

Response to the 123 Assistance Center Request for Proposals

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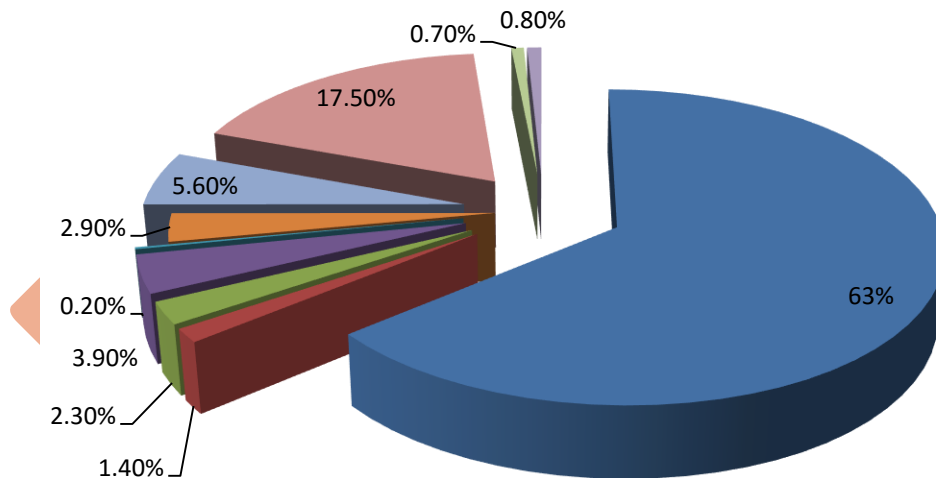
## Section 1: Executive Summary

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We appreciate the opportunity to respond to the Ohio Development Services Agency's Fiscal Year 2014-2015 Minority Business Assistance Center (MBAC) Request for Proposals (RFP) and have conducted a thorough assessment of the requirements and qualifications. Acting as host agency of the proposed Any Town Group Region 1 MBAC, the Urban League of XYZ City, Inc. is proud to submit what we confidently view as the most advantageous and economical solution to produce business growth for small, minority and economically disadvantaged businesses in our designated service area.

### Market Analysis

According to the Department of Administrative Services' Equal Opportunity Division reporting website, there are a total of 811 MBE/EDGE-certified providers in the primary counties identified as the Region 1 market. In the Region 1 secondary counties, there are seven in total MBE/EDGE-certified providers. The chart below highlights the percentage of MBE/EDGE-certified providers distributed between the primary and secondary counties of Region 1.



*Figure 1: Details the distribution of MBE/EDGE-certified providers in the nine primary counties and five secondary counties\*.*

## **A Collaborative Strategy**

At the core of our proposed strategic plan is the development of the Any Town Group Region 1 MBAC, a collaboration of four of the area's most trusted agencies – the Urban League of XYZ City, the ABC Urban League, the This County Urban League, and the Stark County Minority Business Association. This collaboration stands on the ABC Urban League's eight years of experience hosting the Any Town Region MBAC; as well as, the organizations' strong reputation in providing valuable services to the local business community.

At Any Town Group Region 1 MBAC, we will provide the full range of services to transition businesses from intake through certification, to linkage with capital opportunities and connection with procurement opportunities. With the longstanding, trusted reputation and extensive experience of our partnering agencies, the Any Town Group Region 1 MBAC is well positioned to interface and collaborate with the Minority Business Development Division in providing in-depth evaluation, assessment, and comprehensive support services to help business owners achieve economic independence and entrepreneurial success.

## **Backed by an Experienced Team**

The Any Town Group Region 1 MBAC will be led by Donald (Don) Graham, business coach for the Any Town Region – MBAC division of the Ohio Development Services Agency located at the Urban League of XYZ City's Entrepreneurial Center. Michael Davis, Sr., Director of the MBAC, located at the ABC Urban League Entrepreneurial Center, will support Mr. Graham in leading the efforts of the Any Town Group Region 1 MBAC.

Both Mr. Graham and Mr. Davis have deep roots in the Any Town business community and offer extensive experience in overseeing programs and initiatives that yield measurable outcomes for local small, minority, and economically-disadvantaged businesses. Mr. Davis' background includes the management of the Regional MBAC in ABC, an organization which was ranked second among all Ohio MBACs in loans and contracts awarded, jobs created, and jobs retained. Since 2011, Mr. Graham worked alongside Mr. Davis in promoting business expansion and sustainability in XYZ City and its surrounding areas.

Under their direction, the Any Town Group Region 1 MBAC will rely on our team of highly skilled and experienced business counselors and administrative/training support to support businesses across the nine primary counties and five secondary counties in Region 1.

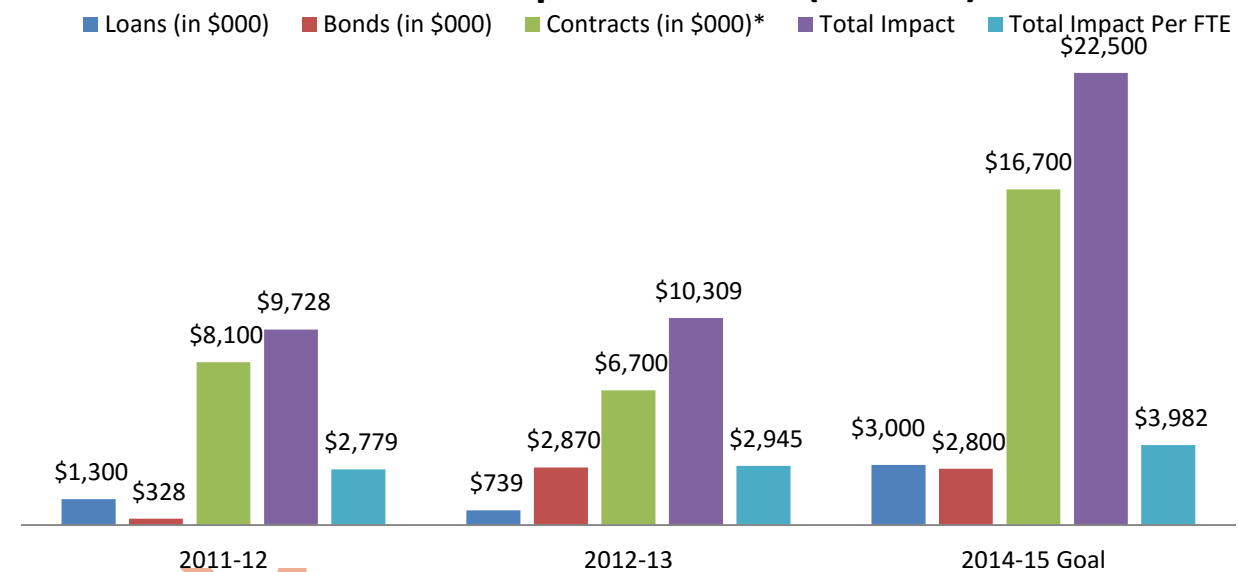
## Key Performance Metrics

We have achieved significant results in loans and contracts awarded, jobs created and jobs retained for the Region MBAC. We have included a snapshot of our past and anticipated success below and look forward to the opportunity to host the Any Town Group Region 1 MBAC in fiscal year 2014-2015.

