

Business Expansion and Retention (BEAR)-Economic Development Projects Grant

Application Information and Instructions

The Utah Governor’s Office of Economic Development (GOED), through the Office of Rural Development (ORD), is requesting grant applications for the **Business Expansion and Retention (BEAR)-Economic Development Projects Grant**. The Business Expansion and Retention (BEAR) Program is designed to grow rural businesses, influence rural job creation and increase economic diversity in rural regions. The Business Expansion and Retention (BEAR)-Economic Development Projects Grant extends the opportunity for grant funding to communities with special economic development projects. This grant is post-performance.

WHO IS ELIGIBLE?

The following entities are eligible to apply for the **Business Expansion and Retention (BEAR)-Economic Development Projects Grant**, as administered by GOED:

- Public, nonprofit, private organizations primarily engaged in economic development efforts in rural areas of the state, and shall include:
 - All 4th, 5th, and 6th class counties, and the cities/townships within those counties
 - Cities in 3rd class counties with populations less than 20,000 and median household incomes of less than \$70,000
- and, may include the following organizations located in the rural areas listed above:
 - Federally recognized Indian Tribes within the State of Utah
 - Associations of Governments (AOG)
 - Business Resource Centers (BRC)
 - Small Business Development Centers (SBDC)

***Note:** State statute dictates where eligible Business Expansion and Retention (BEAR) projects may take place. Associations of Governments (AOG), Business Resource Centers (BRC), and Small Business Development Centers (SBDC) and any other non-profit or private organizations primarily involved in economic development on a regional basis will be limited to doing BEAR projects and activities within 4th, 5th, and 6th class counties, and the cities/townships within those counties; and to cities in 3rd class counties with populations less than 20,000 and median household incomes of less than \$70,000. A list of qualifying cities in 3rd class counties is provided (see Attachment A).*

THE GRANT

FUNDING

Funding for the **Business Expansion and Retention (BEAR)-Economic Development Projects**

Grant is designated to the BEAR Program through the Industrial Assistance Fund (IAF) of the State of Utah as per state statute 63N-3-103.

COMPETITIVE

This grant is competitive in nature as it involves a defined pool of funds. Additionally, each application will be scored based on the quality of the application, the quality of the project description, project readiness, its purposes, goals, measurable outcomes related to business expansion and retention, and contribution to the overall economy. The applicants will be required to justify the need for the grant and the dollar amount requested. They will show creativity and planning in their proposed projects, and design measurable Business Expansion and Retention standards. The terms of the grant are set for one fiscal year. All projects must be completed within that fiscal year. No partial funding will be granted for unfinished projects. (*See Traditional BEAR activities under BUDGET for an explanation of the only exception to this policy)

Any qualifying entity may apply, but no more than two (2) applications per county area will be awarded a grant until the defined pool of funds is exhausted. Only one application per applying entity will be considered. The highest scoring applications will be awarded the grants. Due to limited funds and the competitive nature of the grant not all applicants are guaranteed funding.

TIERS OF FUNDING

Funding for individual projects is set in a tiered structure. Applicants may apply for funding in the following amounts: \$10,000, \$20,000, and \$30,000. Each applicant will propose a budget for their project and ask for appropriate funding based on tiered funding levels. Applicants will be encouraged to design and budget their project carefully and realistically, demonstrating the ability to use requested funds in the allotted time frame. An applicant may be asked if they will accept a lower funding amount than the requested tier based on application review, scoring and/or grant funding adjustments. By state statute, no entity will be awarded more than \$30,000.

MATCHING FUNDS OPPORTUNITY

An economic development project that involves a match to the BEAR Grant Funds is highly encouraged. Bonus points will be given to a project that includes matching funds. For example, an applicant may describe a 50/50 match in the proposed budget of a project. Continuing the example, in the project design and budget an applicant would describe a project with a proposed budget of \$40,000. The applicant would ask for BEAR Funds at the tier level of \$20,000 and then delineate the form of matching funds that will contribute to the overall

project budget of \$40,000. The 50% match may be in the form of monetary funding from the applicant, private donations, in-kind contributions, or a combination of these.

