

Working Lands Enterprise Initiative
Building Executive Business and Marketing Skills for Working Lands Businesses
Request for Proposals

Introduction

The Working Lands Enterprise Board (WLEB) is releasing a request for proposal that allows non-profit organizations or for-profit organizations (hereafter referred to as applicants) to apply for contracts in specific service area(s), 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.

Proposals can focus on one service area (or apply to both in same proposal) for FY2022 proposals:

The primary service areas are: a) Building Executive Business Skills and b) Increasing Marketing Skills. Both contracts shall provide services for the benefit of working lands businesses (farm, food, and forest enterprises) that existing programs and providers have previously struggled to reach. The WLEB encourages the entrepreneur's understanding of the value and needed prioritization of executive and marketing business skills to augment viable businesses. Applicants will find additional information regarding specific goals outlined in the service area and assigned contract terms section below.

In using the terminology Executive Business and Marketing skills, 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:

Executive Business Skills:

- 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
- Management & HR: organizational structure, management structure, internal and external teams, human resources, job descriptions, providing benefits and recruiting & retaining employees
- Operations: 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

Marketing Business Skills:

- Understanding and adaptability across the enterprise's supply chain
- Understanding and responsiveness to existing and/or emergent marketing needs
- Markets & sales: ability to identify appropriate markets, brand and sell products, value proposition, product differentiation and perform or access market research
- Marketing & Branding skills: ability to be viable in the market environment, ability to brand and sell products, product development, building marketing strategic plans
- Developing digital and overall technology skills
- Customer relations and engagement

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 continue nimbly providing tools, expressly focused on executive and marketing 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 hesitant and/or 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 and marketing their enterprises, and to recognize that managing and marketing a working lands enterprise from the perspective of a well-rounded business executive is essential to the long-term health of the enterprise. Applicants are welcome to apply with a proposal that assists farm, food, forest and/or wood products businesses under a new contract or in coordination with an existing contract.

Proposals are due by the end of business day (5pm) on Wednesday, September 29th, 2021. 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 September and October of 2021 by the Working Lands Enterprise Board. Project decisions will be communicated in November 2021.

Overall Application Requirements

The proposal 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, food producers/processors, 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 and/or marketing 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:
 - high level of business acumen with demonstrated experience and knowledge of key business skills
 - brief organizational introduction (one page or less, including key staff working on this project);
 - 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/focus area as appropriate and should include a narrative in addition to the dollar breakdown
 - for those previously awarded WLEB funding, please provide a summary of outcomes & impacts from previous/current WLEB grants/contracts. Please note: Contracts will be designed to avoid overlapping or redundant funding.

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. The Working Lands Board is particularly interested in proposals in which equity and inclusion dialogue with partner stakeholders has moved past peripheral organizational value shifts, to the center of the organization's strategic development. Those proposals with a thoughtful and robust outreach and sharing strategy will be more competitive."

Service Area and Assigned Contract Terms

Each awarded contract will have a one-year time frame, with a minimum award of \$50,000 and not to exceed \$100,000, 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 and Marketing Business Skills service areas. Applicants may cite any or all focus areas in their proposal. The Working Lands Enterprise Board appreciates both breadth and focus of work, thus will not give advantage to proposals which include multiple focus areas.

Executive Business Skills:

- 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;
- 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, onboarding manuals and professional development, 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

Marketing Business Skills:

- Strategies for adaptability across supply chain: navigation within Vermont/regional supply chain impacts e.g., distribution and aggregation bottlenecks, utilizing brokerage services;
- Responsiveness to emergent marketing needs: e-commerce, home delivery, curbside pick-up, block chain (traceability), and farmer/forest products to market apps;
- Marketing & Sales capacity: strategies to employ for generating revenue, increasing sales, product developments, market assessment, marketing new products, market access;
- Marketing & Branding: ability to be viable in the market environment, ability to brand and sell products, product development, promotion tactics, building marketing strategic plans;
- Developing digital awareness, use of technology, and ability to follow trends in the broader marketplace via internal or external data and analytics; website search engine optimization, and;
- Customer engagement: consumer relations, awareness of consumer preferences, consumer connection to the food, farm or forest producer

The contracted work of both service areas 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 and marketing business skills discussion, including but not limited to the following approaches:
 - Collaboration with and training of other service providers (e.g., business assistance, marketing consultants, graphic designers, 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;
 - Provide flexible assessment methods for evaluating business skillsets and needs, where previously designed onsite visits to an enterprise, (including a preliminary walk-through assessment as a means for intake) may not be as convenient due to Covid-19
 - Innovative solutions to business management, such as opportunities for shared learning between seasoned and new business owners, storytelling via social media engagement; 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, food 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 deliver the education services most effectively, 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, including the entrepreneurs increased understanding of marketing-skills and business-skills tools

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.