### Total Impact Per FTE

The total impact per FTE in the Financial Impact Metrics graph below indicates the high productivity rate achieved by the Region MBAC staff and business counselors in 2011-2013, as well as our anticipated impact in fiscal year 2014-2015. According to the data below, for every one FTE, we have been able to produce nearly \$3 million (and anticipate nearly \$4 million next year) in loan contracts or bonding.

### Financial Impact Metrics (in \$000)



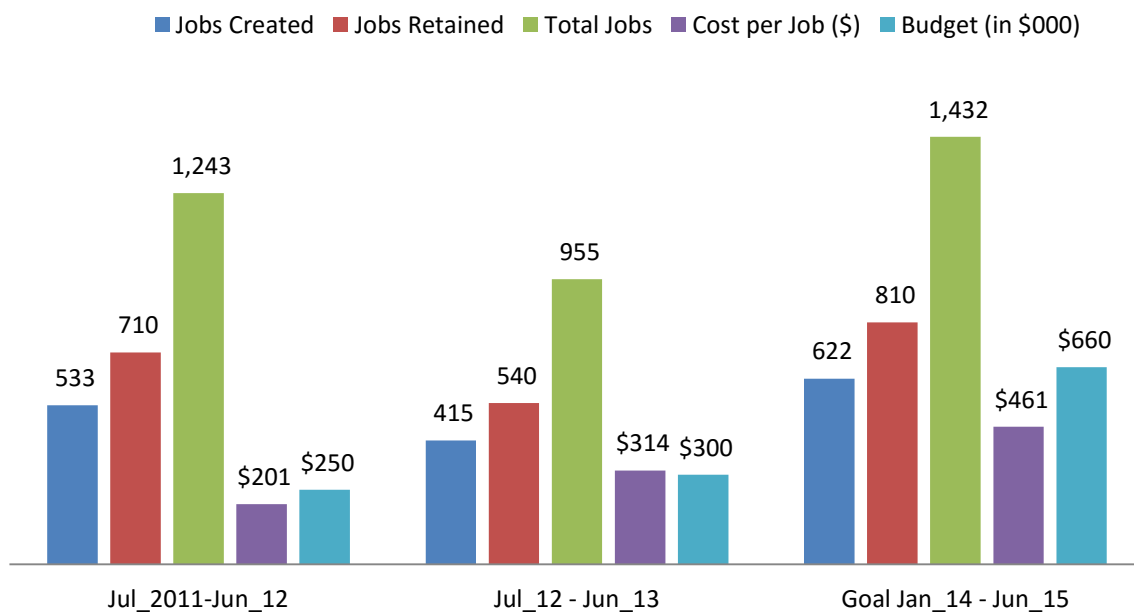
\*Contracts in 2012-13 were \$21.7 million. This number has been normalized to remove a one-time contract from one company of \$15 million.

Figure 2: Highlights Any Town Group Region 1 MBAC financial impact key performance metrics.

## Jobs Creation

According to the graph below, the cost for every job created or retained by our MBAC client has ranged between approximately \$200 to \$300.

### Jobs Creation Metrics



*Figure 3: Highlights Any Town Region 1 MBAC jobs creation key performance metrics.*

## Financial Summary

The Urban League of XYZ City is a mature, fiscally-sound non-profit organization with a history that spans nearly 100 years. Our proposed budget is evidence of our effective and efficient procedures for fiscal management and tracking and documentation of cash match and grant monies. Please refer to Section 7: Proposed Budget/Cash Match for details about our financial plan.

## Host Agency Qualifications

The Urban League of XYZ City is an Ohio 501(c)(3) organization and meets all mandatory requirements outlined in Section 4: Organization Qualifications of the RFP. The organization is legally able to operate as evidenced by the completed W-9 form included in Section 8 – Appendix of this response. The four agencies included in the Any Town Group Region 1 MBAC are collectively offering a cash match of \$137,762.20, which exceeds the minimum cash match requirements by 3.4 percent.

As requested, the host non-profit organization will ensure the required physical facilities are provided, including but not limited to the library, a consulting area, adequate parking facilities, prominent signage for events, and a plan room.

### About the Urban League of XYZ City

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## Section 2: Proposed Model, Client Flowchart and Service Area

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Our proposed model is a collaborative, regional approach facilitated through the Any Town Group Region 1 MBAC. This model provides us with the depth and capability to penetrate the nine primary counties and five secondary counties identified in Region 1, thereby local small, minority and disadvantaged businesses implement and execute actionable growth plans.

### 5.1 Deliverables

- **Present a model that depicts the method that the center will utilize to move clients through the intake and/or consulting process in order to identify and match specific client needs with available resources. Describe your process for gaining insight into client needs. The proposed model may include a client flowchart that depicts the process. Describe how you would leverage your resources to support the successful growth and development of those businesses. What characteristics does the model contain which will make this plan successful?**

The client flowchart identified below demonstrates the Any Town Group Region 1 MBAC's intake process and outlines how we will guide clients from intake through certification, to linkage with capital opportunities and connection with procurement opportunities.

Our proposed client flowchart is included on page 8.

### **Our Client-Focused Model**

Our proposed intake process will start when businesses request services, either via phone or in-person, from the Urban League of XYZ City, the ABC Urban League, or one of the satellite offices located at the This County Urban League and the Stark County Minority Business Association. To ensure process effectiveness and consistency, clients contacting any one of the service centers or satellite offices will complete a standard questionnaire to determine the level of support required.

Administrative staff will conduct a preliminary review and evaluation of the questionnaire before sending the completed form to the Any Town Group Region 1 MBAC directors Donald Graham and Michael Davis who will conduct an assessment based on the vision and goals of the Any Town Group Region 1 MBAC. If it is determined that the business



owner's request aligns with the MBAC's mission, the client will then be assigned to the appropriate business counselor who will determine the best course of action, establish a business case summary for the client and set 30-60-90-day measurable goals for this proposed action.