APPLICATION COMPONENTS & POINT VALUES

Each of the following elements of the application will be reviewed and scored. The points described are a maximum possible score for each element. A reviewer of the application may score anywhere from 0 up to the maximum points allowed per element.

APPLICATION COMPONENTS (15 points total)

Organizational Information (5 points) (described in the Application and Awards Processes section below)

Supporting documents (10 points) (described in the Application and Awards Processes section below)

PROJECT DESIGN (20 points)

This grant is project based, and post-performance. It is intended to help address economic development needs related to business expansion and retention in rural parts of the State of Utah as identified by communities, counties and organizations involved in economic development activities. In this section, the applicant will explain the project, the purpose, the goals and benchmarks, the stakeholders and partners, and their defined roles. The project design will require demonstration of an economic development need, identify targeted industries that may be affected, and more specifically, address how the project will 1) assist new and existing rural businesses, 2) influence rural job creation, and 3) diversify Utah's rural economies.

Note on Traditional BEAR (Business Expansion and Retention) activities: *In past BEAR grants the traditional activities of business visits, survey assessments, and referrals were remunerated at \$100 per visit and closed referral. This will no longer be the case. If an applicant chooses to engage in Traditional BEAR activities it will be done as a project. The applicant will determine the methods to the activities and the measurements of success. The project design and scope of work will require the applicant to demonstrate an economic development need, a plan for project execution, a project budget, a fixed timeline, and a metrics for measuring the success of the project against set goals and benchmarks. The applicant will also identify who will be involved as partners or team members in these activities. As an alternative, for example, an applicant may choose to engage in business evaluation by using technologies such as survey tools rather than face to face visits.*

SCOPE OF WORK (20 points)

A project will be defined as a set activity or activities described in a Scope of Work that is fixed to a time period in which the project will be completed. In this section the applicant will explain how the project will be completed, including a plan for project execution, what type of

work will be done, what support activities will be involved, and the participants. The Scope of Work will also require an explanation of who will track and record the progress of the project against stated goals and benchmarks as explained in the Project Design, and who will be responsible for final project reporting. This will require the applicant organization to have a well thought-out plan for a project and the means to accomplish the project within the 1 year term of the project contract.

DELIVERABLES AND OUTCOMES (20 points)

Each project applicant will determine success and how it will be measured against set goals and benchmarks. Explain what the completed economic development project looks like; e.g., what populations or industry sectors will the project affect or, will sales and business opportunities be enhanced by this project or, will there be referrals made to other economic development resources and partners to address business needs?, etc. Quantifiable data and projections will be required in the application addressing each of the applicant’s set goals and benchmarks. Metrics must also address how the project will 1) assist new and existing rural businesses, 2) influence rural job creation, and 3) diversify Utah’s rural economies. If a project design is determined to have an indirect or long term effect on the above factors, then the applicant will offer estimated or projected calculations.

The applicant may add additional metrics to be considered measurements of success that further justify the proposed project and documentation to show accountability for a completed project. Deliverables and outcomes, as defined by the applicant, will be included in each project contract and will be reviewed by GOED’s Compliance division to determine true completion of the project. Part of the application scoring will be based on the likelihood of project completion. It is important that deliverables and outcomes are achievable and not conflated to impress or attempt to receive a high score by the reviewers of the application. Table 1 is a sample:

Table 1-Sample Deliverables/Outcomes Metrics

Project Applicant and Name of Project	# of new and existing rural businesses served	Projected # of Jobs Retained	Projected # of New Jobs Created	Projected economic industry diversification
Activity				
Goals				
Benchmarks				
Totals				

TIMELINE (10 points)

List the expected dates for the project, including expected start date, end date, and estimated dates for benchmarks and goals reached through the course of the project. Remember that the term of a BEAR Contract is approximately one year and the project must be completed in order to receive reimbursement. If it is estimated that a project will not be able to be completed within the 1 year contract period (which will be on the fiscal year, July 1, 2018 through May 31, 2019) please do not apply. Rather, consider preparing a project for the next grant cycle. Table 2 is a sample:

Table 2- Sample Timeline

Project Timeline	Start	Benchmarks	Project Completion
Date			
Date			
Date			
Date			

BUDGET (15 points)

Each economic development project will be accompanied by a detailed budget. The budget will outline estimated project costs. This will require thorough planning of the project. The exercise of budgeting will also help the applicant determine the likelihood of project completion. The sample provided in Table 3 will help address categories that may be calculated in the overall project costs. This is only an example, as the applicant will create a budget to reflect the design, scope of work, and the deliverables and outcomes of their project. There is allowance for an administration fee, but it is not to exceed 5% of the total project budget.

