March 2004

To: All Interested Organizations

Enclosed you will find a Request for Proposal (RFP) for Small Business Development Center program proposals that are a part of the Illinois Entrepreneurship Network. The Illinois Department of Commerce and Economic Opportunity is requesting proposal submissions from educational institutions and non-profit business development organizations interested in operating a Small Business Development Center (SBDC), an International Trade Center (ITC), and/or a Procurement Technical Assistance Center (PTAC).

Proposals must cover a twelve month period and must include a 100% matching contribution for the funds requested. A minimum of 50% of the matching contribution must be cash. The balance of the match required can be provided as in-kind match. All matching funds must be committed at the start of the agreement and be directly allocable to the operations of the center program(s). Minimum funding request for each Center program shall be $50,000. The total amounts of program dollars awarded are subject to state and federal appropriations.

The original and three copies of your detailed proposal must be submitted to the Illinois Department of Commerce and Economic Opportunity, Small Business Office/SBDC; Attention: Mark Petrilli, 620 East Adams Street, 4th Floor, Springfield, Illinois 62701 by 5:00 p.m., Friday, April 23, 2004.

If you have any questions regarding the RFP, please contact Rod Hollenstine at 217/524-6105.

Sincerely,

Jack Lavin
Director

Enclosure
REQUEST FOR PROPOSAL

Evaluation Criteria
The enclosed Request for Proposal (RFP) provides guidelines for responses from qualified applicants seeking funding for several of the Department of Commerce and Economic Opportunity (DCEO) Small Business Development programs. Below are the criteria to be used in evaluating applicant's proposals.

The Department shall give greater consideration to those proposals for the Small Business Development Centers, the International Trade Centers, and the Procurement Technical Assistance Centers, which demonstrate the following:

- The strongest collaborative relationship within the Illinois Entrepreneurship Network and the state’s Economic Development Regions;
- the strongest past, present, and projected program performance;
- a high percentage of the total available effort dedicated to providing one-on-one counseling assistance;
- a concentrated effort providing counseling to existing small businesses;
- a strong commitment of quality cash match and additional resources above and beyond the minimal requirements;
- the integration and co-location of the Center’s activities within the host applicant’s other economic development efforts, utilizing a single administrative structure;
- adherence and compliance with all RFP guidelines and requirements;
- demonstrated integration of program delivery with Illinois Entrepreneurship Centers and other DCEO programs (i.e., Illinois Technology Enterprise Centers (ITEC), Environmental Assistance, Energy and Recycling, Manufacturing Extension Centers, etc.), and other federal, state, and local small business and economic development programs;
- effective linkages with other related business assistance providers (public and private);
- strong outside support from local and area business organizations, chambers of commerce, local and regional economic development organizations;
- high quality center locations which are easily accessible, identifiable, and in a convenient business-like setting; and
- greatest extent of geographical coverage of specified areas.
ILLINOIS DEPARTMENT OF COMMERCE
AND ECONOMIC OPPORTUNITY

2005 – 2007
REQUEST FOR PROPOSAL

SMALL BUSINESS DEVELOPMENT CENTER

INTERNATIONAL TRADE CENTER

PROCUREMENT TECHNICAL ASSISTANCE CENTER

Rod R. Blagojevich, Governor

Jack Lavin, Director

In partnership with the
U.S. Small Business Administration, the U.S. Department of Defense,
and the Illinois Department of Commerce and Economic Opportunity
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I. PURPOSE AND INTENT

A. Introduction

The Illinois Department of Commerce and Economic Opportunity (DCEO), in partnership with the U.S. Small Business Administration (SBA), and the U.S. Department of Defense, Defense Logistics Agency (DLA) administers several business assistance programs dedicated to providing Illinois companies and entrepreneurs with quality business counseling, training, information, and technical assistance. This Request for Proposal (RFP) package is intended to solicit proposals from qualified non-profit business related groups and educational institutions to fund centers that comprise several programs of the Illinois Entrepreneurship Network (IEN). The IEN’s primary mission is to assess, assist, and accelerate the high-growth potential of client entrepreneurial ventures, in conjunction with traditional small business service delivery. Regional Entrepreneurship Centers (EC) are conceived as regional hubs of the Illinois Entrepreneurship Network (IEN), coordinating small business and entrepreneurship development activity in support of entrepreneurial clients with high growth potential, building on the existing infrastructure of existing small business development center programs. The programs covered by this RFP include the Small Business Development Centers (SBDC), the SBDC International Trade Centers (ITC), and the Procurement Technical Assistance Centers (PTAC). These centers are referred to throughout this RFP as “SBDCs, ITCs, PTACs” or “Centers.” An entity submitting a proposal will be referred to as an applicant.

B. Regional Service Delivery

The Illinois Department of Commerce and Economic Opportunity is developing a regional focus for its service delivery and assistance programs. This focus will facilitate reduced administrative costs, the maximum use of available resources and stronger regional coordination of all small business assistance services to better meet regional needs. To lead this effort, the State of Illinois has been divided into 10 Economic Development Regions with economic development plans tailored to the unique strengths and needs of each region. (Regional Economic Development map is included in this section).

Applicants requesting funding for the centers must clearly demonstrate how small business needs have been assessed and how the program services will be provided to address these needs throughout the regional service area. The applicant’s service area must be clearly defined by county lines or the DCEO defined regions (except in Cook county which may be defined by street intersections). DCEO reserves the right to adjust the funding levels where it is determined to be in the best interests of the client base, the service area and the SBDC, ITC, and PTAC programs.
Applicants may submit a proposal for an individual center program or they may submit a consolidated proposal covering more than one center program. However, the regionalization of services will mandate strong coordination and co-location of the Centers with the Entrepreneurship Centers and other partners of the Illinois Entrepreneurship Network wherever possible. The consolidation of resources will help to reduce administrative costs, enhance regional cooperation, and foster synergy among all the IEN programs. In order to effectively serve an area, applicants may propose the use of “circuit riders,” “satellites,” video counseling and/or other methods of communication. Institutions are encouraged to establish coalitions with other service providers within the region in order to deliver program services in the most effective and efficient manner possible. Special consideration will be given to those proposals which best demonstrate cost sharing, cooperation, coordination and consolidation within their respective regions.

The Illinois SBDC, ITC, and PTAC programs are collaborative efforts between universities, colleges, economic development groups, business organizations and local, state and federal governments to serve the management and technical needs of Illinois small businesses. Proposals to provide funding for the centers must clearly demonstrate how the applicant will assess and coordinate these various resources in order to provide quality assistance. In order to effectively administer and deliver services the applicant is expected to secure additional support and cash resources beyond the minimum levels required for the centers in the RFP. The applicant will receive credit in the proposal review process for leveraging additional cash resources.

DCEO SBO/SBDC recognizes that applicants may also dedicate significant non-cash or in-kind resources to the centers in excess of the matching requirements. Applicants are encouraged to detail these resources within the proposal narrative as part of the coordination/cooperation section. Although these additional in-kind resources are not required to appear in the proposed budget, special consideration will be given in the proposal review process.
Governor's Economic Development Regions
II. **OPERATION REQUIREMENTS - ALL CENTERS**

A. **Offices**

Each center shall maintain a visible, professional, fully equipped, Americans with Disabilities Act (ADA) compliant office location, with a separate and publicly listed phone number, so as to be easily accessible to small business clients. Each facility shall have reserved parking adequate for business clients, and signage clearly indicating the center's location. The location of a center must be thoroughly justified. A proposed center located in a convenient, business like environment will receive special consideration in the proposal review process.

B. **Hours and Holidays**

All centers shall be open for service and operate on a full-time, 5-day per week basis excluding weekends and holidays. Special consideration shall be given to proposals which offer extended evening and/or weekend hours. The total number of holidays (days closed) during the program year shall not exceed 12 in a 12 month period. Center closures exceeding one working day shall require the use of a telephone answering device or service to explain how center services can be accessed. An answering device or service shall also be utilized during working hours when no staff is available.

C. **Staffing**

The preferred staffing requirements are detailed in Section IV, INDIVIDUAL PROGRAM REQUIREMENTS of this RFP. Sample job descriptions are included in Appendix A. In addition, each center should have several part time and/or volunteer assistants available on a continuing and regular basis. This could include student interns, faculty, professional small business experts, and private sector consultants. Time and effort for all resources must be properly documented. A sample Time and Effort Form is included in Appendix B.

All center staff and service providers are required to sign an appropriate Conflict of Interest Statement. Original signed conflict of interest statements are to be returned with the agreement. A copy of the statement is included in Appendix B.

In-kind contributions from host organizations may include the services of an accountant to handle all of a center's financial records, faculty/trainers to develop the education/training programs offered by the Network center, a public relations specialist to help promote the center and design its brochures, training materials, etc.

The RFP staffing recommendations can be modified based upon area client demand, resources provided by host organizations, and program emphasis. Some centers may depend more heavily upon outside consultants, while others will prefer to develop their own expertise. However, each center must maintain its primary emphasis on quality, in-depth, one-on-one business counseling. Each center is expected to deliver a minimum of 900 hours of direct counseling for each professional full time equivalent (PFTE) staff.
person dedicated to the center. In certain areas, satellite centers may operate with less than full time staffing if circumstances are thoroughly justified in the proposal.

A center shall notify the DCEO Small Business Office/Small Business Development Center (SBO/SBDC) in writing within three business days of receipt of a director’s departing notice. The SBO/SBDC retains the right to review the personnel change of director to determine whether support will be continued beyond the quarter during which the change occurs.

Prior to the interview process, copies of resumes/applications of the top candidates seeking to fill the position of center director shall be forwarded to the SBO/SBDC for review. The DCEO SBDC State Director or designee, shall be in attendance at the actual interviewing session of the final candidates and be afforded the opportunity to discuss and rank the candidates. The SBO/SBDC shall reserve the right of final approval and hiring of said candidate, however, reasonable approval will not be withheld.

D. **Staff Development**

Center directors are required to participate in all meetings designated by the SBO/SBDC. Counselors, coordinators, and professional staff are strongly encouraged to attend. These meetings provide an excellent opportunity for training, networking, planning, and exchanging information.

All center directors, counselors, and professional staff are required to complete a minimum of 50 hours of professional development/continuing education each year.

In addition to the network meetings, the SBO/SBDC may require center director’s attendance at other meetings such as those held by the Illinois Small Business Development Association (ISBDA).

As additional staff development and training needs are identified, the SBO/SBDC will conduct periodic training sessions to fulfill these needs. The centers shall also identify individual training needs and make the necessary training available for center staff.

E. **Marketing and Identity**

Each center shall implement a marketing program designed to inform its various stakeholder groups and existing and prospective small business owners/operators of the services available through the center. An annual marketing plan outline is required with the applicants proposal.

Where required, acknowledgment of the support of the U.S. Small Business Administration (SBA), U.S. Department of Defense (DOD), and the Department of Commerce and Economic Opportunity (DCEO) Illinois Entrepreneurship Network (IEN), shall appear on all promotional and training materials printed and distributed by each center.
Each center will be strongly encouraged to participate in all the SBO/SBDC sponsored conferences, exhibits, expositions and workshops.

Each center shall market itself as a member of the Illinois Entrepreneurship Network. Each center shall conform to marketing standards set by the SBO/SBDC and SBA, including use of required logos, standardized stationary, business cards, signage, promotional materials, etc. Cost for these items should be included in the center’s proposed budget.

Each center shall enter all training sessions and events into the DCEO Calendar of Events.

Each center will provide a link from its World Wide Web home page to the home page of DCEO and the SBA.

F. Knowledge of Client Needs and Expectations

Each center must demonstrate it has a systematic process or processes to analyze the needs of its small business community. Further, the center must demonstrate it utilized the results of the analyses to develop and deliver programs to meet identified needs. The needs analysis need not be a formal research effort, nor must it be a state or regional-wide analysis. It must, however, be designed to obtain information from relevant public, private, and education institutions, as well as from owners of small businesses, in order to identify and develop valuable services for the SBDC, ITC, and PTAC to offer.

Research on client needs and expectations should include a systematic process for gaining customers’ knowledge. The process should:

- Use multiple listening posts.
- Determine key customer requirements.
- Determine product/service features of most importance to customers.

The objective is to identify and segment customers, markets and key stakeholders and to determine requirements, expectations, and preferences for each.

G. Equipment

Each SBDC, ITC, and PTAC location shall have on-site, at a minimum, a personal computer and assorted software and hardware as defined below:

- Pentium IV 2.8 GHz Processor (or higher)
- 512mb of RAM with 3.5” disk drive and 80gb Hard Drive, CD Drive
- ASYNC Communications Adapter
- 17” Display Color Monitor
- Windows 2000 or XP
- Microsoft Office
- Network adapters (if needed)
- Microsoft Internet Explorer 6.0 or higher
Centers must also have full time, high speed access to the Internet for center staff and clients.

**H. Resource Directory**

Each center shall compile a listing of all area business assistance resources, including governmental, educational, and private sector resources. Business clients with adequate financial resources or firms whose requirements are beyond the capacity of the center or resource staff shall be referred to private consultants and other professionals. Each center shall refer clients equitably to at least three available private consultants. Such equitable distribution should prevent over-reliance on any one private consultant or professional. Centers/staff shall not receive renumeration for any such referrals, either directly or indirectly.

**I. Advisory Board**

Successful applicants shall create and/or maintain a separate and distinct board of advisors comprised of local/regional business owners, lenders, equity investors, chamber of commerce representatives, other economic development individuals, educational institution personnel, governmental representative, and other appropriate individuals. When two or more center programs within the Illinois Entrepreneurship Network are hosted by the same organization, one board of advisors can be utilized to support all center programs.

The local center advisory boards shall meet at least twice per year, but the SBO/SBDC strongly recommends the centers convene their advisory board at least quarterly. Advance notice of the center’s advisory board meetings and member listing shall be submitted to the SBO/SBDC office.

