



Working Lands Enterprise Initiative FY24 Service Provider Request for Proposals

Introduction

The Working Lands Enterprise Board (WLEB) invests in business and technical assistance service providers who work directly with working lands enterprises to support them as they grow, pivot, and adapt to an ever-changing context.

WLEB seeks Fiscal Year (FY) 2024 service provider proposals to build **executive and marketing business skills** for working lands enterprises (farm, food, and/or forest products). Proposed work can target enterprises in all stages of business development, from pre-venture through established operations. Additional information about specific goals is outlined below.

Proposals are due by 5 p.m. on Friday, November 3, 2023. Proposals must be sent as a single PDF file to Elizabeth Sipple, Working Lands Enterprise Initiative Program Manager, at Elizabeth.Sipple@vermont.gov. Proposals will be reviewed in November 2023 by WLEB. Contract award decisions will be communicated in December 2023. The earliest project start date is January 1st, 2024.

Contract Terms

Each awarded contract will have a one-year time frame, with a minimum award of \$50,000 and a maximum of \$100,000, with the option of up to two (2) one-year contract renewals contingent upon available funding, performance, and WLEB discretion. Funding of multi-year projects is contingent on future State budget allocations in addition to funding decisions of the Working Lands Enterprise Board.

All State of Vermont contracts are subject to the [Standard State Provisions for Contracts and Grants](#) (Attachment C).

Service Areas

WLEB has identified the following focus areas as priorities for the building Executive and Marketing Business Skills service areas. Candidates may cite any or all focus areas in their proposals. WLEB appreciates both breadth and focus of work, and thus will not give advantage to proposals which include multiple focus areas.

In using the terminology Executive and Marketing Business 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: ability to develop and understand financial statements; decision-making based on financial data; understanding key financial indicators such as cost of production, gross profit margin, and pricing strategy; cash flow management.
- Enterprise accounting: strong financial record-keeping and accounting practices; adopting and/or improving record-keeping software systems, such as QuickBooks; understanding tax planning to make informed business decisions.
- Business organization structure: business registration; choosing the appropriate legal structure(s), particularly during business formation or in preparation for transfer and/or succession planning.
- Management & HR: organizational structure, management structure, internal and external teams, human resources, job descriptions, providing benefits; developing employee handbooks and a compensation philosophy; methods for employee recruitment and retention.
- Regulations and permitting: navigating regulations including worker's compensation, labor and wage and hour laws, and permitting.
- Exit strategy/succession: planning for eventual exit and/or succession of business and/or transfer of land and assets.

Marketing Business Skills

- Market development: market assessment, ability to identify appropriate markets, navigation within Vermont/regional supply chain, distribution and aggregation, utilizing brokerage services.
- Promotion and branding: product development and differentiation, understanding pricing and value proposition, promotion tactics, navigating certification processes, building marketing and sales, strategic planning, strategies to generate revenue.
- Responsiveness to emergent marketing needs: e-commerce, home delivery, curbside pick-up, traceability, and digital applications to market farm/food/forest products.
- Digital awareness: use of technology, ability to follow trends in the broader marketplace via internal or external data and analytics, website search engine optimization.
- Customer engagement: consumer relations, awareness of consumer preferences, consumer connection to the food, farm, or forest producer.

The contracted work of both service areas above will target active food, farm, or forest 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.

The overall desired outcome of this funding opportunity is for businesses to increase their level of knowledge, skill, and comfort around the day-to day and broader aspects of managing and marketing their enterprises, and to recognize that managing a working lands enterprise from the perspective of a well-rounded business executive is essential to the long-term health of the enterprise. Candidates are welcome to submit proposals for work under a new contract or in coordination with an existing Working Lands Service Provider contract.

WLEB is very interested in proposals that identify and seek to address specific service provision gaps, such as reliable and affordable accounting, tax, and legal services available to working lands enterprises or regulatory and permit navigation support.

WLEB is also very interested in proposals that identify and seek to address barriers to learning and that share ideas on how to creatively expand, enhance and deliver executive business skills knowledge to working lands businesses in ways that encourage entrepreneurs that are unaware of the services available to them or who have been hesitant and/or resistant to use such services.

