

Working Lands Enterprise Initiative

Building Executive Business Skills for Food, Farm, Forest and Wood Products Enterprises

Request for Proposals

Introduction

The Working Lands Enterprise Initiative has developed a new Executive Business Skills Pilot Project that allows pre-qualified vendors, non-profit organizations or for-profit organizations (hereafter referred to as applicants) to apply for contracts in a specific service area, identified by the Working Lands Enterprise Board (WLEB). Funding of multi-year projects is contingent on future state budget allocations, in addition to funding decisions of the Working Lands Enterprise Board, pursuant to the State of Vermont's Payment Provisions Attachment B.

The primary service area for FY2020 proposals is: Building Executive Business Skills in Working Lands businesses that existing programs and providers have previously struggled to reach. Applicants will find additional information regarding specific goals outlined in the service area and assigned contract terms section below.

Executive Business Skills: In using this term, WLEB refers to core skills that are associated with strong business acumen and management, appropriate to the type, scale and stage of growth of an entrepreneur's business, including but not limited to:

- Financial literacy: strong record-keeping, ability to develop and understand financial statements, decision-making based on financial data, development of key financial performance indicators, cash management strategies and strong accounting practices,
- Marketing & sales: ability to identify appropriate markets, brand and sell products, value proposition, product differentiation and perform or access market research
- Management & HR: organizational structure, management structure, internal and external teams, human resources, job descriptions, providing benefits, recruiting & retaining employees
- Operations: with focus on key performance indicators,
- Regulatory: regulations including worker's compensation, labor and wage & hour laws, permitting,
- Exit/succession: planning for eventual exit and/or succession of business and/or land and assets

Much work has been, and is currently being, done by numerous organizations with, and independent of, WLEB funding to provide education, training, as well as business and technical assistance to elevate the business acumen and management capacity of individual and collective Working Lands businesses.

WLEB has engaged with service providers and business stakeholders to identify barriers to learning and service gaps, and to share ideas on how to creatively expand, enhance and deliver executive business skills knowledge. There are existing service providers, tools and programs; the work is how best to nimbly provide tools, expressly focused on executive business skills, in a flexible learning format, to Working Lands businesses in a way that encourages entrepreneurs that are unaware of the services available to them or who have been resistant to use such services. The desired outcome is for businesses to increase their level of comfort around the day-to day and broader aspects of managing their enterprises, and to recognize that managing a working lands enterprise from the perspective of a business executive, is essential to the long-term health of the enterprise. Applicants are welcome to

apply with a proposal that assists food, farm, forest and/or wood products businesses under a new contract or in coordination with an existing umbrella contract of an existing prequalified vendor (see attached pre-qualified vendor document).

Proposals are due on or before the end of business day (5pm) on May 15th, 2020. Proposals can be sent to Lynn Ellen Schimoler, Working Lands Enterprise Initiative Program Manager, in a single .pdf file to LynnEllen.Schimoler@vermont.gov.

Proposals will be reviewed in May and June of 2020 by the Working Lands Enterprise Board. Pilot project decisions will be communicated by June 5th, 2020.

Overall Application Requirements

- The pilot must demonstrate the use of new and innovative approaches to, and tools for, reaching working lands enterprise businesses, such as new learning delivery models, novel outreach, and different approaches to communicating with farmers, loggers and other working lands entrepreneurs.
- Applicants should outline how their program would, or could, be a force multiplier and reach more businesses, or collectively increase the executive business skills of a larger number or business owners, such as if there are efficiencies achieved or greater outcomes if a higher dollar amount or contract commitment across multiple years was made available.
- Applicants must articulate need and explain the value of work done on a per dollar basis (how much the services will cost per client assisted). Additional explanations of the value of services are welcome, however, per client costs are required.
- Applicants must show that the proposed need for services is clear, consistent, and otherwise not being met.
- Applicants should include the following proposal components:
 - brief organizational introduction (one page or less, including key staff working on this project);
 - High level of business acumen with demonstrated experience and knowledge of key business skills.
 - service area project description, using above outlines as a guide;
 - description of collaborative work or partnerships in the project;
 - goals, performance measures, and outcomes;
 - outreach plan to eligible businesses; and,
 - budget by service area and subsector.