**J. Reporting**

Each center shall maintain records in accordance with program guidelines and policies including the use of the Illinois Client Activity Tracking System (ICATS), or other system(s) as directed. The centers are also required to utilize DCEO's Grantee Reporting System (GRS) for fiscal reporting. Copies of the required report forms for specific programs are available upon request.

**K. Financial**

Each center must utilize either an existing in-house, automated financial management system or an appropriate financial management software program to maintain accurate and up-to-date financial records. This financial management system must incorporate all program costs, including both cash and in-kind match, into one general ledger to insure that costs are tracked separately within the host institution. All program costs must be encumbered or expended by the last day of the cooperative agreement. A separate account must be established to be used solely for program income (refer to individual program sections for specifics on program income accounts). Internet access to the Department of
Commerce and Economic Opportunity’s Grantee Reporting System (GRS) must be available and all costs, including cash and in-kind match, must be reported monthly. Submission of a copy of the organization’s general ledger and chart of accounts will be required in conjunction with an annual financial review. Documentation for costs incurred will also be solicited on a random basis throughout the grant period to insure compliance with rules and regulations. A lack of appropriate fiscal documentation may result in host institutions’ repayment of declared disallowed costs.

Host institutions are subject to pertinent federal OMB Circulars, which govern administrative and financial management of the programs. Please refer to Appendix C of this RFP for a listing of these OMB Circulars. Access is available at [www.whitehouse.gov/omb/circulars/index.html](http://www.whitehouse.gov/omb/circulars/index.html).

L. **Operations Manual**

Each center shall have a copy of the Center Operations Manual on site and shall comply with all applicable policies and guidelines. Policy notes will be sent periodically to the centers to update the Operations Manual. Each center shall be responsible for maintaining and updating the manual when revisions are provided by the DCEO SBO/SBDC. The Operations Manual (current copy is available upon request), this RFP, and the applicants final proposal, shall be incorporated by reference into the center’s cooperative agreement.

M. **Client Files**

Each center shall maintain a confidential file on site for each client which contains, at a minimum, a completed, signed "Request for Counseling" form, signed economic impact verification, and other pertinent client information. Said files shall be kept in a locked and secure location. A copy of the Request for Counseling Form is included in Appendix B.

N. **Training Files**

Each center will maintain a training file for each sponsored and co-sponsored training activity that will include the following: a) Management Training Report; b) Attendance list; c) Training evaluation forms and summary; and d) Brochures or other marketing material.

O. **Personnel Files**

Each center shall maintain personnel files on all full or part-time staff. Personnel files shall include a copy of the signed Conflict of Interest Statement and resume. Signed monthly (at minimum) Time and Effort sheets are required for anyone less than full time. A copy of the Conflict of Interest Statement is included in Appendix B.
III. PROGRAM SUPPORT

A. Match

A total matching contribution equal to or greater than 100 percent of the amount of funds provided by the DCEO SBO/SBDC must be provided from sources other than the federal government or the Department of Commerce and Economic Opportunity for the operation of a center. A minimum of 50% of the matching contribution must be in cash. The balance of the 100% matching requirement may be provided as in-kind match. Special consideration shall be given to those applicants whose matching contributions of direct cash exceed the required 50 percent.

The availability of the matching contribution for each center must be committed in advance and certified by an official of the applicant organization within the agreement. The source of the cash match and in-kind funding must be identified on the Source of Funds and Certification of Cash Match forms. All funds, including cash match, must be under the direct control of the center director. Cash match must be present from the start of the agreement and should be expended on a monthly basis in conjunction with DCEO funds. All cash and in-kind match must be verifiable back to the SBDC ledger.

Time and effort performance must be documented for all individuals contributing less than 100 percent of their time toward delivery of center services and who appear in the Cooperative Agreement as being paid with DCEO funds, cash or in-kind match dollars.

Time and Effort Certification forms must be completed and signed, at minimum, on a monthly basis and kept on file at the local center office for DCEO SBO/SBDC monitoring. Time and effort documentation must specify how time was spent in direct support of the center operations.

B. Program Income

Program Income is defined as gross income (total receipts before costs) earned by the recipient that is directly generated by an SBDC, ITC, or PTAC supported activity or earned as a result of the award. A recipient is any center or other participating entity that receives funding from the U. S. Small Business Administration (SBA), Department of Commerce and Economic Opportunity (DCEO) or Department of Defense (DoD) through the SBO/SBDC program.

Program income includes, but is not limited to, income from fees for services performed, the use or rental of real or personal property acquired under federally-funded programs, the sale of commodities or items fabricated under an award, license fees and royalties on patents and copyrights, and interest on loans made with award funds. Training fees, sale of materials, rental fees, and other income which is cash in nature are considered program income. Examples of program income include, income earned by or from providing
training to another center or other entities, trade shows, sponsorship fees, sale of books, brochures, etc., sale of advertising space in magazines, performance of in-depth research work, and training including cosponsored events.

Centers are required to use program income to directly expand or enhance their quality or quantity of services, resources, outreach or advocacy and/or to initiate new services or programs that are related to their mission. Program income must be used to further existing program objectives and/or for new programs or services beyond those currently being delivered. Program income earned by the center must be under the direct control of the center director.

The DCEO SBO/SBDC reserves the right to recover any or all unexpended program income. Any unused program income may be carried over to subsequent budget periods to further program objectives during that program period. A separately identifiable account must be established to record program income. All income and expenses from this account must be reported to DCEO as required for each program.

Specific program income reporting requirements for the SBDCs, ITCs, and PTACs are discussed in their respective program areas of this document.

C. Funding

The exact funding levels of the centers are subject to state and federal appropriations and approvals. Final center funding determinations will be based upon the merits of the applicant's proposal which should include demonstrated need, quality and quantity of direct counseling services, appropriateness of proposed activities, experience in providing assistance to small business, efficiency of operation, cooperation, and support from other local service providers and community/educational agencies/institutions, integration with other DCEO programs, and amount of non-federal financial support. Each center shall provide a minimum of 900 counseling hours for each $50,000 in program funding provided by the DCEO SBO/SBDC. The DCEO SBO/SBDC reserves the right to negotiate the final budget detail and scope of work prior to entering into a cooperative agreement with the applicant.

D. Annual Cooperative Agreement/ Three Year Proposal

A center operates under an annual fixed price agreement with the DCEO. Agreements shall be individually negotiated as to performance goals and objectives, budget details, and the total amount of the award. The provisions of this RFP, the applicant's proposal, applicable program rules and guidelines, and the Center Operations Manual shall be incorporated by reference into the cooperative agreement.
Although the budget(s) and objectives will cover a 12 month period, the proposals submitted by applicants will remain in effect for three years. When the applicant’s proposal covers more than one center program, the applicant shall submit one consolidated narrative proposal covering the requirements of each program. However, applicants shall submit a separate 12 month Scope of Work, budget summary and budget detail for each different program applied for under this RFP. The DCEO SBO/SBDC and successful applicants will renegotiate new budgets and objectives at the end of each program year.

A maximum of 10% in indirect costs may be taken from DCEO funds by host institutions that have an existing, approved Indirect Cost Rate Agreement from a cognizant federal agency. If an indirect cost rate agreement is not in place at the beginning of the cooperative agreement period, under no circumstances may indirect costs be charged against the award.

As a part of the Cooperative Agreement, successful applicants will be required to sign certain certifications and assurances to comply with Federal and State requirements.
IV. INDIVIDUAL PROGRAM REQUIREMENTS

Each proposal shall include projected performance measures for each of the indicators as required in Section VII, SCOPE OF WORK, for each program. Applicants shall submit the performance measures covering a 12 month period.

A. SMALL BUSINESS DEVELOPMENT CENTER (SBDC)

1. Staffing

Each SBDC shall have, at minimum, one Professional Full Time Equivalent (PFTE) 100% dedicated to the program.

The preferred staffing requirements of a fully operating SBDC are three full time employees: one full time director who devotes approximately 60% of his/her time to counseling and 40% to managing the center and performing outreach responsibilities; one full time business counselor who spends 75% of his/her time counseling and 25% of his/her time assisting with training programs and other special activities; and one full time support staff who provides clerical, bookkeeping, computer data entry, general program and administrative assistance.

The total work hours available for a full time professional are 1,950 hours, based on a 37.5 hours work week at 52 weeks/year. Allowing for 300 hours of holiday, sick and vacation time and 150 hours for professional and personal development, each PFTE has a total of 1,500 hours of available time. Each center shall provide a minimum of 900 hours of direct one-on-one counseling per each PFTE.

2. Counseling, Clients, and Services

The DCEO SBDC is targeting the following statewide counseling performance totals for the next three years:

<table>
<thead>
<tr>
<th>Performance Indicators</th>
<th>FY2005</th>
<th>FY2006</th>
<th>FY2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average hours per case</td>
<td>6.0</td>
<td>7.0</td>
<td>8.0</td>
</tr>
<tr>
<td>Percentage of existing business</td>
<td>55%</td>
<td>60%</td>
<td>65%</td>
</tr>
<tr>
<td>Percentage of continuous cases</td>
<td>50%</td>
<td>55%</td>
<td>60%</td>
</tr>
</tbody>
</table>

The clients of the SBDC normally fall within one of these four categories:

Pre-Venture: Individuals interested in starting a business seek information, counseling, and training assistance necessary to start a business. This includes individuals who are in the concept stage. These clients are interested in basic information concerning business start-up that enables them to assess their interest in and ability to pursue new business start-up.
Start-up: Clients seek assistance and skills to overcome the obstacles faced during the establishment and operation of their business. Clients are in the process of starting or acquiring a small business or have already been in operation for up to one year.

Established: Clients are beyond their first year of operation. These are small businesses that need assistance with specific issues or problems.

High-Growth potential: These firms have the potential for rapid growth or may already be growing at rapid annual rates. Faced with difficult challenges, these firms need more specialized, in-depth assistance to help them plan and manage their growth. The SBDC should work closely with the Regional Entrepreneurship Center to ensure these clients receive the needed specialized assistance.

Each SBDC shall provide one-on-one in-depth, quality core counseling in the following areas: business planning, management, access to capital, marketing, finance and accounting, regulation and taxation, production and operations, office automation, eBusiness basics, basic internet utilization, basic website development, and other areas of assistance required to promote small business growth.

Each SBDC shall provide one-on-one management assistance services to small businesses, either directly or through contractual agreement with recognized experts, or through referral to cooperative agencies. Special emphasis shall be given to the use of low cost resources. The effective use of SCORE counselors and other counseling resources is strongly encouraged.

Completed Illinois Client Activity Tracking System (ICATS) Request for Counseling forms must be signed upon initial counseling session, and maintained in the client files along with ongoing counseling notes at each center office.

All counseling activity shall be entered in the ICATS (see Appendix B) on a daily basis. Client information must be entered into the ICATS by the fifth (5th) business day of the month for the previous month’s activity. Any activity recorded after the 5th business day shall be included in the current month’s activity. A regular 90 day follow-up process should be established for all clients.

3. Reporting

Each SBDC shall comply with the following reporting requirements:

Reports

a. Quarterly Narrative Report. The narrative is to be clear, concise and highlight significant program activities for the prior period. See Appendix B for format. Quarterly reports are due on the fifth (5th) business day of the month following the quarter. Reports are to be entered into the ICATS.
b. Economic Impact Report (EIR). Signed verification on economic impact results must be maintained in center’s client files. Economic Impact shall be entered into the ICATS.

c. Success Story. Each center is responsible for developing success stories as they occur and entering them into the ICATS.

d. Financial Reporting. Monthly reporting of costs, including both cash and in-kind match, is required on the agency’s Grantee Reporting System (GRS) which is accessible through an internet connection. Costs must be entered into the appropriate month in which they were incurred to comply with federal regulations.

e. Program Income Reporting. SBDCs and ITCs will report their program income to DCEO on a semi-annual basis. Program income and expenses, by category, will be reported in a spreadsheet format supplied by the Department. The spreadsheet will be emailed to each center for completion in July and January of each program year. A center may carry over up to 25% of its total budget (DCEO and match) in program income in excess of 25% of the center’s total budget must be expended within the current budget period.

Sponsored Management Training Reports (888’s)

Sponsored Management Training Reports (888's) shall be entered into the ICATS within five (5) business days of completion of the training event.

Co-sponsored Management Training Reports shall also be completed for all co-sponsored events and entered into the ICATS within five (5) business days of the event.

4. Technology Services

Each SBDC proposal must include a plan to provide technology related services to program clients. These services, which may be provided directly by SBDC staff or secured through other resources, such as the Illinois Technology Enterprise Centers, shall include, but are not limited to the following:

a. assist Illinois inventors in locating Illinois manufacturers to produce and market their inventions;

b. make linkages for clients with appropriate resources such as the Illinois Technology Enterprise Centers for assistance on Federal research and development grants;

c. conduct seminars and/or training sessions aimed at furthering the technical and intellectual skills of Illinois business owners, managers and entrepreneurs in the area of technology;

d. assist with general feasibility studies of new venture ideas;

e. provide marketing assistance for technology clients; and

f. provide a dedicated workstation with access to the Internet.
5. **Additional Resources**

All SBDCs shall bring the following minimum outside resources to the program:

- **a.** pro bono counselors/private consultants equaling a minimum of 250 client hours;
- **b.** SCORE/ACE (where available) pre-screening services;
- **c.** faculty counselors (where available);
- **d.** student resources (where available);
- **e.** identify woman and minority business owners who can assist emerging business owners in mentor/protégé or coaching relationships;
- **f.** a computer workstation designated specifically for client use including the following equipment and software requirements:
  - Pentium IV 2.8 GHz Processor (or higher)
  - 512mb of RAM with 3.5” disk drive and 80gb Hard Drive, CD Drive
  - ASYNC Communications Adapter
  - 17” Display Color Monitor
  - 56k Modem needed if using dial up internet
  - Windows 2000 or XP
  - Microsoft Office
  - Network adapters (if needed)
  - Microsoft Internet Explorer 6.0 or higher
- **g.** provide assistance to incubator tenants where incubators fall within the service area of the SBDC; and
- **h.** provide other resources and services including:
  1. a current file maintained in the form of a resource directory of federal, state, and local resources available to small businesses through the Illinois Entrepreneurship Network, including Entrepreneurship Centers, Illinois Manufacturing Extension Centers (IMEC), Illinois Technology Enterprise Centers (ITEC) and Energy and Recycling programs;
  2. referral and linkage to information specialists and technology transfer agents as well as lab, engineering, design, and technology adaptation facilities;
  3. maintenance of cooperative working relationships with financial institutions, CPA associations, bar associations, management groups, trade associations, business organizations, chambers of commerce and SCORE;
  4. establishment and maintenance of a basic library for client usage that contains SBA and State of Illinois publications as well as small business related periodicals pertaining to business planning, marketing, financing, management materials, statistical data needed by small businesses, newspapers, and reference materials. Appropriate business video/audio tapes and software programs together with self instructional and interactive materials are also encouraged;
5. full access to the Internet; and
6. utilization of financial analysis software when assisting clients with loan structuring.