The assigned business counselor will document all client discussions, milestones, and accomplishments; as well as, enter comprehensive notes into the MBDAssist reporting system within 72 hours of the performed service. The Any Town Group Region 1 MBAC administrative staff will use this data to develop monthly and quarterly reports to keep the Any Town Group Region 1 MBAC in step as they achieve their identified goals and performance outcomes.

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## **Promoting Measurable Outcomes**

Once business owners have been entered into MBDAssist they will be identified as Tier I, II or III, categories which will be used to determine the appropriate action plan to meet their needs. This system will allow the Any Town Group Region 1 MBAC to provide effective service, regardless of the maturity of the enterprise or the experience of the business owner.

### **Tier I Businesses**

Tier I business owners are typically start-up or new venture companies; those with marketable ideas who do not have a business plan. This group will be encouraged to participate in entry-level training programs and workshops such as Kauffman FastTrac, New & Growth Venture sessions.

### **Tier II Businesses**

Tier II business owners typically have been in business for at least one year, either are certified or qualify to obtain certification, and are preparing or have completed business plans with financial projections. Businesses in this group are eligible to obtain a mentor to assist with building capital and have identified appropriate NAICS or industry classification codes. Tier II businesses also typically have been referred to the appropriate network partners of the Minority Business Development Division, such as procurement technical assistance centers (PTACs), and have 30-60-90-day goals implemented into their action plans.

This group of businesses owners will benefit significantly from the Any Town Group Region 1 MBAC's self-certifying (Ohio MBE/EDGE) programs designed to funnel certifiable enterprises directly to the Department of Agency Services. Tier II business owners will also be encouraged to participate in various workshops and training seminars such as: "Growth Venture," "QuickBooks for Small Business Owners," "LEED Green Associates," "Identifying Your ROI," "Financials in a Day," and so on to position their ventures for sustainable growth. We will also assist business owners with identifying and addressing credit issues, pursuing joint ventures and exploring procurement and contract opportunities.

### **Tier III Businesses**

Tier III business owners typically have a business plan and are prepared to apply for lending and bonding opportunities. Clients in this group will receive ongoing business

coaching and support as they pursue business growth. Services include, but are not limited to, technical support, assistance with completing loan applications, as well as, preparing and submitting bids for state contracts. We will assign an SBA representative to Tier III clients, providing continuous advice and support.

- **Describe the business environment in the geographic region that your response covers. What is the current economic environment in the area? Describe the types of minority-owned businesses, including prevalent industry categories or market segments located within the region. Describe the business growth opportunities and challenges. Explain in detail the strategies you will use to inform minority businesses, in the proposed area, of the services that are provided through the Minority Business Assistance Center.**

According to the Department of Administrative Services' Equal Opportunity Division reporting website, there are 811 total MBE/EDGE-certified providers in the primary counties identified as the Region 1 market. Only 0.8 percent of all MBE/EDGE-certified providers in Region 1 are located in the five secondary counties.

## **Market Analysis**

The highest concentration of MBE/EDGE-certified providers was found in counties, with 63 percent in County and 17.5 percent in County. Please refer to the tables below for additional details.

	County	MBE	EDGE
1	Removed	212	300
2	Removed	12	21
3	Removed	61	81
4	Removed	2	10
5	Removed	18	28
6	Removed	9	15
7	Removed	1	5
8	Removed	3	14
9	Removed	5	14
	<b>Total</b>	<b>323</b>	<b>488</b>

*Figure 5: Details the number of MBE/EDGE-certified providers in the nine primary counties of the Region 1 market.*

	County	MBE	EDGE
1	Removed	0	1
2	Removed	0	0
3	Removed	0	1
4	Removed	2	3
5	Removed	0	0
	<b>Total</b>	<b>2</b>	<b>5</b>

*Figure 6: Details the number of MBE/EDGE-certified providers in the five secondary counties of the Region 1 market.*

## Impact on Region 1 Target Market

The charts below outline the groups we are most likely to attract to participate in and benefit from programs offered by the Any Town Group Region 1 MBAC.

	County	MBE/EDGE	All Ohio MBE Firms	Firms w/Paid Employees	Target Market
1	Removed	512	19,486	2,045	A+C
2	Removed	33	1,511	217	A+C
3	Removed	142	4,286	481	A+C
4	Removed	12	214	24	A+C
5	Removed	46	1,555	282	A+C
6	Removed	24	408	68	A+C
7	Removed	6	280	66	A+C
8	Removed	17	485	127	A+C
9	Removed	19	642	217	A+C
	<b>TOTAL</b>	<b>811</b>	<b>28,867</b>	<b>3,527</b>	<b>A+C</b>

*Figure 7: Details Any Town Group Region 1 MBAC target market in primary counties of the designated service area.*

	County	MBE/EDGE	All Ohio MBE Firms	Firms w/Paid Employees	Target Market
1	Removed	0	1	0	A+C
2	Removed	0	0	0	A+C
3	Removed	0	1	0	A+C
4	Removed	2	3	0	A+C
5	Removed	0	0	0	A+C
	<b>TOTAL</b>	<b>2</b>	<b>5</b>	<b>0</b>	<b>A+C</b>

*Figure 8: Details Any Town Group Region 1 MBAC target market in secondary counties of the designated service area.*

## Marketing Strategy

The first step in our marketing strategy is to craft targeted marketing messages that communicate the core benefits of services provided by the Any Town Group Region 1 MBAC. While we have had significant success in reaching our target groups, it is important that we expand the scope of our messaging to include the additional counties in Region 1 and boost awareness of our ability to address the needs of the Asian and Hispanic communities in our region. We are working with the Hispanic Business Center to ensure our MBAC services meet the needs of local Spanish-speaking business owners. In addition, we are adding a part-time MBAC business counselor to work with members of the Asian business community.

We have found that a diverse marketing mix is most effective in reaching target audiences. Therefore, we will use both offline and online tactics to inform minority businesses in Region 1 about the services offered by the Any Town Group Region 1 MBAC. We have included below a detailed plan on how we will promote our services.

## **Digital Marketing**

A recent study conducted by *Search Engine Journal* (<http://www.searchenginejournal.com/24-eye-popping-seo-statistics/42665/>), a leading search engine marketing resource, found that 88.1 percent of U.S. Internet users browse or research products and services online. Studies such as this indicate the importance of employing an effective digital marketing strategy.

**Website:** We will continue our website marketing efforts from fiscal year 2011-2012 and share program schedules on the websites of the Urban League of XYZ City and the ABC Urban League. We will also distribute course rosters to our partners: the This County Urban League, and the Stark County Minority Business Association, for posting on their websites.