Proposal Requirements

Candidates should elaborate on the following points in their proposals:

1. Brief organizational introduction (one page or less)
 - a. Identify key staff intended to work on the proposed project.
 - b. Describe relevant knowledge and experience of project management team members.
2. Project description
 - a. Provide a brief overview of your project, explain why it is being proposed, and reference key anticipated impacts.
 - b. Describe the service focus area and scope of work proposed. Include specific services that will be provided, time frame, and anticipated number of clients to receive services.
 - c. Describe the methods of service provision, including but not limited to the following approaches:
 - Collaboration with other service providers (e.g., business advisors, marketing consultants, graphic designers, lawyers, accountants, lenders, and financial managers) to develop a network of support for business owners
 - Individual and/or group training and support
 - In-person and/or video-conferencing
 - Use of audiobooks, podcasts, or written materials
 - Opportunities for shared learning between seasoned and new business owners

3. Outreach

- a. Provide a brief summary of the outreach plan for your project, including how your target audience will be reached and the process for evaluating your outreach efforts.
- b. Describe strategies and processes to recruit businesses, assist businesses in different stages of development, and strategically reach the greatest number of people.
- c. Provide specific details about how business based in different sectors will be engaged, recognizing the differences in need across agriculture, food, and/or forest-based enterprises. Explain the use of new and innovative approaches to reaching working lands businesses, such as new learning delivery models, novel outreach methods, and different approaches to communicating with farmers, food producers/processors, loggers, sawmill operators, and other working lands entrepreneurs.
- d. If applicable, describe how this project will reach historically underserved and/or marginalized communities. Identify strategies you will employ to engage these communities. Examples of historically underserved and/or marginalized communities are people living below the poverty threshold and/or facing food insecurity or homelessness, immigrants, LGBTQ+ people, people of color, people with disabilities, veterans, and women.

4. Service need

- a. Explain how your project will expand the reach and build upon the success of existing business assistance services across the state of Vermont.
- b. If applicable, describe how the proposed project will fill an existing gap(s) in services available to working lands businesses.
- c. Describe any collaborative work or partnerships that will support the project.

5. Goals and Outcomes

- a. Describe the project's goals, performance measures, and outcomes, with a focus on what success will look like at the end of the contract period.
- b. Explain how the proposed services will improve viability, profitability, and overall health of the businesses served.
- c. Outline how the proposed work 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 of business owners. Identify whether greater efficiencies or outcomes would be achieved if a higher dollar amount or multi-year contract commitment was made available.
- d. For those previously awarded WLEB funding, provide a summary of outcomes and impacts from previous/current WLEB grants/contracts. Please note that contracts will be designed to avoid overlapping or redundant funding.

6. Project work plan

- a. List the activities that are necessary to accomplish your project objectives along with significant anticipated milestones. Include your performance monitoring/data collection activities. If you request funds for travel, these activities must also be included.
- b. Personnel/responsible parties – Indicate the project participants who will do the work involved in each activity, including yourself, employees, and/or subcontractors. Any personnel or subcontractors referenced in your budget must be included to demonstrate their role and justify associated funds.
- c. Estimated timeline/completion date – Identify your project timeline, including the start date and projected completion date for each activity.

7. Budget

- a. Provide a detailed budget table and narrative describing the anticipated costs within each line item. Please list additional funds received for this project (not for your organization as a whole) and matching funds committed.
 - i. Examples of **cash match** include third party funds and applicant labor directly associated with the proposed project
 - ii. Examples of **in-kind match** include goods or services provided during the grant period for which no expenditure is made (e.g., contractors, consultants, or equipment provided pro bono, volunteer labor)
- b. Explain how funds will be used to their best and highest value, while providing WLEB with the greatest value for the investment.
- c. Articulate the estimated value of the proposed work (how much the services will cost per client assisted).

Proposals will be evaluated on the following criteria:

Quality of the concept: The proposed activities in the workplan are clear and can be conducted within the 12-month grant period. The proposed activities are a reasonable approach to addressing identified service needs. The candidate possesses a strong management team and partnerships for executing the proposed work. Proposals with a robust outreach strategy will be more competitive.

Demonstrated Project Need: The proposal demonstrates that there is a credible need for the specified project.

Goals and Impact: The candidate clearly demonstrates how the project will build executive and marketing business skills for working lands enterprises. Proposed goals and outcomes are relevant to the project, are explained clearly in the proposal, are significant according to scale of the project, and are realistically achievable within the project period of 12 months.

Budget: The proposed budget is clear and reflects realistic and well-planned components. Budget narrative supports and further details items in budget table. The estimated value of the proposed work and cost of services per client is clear.

Engagement, Equity, and Equality: Projects reaching or impacting one or more historically underserved and/or marginalized communities will be more competitive.