Applicants are required to arrange access to comprehensive resources within their local colleges, public libraries, state and federal offices, and other community resource centers for small business owners.

Small businesses which participate in SBDC activities may often have requests for services that are beyond the expertise of the SBDC business analyst. In such cases, the SBDC shall assist the small business client by directing and arranging for assistance from other cooperating service providers or private sector resources.

6. **Education and Training**

The SBDC will provide a core training program, as either a sponsor or co-sponsor, in the following areas:

a. financial analysis/access to capital in small business;
b. starting a small business; business planning;
c. expanding a small business;
d. utilization of e-Business technology;
e. marketing a small business; and
f. small business taxation.

Applicants shall ensure that quality training designed to improve the skills and knowledge of existing and prospective small business owners/managers is provided within their respective service areas. A training unit may take the form of a complete course, conference, or workshop consisting of one or more sessions with a minimum of one hour of training.

Training in basic small business management subjects and in specialized areas shall be emphasized. Topics of special interest to women, minorities, veterans, persons with disabilities, farmers, exporters, and young entrepreneurs are also encouraged.

In no event shall SBDCs compete with, or duplicate, small business educational programs offered by local colleges, chambers of commerce, private sector organizations, associations, and other small business assistance providers. Applicants are encouraged to utilize co-sponsored training arrangements with these entities to extend outreach and productivity. Final responsibility for the quality of the training rests with the SBDC.
7. Screening and Referral

Each SBDC is expected to provide basic screening of businesses to determine their potential to successfully export their products or services to international markets or sell in the government or private contracting arenas.

Businesses which demonstrate the desire and ability to pursue such market expansion shall be referred to an SBDC International Trade Center or Procurement Technical Assistance Center. SBDCs are expected to develop memorandums of understanding with other SBDCs outlining cooperative relationships, referral methods and client follow-up. Regular follow-up contact is required for all referrals.

8. Disaster Operations Plan

Each service center must have in place disaster plans which are in coordination with the host institution to ensure delivery of services to small businesses in its area of operations, and such plans must be kept on file and available for review by SBA officials. Plans should be reviewed annually by the center directors and updated as needed. SBDCs individually, and in cooperation with SBA and other Federal Agencies as well as state and local entities, are encouraged to provide disaster recovery assistance to support impacted small businesses in local economies.

9. Definitions

a. **Client**: each person or business firm who completes a Request for Counseling Form and who has received at least one (1) hour of substantive and significant consulting assistance from an SBDC resource.

b. **Continuous Counseling**: multiple counseling sessions provided to a client during the course of the budget period.

c. **Counseling/Consulting**: an ongoing process of two-way communication between client and consultant(s). This process includes identifying and analyzing the client’s needs and problems. To accomplish this, the consultant may need to gather information and conduct research in order to implement the appropriate strategy. The goal of SBDC consulting is to increase the management capability of the business owner and is viewed as an educational process.

d. **Counseling/Consulting Hours**: all time spent by consultants in the following activities:
   1. direct one-on-one with the clients in person, with electronic communication or by telephone.
   2. preparation for client meetings including preparation of correspondence, or communication by whatever the medium.
   3. research activities on behalf of clients, and travel to and from the client’s facility/location or outreach center.
e. **Counseling/Consulting Utilizing Electronic Communications Technology:** In order to log consulting hours provided to individuals via electronic means, the following conditions must be met.

E-Counseling (Electronic Counseling): To count E-counseling toward the SBDC’s goals, the counseling must be substantive. To receive credit for one hour of counseling, the counselor must spend at least one hour researching and formulating the response. This can include several electronic questions and responses that cumulatively add up to one hour.

The SBDC must obtain the client’s signature on a completed Request for Counseling Form. The form should be completed after an initial exchange of information has revealed that the client could benefit from SBDC consulting assistance. Such exchange of information may occur in a face-to-face meeting, via telephone, via exchange of e-mail, via any other media or combination of media that allows the client and the SBDC consultant to exchange information describing the perceived needs of the client and the capabilities of the SBDC to satisfy those needs.

Once a consulting relationship has been established with a signed Request for Counseling, all preparation and contact time associated with the engagement should be logged. It is recognized, in the case of many forms of communication, contact time becomes a very different concept. In the case of consulting via electronic communications technology, “contact time” is defined as time spent in reading or analyzing information provided by the client and time spent in synopsizing or synthesizing materials to be transmitted to the client.

Preparation time is defined as time spent on behalf of the client and might include research or surveying relevant background information. It is recognized that consultants will exercise their best judgment in making the allocation of time.

f. **Information Transfer Actions:** to serve the many small businesses that contact the SBDCs for information yet do not become a client, all centers engage in “information transfer.” Requests for information may be initiated by letter, telephone call, e-mail or other forms of communication. At a minimum, SBDCs will record the number of such requests to which they respond as a contact in the ICATS.

g. **Management Training Course:** consists of a series of sessions at which small business management subjects are taught to the same group of small business owners or managers. Depending on the nature of the course, this training may last one day or many but must exceed eight hours in total. A management training course may be offered through any communications technology.
h. **Management Training Conference**: training sessions at which small business management subjects are taught to groups of small business owners or managers. To be considered a conference, the training must be less than a total of eight hours. Training of less than one hour is not acceptable for reporting purposes.

i. **One-Time Counseling**: counseling provided to a client on a one-time basis during the course of the budget period.

j. **SBA Client**: any firm or individual that has received a loan or a loan guarantee from SBA; a pending applicant for a loan; a certified 8(a) participant; a surety bond holder or a Certificate of Competency (COC) applicant.

k. **SBA Program Officer**: the SBA employee who negotiates the annual Cooperative Agreement and monitors the ongoing operations of an SBDC. This person receives a letter from the SBA giving official authority to act as the SBA’s representative.

l. **SBDC Network**: the combination of the DCEO SBDC, the SBDC Service Centers, ITCs, PTACs, and Satellite Offices.

m. **SBDC Program Announcement**: the document developed annually by the U.S. SBA Office of SBDCs to solicit proposals from SBDC applicants. It outlines statutory requirements, goals and initiatives of the SBA, financial and programmatic reporting requirements, and the required application format.

n. **SBDC Satellite Office**: an outreach location that reports to an SBDC Service Center or to the DCEO SBDC. Satellite offices generally offer limited services provided by part-time staff.

o. **SBDC Service Center**: participating organizations, universities, community colleges, state entities, chambers of commerce, etc., that enter into written agreements with the DCEO SBDC to provide full time small business services.

p. **SBDC Training**: training is the provision of advice, guidance and instruction to groups of prospective and existing small business persons and entities, whether by in-person, groups sessions or by such communication modes as teleconferences, videos, publications and electronic media. Such training must be at least two hours in duration to be acceptable, have a planned attendance of six attendees unless the subject matter or special circumstances justify a lower attendance. In those cases, the justification must be explicitly stated. In order to be counted as a training deliverable, training must be documented to include activity brochure or flyer, attendees list and evaluation.
q. **Training Deliverables**: a training event that qualifies as a deliverable should meet the following criteria:

1. provide a minimum of two hours of instruction, supported by a list of attendees;
2. have a planned minimum of six attendees, unless the subject matter or special circumstances justify lower attendance. In those cases, the justification must be explicitly stated;
3. be an activity that addresses a topic having application to small business owners or potential small business owners; and
4. be a general information conference if the conference is designed to transmit information the attendees can utilize in operating their business.
B. INTERNATIONAL TRADE CENTER (ITC)

1. Staffing

Each ITC shall have, at minimum, one Professional Full Time Equivalent (PFTE) 100% dedicated to the program.

The preferred staffing requirements of a fully operational ITC are: one full-time director who devotes approximately 60% of his/her time in direct counseling, client outreach and special activities and 40% of his/her time in the management and promotion of the center; one full-time trade specialist who devotes 75% of his/her time in direct client counseling and 25% assisting with training and special activities; and at least one half-time clerical staff person who provides administrative support for the center.

The total work hours available for a full time professional are 1,950 hours, based on a 37.5 hours work week at 52 weeks/year. Allowing for 300 hours of holiday, sick and vacation time and 150 hours for professional and personal development, each PFTE has a total of 1,500 hours of available time. Each center shall provide a minimum of 900 hours of direct one-on-one counseling per each PFTE.

2. Counseling, Services and Assistance

The DCEO SBDC is targeting the following statewide performance totals for the next three years:

<table>
<thead>
<tr>
<th>Performance Indicators</th>
<th>FY2005</th>
<th>FY2006</th>
<th>FY2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average hours per case</td>
<td>6.0</td>
<td>7.0</td>
<td>8.0</td>
</tr>
<tr>
<td>Percentage of continuous cases</td>
<td>50%</td>
<td>55%</td>
<td>60%</td>
</tr>
</tbody>
</table>

The ITC shall provide client counseling on exporting to Illinois small and medium-sized businesses seeking international trade assistance. Counseling shall be provided at the center and/or on site at the business location. Counseling services shall include but not be limited to: pricing, documentation, finance options, shipping and logistics information, translation, foreign market and industry research, tariff schedules, and industry classifications.

Each ITC shall provide a full-time Trade Specialist to provide one-on-one trade assistance. This assistance may be provided either directly through contractual agreement with recognized experts, or indirectly through referrals to cooperating agencies or organizations. This assistance will provide international trade information, preliminary market research for clients and assist clients in developing an international marketing plan and/or business strategy.
The ITC shall promote and market the ITC and the SBDC services throughout the designated ITC service-delivery area. The ITC shall utilize such vehicles as newsletters, brochures, public speaking promotions, advertisements, articles and work with other centers/referrals as appropriate.

All counseling activity shall be entered in the Illinois Client Activity Tracking System (ICATS) (see Appendix B) on a daily basis. Client information must be entered into the ICATS by the fifth (5th) business day of the month for the previous month’s activity. Any activity recorded after the 5th business day shall be included in the current month’s activity.

Completed ICATS Request for Counseling forms must be signed upon initial counseling session, and maintained in the client files along with ongoing counseling notes at each center office.

3. Reporting

Each ITC shall comply with the following reporting requirements:

Reports

a. Quarterly Narrative Report. The narrative is to be clear, concise and highlight significant program activities for the prior period. See Appendix B for format. Quarterly reports are due on the fifth (5th) business day of the month following the quarter. Reports are to be entered into the ICATS.

b. Economic Impact Report (EIR). Signed verification on economic impact results must be maintained in center’s client files. Economic Impact shall be entered into the ICATS.

c. Success Story. Each center is responsible for developing success stories as they occur and entering them into the ICATS.

d. Financial Reporting. Monthly reporting of costs, including both cash and in-kind match, is required on the agency’s Grantee Reporting System (GRS) which is accessible through an internet connection. Costs must be entered into the appropriate month in which they were incurred to comply with federal regulations.

e. Program Income Reporting. SBDCs and ITCs will report their program income to DCEO on a semi-annual basis. Program income and expenses, by category, will be reported in a spreadsheet format supplied by the Department. The spreadsheet will be emailed to each center for completion in July and January of each program year. A center may carry over up to 25% of its total budget (DCEO and match) in program income in excess of 25% of the center’s total budget must be expended within the current budget period.
Sponsored Management Training Reports (888's)

Sponsored Management Training Reports (888's) shall be entered into the ICATS within five (5) business days of completion of the training event.

Co-sponsored Management Training Reports shall also be completed for all co-sponsored events and entered into the ICATS within five (5) business days of the event.

4. Additional Resources

a. The ITC shall serve as an outreach location of DCEO's Illinois Trade Office (ITO) promoting ITO services, trade shows and other programs. The ITC shall, when appropriate, refer clients to ITO staff for further assistance. The ITC shall closely coordinate activities with ITO domestic and foreign based offices;
b. The ITC shall develop and maintain follow-up contacts and network with other private and public sector international trade providers and resources;
c. The trade specialist shall schedule and visit, on a regular basis, designated SBDCs located in the ITC service/delivery area to provide client counseling and other services as needed. The ITC will participate in coordination meetings of the SBDCs, all SBDC/ISBDA meetings and other meetings specified by program management;
d. The trade specialist shall provide other services and assistance as may be required to achieve the objectives of the ITC;
e. The ITC shall develop, maintain and update an international trade library of resource materials, resource providers, referral sources and other information necessary to assist small business exporters, including access to all materials provided through the National Trade Data Bank and other electronic resources;
f. Each ITC shall establish and maintain a basic international trade library that contains export-related periodicals, U.S. Department of Commerce, U.S. Small Business Administration, other federal agency publications and State of Illinois materials. Publications shall cover such topics as the basics of exporting, international marketing, country/market trends and statistics, industry statistical data, financing and other relevant reference materials. These materials will be used to help market and promote the services and activities of our private and public resource partners;
g. These materials shall be provided for client use on location at the ITC in either hard copy or appropriate data bases. Additional and more comprehensive resources shall be identified and made available through other area international trade providers such as public libraries, local colleges, state and federal government offices, and other community resource centers; and
h. A computer workstation designated specifically for client use including the following equipment and software requirements:
   - Pentium IV 2.8 GHz Processor (or higher)
   - 512mb of RAM with 3.5” disk drive and 80gb Hard Drive, CD Drive
   - ASYNC Communications Adapter
   - 17” Display Color Monitor
   - Windows 2000 or XP
   - Microsoft Office
   - Network adapters (if needed)
   - Microsoft Internet Explorer 6.0 or higher

   Centers must also have full time, high speed access to the Internet for center staff and clients.