**Email Marketing:** We will continue to collect contact information from center visitors and regularly distribute emails alerting our database of clients and prospects about Any Town Group Region 1 MBAC programs.

**Social Media Marketing:** We will continue to promote programs on Facebook, Twitter, and LinkedIn. The goal of our social media marketing strategy is to build connections with the local business community and get the word out about the benefits of participating in our programs.

**Content Marketing:** We will continue to use client testimonials and content marketing strategies (such as our monthly newsletter) to generate buzz about the Any Town Group Region 1 MBAC.

## **Offline Marketing**

Traditional marketing tactics such as networking and print marketing materials are successful when used alone or with online marketing activities. Our offline marketing strategy includes:

**Printing and Distributing Marketing Materials:** We will continue to distribute informational brochures and flyers.

**Sharing Relevant News:** We will distribute press releases and work with local media outlets to highlight news about programs offered in our target area.

**Participate in Networking Events:** We will participate in small and minority business trade shows and events, workshops, and seminars to promote services offered by the Any Town Group Region 1 MBAC.

We will rely on internal administrative staff of the Urban League of XYZ City and the ABC Urban League to execute the promotion strategies identified above.

- **Attachment 1 identifies Key Performance Measures that will apply during the grant period covered by this RFP. The Key Performance Measures are designed to produce measureable outcomes that support business expansion and sustainability. They provide a systematic process for evaluating how effective each Minority Business Assistance Center is with regard to providing client services. For example, while ‘client transactions’ form the foundation to support businesses, achieving the full range of performance measures allows the Minority Business Assistance Centers to transition some businesses from intake through certification, to linkage with capital opportunities to connecting them with procurement opportunities. In this section of your narrative, please describe specific strategies and tactics that you will utilize to achieve these Key Performance Measures. Minority Business Assistance Center’s will be required to provide regular reports of their performances to Minority Business Development Division.**

Implementation of a streamlined client intake process will be the driving factor in our ability to achieve the identified key performance measures. Every client interaction with the Any Town Group Region 1 MBAC will start with the intake process and our ability to effectively collaborate with intake centers and satellite offices, guiding clients through the process to an assigned business counselor; this will play a critical role in producing measurable outcomes that support business expansion and sustainability in Region 1. We will keep a close eye on the effectiveness of this strategy and proactively adjust the plan as necessary.

Please refer to our client assistance flowchart included in Section 2 for additional details.

- **Describe how you will interface and collaborate with Minority Business Development Division staff to ensure alignment and goal achievement. Indicate how you will partner with other organizations to leverage resources to meet Minority Business Assistance Center objectives. Identify those organizations. Be as specific as possible in describing how collaborations with these entities will support your ability to achieve the performance outcomes.**



As mentioned, the Any Town Group Region 1 MBAC is a collaborative effort that leverages the experience and breadth of our partner agencies. We back our support and business coaching services with actionable plans to help enterprises realize measurable results.

Region 1 includes nine primary counties and five secondary counties. Through a collaborative approach, the Any Town Group Region 1 MBAC will have the depth and reach to effectively penetrate the region's business community and provide the high level support and services our clients need to develop and maintain successful enterprises.

## **Valuable Collaborations**

Both the Urban League of XYZ City and the ABC Urban League will draw on their strong presence in the local business community and experience in leading the Any Town Region MBAC for the past eight years to continue to partner with other local organizations to achieve performance outcomes for the Any Town Group Region 1 MBAC in the fiscal year 2014-2015. We have included details below on a few of our collaborations.

In addition to the nonprofit organizations highlighted below, we rely on Charter One Bank, Dollar Bank, First Merit Bank, Fifth Third Bank, Huntington National Bank, Key Bank, PNC Bank and various equipment and alternative lenders to help clients achieve access to capital.

### **Greater ABC Chamber of Commerce**

The partnership between the ABC Urban League and the Greater ABC Chamber of Commerce serves to contribute to the growth and stability of the region's minority-owned businesses.

**Professional Minority Business Accelerator (PMBA) Program:** The ABC Urban League partners with the SCORE ABC Chapter and Kent State University to facilitate the PMBA program, a 15-month business accelerator program offered to help mature, profitable businesses transition from the MBAC to the accelerated PMBA program. To qualify for the program, entrepreneurs must own a for-profit enterprise that is at least a year old, conduct business in Medina, Portage, or Summit counties, have a gross revenue from \$50,000 to \$2.5 million, and their majority ownership must be by African Americans, Asians, Hispanics, Native Americans, Indians, veterans, or women.

As of October 2013, the PMBA program has graduated 86 percent of its participants and helped businesses owners collectively generate \$27.6 million in new sales. A full listing of successes includes:

PMBA PARTICIPANT SUCCESSES	
Open New Locations:	13
New Permanent Hires:	140
New Part-Time Hires:	79
New Products/Services:	301
New Sales Growth:	\$27.6 million
New MBE certifications:	24
Corporate Identity/Brand Enhancement	59

*Figure 9: Highlights year-to-date successes of participants in the 15-month PMBA program.*

**Micro Loan Program:** The ABC Urban League partners with the Greater ABC Chamber of Commerce to facilitate the Micro Loan Program, an initiative that helps mature and start-up, for-profit enterprises that reside or conduct business in Summit County to obtain funding for working capital, as well as, fixed-asset and inventory purchases. To date, the program has distributed more than \$100,000 in loans to local businesses.

**Emerging Entrepreneur Workshop:** The Minority Business Development Center's emerging entrepreneur workshop is designed to help new and established entrepreneurs increase their knowledge and understanding of business ownership.

**Construction Management Program:** The Region MBAC's Construction Management Program is designed to help business owners understand what it takes to survive and thrive in the construction industry.

**Construction Training Program:** The Region MBAC's 10-hour Occupational Safety and Health Administration (OSHA) Construction Industry Outreach Training Program

teaches entry-level construction workers to recognize and prevent potential safety and health hazards common to a construction site. OSHA recommends this training.

**Home Enhancement Program:** The Region MBAC's Home Enhancement Program seeks to stimulate job opportunities for minority contractors by providing general home repair at no cost to elderly and disabled residents of the County.

**QuickBooks Financial Accounting:** The Region MBAC's QuickBooks Financial Accounting course is designed to help small business owners learn how to use QuickBooks software to better manage bookkeeping, employees, and projects.