MATCHING FUNDS (Bonus 10 points)

Describe additional funding that may be used to support this project. Please include the source of the funding, e.g. applicant entity contribution, project partners, private sector contributions, non-profit participation, intergovernmental agencies, etc. Please identify the contributor's activities connected to the project, and the type of matching funds being offered (cash or in-kind, etc.), and the estimated dollar value of the matching contributions. This will be address in the proposed budget.

Table 3-Sample Budget Structure

Project Expenses	Grant Request	Cash Matching	In-kind Matching	Total
Project Design				\$
Planning				\$

Equipment/Supplies				\$
Business Consultation				\$
Contract Services				\$
Marketing and Outreach				\$
Implementation				\$
Administration (not to exceed 5% of grant)				\$
Total Project Expenses	\$	\$	\$	\$

Note: *If the applicant is doing a project that involves Traditional BEAR activities an applicant may request reimbursement on a quarterly basis. This is the only project type that will be reimbursed by partial completion. All other types of economic development projects will require full completion before reimbursement.

APPLICATION AND AWARD PROCESSES

IMPORTANT DATES

- Grant Release Date: May 14, 2018
- Pre-application Orientation Webinar: May 18, 2018
- Applications Due: June 11, 2018, 5 pm (no applications will be accepted after this date)
- Application Scoring Period: June 12 through June 25, 2018
- Award Notification: June 29, 2018
- Contracts completed for distribution and signatures: July 12, 2018
- Grant Contract Agreement Term: July 1, 2018 through May 31, 2019 (the 30 days after May 31st allows for GOED Finance Department to process requests for payment before the end of the fiscal year)

Note: No amendments will be allowed to a contract after 6 months; January 1, 2019. There will be no penalty for early project completion.

HOW TO SUBMIT AN APPLICATION

Please submit the **Business Expansion and Retention (BEAR)-Economic Development Projects Grant** applications by visiting the GOED website business.utah.gov/rural. Scroll down to the Business Expansion and Retention tab and then open the link entitled **Business Expansion and Retention (BEAR)-Economic Development Projects Grant**. This will direct the applicant to the official application. The applicant will find all instructions there. Fill in all the required fields and upload all supporting documents. The applicant will also be directed to enter the economic development project description, scope of work, expected deliverables and outcomes, proposed budgets, matching funds and timeline. All grant applications are due

no later than June 11, 2018, at 5 pm. No applications will be accepted after this date and time.
The applicant may direct all questions regarding this grant to James Dixon at jdixon@utah.gov.

APPLICATION SCORING

Each application will be scored based on the quality of the application, the quality of the project description, project readiness (likelihood of completion), its purposes, goals, measurable outcomes related to business expansion and retention, and contribution to the overall economy. The applicants will be required to justify the need for the grant and the dollar amount requested.

The applications will be scored under the following considerations:

Does the proposed project of the BEAR-Economic Development Projects Grant

1. Assist new and existing rural businesses?
2. Influence rural job creation; and
3. Diversify Utah's rural economies?

The reviewers of the application will consider if the applying entity will:

1. Conduct outreach and information gathering efforts to better understand the needs of local businesses; or
2. Engage in other activity approved by the administrator that is intended to expand or retain businesses in a rural area of the state

Each application will be scored by multiple reviewers to ensure objectivity and fairness in evaluation. The score for any application, scored by a single reviewer, may be up to 100 points, plus 10 additional points for matching contributions. Scores from all application reviewers of a single application will then be blended to generate a final percentile ranking. Final allocation of funding may be affected by the percentile ranking of each application. The Governor's Rural Partnership Board (GRPB) will participate in reviewing and scoring, and will make final recommendations for grant allocations. As stated above, an applicant may be asked if they will accept a lower funding amount than their requested tier based on application review, scoring and/or grant funding adjustments. Participation in the application process does not guarantee funding, or funding at the applicant's requested tier of funding.