5. **Education and Training**

   a. The ITC shall develop, market and present export training programs, workshops and/or seminars for new-to-export businesses;
   b. The ITC shall develop, market and present Exporters Forums and other networking and training opportunities for new-to-market and more experienced exporting businesses; and
   c. The trade specialist shall participate in SBDC meetings in the ITC service delivery area as well as center designated meetings as directed by program management. Participation in the ASBDC and NASBITE are encouraged.

6. **Disaster Operations Plan**

   Each service center must have in place disaster plans which are in coordination with the host institution to ensure delivery of services to small businesses in its area of operations, and such plans must be kept on file and available for review by SBA/DCEO officials. Plans should be reviewed annually by the center directors and updated as needed. SBDCs individually, and in cooperation with SBA and other Federal Agencies as well as state and local entities, are encouraged to provide disaster recovery assistance to support impacted small businesses in local economies.

7. **Definitions**

   Refer to SBDC Definitions on pages 17-20.
C. PROCUREMENT TECHNICAL ASSISTANCE CENTER (PTAC)

1. Staffing

Each PTAC shall have, at minimum, one Professional Full Time Equivalent (PFTE) 100% dedicated to the program.

The preferred staffing requirements of a fully operational PTAC are: one full time director who devotes approximately 60% of his/her time in direct counseling and client support and 40% of his/her time in the management and promotion of the center; one full time contracting assistance specialist who spends approximately 75% of his/her time in direct counseling and support of procurement clients and 25% assisting with training and special activities; and at least one half time clerical staff person who provides administrative support for the center.

The total work hours available for a full time professional are 1,950 hours, based on a 37.5 hours work week at 52 weeks/year. Allowing for 300 hours of holiday, sick and vacation time and 150 hours for professional and personal development, each PFTE has a total of 1,500 hours of available time. Each center shall provide a minimum of 900 hours of direct one-on-one counseling per each PFTE.

2. Counseling, Services, and Assistance

The PTACs shall emphasize in-depth, high quality, one-on-one counseling and technical assistance to program clients. The PTAC shall provide services that include, but are not limited to:

a. general consultations and information on the Department of Defense, federal, state, local government, prime and sub-contractor markets;

b. automated matching of firm's product, manufacturing or service capabilities with major military and civilian buying agencies;

c. instruction in the completion of bidder application forms and the Centralized Contractor Registry (CCR) system;

d. identifying defense and civilian agency contracting and sub-contracting opportunities and making appropriate referrals to Illinois firms;

e. specifications and standards, bar coding, packaging information and other information needed to bid;

f. review of bid packages to insure client understanding of bid requirements;

g. information, training, and assistance in the area of e-business, electronic commerce/electronic data interchange (EC/EDI);

h. information regarding contract administration, ISO standards, Total Quality Management (TQM) and other areas as needed; and

i. assistance with specialized requirements in areas such as research and development, construction and data processing.
All counseling activity shall be entered in the Illinois Client Activity Tracking System (ICATS) (see Appendix B) on a daily basis. Client information must be entered into the ICATS by the fifth (5th) business day of the month for the previous month’s activity. Any activity recorded after the 5th business day shall be included in the current month’s activity.

Each PTAC shall also enter information on clients with federal contracting potential into the designated Illinois match system in order to provide clients with automated bidding opportunities and access to government EC/EDI contracting opportunities.

3. Reporting

a. Each PTAC shall report the following programmatic information to the DCEO PTAC:

1. The number and type of clients assisted. The reported information shall include number of initial and follow-up counseling sessions and total number served for: small businesses, other than small businesses, small disadvantaged businesses, women-owned companies, service disabled veterans, and for the number of firms located within a distressed area or HUBZones;
2. The type of assistance provided to program clients. The types of assistance reported includes: general counseling, marketing and targeting assistance, bid referrals, bid assistance, technical assistance, technical assistance referrals and resource support such as providing standards and specifications;
3. The number of DoD and other government agency prime and sub-contracts awarded to clients shall be reported on a monthly basis as well as the dollar value of these contract awards. These contracts shall be verified in writing by the client and a copy of the verification form submitted monthly;
4. The number of full and part-time jobs actually created and/or retained as the result of assistance provided by the program shall be verified in writing by the client receiving the contract award;
5. Client success stories attributed to assistance provided by the PTAC should be completed and entered monthly into the ICATS Success Story database;
6. The number of bids submitted by clients; and
7. The number of active clients.

b. Financial Reporting. Monthly reporting of costs, including both cash and in-kind match, is required on the agency’s Grantee Reporting System (GRS) which is accessible through an internet connection. Costs must be entered into the appropriate month in which they were incurred to comply with federal regulations.

c. Program Income Reporting. PTACs will report their program income to DCEO on a quarterly basis in response to an email request. The total gross income and expenses will be reported throughout the program year and will be split into 2 separate amounts, “government share” and “recipient share” in October of each program year. These amounts will be provided to each center by DCEO based upon
the ratio of spending established for DCEO’s overall PTAC program. The “recipient’s” share of program income may now be used as cash match in the next program year. For example, program income earned in FY04 or FFY03 may not be used as match until FY05 or FFY04. This is specifically outlined in the SCAA.

4. **Additional Resources**

Each PTAC shall secure and provide the following additional resources and services:

- a. volunteer and/or student resources to provide administrative support to the PTAC;
- b. access to counselors and/or education programs which can provide specialized in-depth assistance in areas such as electronic commerce/electronic data interchange (EC/EDI), e-business, ISO standards, and Total Quality Management control (TQM);
- c. an updated reference library that includes: a current file of resource directories of federal, state and local resources available to small businesses;
- d. linkages with financial institutions, professional associations, management groups, trade associations, chambers of commerce, economic development councils and appropriate consultants; and
- e. access to educational opportunities through community colleges, universities, public libraries, and other local, state and federal resources.

5. **Education and Training**

When needs for specialized training and education are identified, the PTAC shall conduct or provide access to training and counseling in the following areas:

- a. marketing techniques and strategies;
- b. pricing policies and procedures;
- c. pre-award procedures;
- d. post-award contract administration;
- e. quality assurance;
- f. production and manufacturing;
- g. financing;
- h. electronic Commerce/Electronic Data Interchange (EC/EDI);
- i. e-business;
- j. subcontracting;
- k. bid and proposal preparation;
- l. specialized acquisition requirements for such areas as construction, research and development and data processing; and
- m. packaging specification and requirements.
6. **PTAC Definitions**

a. **Active Client**: client that has received Procurement Technical Assistance within the last 12 months.

b. **Client**: an individual or a business that is seeking or may potentially seek to market its goods and/or services as a prime contractor or subcontractor to DoD, other federal agencies, and state or local governments that has received Procurement Technical Assistance.

c. **Counseling Session**: a documented event, including, but not limited to, a telephone call, correspondence, e-mail, or personal discussion held with a business firm/client, where professional guidance is provided to assist the business firm/client in marketing its goods and/or services to DoD, other federal agencies, and state and local governments. This includes, but is not limited to, providing advice and assistance such as:

1. Assisting business firms/clients by providing marketing and technical assistance in selling their goods and/or services to DoD, other federal agencies, and state and local governments;
2. Assisting with understanding specifications;
3. Assisting in the preparation and proper submission of applications, certifications, registrations, etc. in order to do business with government entities;
4. Assisting in the preparation of offers;
5. Providing post award assistance in areas such as production, quality system requirements, finance, engineering, transportation and packaging; and
6. Providing information to business firms/clients on the DoD Mentor-Protégé Pilot Program, Electronic Commerce (EC), HUBZone Empowerment Contracting Program, subcontracting opportunities with contractors holding government prime contracts, and commercial item acquisitions.

The distribution of publications, specifications, and bid matches is not a counseling session. However, if such actions result in an award to an active client that award may be counted on the DLA 1806 “Procurement Technical Assistance Cooperative Agreement Report” submission. Simply referring business firms/clients to another source for advice or assistance is not a counseling session nor can any resulting award be counted on the DLA 1806 submission.

d. **Follow-up Counseling Session**: a counseling session held with a client, subsequent to the initial counseling session.
e. **Initial Counseling Session**: the first counseling session held by a recipient with an individual or business firm. The initial counseling session may determine that the individual or business firm has no likely potential to do business with a federal agency and/or state and local government.

f. **Procurement Technical Assistance**: any assistance of a specialized or professional nature provided to a business firm/client to enable it to identify potential contractual opportunities with DoD, other federal agencies, and state and/or local governments, or to obtain or perform under contracts with these entities. This specialized assistance may consist of, but is not limited to, locating potential marketing opportunities for PTAC’s business/clients’ products and/or services, educating and/or familiarizing firms and clients in the area of electronic commerce, assisting in the preparation of registrations, proposals, and financial and contractual forms, and providing guidance in relation to quality assurance, production, and/or assistance in the resolution of engineering, financial, quality or production problems.
V. PROPOSAL SUBMISSION INFORMATION

PROPOSAL FACT SHEET

Performance Periods: Twelve Months

Funding Periods: Twelve Months

Proposal Due Date: Friday, April 23, 2004 (close of business, 5:00 p.m.)

Proposal Format: Proposals must be submitted according to the proposal format as shown in Section V. DCEO reserves the right to reject proposals that do not follow the specified format and instructions.

Each applicant must submit one consolidated narrative proposal covering all center programs (Sections I–IV), which funds are being requested. However, separate Scope of Work and Budget (Sections V–VII) must be submitted for each center program.

Please do not use spiral bound presentation folders for your proposals. Please number all pages.

Proposal Submission: Please submit the original and three copies to:

Illinois Department of Commerce and Economic Opportunity
Small Business Office
620 East Adams Street, 4th Floor
Springfield, IL 62701

ATTN: Mark Petrilli

RFP Questions: Contact: Rod Hollenstine
Phone: 217/524-6105
E-Mail: rodney_hollenstine@commerce.state.il.us
PROPOSAL INFORMATION SHEET

PROGRAM NAME:  
( Check all that apply)  
_____ Small Business Development Center (SBDC)  
_____ International Trade Center (ITC)  
_____ Procurement Technical Assistance Center (PTAC)  

CONTACT PERSON:  __________________________________________________

RESPONSIBLE DIVISION/UNIT:  ________________________________________

APPLICANT ORGANIZATION:  ________________________________________

MAILING ADDRESS:    
__________________________________________________________________
__________________________________________________________________

E-MAIL ADDRESS:    ________________________________________

TELEPHONE NUMBER:   ________________________________________

FAX NUMBER:     ________________________________________

APPLICANT FEIN:    ________________________________________

TOTAL FUNDS REQUESTED FROM DCEO: (12 MONTHS)  $ __________________________

SBDC $__________  ITC $__________  

PTAC $__________

__________________________________________________________________

Name and Title - Official

__________________________________________________________________

Signature  Date

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I. **Table of Contents**

Indicate all headings and subheadings with appropriate page numbers. List all attachments by title.

II. **Proposal Information Sheet**

Complete the Proposal Information Sheet that is included in the RFP. The sheet must be completed fully and accurately.

III. **Executive Summary**

Prepare a one-two page executive summary, which provides an overview of the major highlights and key points of the proposal. Please include a brief description of your small business needs assessment process. The participating agencies and the amount of funding requested for each program should also be included in this clear, succinct and concise summary.

IV. **Center Requirements**

A. **Staffing**

An organizational chart of the center(s) and of the host institution is required. Resumes should be provided on all key program staff (e.g. center director, business specialist, coordinator, etc.). The specific duties and responsibilities of staff should be defined.

The proposal should also include the total number of Professional Full Time Equivalent (PFTE) being dedicated to each center.

B. **Counseling Services and Assistance**

Describe the center(s) services to be provided and the manner in which counseling will be conducted for center clients.

C. **Additional Resources**

Describe how the required additional resources and services will be identified and delivered through the program(s).

D. **Education and Training**

Describe how the training needs of your service area were determined. Discuss what training sessions will be held to meet those particular needs.

E. **Marketing Plan Outline**

Provide an outline of the plans to market the services and programs of the center(s) to the appropriate client base.
F. Coordination/Cooperation

Describe how the center(s) will provide coordinated services to the entire area to be served. The relationships with any other institutions, other DCEO programs, groups, or associations that will be used to deliver services should be identified and their roles explained.

G. Advisory Board

Describe the make-up of the center Advisory Board and how it will be utilized to support the center. Please indicate how often the Advisory Board will meet and include a list of members, if available.

H. Office Operations

Identify the location, address and operating hours of the center(s). Provide a description of how clients will be serviced when professional staff is out of the office. A description of the facility along with parking arrangements and accessibility should also be included.

I. Fiscal Management

Identify the fiscal agent for the center program(s). Describe your organization’s fiscal procedures and controls and responsible staff in the following areas: reconciliation of cash accounts, segregation of program income, maintenance of property control records, time and effort certification, bookkeeping procedures, and the maintenance of general ledgers.