### **Goldman Sachs 10,000 Small Businesses Program (Cleveland)**

The Urban League of XYZ City partners with Goldman Sachs and the Goldman Sachs Foundation and plays a critical role in providing a pipeline of candidates to the 10,000 Small Businesses Program in Cleveland. Goldman Sachs and the Goldman Sachs Foundation have committed to invest a combined total of \$15 million, including \$5 million in grants to support business education and \$10 million in capital to support small businesses located throughout Any Town.

### **The Economic and Community Development Institute (ECDI)**

The Urban League of XYZ City hosts a quarterly night with ECDI, a Cleveland 501(c)(3) non-profit economic development organization that offers micro-loans and business education to underserved entrepreneurs. This program educates local businesses owners about the lending process and how to qualify for loans.

## Section 3: Proposed Strategic Plan

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The Urban League of XYZ City, the ABC Urban League, the This County Urban League and the Stark County Minority Business Association each work to help clients obtain access to capital, bid and win contracts, and gain advanced knowledge to operate fiscally responsible enterprises. By leveraging the individual success of each of these organizations and combining efforts, the Any Town Group Region 1 MBAC will have the strength and depth to make a greater impact on the small, minority and economically disadvantaged businesses across the designated service area.

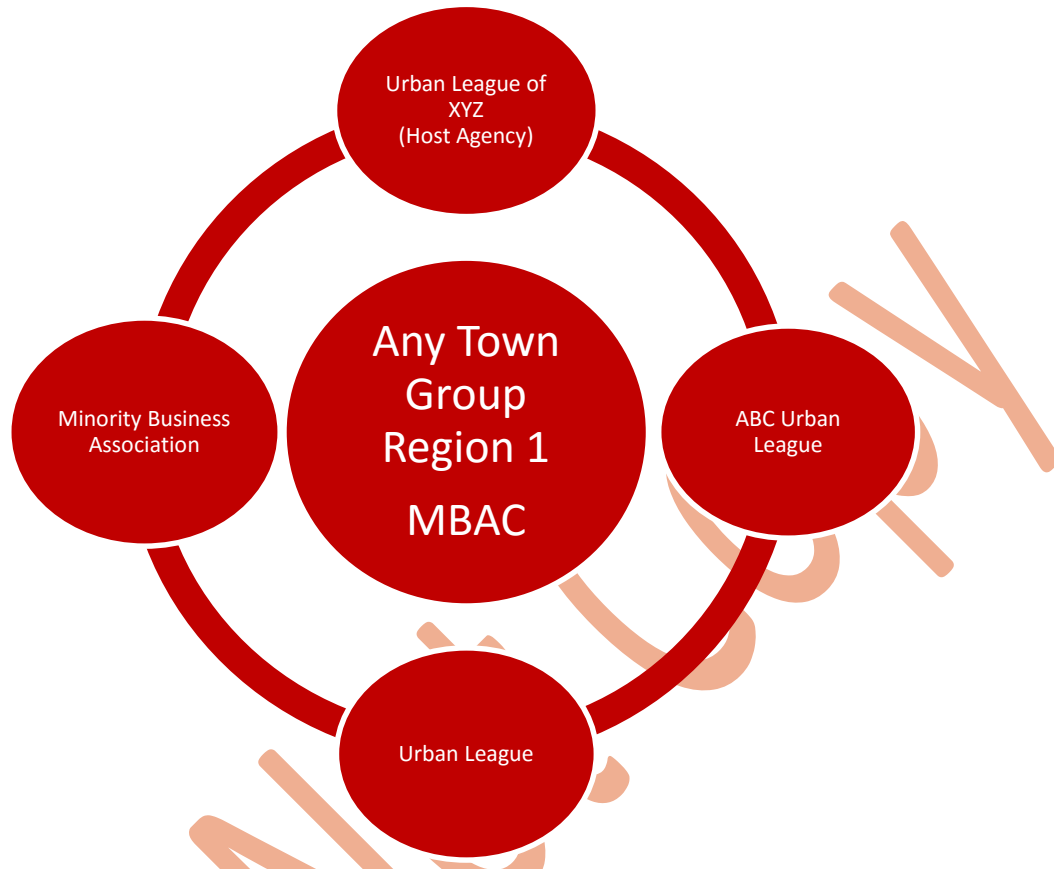
### **Situation Analysis**

The need for programs designed to increase the exposure and visibility of small, minority and economically disadvantaged businesses is validated and magnified by information that attributes long-term value to participants in these programs. Numerous studies document the challenges faced by minority and small business owners in accessing capital, bidding on and winning state contracts, and penetrating their respective markets.

### **Our Proposed Strategy**

Our proposed strategic plan focuses on the development of the Any Town Group Region 1 MBAC, a regional initiative designed to meet the needs of minority businesses operating in Region 1. The Urban League of XYZ City will serve as host organization and lead the efforts of the Any Town Group Region 1 MBAC.

By blending the experience of our four experienced and focused non-profit organizations, the Any Town Group Region 1 MBAC is well-positioned to provide the results-driven counseling, technical support and training businesses need to thrive in the designated service area.



*Figure 10: The Any Town Group Region 1 MBAC blends the expertise and strong community presence of four of the region's nonprofit organizations to help business owners overcome growth and sustainability challenges.*

### **Our S.M.A.R.T. Approach**

While obstacles to minority-business ownership have decreased over the past decade, challenges still remain, such as access to capital and the simple act of connecting with the right people. Member agencies of the Any Town Group Region 1 MBAC collectively have near 200 years of experience serving the local small, minority, and disadvantaged business community. Not only does this longstanding history position our MBAC as a trusted knowledge resource, but it also gives us the ability to connect clients with the right people – those who are committed to driving business success – in our market.

Through the collaborative efforts of the Any Town Group Region 1 MBAC, we will continue to facilitate a variety of programs that address the needs of small, minority and disadvantaged businesses. We will use the state's financial assistance to fund performance-driven programs

that increase the exposure and visibility of minority and small business enterprises. The Any Town Group Region 1 MBAC will produce quantifiable results by:

- Setting specific, measurable, attainable, realistic and timely (S.M.A.R.T.) goals annually
- Establishing quarterly action plans to achieve desired results
- Analyzing and reporting on the success of our proposed Any Town MBAC by monitoring and tracking the number of:
  - Jobs created in Region 1
  - Contracts awarded to clients operating in our designated service area
  - MBE/EDGE certifications obtained by Region 1 businesses

## 5.2 Proposed Service Areas

**Minority Business Development Division is seeking non-profit business assistance providers to serve minority, small and disadvantaged businesses located in six centers throughout Ohio. Applicants must be located within proposed service areas. Each submitted response should indicate the proposed service area with a detailed plan for providing services to targeted businesses located within the designated service area.**

The proposed Any Town Group Region 1 MBAC will support clients operating in the designated nine primary counties and five secondary counties as indicated in the map below.