Proposals will be evaluated on the following criteria: innovative program development; goals and performance measures; clarity of proposal; partnerships within contract; sustainable program funding; and, highest and best use of funds based on outcomes.

Service Area and Assigned Contract Terms

- Each awarded contract will have a one year time frame, not to exceed \$50,000, with the option of up to two (2) one-year contract renewals conditional upon funding, performance, and Working Lands Enterprise Board discretion.

The Working Lands Enterprise Board has identified the following focus areas as priorities for the Building Executive Business Skills service area. Applicants may cite any or all focus areas in their proposal. The Working Lands Enterprise Board appreciates both breadth of work and focus, thus will not give advantage to proposals which include multiple focus areas.

- Financial literacy - e.g., understanding balance sheet and profit & loss statements, understanding key financial indicators such as cost of production, gross profit margin pricing strategy, cash-flow management,
- Marketing and Sales capacity - strategies to employ for generating revenue, increasing sales, product developments, market assessment, marketing new products, market access,
- Enterprise accounting – supporting the adoption and/or improving record-keeping software systems, such as encouraging thorough use of QuickBooks. Understanding tax planning, to make informed business decisions for current year and future years,
- Business Organizational Structure - choosing sole proprietor, LLC, S Corp, etc., to build successful strategies for transfer and/or succession planning,
- Worker's Compensation for the Working Lands – understanding class codes, audits, claims management, independent contractor documentation,
- Operations key performance indicators, and;
- Human Resources development and training tools – general operations management, internal and external teams, exploration of options for securing workforce, wage & hour laws - specifically how it affects their business, especially if a diversified operation with potential exemptions.

The contracted work of the Building Executive Business Skills service area will target active food, farm, forest or wood products businesses that have a direct impact on Vermont's working landscape, with a focus on assisting business clients with improving their business acumen and overall management (and thus profitability) of their business.

Interested applicants should elaborate on the following points in their proposal:

- Developing and/or providing services that are easily accessible and available to eligible clients;
What specific services will be provided to how many clients in a given year, with clients being active food, farm, forest, or wood products businesses;
- Business acumen knowledge and experience;
- Methods to normalize the executive business skills discussion, including but not limited to the following approaches:
 - Collaboration with and training of other service providers (e.g., business assistance, lawyers, accountants, lenders, and financial managers) to develop a network of support for business owners;
 - Use of audiobooks, podcasts, webinars and/or video training, via video-conferencing. Allowing on-site participation on a smartphone, tablet or PC;
 - Innovative solutions to business management, such as opportunities for shared learning between seasoned and new business owners, mentoring with a business owner, developing change ambassadors, or open book finances.
 - Project plan that reflects the design of user training sessions, manuals and/or workplans

The WLEB prefers that work of the service area should target enterprises in all stages of business development, from pre-venture through established operations. However, consideration will be given to applications that target a collective of enterprises at a specific stage. Interested applicants should elaborate on the following in their proposal:

- Focus Area
 - Articulate and discuss service focus area and the scope of work proposed.
- Target audience
 - Articulate outreach process to recruit businesses, assist businesses in different stages of development, and strategically reach the greatest number of people; and,
 - Projects can be specific to agriculture or forest based enterprises, or inclusive of both, and the applicant should provide specific details of how each will be engaged as there are recognized differences in need.
- Expansion of Services
 - Elaborate on how this funding will expand capacity to offer services;
 - Give examples of how funding will allow for innovation and service development;
 - Give specific examples of what new tools/which tools will be used to most effectively deliver the education services; and,
 - Explain how these funds will expand and build upon existing reach and success of business assistance services across the state of Vermont.
- Outcomes
 - Reporting metrics: goals, measures, and outcomes with a focus on what success will look like at the end of the contract period; and, Improved viability, profitability and overall health of the businesses served.

Applicants should take the opportunity to explain how they will utilize these funds to their best and highest value over other applicants, while providing the Working Lands Enterprise Board the greatest value for the money. Applicants should explain how this work will be stepping outside the bounds of their normal project scopes, while developing opportunities to do their work more effectively.