V. Scope of Work Narrative

Complete a brief Scope of Work narrative for each program outlining how each of the goal areas included in the Scope of Work Section VII on pages 44 - 53, will be addressed by your center.

VI. Performance Indicators/Measures Form

Complete a separate performance indicators/measures form for each program addressed in your proposal.

VII. Budget

Follow budget instructions detailed in Section VI of this proposal package.

Sections I – IV – One consolidated proposal for all programs.

Sections V – VII – Separate submissions for each program.
REQUIRED PROPOSAL FORMAT

I. Table of Contents

II. Center Information Sheet

III. Executive Summary

IV. Center Requirements
   A. Staffing
   B. Counseling Services and Assistance
   C. Additional Resources
   D. Education and Training
   E. Marketing Plan Outline
   F. Coordination/Cooperation
   G. Advisory Board
   H. Office Operations
   I. Fiscal Management

V. Scope of Work Narrative(s)

VI. Performance Indicators/Measures Form(s)

VII. Budget(s)
VI. BUDGET

INSTRUCTIONS FOR THE PREPARATION OF THE PROPOSAL BUDGET

Separate budget pages (Source of Funds, Budget Summary and Budget Detail Worksheet pages) must be completed for each program (e.g., separate for SBDC, another for ITC, and another for PTAC) in your proposal. The proposed budget should be completed by following the format provided. The initial preparation of your budget should begin with the completion of Budget Detail Worksheets and conclude with Budget Summary pages. All information on detailed budget sheets should be clear and concise. The budget should be checked for accuracy and completeness. A maximum of 5% flexibility of your grant budget (DCEO funds) is allowable (between budget categories) without doing a budget modification during the course of the agreement. It is therefore important that budget amounts be estimated as closely as possible to actual costs to minimize the necessity for modifications to the agreement. A brief budget narrative should also be included to elaborate on specific budget categories as needed.

I. Budget Detail

A. Personnel: Show salaries and wages only. Identify all staff by name and title and list their annual salary and percentage of time dedicated to the center. Also, identify personnel to be used as match for the program. For each staff person in the proposal, you must list their annual salary and percentage of time. Also sum the percentage of time for all professional staff dedicated to the center and divide by 100 to determine the number of professional full time equivalent (PFTE), e.g., 100% + 50% + 75% = 225% + 100 = 2.25 PFTE.

B. Staff Fringe Benefits: List applicable fringe benefits, employer share of social security (FICA), retirement, group insurance, unemployment insurance and worker's compensation. For each fringe line indicate the applicable wage base to which fringe benefits apply, the percentage rate, the DCEO share and match share. Do not include those fringe benefits treated as indirect costs in the negotiated indirect cost rate agreement.

C. Travel: List travel expenses for all personnel employed by the program. Include specific lines identifying per diem/meal allowance, and mileage/public transportation fare. Explain computation for each line including unit of measurement (e.g., mileage, number of trips), unit price, and quantity of units. List DCEO share and match share. Travel for consultants should not be included in this section. Each out-of-state and out-of-country travel request must be identified separately and completely justified in the narrative. The Network Operations Manual outlines specific procedures for approval of out of state and out of country travel.

Travel should include, at a minimum, expenses to be incurred attending 4 quarterly meetings of the Illinois Small Business Development Center Network, which are required training for all directors.
D. **Equipment Purchase**

Identify all non-expendable personal property to be purchased by the program. For the purpose of this RFP, non-expendable personal property is defined as all tangible personal property of a non-consumable nature having a useful life of more than one year and an acquisition cost of $1,000 or more per unit. Each item of non-expendable personal property costing over $1,000 must be identified and explained in the budget detail. Approval will also be required prior to equipment purchase.

Personal property is defined as property of any kind except real property. It may be tangible-having physical existence, or intangible-having no physical existence, e.g.; patents, inventions, and copyrights.

Equipment purchased with grant funds becomes the property of the Department of Commerce and Economic Opportunity and must be tagged as such at the host institution. In the event that the center closes, the property is reclaimed by DCEO; in the event that the equipment becomes obsolete, the host institution must receive permission from DCEO to dispose of the equipment. NOTE: PTACs are not allowed to purchase equipment with grant funds.

E. **Supplies**

List all tangible personal property except that which is in Line “D-Equipment.” Include line items detailing office supplies and training/instructional supplies. Requests in excess of $500 must be identified and fully justified in the narrative.

Consumable items are supplies, i.e., copy paper, pens, pencils, paperclips, etc. Supplies would also include items used for training sessions.

F. **Contractual Services**

Describe and list all contractual purchases (except consultant services, which are to be detailed in Line "G" Consultant Services) directly benefiting the program. Include specific line items detailing the expenses of facility costs, equipment rental and, data processing costs. Proposed satellite office(s) should be identified as a contractual service. Include a separate detailed budget and summary for each satellite facility. Any other significant subcontracting must be further identified and justified in the narrative. Requests in excess of $2500 must be identified and completely justified in the narrative.
G. **Consultant Services**

Describe services being provided and include name of consultant when available. Identify expenditures for the purchase of professional and technical services related to the management or operation of the program. (Note: PTACs are not allowed to pay for professional and technical consultant services).

H. **Other Direct Costs**

List all direct costs not included in Lines "A" through "G."

**This category may include:** Facility costs, i.e., rent and utilities; printing; telecommunications charges; postage; office equipment rental (copiers and other office machinery); subscriptions; dues; printing costs, building maintenance costs; marketing and advertising costs which are not on contract; and membership fees.

I. **Total Direct Costs**

Sum all direct costs listed on lines "A" through "H."

J. **Indirect Costs**

List approved indirect costs, if applicable. Attach a copy of your host institution’s approved Indirect Cost Rate Agreement. DCEO allows centers a maximum of ten percent (10%) of the DCEO share to be used for indirect costs. An Indirect Cost Rate Agreement with a federal cognizant agency must be on file with DCEO before indirect costs may be incurred. Include an explanation of your institution’s indirect cost calculation as it pertains to this agreement with your budget narrative.

K. **Total Costs**

Sum of lines "I" and "J."

L. **Program Income**

Estimate all direct charges or fees to be collected from participants of the program. Fees for counseling services are prohibited. Fees for training are limited by SBA regulations. Please refer to individual program areas for program income reporting requirements, and refer to pages 9 and 10 for additional information.

II. **Budget Summary**

Include only the total for each line item from the budget detail.
III. **Expenditures and Match of Major Subcontractors**

If the program proposes to subcontract significant program activities to other agencies or organizations, a Budget Summary, and Itemization of Match must be completed by those major subcontractors.

If the program proposes to use the cash match contribution of other organizations to meet the requirements of the SBO/SBDC programs, such organizations must be identified and the Cost Share Detail must be provided.

IV. **Cash Match**

Cash match must be identified and included in the budget portion of the proposal. Please include an explanation of program involvement and percentage of time committed to the program for each staff person listed under personnel cash match. Time and Effort sheets (see Appendix B) shall be completed monthly for each staff member that is less than full time during the program year. Special consideration will be given to those proposals identifying additional cash resources to be used for the advancement of the program.

V. **In Kind Match**

In kind support must be identified and detailed in the budget portion of the proposal. Please include an explanation of program involvement and percentage of time committed to the program for each staff person listed under personnel in kind match. Time and Effort sheets (see Appendix B) shall be completed for each of these staff during the program year.

**NOTE:** **ALL BUDGET FIGURES MUST BE ROUNDED TO THE NEAREST DOLLAR.**
### SOURCE OF FUNDS

- ____ SBDC  
- ____ ITC  
- ____ PTAC  

1. **DCEO FUNDS REQUESTED**  
   $_______________

2. **CASH MATCHING FUNDS**

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<thead>
<tr>
<th>SOURCE</th>
<th>AMOUNT</th>
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</table>

**TOTAL CASH MATCHING FUNDS**  
$_______________

3. **IN-KIND MATCHING FUNDS**

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<thead>
<tr>
<th>SOURCE</th>
<th>AMOUNT</th>
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</table>

**TOTAL IN-KIND MATCHING FUNDS**  
$_______________

4. **TOTAL PROGRAM FUNDING (1 + 2 + 3)**  
$_______________

**NOTE:** ALL BUDGET FIGURES **MUST** BE ROUNDED TO THE NEAREST DOLLAR.
# BUDGET SUMMARY

_____ SBDC  _____ ITC  _____ PTAC

**NAME:**

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<table>
<thead>
<tr>
<th>CATEGORIES</th>
<th>DCEO SHARE+</th>
<th>CASH MATCH+</th>
<th>IN-KIND MATCH</th>
<th>GRAND TOTAL</th>
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<tr>
<td>A. PERSONNEL</td>
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<tr>
<td>B. FRINGE BENEFITS</td>
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<tr>
<td>C. TRAVEL</td>
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<td>D. EQUIPMENT</td>
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<td>E. SUPPLIES</td>
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<tr>
<td>F. CONTRACTUAL</td>
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<td>G. CONSULTANT</td>
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<tr>
<td>H. OTHER DIRECT</td>
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<tr>
<td>I. TOTAL DIRECT COSTS (Sum of A-H)</td>
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<tr>
<td>J. INDIRECT COSTS (**10% limit)</td>
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<td>K. TOTAL COSTS</td>
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<tr>
<td>PROGRAM INCOME (Estimate)</td>
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**UNDER NO CIRCUMSTANCES MAY THE GRANTEE CHARGE FOR INDIRECT COSTS WITHOUT A CURRENT APPROVED INDIRECT COST RATE AGREEMENT. INDIRECT COSTS TAKEN FROM DCEO FUNDS ARE LIMITED TO 10% OF THE TOTAL DCEO SHARE.**

**NOTE:** ALL BUDGET FIGURES **MUST** BE ROUNDED TO THE NEAREST DOLLAR.
## BUDGET DETAIL WORKSHEET

____ SBDC      ____ ITC      ____ PTAC

**CENTER NAME:** ___________________________________________________________

<table>
<thead>
<tr>
<th>DESCRIPTION</th>
<th>DCEO SHARE +</th>
<th>CASH MATCH +</th>
<th>IN-KIND MATCH</th>
<th>TOTAL</th>
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<tbody>
<tr>
<td>A. PERSONNEL (Name &amp; Title)</td>
<td>ANNUAL SALARY</td>
<td>% OF TIME</td>
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<td>TOTAL PERSONNEL</td>
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<td>Total Number of Professional Full Time Equivalent (PFTE)</td>
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<th>B. FRINGE BENEFITS</th>
<th>% OF WAGE x</th>
<th>WAGE BASE</th>
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<td>TOTAL FRINGE BENEFITS</td>
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<tr>
<th>C. TRAVEL (Meeting/Conference &amp; number of People)</th>
<th># IN STATE MILES (RATE/MILE)</th>
<th>OUT-OF-STATE COST</th>
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<td>TOTAL TRAVEL</td>
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<tr>
<th>D. EQUIPMENT PURCHASE</th>
<th>(Complete Equipment Purchase List)</th>
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<td>TOTAL EQUIPMENT</td>
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**NOTE:** ALL BUDGET FIGURES MUST BE ROUNDED TO THE NEAREST DOLLAR.
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<tr>
<th>DESCRIPTION</th>
<th>DCEO SHARE +</th>
<th>CASH MATCH +</th>
<th>IN-KIND MATCH</th>
<th>TOTAL</th>
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<tr>
<td>E. SUPPLIES (General Office, Ops. &amp; Computer Supplies)</td>
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<td>TOTAL SUPPLIES</td>
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<tr>
<td>F. CONTRACTUAL SERVICES (Itemized Costs)</td>
<td># OF HOURS</td>
<td>Hourly Rate/ Contract Amt.</td>
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<td>TOTAL CONTRACTUAL</td>
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<td>G. CONSULTANT SERVICES (Specify Purpose)</td>
<td>HOURS</td>
<td>RATE</td>
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<td>TOTAL CONSULTANT</td>
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<td>H. OTHER DIRECT COSTS (Specify Items)</td>
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<td>TOTAL OTHER DIRECT</td>
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<td>I. TOTAL DIRECT COSTS (Sum of Categories A - H)</td>
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<tr>
<td>J. INDIRECT COSTS (NOT TO EXCEED 10% OF TOTAL DCEO SHARE)</td>
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<td>xxxxxxxx</td>
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<tr>
<td>K. TOTAL COSTS</td>
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**NOTE:** ALL BUDGET FIGURES MUST BE ROUNDED TO THE NEAREST DOLLAR.
CERTIFICATION OF CASH MATCH

FUNDING CYCLE: __________________________

<table>
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<th>CENTER NAME</th>
<th>GRANT #:</th>
<th>TELEPHONE NO.</th>
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<thead>
<tr>
<th>STREET ADDRESS</th>
<th>CITY, STATE ZIP</th>
<th>COUNTY</th>
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CERTIFICATION

As the duly authorized Officer/Representative of the State sponsored center described above, I hereby certify that the Program Budget for the Funding Cycle indicated above contains actual cash dollars in the Amount of $____________________ from sources other than the Federal Government. I further certify that the center budget is under the direct control of the center director.

Signed_________________________________________________________________________
Authorized/Representative/Officer

Title___________________________________________________________________________

Date___________________________________________________________________________

****************************************************************************************

SOURCE OF CASH MATCH FUNDING: _____________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________

Effective 1/04
VII. SCOPE OF WORK

Complete a brief Scope of Work narrative, which explains how your center will address each of the major goal areas for each program as described in this section.

Due to federal and state requirements and guidelines the “Scopes of Work” for the SBDCs, ITCs, and PTACs must track several program outputs and outcomes (economic impact). Although the programs will continue to emphasize the importance of one-on-one counseling and other outputs for program clients, the ultimate factors for determining the success of the programs are the outcomes that have resulted from the assistance provided by the centers. Based on historical program information and center funding, minimum performance levels have been identified for several of the program output and program outcome (economic impact) indicators, for every $50,000 in funds provided to the centers.

