

Request for Proposal for rural Business Expansion and Retention (BEAR) Grant Funding

The Utah Governor's Office of Economic Development (GOED) is requesting grant proposals from County Economic Development offices, Tribes, Business Resource Centers, Small Business Development Centers, and associations of governments based in rural areas of the state to utilize Business Expansion and Retention (BEAR) funding.

The purpose of this funding is to achieve the following desired outcomes in targeted industries (see Definitions: Targeted Industries), as identified by the applicant:

1. Business growth from new startups;
2. Expansion of existing businesses;
3. Job creation and/or job retention; and
4. Business need fulfillment (see Definitions: Business Need Fulfillment),

These outcomes are expected to be measured and reported quarterly. Program delivery is focused on one 12-month performance period beginning on 1 July 2015 and ending 30 June 2016. Funding will be issued quarterly. Each applicant must develop and report on quarterly milestones (see Definitions: Milestones) and metrics in order to qualify for the funding for the quarter.

- We are seeking only **one** application per county and/or tribe but counties/tribes can group together under one application.
- Any applicant must have signed letters of approval and support from any counties, cities and/or tribes within the scope of their application.
- Total state funding will be determined at the end of the current fiscal year, and adjustments to local allocations may be made once the final funding is determined.

Overview

The objective of this RFP is to assist in **growing new** and **existing rural** businesses by enhancing the level of technical services and support provided to rural businesses. Applicants are encouraged to collaborate with local, regional, and state business service providers in implementing your BEAR Team's objectives (see Definitions: BEAR Team).

Eligibility

County Economic Development offices, Tribes, Business Resource Centers, Small Business Development Centers, and Associations of Governments based in rural areas of the state are eligible to apply (see Definitions: Rural Counties eligible for BEAR).

How Funds May be Used

1. Each applicant shall submit a detailed proposal that outlines: How the applicant would spend money awarded under this contract, milestones to be achieved each quarter for each program that would be funded with the money awarded from this contract, and what metrics will be used to assess the success of each program funded by the money awarded from this contract (see metrics and measurements section below).

Funding awarded under this contract may be used for the following categories of activities:

1. Business Expansion and Retention visits that are:
 - a. Entered into a GOED approved BEAR software program (Executive Pulse)
 - b. Face to face business visits made to targeted industries identified in the application (see Definitions: Face to face visits).
2. Efforts to assist rural small businesses with business development such as:
 - a. Business training and skill development (workshops and/or one-on-one training) with special emphasis on training in various areas of marketing, e-commerce, social media, and small business management, etc.
 - b. Technical assistance to businesses and entrepreneurs
 - c. Market research, and strategy development
3. Business and industry specific trainings.
 - a. Speaker fees
 - b. Promotional materials
4. Bi-weekly BEAR team meetings (see Definitions: Bi-weekly BEAR Team meetings)
 - a. The quarterly report must include meeting minutes, agenda, and action items
 - b. Costs may include trainings, food and/or refreshments

Funds may not be used for construction, rent, equipment, or computers.

Application Requirements

- Only one applicant per eligible county and/or tribe, however, more than one county and/or tribe may submit a combined effort
- The sponsoring/lead submitting entity must sign the proposal
- A fiscal agent who will receive the funds must be designated. This agent will remain responsible for the accounting and reporting for the life of the contract, unless changes through written amendment.
- Proposals must be submitted in accordance with the proposal outline below (limit is six pages)
- Letters of approval and support from counties, cities, and/or tribes where applicable.
- Letters of commitment from BEAR Team and articulation of the role of each team member.
- Leveraged funds are required (see Budget Requirements section below)
- All applicants receiving funding will be required to submit quarterly performance reports

Metrics and Measurements

Required quarterly performance reports will measure outcomes from the BEAR visits. These reports should include, but are not be limited to, the following:

- Business visits to targeted industries (applicants must use a GOED approved BEAR software program to record and track all face to face visits, action items, follow-up, and results metrics)(80% survey completion)
- Business referrals (action items with an average of 1 to 2 per business visit)(see Definitions: Business Referrals)
- Training of employees and hours of services and consultation
- New Business Start-ups within targeted industries identified in application
- Public and Private investments (i.e. Rural Fast Track Grant)
- Jobs created, filled, and/or retained

- Increased and retained payroll
- Optional section for success stories (the top 5 success stories will be selected from all participating BEAR applicants and will be awarded an additional \$500 per story at the end of the calendar year, and again at the end of the fiscal year. You must have the company's permission to share the success story (see Success Story example in the appendix).