**Additional information removed for client confidentiality.**

### **A Trusted, Results-Focused Resource**

Please see below for brief descriptions of the partnering agencies.

**The Urban League of XYZ City** offers a full calendar of events to increase client competitiveness through advanced training, business coaching, and support. One of the agency's most successful initiatives is its Minority Business Enterprise (MBE)/Encouraging Diversity, Growth & Equity Unity (EDGE) certification program. Under this program, the Urban League of XYZ City provides monthly group training sessions focused on helping businesses meet the Ohio MBE/EDGE certification requirements. These training sessions offer hands-on coaching to help clients to not only complete the online application, but also to gather and submit all required documentation.

**The ABC Urban League** has served as the host agency for the Any Town Region MBAC since the fiscal year 2011-2012. During this time, the MBAC has been ranked as the second leading center for loans and contracts awarded, jobs created, and jobs retained. Like the Urban League

of XYZ City, the ABC Urban League offers a full range of programs to help small businesses obtain the training, support, and access to the capital these businesses will need as they work to build their own sustainable growth. For example, the ABC Urban League's Micro-Loan Program was established in 2006 to provide funding for start-ups and mature businesses operating in Summit County; in addition, the funding is to cover the cost of equipment, marketing, operational expenses, and other business needs. Over the past seven years, the program has distributed funding totaling more than \$100,000 to local small, minority, and disadvantaged businesses.

**This County Urban League** collaborates with the Urban League of XYZ City to support, advocate and help facilitate multiple programs to improve the quality of life for This County residents and businesses. This organization will serve as a satellite office for the Any Town Group Region 1 MBAC, providing a variety of business assistance to startup and mature firms that are 51 percent owned and controlled by a minority. Minority is defined as Asian, African American, Hispanic or Latino, and American Indian.

**County Minority Business Association** partners with the ABC Urban League to facilitate a variety of initiatives that will empower small, minority, and disadvantaged businesses. This organization will serve as a satellite office for the Any Town Group Region 1 MBAC, providing a variety of business assistance to start-up and mature firms that are 51 percent owned and controlled by a minority. Minority is defined as Asian, African American, Hispanic or Latino, and American Indian.

### **5.3 Scope of Services**

**The Minority Business Assistance Center is required to perform work in three (3) basic areas – market development, client services and operational quality. These elements are designed to increase the exposure and visibility of minority and small business enterprises. Minority Business Assistance Center efforts in these areas should provide quantifiable results. The proposal should contain a detailed plan to accomplish: (1) market development; (2) client services; and (3) operational quality.**

The Any Town Group Region 1 MBAC will have centers located at the Urban League of XYZ City and the ABC Urban League with satellite offices available in the This County Urban League and the Stark County Minority Business Association.

To ensure program consistency and effectiveness, all centers and satellite offices will employ the same client intake process and use the same forms and evaluation process to develop customized plans of action for clients. We are committed to tracking and measuring the effectiveness of the Any Town Group Region 1 MBAC and will use this data to provide

quantifiable results. We have included below a detailed plan to achieve: (1) market development; (2) client services; and (3) operational quality. For additional information about our proposed model, please refer to Section 2 of our response.

## Market Development

The Any Town Group Region 1 MBAC will continue to identify, develop, and leverage public and private sector resources and business opportunities for the center's clients. We will continue to pursue assistance from professional MBE/EDGE-certified service providers and promote individual minority business owners to the public and private sectors; in addition to, build market awareness of their capabilities and talents.

We will maintain a database of MBE/EDGE-certified "preferred" service providers of those businesses with which we have established strong working relationships. We will research the state of Ohio database for additional service providers when the need arises. Additionally, we will refer and promote the capabilities of our "preferred providers" to clients of the Any Town Group Region 1 MBAC.

We will maintain direct contact with Minority Business Development Division staff, government procurement officials, purchasing executives and banking officials by establishing a regular schedule (i.e., weekly or monthly) for informational phone calls, in-person meetings and email correspondence. This will ensure clients and other minority firms in the Region 1 market are kept abreast of the latest developments in contract opportunities and lending resources. We will also rely on the local presence and expertise of our advisory board to resolve issues and aid the Any Town Group Region 1 MBAC in serving as advocates for minority firms in our market.

## Client Services

Under our proposed model, each business owner will be grouped in one of three tiers and assigned to a business counselor based on the: (1) maturity of the business; (2) the experience of the owner; and (3) the business owner's goals. This approach allows us to provide services tailored to the client versus cookie-cutter support that fails to address our clients' individual needs and objectives.

Between the Any Town Group Region 1 MBAC's two centers and satellite offices, we will offer the full range of business consulting services, including but not limited to:

- **Marketing:** The Urban League of XYZ City and the ABC Urban League will continue to offer monthly coaching sessions and one-on-one consultations to advise business owners on the development and executive of strategies for market research, promotion,



advertising, sales, sales forecasting, market feasibility studies, pricing, and customer service.

- **Financial Management:** The Urban League of XYZ City and the ABC Urban League will continue to offer monthly group sessions and one-on-one consultations to provide guidance on capital budgeting, general accounting, break-even analysis, cost accounting, financial planning and analysis, budgeting, tax planning, and business consulting (excludes, bookkeeping, tax preparation, and audits).
- **Financial Assistance:** The Urban League of XYZ City and the ABC Urban League will continue to offer monthly group sessions and one-on-one consultations to assist businesses with identifying, preparing, and packaging state loan and bond program applications; standard commercial and alternative debt (i.e., loans or lines of credit); other public/private bonding; leases (property and equipment); equity ((i.e., venture or angel capital); and trade credit opportunities. For example, the ABC Urban League partners with the SCORE ABC Chapter and State University to facilitate the Micro-Loan Program, which has, to date, distributed more than \$100,000 in loans to local businesses.
- **Procurement Assistance:** The Urban League of XYZ City and the ABC Urban League will continue to offer monthly programs and one-on-one consulting services to help businesses identify and respond to private and public-sector contracting opportunities, develop capability statements, and create advantageous partnerships and joint venture relationships.
- **Construction Industry Assistance:** The Urban League of XYZ City and the ABC Urban League will continue to offer monthly group sessions and one-on-one counseling to assist construction industry clients with estimating, bid preparation, bonding and take-offs.
- **Certification Assistance:** The Urban League of XYZ City and the ABC Urban League will continue to offer monthly programs and one-on-one consultations to guide clients through the MBE/EDGE certification process. For example, the Urban League of XYZ City offers a hands-on training session in which business owners are counseled on the completion of the online MBE/EDGE certification application. Participants also receive assistance with gathering and submitting all required documentation.

