show when project funds were spent.

Because grant funds can not be used for reimbursement or to pay off debt, you may not include in your **grant request** any money that will be spent before the funding agreements are finalized.

**21. Can home-based businesses apply for funds to make property improvements or building expansions?**

Property improvements and/or construction projects on privately owned residential properties (i.e. homes and properties which are zoned as residential) **do not** qualify for funding under this program.

**22. Why isn't my application going through when I click 'Submit application'?**

Before reaching out to County staff about an issue with the form, please do the following:

- Double-check that you have completed all required questions.

- Double-check that you have successfully uploaded your project budget in .xlsx format.
- Double-check that you have successfully uploaded your proof of matching funds in PDF file format.
- Confirm that your uploaded files do not exceed 10 MB in size.
- Confirm that your question responses do not exceed the stated character limit (including spaces).

To ensure that you do not lose your work in the event of a form error, please write your responses to the application questions in a separate, saved document prior to filling out the application form.

**23. Does software count as a “good” under the traded-sector definition?**

Yes, software that is produced in Clackamas County and sold outside of the county and its immediate surroundings would qualify as a traded-sector line of business.

**24. Are services that are sold outside of Clackamas County considered traded-sector?**

No, purely service-based businesses do not qualify as traded-sector under this program.