REQUIREMENTS FOR PROJECT REIMBURSEMENT

The GOED Compliance Department will identify key elements from each application to determine project completion. The key elements for project completion will be included in the

BEAR contract. The Office of Rural Development and the applicant (the applying entity's responsible party) will then agree to the contract and sign it. No amendments will be allowed to a contract after 6 months; January 1, 2019. Reimbursement requirements will be met based on the agreements written in the contract. No reimbursements requests will be granted after May 31, 2019.

Business Expansion and Retention (BEAR)-Economic Development Projects Grant
Application Information and Instructions (continued)

APPLICATION COMPONENTS

Required fields (5 points)

1. Date submitted
2. Name of applying entity that will host the Economic Development Projects Grant
3. Full mailing address and telephone number of applying entity
4. Proposing organization Tax ID Name of Fiscal Agent (if other than applying entity)
5. Key organizational contact(s)
6. Email addresses and telephone numbers of responsible contact(s) (more than one is preferred)
7. Amount of grant request (see TIERS OF FUNDING) for FY 2019

Supporting Documentation (10 points)

To be uploaded:

1. Executive Summary of BEAR Project
2. List stakeholders and partners in the grant project and the roles they will perform
3. Letter(s) of support from all entities involved in the project, including those involved in the matching portion of the grant, and articulation of their roles as project participants
4. The entity's W9 form, or the applicant's State of Utah vendor number if the applicant is currently a state vendor

Project Design (20 points) (1000 Characters)

To be written into the appropriate field:

1. Describe in detail the proposed Economic Development Project and its purpose
2. Who will be the participants and what are their roles?
3. Explain why this project is important to economic development in the applicant's area; what is the justifiable need for this project?
4. Include a description of how the project will:

- a. Assist new and existing rural businesses
 - b. Influence rural job creation; and
 - c. Diversify Utah’s rural economies
5. Identify targeted industries the project intends to affect

Scope of Work (20 points) (1000 Characters)

To be written into the appropriate field:

- 1. Include a description of how the project will be completed
- 2. Describe the economic development goals and benchmarks of the project
- 3. Include a description of the activities of the project. What type of work will be done?
- 4. Explain how the project will be tracked and recorded against goals and benchmarks

Deliverables and Outcomes (20 points) (1000 Characters)

To be written into the appropriate field:

Please address the following:

- 2. What will the completed economic development project look like? e.g.,
 - a. What populations or industry sectors will the project affect?
 - b. Will sales and business opportunities be enhanced by this project?
 - c. Will there be referrals to economic development resources and partners?
 - d. How many projected new jobs will be realized as a result of this project?
- 3. Show metrics of project success, e.g., how it will be measured, tracked and recorded against goals and benchmarks, and how the project will:
 - a. Assist new and existing rural businesses
 - b. Influence rural job creation; and
 - c. Diversify Utah’s rural economies
- 4. By what documentation will the applicant show accountability for a completed project? e.g.,
 - a. Spreadsheet documentation?
 - b. Customer Relationship Management reports?
 - c. Receipts and expenditures; matching contribution records?

Timeline (10 points) (300 Characters)

Explanation to be written into the appropriate field:

Spreadsheet to be uploaded:

- 1. Explain the timeline for completion of the project including important dates, goals, benchmarks, etc.
- 2. Submit a proposed timeline in spreadsheet format

Budget (15 points) (500 Characters)

Explanation to be written into the appropriate field:

Spreadsheet to be uploaded:

1. Explain the funding requirements of the project
2. Include calculated project bids
3. If Traditional BEAR activities, provide estimated quarterly reporting
4. Submit a proposed budget in spreadsheet format

Matching Funds (bonus 10 points) (500 Characters)

Explanation to be written into the appropriate field:

1. Explain the matching contribution to the economic development project
2. Submit a list of contributors to the match and the dollar value each will offer
3. Identify the contributor's activities connected to the project, and the type of matching funds being offered (cash or in-kind, etc.)
4. Include the matching contribution(s) and the dollar values of the match in the budget spreadsheet format