Budget Requirements

As part of the budget submission for this proposal, please indicate the federal, state, local government, academic or private funds that will be included to accomplish each BEAR activity you propose.

Payments

Reimbursement will be based on required quarterly performance reports related to proposed metrics and measurements. Submissions for reimbursement for training seminars must be accompanied by receipts, a promotional flier/agenda, a list of attendees, and a breakdown of contributing funds.

BEAR Grant Proposals for FY 2016 are due to the Governor's Office of Economic Development on or before June 19, 2015 at 5:00 PM.

Please submit your BEAR grant proposal electronically only. Complete the BEAR Proposal Submission Outline provided below and return all documents in PDF format only to Daniel Royal droyal@utah.gov. Please call or send an email for verification droyal@utah.gov.

Contacts:

Daniel Royal - Phone 801 538-8687 - email droyal@utah.gov

Linda Gillmor - Phone 801 538-8804 - email lgillmor@utah.gov

Jake Hardman – Phone 435 865-6541 – email jhardman@utah.gov

BEAR Proposal Submission Outline

The reviewers of the proposal must be able to “catch the vision” of your proposal.

Proposal Format

The proposal is limited to six pages. Items 1 through 7 are included in the 6 page limit. Cover Page and Appendices are not included in the six page limit. All proposals are to be in either Microsoft Word format, or PDF format.

Cover Page

- Date submitted
- Proposing organization Tax ID#
- Key organizational contact(s)
- Full mailing address, telephone number, fax number of contact
- Email address of responsible contact(s) (more than one is preferred)
- Name of sponsoring entity that will host the BEAR program (include letters of support from sponsoring entity and any other required letters of support from county, city, and/or tribe as an appendix)
- Name of Fiscal Agent (if other than sponsor)
- Amount of request (total) for FY 2016 (July 1, 2015 through June 30, 2016)
- Signatures (authorized organization official(s))

1. Identify target industries and reason for selection

- a. list of companies
 - i. NAICS code- industry category

2. List BEAR Team members and the roles they perform. Describe how this collaboration supports local businesses. How often will you meet? At what location? Team may include:

- a. Local Chamber of Commerce
- b. Local SBDC
- c. Local BRC
- d. Local economic development professionals
- e. Etc.

3. Past BEAR initiative and Results (if previously received BEAR funding)

If the proposed region received BEAR funding last fiscal year (FY2015) please describe the partner agencies or organizations, the use and achieved results. If the region did not previously receive BEAR funds, mark this area as “not applicable.”

4. Market Analysis and Needs

- 4.1. Define the proposed region that the BEAR program will cover
- 4.2. Define current business support resources that are available in your area

4.3. Outline a gap analysis identified by the local planning process which will identify the resources needed to most effectively serve your geographical region

5. Scope of Work and Qualified Milestones

Based on your available resources and identified gaps, discuss how BEAR funding will assist in accomplishing your goals. Be specific. What efforts will be supported by BEAR funding that are not currently available? What are your milestones and metrics? What are your funding requirements to meet your initiatives?

5.1. Describe what industries you will be targeting for your BEAR visits and why these NAICS codes have been selected

5.2. Service provider partners and functions they perform

5.3 List needed programs

5.4. Define how the BEAR program will meet services currently not available

5.5. Explain delivery needs, and methods of delivery for programs

5.6. Service delivery; explain how services will be delivered to customers

5.7. Proposed outreach; explain how outreach will take place, and who will be performing the outreach.

6. Quarterly Performance, Metric and Milestones:

Define your quarterly performance metrics, measurements, and desired outcomes. **These quarterly metrics will be the basis for reimbursement**

7. Budget

7.1. Proposed Budget — Expected use of requested funds

7.2. List other local, state and federal funds available and/or proposed that support the BEAR program

Appendix

Letters of approval and support from counties, cities, and/or tribes where applicable.