Performance Indicator(s): At a minimum, all performance indicators (program goals) in this section will be tracked for each center program included in applicant’s proposal. Applicant may also include additional performance indicators and measures if desired.

Performance Measure(s): Specific quantitative measures must be projected for each performance indicator included in this section for each applicable program. These measures will be used to evaluate the programs effectiveness and to assess whether or not all activities have been completed and objectives met. The recommended minimums for certain performance indicators are noted in parenthesis ( ).
SMALL BUSINESS DEVELOPMENT CENTER GOALS

The Illinois Small Business Development Center (SBDC) has set forth the following major program goal areas. These goals ensure that certain areas of importance are noted. The following goals and indicators should be used at a minimum and should be monitored by center staff on an ongoing basis.

A. ECONOMIC IMPACT
The area of economic impact is where the return on investment and the value added by the program is tracked. All Economic Impact information must be verifiable and documented.

   Performance Indicators:
   1. Number of jobs created. (30 per $50,000)
   2. Number of jobs retained. (45 per $50,000)
   3. Number of business starts. (5 per $50,000)
   4. Number of business expansions. (3 per $50,000)
   5. Number of business acquisitions.
   6. Number of client loans secured.
   7. Dollars in debt financing secured. ($1 million per $50,000)
   8. Number of projects with non-debt financing secured.
   9. Dollars in non-debt financing secured. ($ .5 million per $50,000)

B. BUSINESS COUNSELING
The center should provide basic business counseling services and business analysis to existing and potential small business owners.

   Performance Indicators:
   1. Total client cases.
   2. Number of "continuous" cases.
   3. Percent of in business clients compared to all clients.
   4. Total center counseling hours. (900 per PFTE)
   5. Average hours per case.

C. BUSINESS TRAINING
The center should provide small business training services through either direct SBDC sponsored training events or through co-sponsored training events.

   Performance Indicators:
   1. Number of SBDC sponsored events.
   2. Number of co-sponsored events with local and/or host institution.
D. PROFESSIONAL DEVELOPMENT/TRAINING
The continued process improvement of all staff is important in maintaining quality service for our client.

Performance Indicators:
1. Number of hours of Professional Development Training (50 per PFTE).
2. Attend and participate in all programmatic and SBO/SBDC designated meetings. (4)

E. MARKET INTERACTION AND ASSESSMENT
The development of an overall evaluation and marketing scheme of the services provided by the center.

Performance Indicators:
1. Number of press releases produced by center for local SBDC events/informational forums.
2. Number of Success Stories submitted through the year. (6)
3. Completion of a semi-annual survey of all clients provided service by the SBDC. (2)
### SMALL BUSINESS DEVELOPMENT CENTER
#### PERFORMANCE INDICATORS/MEASURE FORM

**Center:**

<table>
<thead>
<tr>
<th>PERFORMANCE INDICATOR(S):</th>
<th>MEASURE</th>
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<tbody>
<tr>
<td><strong>A. ECONOMIC IMPACT</strong></td>
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<tr>
<td>1. Number of jobs created. (30 per $50,000)</td>
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<td>2. Number of jobs retained. (45 per $50,000)</td>
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<td>3. Number of business starts. (5 per $50,000)</td>
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<td>5. Number of business acquisitions.</td>
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<td>6. Number of client loans secured.</td>
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<td>7. Dollars in debt financing secured. ($1 million per $50,000)</td>
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<td>8. Number of projects with non-debt financing secured.</td>
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<td>9. Dollars in non-debt financing secured. ($ .5 million per $50,000)</td>
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<tr>
<td><strong>B. BUSINESS COUNSELING</strong></td>
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<tr>
<td>1. Total client cases.</td>
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<tr>
<td>2. Number of “continuous” cases.</td>
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<td>3. Percentage of in business clients compared to all clients.</td>
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<td>4. Total center counseling hours. (900 per PFTE)</td>
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<td>5. Average hours per case.</td>
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<td><strong>C. BUSINESS TRAINING</strong></td>
<td></td>
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<tr>
<td>1. Number of SBDC sponsored events.</td>
<td></td>
</tr>
<tr>
<td>2. Number of co-sponsored events with local and/or host institution.</td>
<td></td>
</tr>
<tr>
<td><strong>D. PROFESSIONAL DEVELOPMENT/TRAINING</strong></td>
<td></td>
</tr>
<tr>
<td>1. Number of hours of Professional Development Training (50 per PFTE).</td>
<td></td>
</tr>
<tr>
<td>2. Attend and participate in all programmatic and SBO/SBDC designated meetings. (4)</td>
<td></td>
</tr>
<tr>
<td><strong>E. MARKET INTERACTION AND ASSESSMENT</strong></td>
<td></td>
</tr>
<tr>
<td>1. Number of press releases produced by center for local SBDC events/info. forums.</td>
<td></td>
</tr>
<tr>
<td>2. Number of Success Stories submitted through the year. (6)</td>
<td></td>
</tr>
<tr>
<td>3. Completion of a semi-annual survey of all clients provided service by the SBDC. (2)</td>
<td></td>
</tr>
</tbody>
</table>
INTERNATIONAL TRADE CENTER (ITC) GOALS

The International Trade Center (ITC) program has developed the following set of major program goal areas. These goals serve as a means by which the many important and diverse services and activities of the ITCs are noted. The following goals and indicators are the minimum standards by which you must record your activities. Additional goals and indicators may be added at each individual center’s own discretion. However, you are encouraged to consult with your program manager before adding additional goal areas. None of the goal areas listed below may be eliminated from your official record-keeping activities unless directed in writing by ITC program management staff.

A. ECONOMIC IMPACT RESULTING FROM ITC ASSISTANCE (note: economic impact surveys will be sent at minimum: a) to all clients showing activity at this ITC within the last 12 month period, and b) on a quarterly basis).

   Performance indicators:
   1. Dollar value of export sales secured (by country). ($8 million per $50,000)
   2. Number of jobs created. (25 per $50,000)
   3. Number of jobs retained. (35 per $50,000)

B. BUSINESS COUNSELING
The ITC should provide basic business counseling services and business analysis to existing and potential small business owners.

   Performance indicators:
   1. Total client cases.
   2. Number of “continuous” cases.
   3. Total center counseling hours. (900 per PFTE)
   4. Average hours per case.

C. EDUCATION AND TRAINING FOR BUSINESS (an annual training plan will be submitted in January of each calendar year. This training plan will outline preliminary arrangements for sponsored and co-sponsored workshops/seminars/events)

   Performance indicators:
   1. Number of seminars/workshops/events sponsored.
   2. Number of seminars/workshops/events co-sponsored.
   3. Number of companies educated in export finance/payment.
D. **NETWORKING AND DEVELOPMENT OF RESOURCES**

   Performance indicator:
   1. Number of new counseling and training resources developed.
   2. Number of center advisory board meetings held.

E. **TRADE SPECIALIST TRAINING & PROFESSIONAL IMPROVEMENT**

   Performance indicators:
   1. Number of hours of Professional Development Training (50 per PFTE).
   2. Attend and participate in all programmatic and SBO/SBDC designated meetings. (4)

F. **PUBLIC RELATIONS/MARKETING EFFORTS**

   Performance indicator:
   1. Number of presentations to business/community groups.
   2. Number of press releases produced by center for local ITC events/informational forums.
   3. Number of success stories submitted throughout the year. (6)
   4. Semi-annual satisfaction survey (mailed/faxed/e-mailed) to all clients measuring interest in ITC services and activities. (2)
**INTERNATIONAL TRADE CENTER**

**PERFORMANCE INDICATORS/MEASURE FORM**

Center: ____________________________________________________________

<table>
<thead>
<tr>
<th>PERFORMANCE INDICATOR(S):</th>
<th>MEASURE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A. ECONOMIC IMPACT RESULTING FROM ITC ASSISTANCE</strong></td>
<td></td>
</tr>
<tr>
<td>1. Dollar value of export sales secured (by country). ($8 million per $50,000)</td>
<td></td>
</tr>
<tr>
<td>2. Number of jobs created. (25 per $50,000)</td>
<td></td>
</tr>
<tr>
<td>3. Number of jobs retained. (35 per $50,000)</td>
<td></td>
</tr>
<tr>
<td><strong>B. CLIENT COUNSELING</strong></td>
<td></td>
</tr>
<tr>
<td>1. Total client cases.</td>
<td></td>
</tr>
<tr>
<td>2. Number of “continuous” cases.</td>
<td></td>
</tr>
<tr>
<td>3. Number of “one-time” cases.</td>
<td></td>
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<tr>
<td>4. Percent of in business clients compared to all clients.</td>
<td></td>
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<tr>
<td>5. Total center counseling hours. (900 per PFTE)</td>
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<tr>
<td>6. Average hours per case.</td>
<td></td>
</tr>
<tr>
<td><strong>C. EDUCATION AND TRAINING FOR BUSINESS</strong></td>
<td></td>
</tr>
<tr>
<td>1. Number of seminars/workshops/events sponsored.</td>
<td></td>
</tr>
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<tr>
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<td></td>
</tr>
<tr>
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</tr>
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<td></td>
</tr>
<tr>
<td><strong>E. TRADE SPECIALIST TRAINING &amp; PROFESSIONAL IMPROVEMENT</strong></td>
<td></td>
</tr>
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<td><strong>F. PUBLIC RELATIONS/MARKETING EFFORTS</strong></td>
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<td>4. Semi-annual satisfaction survey (mailed/faxed/e-mailed) to all clients measuring interest in ITC services and activities. (2)</td>
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</tbody>
</table>
PROCUREMENT TECHNICAL ASSISTANCE CENTER GOALS

The Illinois Procurement Technical Assistance Center (PTAC) Program has set forth the following major program goal areas and indicators, which serve to guide the delivery of services to Illinois small businesses. Please use indicators provided in this section when completing performance indicator/measures form. Additional proposed goals, performance indicators and measures may be included, using the same format provided. Although the results in goal area A. Economic Impact may not be under the direct control of the PTAC, the center must submit projected results for this area.

A. ECONOMIC IMPACT
The indicators in this goal area relate to the results of the center's efforts in all of the goal areas listed above. All economic impact will be broken out by each type of business client, i.e., Women, Small Disadvantaged, HUBZone, and Service Disabled Veterans, etc.

Performance Indicators:
1. Number of bids submitted.
2. Number of contracts secured.
3. Dollar value of contracts secured. ($13 million per $50,000)
4. Number of full-time jobs created. (35 per $50,000)
5. Number of full-time jobs retained. (85 per $50,000)

B. ONE-ON-ONE PROCUREMENT COUNSELING/TECHNICAL ASSISTANCE
The grantee shall provide Illinois companies with quality procurement counseling and technical assistance. One-on-one counseling has been proven to be the most effective method to relate information about contracting opportunities. General training sessions should produce clients who have potential for government contracting. Specific issues will be addressed for each individual client.

Performance Indicators:
1. Number of initial counseling sessions. (50 per $50,000)
2. Number of follow-up counseling sessions.
3. Number of active clients.
4. Number of counseling hours. (900 per PFTE)
C. **GENERAL INFORMATION/PROGRAM PROMOTION**
The grantee shall provide general procurement information and promote program services to Illinois companies. General training sessions, seminars and conferences should be planned to highlight the areas and topics of interest to a targeted population with possible interest in government contracting opportunities. Co-sponsored events are encouraged, when feasible, in order to maintain ongoing education and utilize available resource opportunities throughout the Network. Success stories should be submitted to DCEO and other media to highlight the successes that have resulted due to assistance from the center.

**Performance Indicators:**
1. Number of procurement conferences/training sessions to be sponsored or co-sponsored. (6)
2. Number of success stories. (6)

D. **SMALL DISADVANTAGED BUSINESS (SDB) AND WOMEN OWNED BUSINESS DEVELOPMENT**
The grantee shall identify and assist small business clients who have been considered both socially and economically disadvantaged. There are several preferences for businesses that can be classified in these areas. Both prime and sub-contracting opportunities exist. Small business clients will be encouraged to participate in subcontracting opportunities where larger prime contractors must complete a subcontracting plan that encourages participation with these specific targeted populations. (Recommended minimum numbers are not included for this area, however, information will be gathered to measure overall results of the program).

**Performance Indicators:**
1. Number of Small Disadvantaged Business initial counseling sessions.
2. Number of Women Owned Business initial counseling sessions.
3. Number of 8(a) Certified Business initial counseling sessions.
4. Number of HUBZone Owned Business initial sessions.
5. Number of Service Disabled Veteran Owned Business initial counseling sessions.

E. **PROFESSIONAL AND PERSONAL DEVELOPMENT TRAINING/NETWORKING**
Center personnel shall participate in on-going personal and professional training programs. Center personnel should actively network with other PTACs and participate in other associated activities and training opportunities, business organizations and educational seminars to maintain the highest level of current information related to government contracting and business development.

**Performance Indicators:**
1. Number of procurement related training sessions attended. (10)
2. Number of SBO/PTAC designated meetings. (4)
## PERFORMANCE INDICATOR(S):

### A. ECONOMIC IMPACT
1. Number of bids submitted.
2. Number of contracts secured.
3. Dollar value of contracts secured. ($13 million per $50,000)
4. Number of full-time jobs created. (35 per $50,000)
5. Number of full-time jobs retained. (85 per $50,000)

### B. ONE-ON-ONE PROCUREMENT COUNSELING/TECHNICAL ASSISTANCE
1. Number of initial counseling sessions. (50 per $50,000)
2. Number of follow-up counseling sessions.
3. Number of active clients.
4. Number of counseling hours. (900 per PFTE)

### C. GENERAL INFORMATION/PROGRAM PROMOTION
1. Number of procurement conferences/training sessions to be sponsored or co-sponsored. (6)
2. Number of success stories. (6)

### D. SMALL DISADVANTAGED BUSINESS (SDB) AND WOMEN OWNED BUSINESS DEVELOPMENT
1. Number of Small Disadvantaged Business initial counseling sessions.
2. Number of Women Owned Business initial counseling sessions.
3. Number of 8(a) Certified Business initial counseling sessions.
4. Number of HUBZone Owned Business initial sessions.
5. Number of Service Disabled Veteran Owned Business initial counseling sessions.