All training sessions will be available to businesses operating across Region 1. The Any Town Group Region 1 MBAC will continue to ensure all training sessions and consultation services

are provided by highly experienced, local business leaders or professional staff from our partnering agencies and other local nonprofit organizations.

## **Operational Quality**

We realize the importance of tracking, monitoring and reporting on our efforts and results. The Any Town Group Region 1 MBAC will employ highly professional and experienced administrative staff to ensure all client action plans, measurable outcomes and other information is appropriately filed and entered into the MBDAssist reporting system with 72 hours from the time of service. In addition, our business counselors will be responsible for documenting client requests for consulting, developing customized client action plans, and executing signed action plan agreements. The Any Town Group Region 1 MBAC director will oversee the operational quality process to ensure all staff adheres to standard client intake and transition processes and procedures.

We are dedicated to developing the Any Town Group Region 1 MBAC professional staff and will require participation in program review and orientation sessions. We will also implement a system of first-class service to boost our efficiency and effectiveness. Within the first year of employment, all Any Town Group Region 1 MBAC business counselors will be required to participate in certified business advisor training and the Kauffman FastTrac entrepreneurial training programs, or provide proof of equivalent experience. Training requirements will be waived for those employees who provide proof of equivalent experience.

## Section 4: Required Exhibits

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The Urban League of XYZ City on behalf of the Any Town Group Region 1 MBAC acknowledges the required exhibits outlined below and have included all applicable forms on the following pages.

### Required Exhibits Checklist

- ⊗ **Non-Profit Host Organizations: Articles of Incorporation under the laws of the state of Ohio and a copy of the 501(c)(3) or 501(c)(6) Certificate.**
- ⊗ **Minority Business Assistance Center: Articles of Incorporation under the laws of the state of Ohio and is a 501(c)(3) or 501(c)(6) organization pursuant to the Internal Revenue Code.**
- ⊗ **Cash Match Documentation: Certification from a duly authorized officer of the applicant (CEO or CFO) that the applicant, either directly or through a third party, has secured funds for at least 20 percent of the Minority Business Assistance Center office's costs. If the Cash Match is to be provided by a third party, the Cash Match Certification must be signed by a duly authorized representative of the Cash Match provider.**
- ⊗ **Documentation of "mission fit" of the Host agency and its commitment to minority business development (via a copy of the organization's mission statement and/or strategic plan).**
- ⊗ **Resume for full-time Minority Business Assistance Center director: Resume for existing full-time director or plans for hiring of director. New directors must be in place by January 1.**
- ⊗ **Roster of Advisory Board Members: Roster of current Advisory Board members with professional business phone numbers, fax numbers, e-mail addresses and organizational affiliations. If a startup operation, documentation of commitment and plan for building an advisory board.**

- ⊗ **Operations and Budget Attachments:**
  - **Executive Summary**
  - **Service Area (must correspond to attached service map)**
  - **Staff Resumes and Capabilities**
  - **Key Performance Measures FY2014/FY2015 Projected Performance Targets**
  - **Proposed 18 Month Budget – Administrative Cost Detail (January 1, 2014 – June 30, 2015)**
  - **Key Personnel Worksheet**
  - **Organization Chart**
  
- ⊗ **Memoranda of Understanding, Cooperative Agreements, Letters of agreement (if referenced in the proposal).**
  
- ⊗ **Letters of in-kind support (if referenced in the proposal).**

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## Section 5: Staff Résumés and Capabilities

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We are proposing a professional staff with significant expertise as required in Section 6: Staff Competencies of the MBAC RFP. Our key personnel collectively have more than 60 years of experience in providing guidance and support to minority business owners.

### 6.0 Staff Competencies

**The applicant must assign professional staff with significant expertise to key leadership roles for this proposal. The proposal should include resumes for each person in key positions. The following [as provided in Sections 6.2 – 6.3 of the MBAC RFP] are the minimum required qualifications for key personnel. When selecting staff members for the Minority Business Assistance Centers, every effort should be made to choose individuals with previous finance or banking experience to facilitate understanding the fiscal requirements of businesses and to connect them with appropriate financial resources.**

While experience and leadership skills are critical qualities for all proposed MBAC staff, we believe the ability to drive success despite obstacles is also important. Our proposed team is committed to arming small, minority and disadvantaged businesses with the tools to find success in the midst of adversity. Members of our team also possess strong backgrounds in finance and banking, which allows us to offer advanced advice on fiscal responsibility and connect businesses with viable financial resources located throughout the primary and secondary counties identified in Region 1.

Please review the chart below for details on the organizational management of the Any Town Group Region 1 MBAC.

**Additional information removed for client confidentiality.**

### Our Experienced Team

We have included below brief summaries highlighting the skills and accomplishments of our proposed team members. Please refer to the attached résumés and profiles for additional information.

## **Directors**

**Joe Smith** offers 34 years of corporate experience and approximately five years as a business coach. Prior to retiring from the banking industry in 2008, he held several leadership positions including president of the ABC market and executive vice president of consumer lending in the Ohio, Penn., and N.Y. markets for Fifth Third Bank. He also served as bank director for the bank's Cleveland affiliate.

Today, Mr. Smith serves as business coach for Any Town Region – MBAC division of the Ohio Development Services Agency located at the Urban League of XYZ City's entrepreneurial center. In this role, he coaches small businesses on performance bonding; gains access to capital; obtains MBE/EDGE certification in Ohio; and leverages contract opportunities. Mr. Graham received the 2013 Minority Small Business Champion Region V Small Business Award for his outstanding achievements on behalf of Ohio small businesses.