Letters of commitment from BEAR Team and articulation of the role of each team member.

Any other supporting material

Definitions

BEAR Team: The group of people you work with on a regular basis to provide better service to your businesses. This may include (but are not limited to) higher education, Applied Technology Colleges, Small Business Development Centers, Department of Workforce Services, Business Resource Centers, Vocational Rehabilitation, MEP, Local chambers of Commerce, USU-Extension, USTAR, Utah Broadband project, PTAC, World Trade Center Utah, USDA-Rural, private, non-profit, and local economic development offices.

Bi-weekly BEAR Team meetings: These meetings are an opportunity for the BEAR Team to meet collectively on a regular basis to discuss the needs of local businesses and how they can be met. These meetings are not mandatory, but highly encouraged.

Business needs fulfillment: This includes face to face business visits, making and closing referrals and action items such as helping a business find and apply for grants, loans, etc.

Business referrals: When the BEAR Specialist or economic development director identifies a business need, he/she contacts a business service provider able to address that need. A business referral is closed only when an issue is resolved.

Face to face visits: These visits should normally take place at the business's location, but can also take place at a BRC, or a local economic development office. Phone calls do not qualify as a face to face business visit.

Milestones: Expected outcomes or results.

Rural Counties eligible for BEAR: All counties except Utah County, Salt Lake County, Davis County, and Weber County.

Targeted Industries: Businesses or industry sectors identified by the economic development office or planning tools such as the county general plan, Tourism planning, ASAP, etc. These identified businesses or industry sectors should become the focus of your BEAR visits.

Appendix A: Sample Story

Success Stories are a great way to measure the success of the Utah Business Expansion & Retention Program, so beginning FY2016 we are requesting that you submit some stories for your region with your quarterly reporting. The criteria used to determine whether a Utah Business Expansion & Retention Program visit and follow up work can be used as a Success Story, is if a business receives a service as a direct result of a visit. Therefore, if you know that a particular visit(s) meets or exceeds the established Success Story criteria, flag it for submission with your quarterly reports.

The BEAR Director and Staff members will review all Success Stories submitted, and choose five top stories at the end of the calendar year (Qtr.2), and again at the end of the State's fiscal year (Qtr.4/June 30). Permission to use the story must be obtained from the company prior to using the story.

Success Story – (SAMPLE)

Region: Southwest

Visit Date:

Business Liaison:

Company: STEM Manufacturer, Inc.
Mr. John Doe
Ms. Jane Smith
100 Main Street
Rural, UT 84***

Project Synopsis: STEM Manufacturer has Purchase Orders for \$250,000 work of STEM widgets. They need a new machine to expand their production line. They also need 4 more employees trained in robotics. These jobs will pay 125% of the County average wage. They have priced the machine, but are having trouble recruiting employees with robotics skills.

Background: STEM Manufacturing has been in business for 6 years. John started the business in his garage, but quickly grew out of that space. The City had an unused metal building with adequate electricity that they agreed to rent to STEM because they had already hired 15 local residents. As STEM grew, they realized they needed to modernize their production line and recruited Jane Smith who had a degree manufacturing processes. She joined the company three years ago, and has not only managed the production line, but invested in the company, and now owns 50%. This influx of cash, along with a Rural Fast Track Grant, enabled STEM to modernized through technology.

Problem: The new production equipment required specialized training for 4 additional employees.

Solution: The BEAR Specialist met with the local College who agreed to train local college students to fill these new positions. Custom Fit training paid for almost half of the training costs.

STEM Manufacturing increased their net sales by 25% this year, and increased their total wages paid by \$189,000 annually. STEM is also providing 2 robotics internships during the summer semesters at the local College.