GOED BEAR Contacts

James Dixon - Phone (801) 538-8687 - email jdixon@utah.gov

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

Nan Anderson – Phone (801) 631-0141 - email nanderson@utah.gov

Attachment A

BEAR Grants Qualification in Third Class Counties

To qualify for a BEAR grant within a **Third Class County** (pop. 31,000- 125,000) the applying entity must service a city under **20,000 population*** and service a city with median household income of **less than \$70,000*** (according to the American Community Survey- United States Census Bureau)** An applicant may not service or propose projects outside these parameters. State statute dictates where eligible Business Expansion and Retention (BEAR) projects may take place. Associations of Governments (AOG), Business Resource Centers (BRC), and Small Business Development Centers (SBDC) and any other non-profit or private organizations primarily involved in economic development on a regional basis will be limited to doing BEAR projects and activities within 4th, 5th, and 6th class counties, and the cities/townships within those counties; and to cities in 3rd class counties with populations less than 20,000 and median household incomes of less than \$70,000.

Third Class Counties

BOX ELDER COUNTY

Box Elder County	51,528	\$	55,514
City	Population		Median Household Income
Bear River City	833	\$	69,000
Brigham City	18,586	\$	47,675
Corinne	701	\$	51,538
Deweyville	427	\$	63,125
Elwood	1157	\$	78,063
Fielding	424	\$	51,500
Garland	2449	\$	55,855
Honeyville	1234	\$	67,222
Howell	251	\$	47,917
Mantua	635	\$	73,750
Perry	4630	\$	81,094
Plymouth	377	\$	55,321
Portage	285	\$	57,917
Snowville	110	\$	54,583
Tremonton	8097	\$	49,173
Willard	1714	\$	62,500

CACHE COUNTY

Cache County

118,824

\$

51,935

City	Population	Median Household Income
Amalga	620	\$ 51,250
Clarkston	679	\$ 63,000
Cornish	271	\$ 50,000
Hyde Park	4277	\$ 74,931
Hyrum	7866	\$ 59,750
Lewiston	2077	\$ 46,806
Logan	49,539	\$ 36,256
Mendon	1183	\$ 81,250
Millville	2014	\$ 78,158
Newton	795	\$ 61,667
Nibley	6256	\$ 76,250
North Logan	9820	\$ 66,150
Paradise	1117	\$ 69,167
Providence	7122	\$ 70,645
Richmond	2546	\$ 52,188
River Heights	2059	\$ 67,292
Smithfield	10,629	\$ 60,565
Trenton	451	\$ 51,000
Wellsville	3612	\$ 68,177

IRON COUNTY

Iron County

47,751

\$

43,799

City	Population	Median Household Income
Brian Head	86	\$ 48,206
Cedar City	29,786	\$ 40,582
Enoch	6199	\$ 55,381
Kanarraville	329	\$ 56,875
Paragonah	592	\$ 53,021
Parowan	2881	\$ 36,127

SUMMIT COUNTY

Summit County

39,009

\$

91,470

City	Population	Median Household Income
Coalville	1650	\$ 61,781
Francis	1238	\$ 70,833
Henefer	755	\$ 66,750
Hideout	847	\$ 38,839
Kamas	2262	\$ 60,236
Oakley	1290	\$ 72,250
Park City	8064	\$ 105,604

TOOELE COUNTY

Tooele County

61,986

\$

64,149

City	Population	Median Household Income
Grantsville	9862	\$ 64,652
Ophir	17	\$ 33,750
Rush Valley	442	\$ 54,750
Stockton	725	\$ 61,875
Tooele	32,783	\$ 56,602
Vernon	332	\$ 46,875
Wendover	1385	\$ 27,596

UINTAH COUNTY

Uintah County

36,308

\$

67,943

City	Population	Median Household Income
Ballard	846	\$ 68,523
Naples	2420	\$ 70,000
Vernal	10,588	\$ 56,387

Notes:

*RED indicates non-qualifying areas for BEAR Grant

Incorporated cities and towns only are listed, accounting for Population and Median Household Income. Unincorporated towns are under county jurisdictions and are subject to county Median Household Income averages. If a town is not listed here it is Unincorporated and is part of the county.

**Source:

2012-2016 American Community Survey 5-year estimates

<https://www.census.gov/programs-surveys/acs.html>