### E. PROFESSIONAL AND PERSONAL DEVELOPMENT TRAINING/ NETWORKING
1. Number of procurement training sessions attended. (10)
2. Number of SBO/PTAC designated meetings. (4)
JOB DESCRIPTION

I. SMALL BUSINESS DEVELOPMENT CENTER DIRECTOR

The center director position will be responsible for the day-to-day operations of the SBDC. The position calls for a wide variety of management skills due to the diversity of clientele the center serves. The counseling and training work provided by the director and staff to small business give them the opportunity to learn new information. This information may affect hundreds of small businesses. Therefore, it is of the utmost importance that client confidentiality be maintained by the SBDC director and staff. The promotion of the Region to the public and private sectors through presentations, is essential to the center.

The total work hours available for a full time professional are 1,950 hours, based on a 37.5 hours work week at 52 weeks/year. Allowing for 300 hours of holiday, sick and vacation time and 150 hours for professional and personal development, each Professional Full Time Equivalent (PFTE) has a total of 1,500 hours of available time. Each center shall provide a minimum of 900 hours of direct one-on-one counseling per each PFTE. Each SBDC shall have, at minimum, one PFTE 100% dedicated to the program.

SPECIFIC DUTIES

A. Plan and coordinate programs and activities consistent with the goals and objectives of the Illinois Small Business Development Center.
B. Maintain an effective local Board of Advisors.
C. Develop internal and external resources to accomplish program objectives including actively seeking additional funding resources.
D. Provide direct counseling and training or referral of clients to appropriate sources as necessary.
E. Supervise center personnel, both consultants and clerical.
F. Manage center's operational budget.
G. Maintain a current reference library and data base as required by the SBDC program.
H. Establish linkages with other centers or small businesses that may provide additional resources to the center.
I. Maintain current data on private sector consultants for referral to members of the small business community.
J. Maintain client control records and management information system.
K. Provide timely and accurate reports to the SBO/SBDC.
L. Maintain and analyze data on program effectiveness.
M. Promote the SBDC and the needs of the small business community.
N. Establish a marketing plan that will allow for high visibility of the center.
O. Coordinate and cultivate relationship with SCORE, ACE, local Chambers of Commerce, Professional Associations, and Economic Development Groups.
QUALIFICATIONS

A. B.A. or B.S. degree in business, economics or other relevant field.
B. Five (5) years of small business management or business consulting. The incumbent must also have budget and program management experience, including an ability to effectively manage staff reporting relationships. The position requires a strong marketing and sales orientation and will involve public contact and public speaking engagements.

AVERAGE SALARY

$48,000
II. SMALL BUSINESS SPECIALIST

The position of Business Specialist will dedicate seventy-five percent (75%) of his/her time providing counseling and twenty-five percent (25%) in special activities. This position will be the primary counselor for the center.

The total work hours available for a full time professional are 1,950 hours, based on a 37.5 hours work week at 52 weeks/year. Allowing for 300 hours of holiday, sick and vacation time and 150 hours for professional and personal development, each Professional Full Time Equivalent (PFTE) has a total of 1,500 hours of available time. Each center shall provide a minimum of 900 hours of direct one-on-one counseling per each PFTE.

SPECIFIC DUTIES

A. Provide direct client counseling assistance.
B. Maintain client files with appropriate records included.
C. Provide referrals to other appropriate DCEO programs.
D. Assist in the completion of monthly reporting.
E. Skill in the use of computers and business related software.
F. Research and developing material necessary for clients needs.
G. Assist in the production of promotional materials for center (e.g., flyers, newsletters, etc.).
H. Develop marketing plans for training programs.
I. Develop SBDC training programs and analyze impact on participants.

QUALIFICATIONS

A. B.A. or B.S. degree in business, economics, accounting or equivalent field.
B. Experience in business management and/or financial business analysis (banking) is preferred.

AVERAGE SALARY

$35,000
III. INTERNATIONAL TRADE SPECIALIST

The total work hours available for a full time professional are 1,950 hours, based on a 37.5 hours work week at 52 weeks/year. Allowing for 300 hours of holiday, sick and vacation time and 150 hours for professional and personal development, each Professional Full Time Equivalent (PFTE) has a total of 1,500 hours of available time. Each center shall provide a minimum of 900 hours of direct one-on-one counseling per each PFTE. Each ITC shall have, at minimum, one PFTE 100% dedicated to the program.

SPECIFIC DUTIES

A. Evaluate a company's export capability and readiness.
B. Identify and analyze a company's international trade needs and hurdles.
C. Provide in-depth counseling on international trade techniques, the export processes and international market opportunities.
D. Conduct market research using appropriate reference material and data bases to assist companies to identify international markets with the greatest potential for their product or service.
E. Develop and conduct seminars and workshops on the basics of exporting, international market opportunities and other appropriate topics.
F. Develop and conduct Exporters Forums or similar networking sessions to assist new-to-export companies develop mentor relationships.
G. Establish and maintain working relationships with federal, state, and local governments and private organizations involved in exporting and international trade.

QUALIFICATIONS

A. B.A. or B.S. in Business Administration, International Business, International Studies or related field.
B. Familiarity with computer systems.
C. Two to three years experience in international trade business development with a business or economic development organization.
D. Knowledge of, or experience, in international trade related activities.
E. Excellent communication skills.

AVERAGE SALARY

$45,000
IV. PROCUREMENT TECHNICAL ASSISTANCE CENTER DIRECTOR

The total work hours available for a full time professional are 1,950 hours, based on a 37.5 hours work week at 52 weeks/year. Allowing for 300 hours of holiday, sick and vacation time and 150 hours for professional and personal development, each Professional Full Time Equivalent (PFTE) has a total of 1,500 hours of available time. Each center shall provide a minimum of 900 hours of direct one-on-one counseling per each PFTE. Each PTAC shall have, at minimum, one PFTE 100% dedicated to the program.

SPECIFIC DUTIES

A. Conduct on-site plant surveys to assess the potential of a firm to perform successfully in the Federal market.
B. Conduct research, using reference material, government publications, and contacts with Federal buying installations, to identify the segments of the Federal market that match each firm's product mix and administrative and technical capabilities.
C. Provide guidance to firms to help them fill out a range of required government forms. Review government requirements and contract terms with firms and explain the meaning and significance of these requirements and terms.
D. Follow up and troubleshooting assistance in every aspect of Federal government contracting from contract award through successful contract completion.
E. Establish and maintain contacts within the Federal acquisition system, and call on these contacts for help in providing assistance to firms.
F. Provide bid leads to firms to market their products and/or services to federal agencies.
G. Provide specifications and standards to firms and assist them in understanding solicitation requirements.

QUALIFICATIONS

A. B.A. or B.S. degree or equivalent experience.
B. Basic knowledge of manufacturing, quality control and processes.
C. Good communication skills.
D. Ability to master technical literature.
E. General background in business management, and/or small business ownership, purchasing and/or contract administration.

AVERAGE SALARY

$45,000
Appendix B

TIME AND EFFORT CERTIFICATION FORM

I, ____________________________________________, certify that during the period __________________ to __________________, I worked ____________ hours and ____________% time on the center program entitled: ________________________________________________________________________________

_____________________________________________________________________________

_____________________________________________________________________________

_____________________________________________________________________________

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A description of the work I performed on this program is as follows:

_____________________________________________________________________________

_____________________________________________________________________________

_____________________________________________________________________________

_____________________________________________________________________________

_____________________________________________________________________________

_____________________________________________________________________________

Usual Salary Account #(s) ______________________________________  ___________________________________

Biweekly Salary/Hourly Rate  Account # of Cooperative Agreement

Employee Signature       / Date    Employee Social Security Number

Supervisor’s Signature    / Date

This form is to be completed on a monthly basis and kept on file at the center office for monitoring purposes. Individuals identified on a current center agreement, part-time and paid a salary with DCEO funds or Match funds must complete and sign this form.
### REQUEST FOR COUNSELING

<table>
<thead>
<tr>
<th>Name of Company</th>
<th>Point of Contact</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Owner?</td>
<td>E-Mail:</td>
<td>Work Telephone</td>
</tr>
<tr>
<td></td>
<td>Website:</td>
<td>( ) -</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Business Size</th>
<th>Business Type</th>
<th>Organization Type</th>
<th>State of Incorporation</th>
</tr>
</thead>
<tbody>
<tr>
<td>___ Disadvantaged Small</td>
<td>___ Manufacturer/Producer</td>
<td>___ Individual</td>
<td>___ Corporation</td>
</tr>
<tr>
<td>___ Woman-Owned Small</td>
<td>___ Construction Concern</td>
<td>___ Partnership</td>
<td>___ Limited Liability Co.</td>
</tr>
<tr>
<td>___ Disadvantaged SBA 8 (a) Small</td>
<td>___ Service Establishment</td>
<td>___ Non-profit Org</td>
<td>___ Sub S Corporation</td>
</tr>
<tr>
<td>___ Minority- Owned Small</td>
<td>___ Retail Dealer (Type I)</td>
<td>___ Retail Dealer (Type II)</td>
<td>___ Not in Business</td>
</tr>
<tr>
<td>___ Other Small</td>
<td>___ Wholesale Dealer (Type I)</td>
<td>___ Wholesale Dealer (Type II)</td>
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<tr>
<td>___ Large</td>
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</table>

<table>
<thead>
<tr>
<th>Mailing Address</th>
<th>City</th>
<th>State</th>
<th>ZIP Code</th>
<th>County</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>International Trade?</th>
<th>Disabled?</th>
<th>State Senate District #</th>
<th>State Rep. #</th>
<th>Ward (CHI)</th>
<th>US Congressional District #</th>
<th>Primary Counselor</th>
<th>Business Established</th>
<th>Number of Employees</th>
<th>Full Time</th>
<th>Part Time</th>
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<thead>
<tr>
<th>Ethnic Group</th>
<th>Hispanic?</th>
<th>Military Status</th>
<th>SBA Client Type</th>
<th>Referral From:</th>
<th>Referral To:</th>
</tr>
</thead>
<tbody>
<tr>
<td>___ Native American/Alaskan Native</td>
<td>___ Yes</td>
<td>___ None</td>
<td>___ None</td>
<td>Accountant</td>
<td>___ Accountant</td>
</tr>
<tr>
<td>___ Asian</td>
<td>___ No</td>
<td></td>
<td></td>
<td>Advertising/Marketing</td>
<td>___ Legal Counselor</td>
</tr>
<tr>
<td>___ Native Hawaiian/Pacific Islander</td>
<td></td>
<td></td>
<td></td>
<td>Bank</td>
<td>___ Bank</td>
</tr>
<tr>
<td>___ Black/African American</td>
<td></td>
<td></td>
<td></td>
<td>Chamber of Commerce</td>
<td>___ Business License Office</td>
</tr>
<tr>
<td>___ White</td>
<td></td>
<td></td>
<td></td>
<td>Client/Word-of-Mouth</td>
<td>___ PTAC Program</td>
</tr>
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<td></td>
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<td></td>
<td>College/University</td>
<td>___ Chamber of Commerce</td>
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<td></td>
<td>Government Agency</td>
<td>___ Government Agency</td>
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<td></td>
<td>Faculty</td>
<td>___ Counseling</td>
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<td>___ Local EDT</td>
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<table>
<thead>
<tr>
<th>Business Status</th>
<th>Referral From:</th>
<th>Referral To:</th>
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</thead>
<tbody>
<tr>
<td>___ Pre-venture</td>
<td>Accountant</td>
<td>___ Accountant</td>
</tr>
<tr>
<td>___ In Business</td>
<td>Advertising/Marketing</td>
<td>___ Legal Counselor</td>
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<tr>
<td></td>
<td>Bank</td>
<td>___ Bank</td>
</tr>
<tr>
<td></td>
<td>Chamber of Commerce</td>
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<td></td>
<td>Client/Word-of-Mouth</td>
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<td>Legal Counselor</td>
<td>___ Training Seminar</td>
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<td>Local EDT</td>
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<td></td>
<td></td>
<td>___ Local EDT</td>
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<table>
<thead>
<tr>
<th>Miscellaneous</th>
<th>Empowerment Zone</th>
<th>IL Product Logo Use</th>
<th>IL Dept Human Services #</th>
</tr>
</thead>
<tbody>
<tr>
<td>___ Home-Based Business?</td>
<td>___ Yes</td>
<td>___ Yes</td>
<td>___ Yes</td>
</tr>
<tr>
<td>___ Received Aid to Families with Dependent Children (AFDC)</td>
<td>___ No</td>
<td>___ No</td>
<td>___ No</td>
</tr>
<tr>
<td>___ Received Temporary Assistance for Needy Families (TANF)?</td>
<td>___ Yes</td>
<td>___ Yes</td>
<td>___ Yes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Standard Industrial Classifications (SICs)</th>
<th>Product Service Codes (PSCs)</th>
<th>NAICSs</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Product/Service Description</th>
<th>Have you visited another center?</th>
<th>If so, which one?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>___ Yes</td>
<td>___ No</td>
</tr>
</tbody>
</table>
To comply with legislation passed by the Congress and Executive Orders issued by the President, Federal executive agencies, including the Small Business Administration (SBA), must notify you of certain information. You can find the regulations and policies implementing these laws and Executive Orders in Title 13, Code of Federal Regulations (CFR), Chapter 1, or our Standard Operating Procedures (SOPs). In order to provide the required notices, the following is a brief summary of the various laws and Executive Orders that affect SBA’s entrepreneurial development programs.