**Additional information removed for client confidentiality.**

## Section 6: Proposed Key Performance Measures

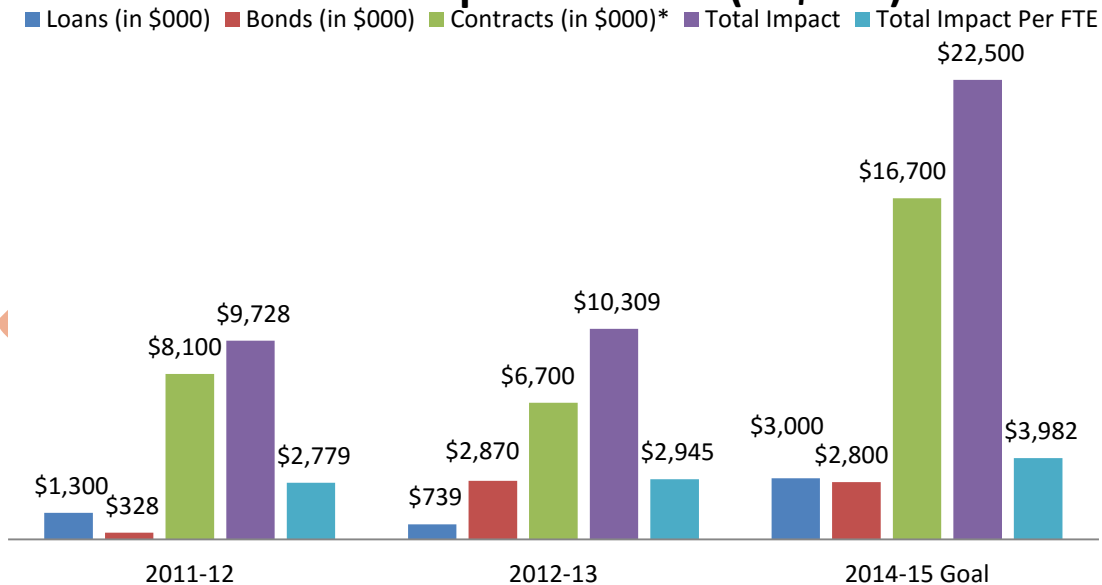
Key performance measures for the Any Town Group Region 1 MBAC follow this page.

### 7.1 Key Performance Measures

The proposal should include the applicant's projected Key Performance Measures (Attachment 1 - Key Performance Measures Worksheet) and how the center will achieve measurable performance outcomes. Failure to fully complete the projections for each line item may result in the proposal being rejected as unresponsive.

As highlighted in our strategic plan, implementation of our streamlined client intake process will play an integral role in our ability to achieve the identified key performance measures. We have completed Attachment 1 – Key Performance Measures Worksheet and will implement and adjust our proposed model as necessary to accomplish the established key performance measures. Please refer to the charts below for details on key performance metrics for the Any Town Group Region 1 MBAC.

#### Financial Impact Metrics (in \$000)



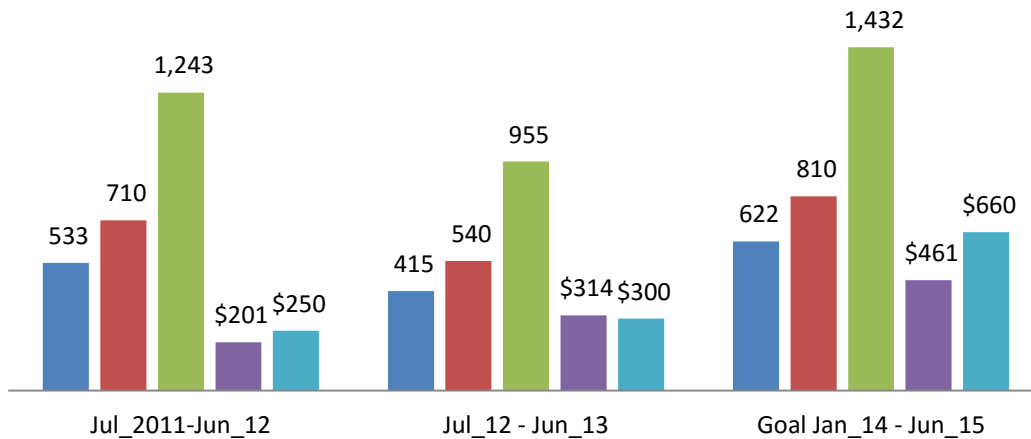
	2011-12	2012-13	2014-15 Goal
Loans (in \$000)	\$ 1,300	\$ 739	\$ 3,000
Bonds (in \$000)	\$ 328	\$ 2,870	\$ 2,800
Contracts (in \$000)*	\$ 8,100	\$ 6,700	\$ 16,700
Total Impact	\$ 9,728	\$ 10,309	\$ 22,500
Total Impact Per FTE	\$ 2,779	\$ 2,945	\$ 3,982
Total FTE	3.5	3.5	5.7

\*Contracts in 2012-13 was \$21.7 million. This number has been normalized to remove a one-time contract from one company of \$15 million.

Figure 13: Highlights Any Town Region 1 MBAC financial impact key performance metrics.

## Jobs Creation Metrics

■ Jobs Created ■ Jobs Retained ■ Total Jobs ■ Cost per Job (\$) ■ Budget (in \$000)



	Jul_2011- Jun_12	Jul_12 - Jun_13	Goal Jan_14 - Jun_15
Number of Months	12	12	18
Jobs Created	533	415	622
Jobs Retained	710	540	810
Total Jobs	1,243	955	1,432
Cost per Job (\$)	\$ 201	\$ 314	\$ 461
Budget (in \$000)	\$ 250	\$ 300	\$ 660
Avg Mtly Budget(in \$00)	\$ 21	\$ 25	\$ 37

Figure 14: Highlights Any Town Region 1 MBAC jobs creation key performance metrics.



## Section 7: Proposed Budget/Cash Match

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While managing previous MBACs in Any Town, we have consistently demonstrated strong fiscal management and analysis capabilities, and will continue to do the same in the 2014-2015 fiscal year.

### **7.2 Budget and Cash Match Requirements**

**The Minority Business Development Division provides grant funding, oversight and administration of the Minority Business Assistance Center network. Funding levels for all centers may change based on FY2014/FY2015 budget for the Minority Business Assistance Center network within Minority Business Development Division's overall budget. Minority Business Assistance Center must have a strong fiscal management, tracking and documentation of cash match and grant monies.**

We will adhere to all budget and cash match requirements set forth in Section 7.2 of the MBAC RFP and have specifically included details regarding our: (1) projected total cost to operate the MBAC and (2) a cash match of \$137,762.20, which exceeds the minimum cash match requirements by 3.4 percent.

### **Total Cost for the Proposed Center**

Our projection of the total cost of the program is \$804,139.12. In accordance with requirements provided in the RFP, our proposed budget includes personnel, fringe benefits, travel, marketing, equipment, supplies, contractual, and other operational costs. A detailed budget is provided on the attached Budget Summary Page.

### **Cash Match Requirement**

We will comply with all cash match requirements and have included all necessary documentation in Section 4: Required Exhibits of this response. Please refer to the attached budget for additional details regarding our 2014-2015 fiscal year budget.