**Paperwork Reduction Act (44 U.S.C.§ 3501)**

SBA is collecting the information on this form in order to facilitate business assistance services to its clients and for agency analyses related to the operation and management of the entrepreneurial development programs. Periodically, the SBA may use the information collected on this form to produce summary reports for program and management analysis, as required by law. SBA also intends to use the individual client data to select participants for follow-up surveys designed to evaluate SBA assistance services.

PLEASE NOTE: The estimated burden for completing this information is 3 minutes. Your responses to the requested information are voluntary under these programs. You are not required to respond to the questions on this form if it does not display a currently valid OMB control number. If you have questions or comments concerning any aspect of this information, please contact the U. S. Small Business Administration Information Branch, Washington, DC 20416 and/or Desk Officer for the Small Business Administration, Office of Management and Budget, Office of Information Regulatory Affairs, 725 17th St., NW, Washington, DC 20503.

**Privacy Act (5 U.S.C. § 552)**

Any Person can request to see or get copies of any personal information that SBA has in the requestor’s file, when that file is retrieved by individual identifiers, such as name or social security number. Requests for information about another party may be denied unless SBA has the written permission of the individual to release the information to the requestor or unless the information is subject to disclosure under the Freedom of Information Act.

Note: Any person concerned with the collection, use and disclosure of information, under the Privacy Act may contact the Chief, Freedom of Information/Privacy Act office, U. S. Small Business Administration, Suite 5900, 409 3rd St., SW, Washington, DC 20416 for information about the Agency’s procedures relating to the Privacy Act and FOIA.

**Freedom of Information Act (5 U. S. C. § 552)**

This law provides, with some exceptions, that SBA must supply information in its files and records to a person requesting it. This generally includes statistical data on SBA’s business assistance programs, which are in the aggregate. SBA does not routinely make available a client’s proprietary data (without first doing pre-notification, as required by Executive Order 12600), or information that would cause competitive harm or constitute a clearly unwarranted invasion of personal privacy.

Address a request under this Act to the appropriate SBA office and identify it as a Freedom of information Act Request. For information about the Freedom of Information Act, contact Chief, Freedom of Information/Privacy Act office, U. S. Small Business Administration, 409 3rd St., SW, Suite 5900, Washington, DC 20416.

**Agreement:**

“I request business management counseling from a Small Business Administration resource partner, the Small Business Development center. I agree to cooperate should I be selected to participate in surveys designed to evaluate SBA assistance services. I understand that any information received by an SBA resource partner counselor will be held in strict confidence by the counselor to the extent allowable by law.

I further understand that SBA resource partner counselors have agreed not to: (1) recommend goods or services from sources in which the individual counselor has an interest; and (2) accept fees or commissions developing from any SBA resource partner counselors. In consideration of the provision of management and/or technical assistance by a resource partner counselor, I agree to waive all claims arising out of this assistance, against SBA personnel, the resource partner from whom I sought assistance, its host organizations, and the counselor(s) arising from this assistance.”

<table>
<thead>
<tr>
<th>Client Signature*</th>
<th>Date</th>
</tr>
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</table>
COUNSELOR/SPECIALIST
CONFLICT OF INTEREST STATEMENT

As a condition of my participation in the Network at ___________________________________,
(Host Organization)

I agree that during the course of providing training or counseling (consulting) services to an active center client I will abide by the following:

1. I will not recommend to center clients the purchase of goods or services from sources in which I personally would receive any direct compensation. (Nor will I invest in the business of any Client.)

2. I will maintain all client proprietary information on a confidential basis. All center information is confidential. I will not disclose any information about any client to any non-center personnel without the client’s permission, nor will I use specific confidential information obtained from one client to assist any other client.

3. Upon completion of my service with the center, I shall not be precluded from performing, for compensation, consulting or contract services as requested by any center client.

____________________________________
Name (type or print)

____________________________________  ______________________
Signature       Date
SERVICE PROVIDER/CONSULTANT
CONFLICT OF INTEREST STATEMENT

This Illinois Small Business Development Center Network Service Provider/Consultant Conflict of Interest Statement (hereinafter referred to as the “Statement”) is entered into this _______ day of ___________________, by and between the ______________________________________ (hereinafter referred to as “Center”) and __________________________________________ (hereinafter referred to as the “Service Provider”).

1. Under no circumstances may a Service Provider solicit work from a client for pay or any other benefit. If the circumstances seem to warrant referring the client to an outside consultant with a particular Service Provider’s expertise, the Service Provider should contact the center director immediately. The center director can then contact the client for verification that a referral should be made. If the center director affirms that the client needs a referral and the client would like to use that Service Provider as a paid counselor, the Service Provider can then negotiate with the client for work.

2. If a Service Provider is approached by a client to work for pay, the Service Provider should contact the center director immediately. As outlined above, the client will be contacted and the appropriate action will be recommended.

3. All client information is confidential. Service Providers may not disclose any information about any client to any non-ISBDCN personnel without the client’s permission, nor may they use specific confidential information obtained from one client to assist any other client.

4. A Service Provider may not invest in the business of any client.

____________________________________
Name (type or print)

_____________________________________  ______________________
Signature       Date
QUARTERLY ACTIVITY NARRATIVE REPORT

The following categories describe the various center functions that should be included in the quarterly activity narrative report.

100 ADVOCACY
Efforts to represent small business interests within the center's territory, to improve the climate for small business and to contribute to the vitality of the small business sector. Advocacy may include such activities as: public speeches, testimonies before state and/or Federal legislatures, small business week activities, number of general phone inquiries, etc.

200 CAPITAL FORMATION
Efforts to develop or assist in developing capital for small business, e.g., loans, microloans, grants, etc. This may include developing close linkages with specialized SBIC’s, venture capitalist, Certified Development Company (CDC), and state and local finance programs.

300 INNOVATION AND TECHNOLOGY TRANSFER
Activities to identify innovation and technology developed by the Federal Government and/or academic organizations having commercial or practical potential and alerting industry and state and local governments to its availability. Also include efforts toward transferring expertise and equipment available from the Federal Government to the private sector. Activities to transfer innovation and technology from business to business, SBIR activities, etc. should also be included.

Activities with the National Institute of Standards and Technology (NIST), and with the Environmental Protection Agency (EPA) for multi-media pollution prevention, Clean Air Act, and other environmental assistance activities should be thoroughly described.

400 INTERNATIONAL TRADE
Activities to promote increased export by small businesses. Activities may include providing support to Export Assistance Centers (USEACs), evaluating small business firms' capabilities, problems and opportunities in exporting, including assisting with client's export related financing needs, providing counseling, training and outreach assistance; participation with public and private sector organizations involved in export development; data base development, match services and market research; participation with World Trade Week, etc.

500 MINORITY SMALL BUSINESS DEVELOPMENT
Activities which help minorities participate in the free enterprise system. Activities may include participation in the Enterprise Zone Initiative’s One-Stop-Capital-Shops (OSCS), working on Hispanic-American initiatives, assisting 8(a) clients, linking minority clients with other assistance opportunities, conferences, etc.
600 RESOURCE DEVELOPMENT
Activities which promote and/or develop other resource partners to assist the SBDC in its mission. Activities may include recruiting, developing and overseeing private and public resource organizations/individuals to provide business development counseling and training and to perform various outreach services.

700 PROCUREMENT
Activities which foster opportunities for increasing small business' share of procurement dollars spent by the private sector, government units and prime contractors. Activities may include conferences, computer match services, assistance to Certificate of Competency businesses, prime contractor outreach, etc.

800 SPECIAL FOCUS GROUPS
Activities targeted toward giving special consideration to selected groups of individuals. This may include activities to assist veterans, Native Americans, train young entrepreneurs, associations, industry groups and other groups identified by SBA and/or the center. (Report minority activity under Minority Small Business Development and Women's activity under Women Owned Businesses).

900 ECONOMIC DEVELOPMENT
General activities (not specific to an individual client) that do not fit in other categories and that are aimed at supporting/strengthening the economic environment in the center's territory. Areas reported on may include Agri-Business, Rural Development, Community Development, Convention/Tourism, Incubators, etc.

1000 RESEARCH
Research efforts aimed toward assisting small business and economic development. Such research may include Data Base Development, Needs Analysis, etc.

1100 OTHER ACTIVITY
Activities which do not fit in the categories above. The activities may include dissemination of basic business information as well as any specific information requested by the SBA Program Officer and mutually agreed upon with the SBDC State Director which does not appear in the above categories.

1200 SUCCESS STORIES
Provide at least three examples of assistance provided in which tangible results occurred. Include a description of the business, the problems, the assistance provided, resources used and actual or expected results. A copy of the Success Story Format follows this section.

1300 TRAVEL
Provide a description of any unplanned out-of-state travel not approved as part of the cooperative agreement.
1400 PROBLEMS
Provide a description of any and all problems that have significant impact on the program or program objectives.

1500 FINANCIAL REPORTS
N/A - Financial reports are submitted under separate cover.

1600 WOMEN-OWNED BUSINESSES
Describe activities targeted to women-owned small businesses such as the Women's Network for Entrepreneurial Training (WNET) program, the Pre-qualification Program, seminars or specialized approaches.

1700 ECONOMIC IMPACT
Provide the economic impact generated from the assistance you have given your clients, using the following format:

Jobs: Created ____________
      Retained ____________

Sales: $ ____________

Taxes: State $ ____________
       Federal $ ____________

Loans SBA $ ____________
        Non-SBA $ ____________

Non-debt financing $ ____________

1800 VETERANS, SERVICE CONNECTED-DISABLED VETERAN-OWNED BUSINESSES AND RESERVISTS ON ACTIVE DUTY
Describe activities targeted toward veteran and service connected-disabled veteran owned businesses, as well as Reservists and National Guard members called to active duty, such as: Veteran Entrepreneurial Training Programs, summits for veteran business owners, DELTA program, base closing and RIF counseling.
## ECONOMIC IMPACT REPORT

<table>
<thead>
<tr>
<th>Center ID#</th>
<th>Center Name</th>
<th>Date</th>
<th>Company</th>
<th>Company I.D.</th>
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</thead>
</table>

<table>
<thead>
<tr>
<th>Primary SIC Code</th>
<th>County</th>
<th>Type of Business:</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td>[ ] Mfg [ ] Svc [ ] Ret [ ] Whole [ ] Const [ ] Other</td>
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<table>
<thead>
<tr>
<th>Business Ownership:</th>
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</thead>
<tbody>
<tr>
<td>[ ] Male [ ] Female [ ] M/F</td>
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<tr>
<th>Legal Structure:</th>
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<tbody>
<tr>
<td>[ ] Sole Proprietorship [ ] Partnership [ ] “S” Corp. [ ] Corporation [ ] Ltd. Liab. Corporation</td>
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<tr>
<th>Economic Result:</th>
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<tbody>
<tr>
<td>[ ] Business Start-up [ ] Business Expansion [ ] Business Sale [ ] Business Acquisition</td>
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<tr>
<th>Equity Financing Used:</th>
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<tr>
<th>Government Contracts Received:</th>
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<tbody>
<tr>
<td># $</td>
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<tr>
<th>Export Contracts Received:</th>
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<tbody>
<tr>
<td># $</td>
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<tr>
<th>Private Contracts Received:</th>
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<tr>
<td># $</td>
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<tr>
<th>Sales Increase:</th>
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<td># $</td>
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<thead>
<tr>
<th>State Tax Increase:</th>
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<td># $</td>
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<thead>
<tr>
<th>Federal Tax Increase:</th>
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<tbody>
<tr>
<td># $</td>
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<table>
<thead>
<tr>
<th>Job Results:</th>
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</thead>
<tbody>
<tr>
<td>Created _______ Retained _______</td>
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<thead>
<tr>
<th>ITP Used: [ ] Yes JTPA Used: [ ] Yes</th>
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<table>
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<tr>
<th>Willing to be used as success story? [ ] Yes [ ] No</th>
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<table>
<thead>
<tr>
<th>Loan Type:</th>
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<tbody>
<tr>
<td>(Choose one per loan amount from below)</td>
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<table>
<thead>
<tr>
<th>Financing Received:</th>
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<tbody>
<tr>
<td>Lending Institution:</td>
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<tr>
<td>amount from below)</td>
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<table>
<thead>
<tr>
<th>DCEO Financing Used:</th>
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<tbody>
<tr>
<td>A. Small Business Loan (Direct)</td>
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<table>
<thead>
<tr>
<th>SBA Financing Used:</th>
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<tbody>
<tr>
<td>G. 502 Loan</td>
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<table>
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<tr>
<th>Other:</th>
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<tbody>
<tr>
<td>R. Revolving Loan Funds S. Conventional Loan T. All Other</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Other:</th>
</tr>
</thead>
<tbody>
<tr>
<td>R. Revolving Loan Funds S. Conventional Loan T. All Other</td>
</tr>
</tbody>
</table>
Cooperative Agreements will include several references to “OMB Circulars” which are applicable to the centers. The most current versions of these Office of Management and Budget (OMB) grants management circulars can be easily accessed at this frequently updated site: [www.whitehouse.gov/omb/circulars/index.html](http://www.whitehouse.gov/omb/circulars/index.html). We encourage each center director and fiscal staff to become familiar with the applicable OMB circulars and use them as a reference. The type of host institution determines which circulars apply and the following listing, taken from the web site listed above, outlines which circulars apply to specific types of organizations:

**Cost Principles**

A-21, Educational Institutions  
A-87, State and Local Governments  
A-122, Non-Profit Organizations

**Administrative Requirements**

A-102, State and Local Governments  
A-110, Institutions of Higher Education, Hospitals, and Other Non-Profit Organizations

**Audit Requirements**

A-133, States, Local Governments, and Non-Profit Organizations

Specific questions on these circulars or other financial requirements should be directed to your respective Network Coordinators.