

PLEASE NOTE: This is a sample application to be used as solely a reference tool to help applicants prepare their answers prior to submitting them on the official online application. **All applications must be submitted electronically by visiting www.mass.gov/export/step and clicking on the “Apply Now” button.**



STEP Grant Application 2018

Sample only – Application must be submitted online at www.mass.gov/export/step.

Thank you for applying to the Massachusetts State Trade Expansion Program ("STEP"). We advise that you compile all necessary information before you begin to complete the application form. The following is information that you will need in order to complete the application:

- Basic company contact details and key facts (e.g., Federal Tax Identification Number, employment data, revenue data, product/service information, etc.)
- Background information on the company's existing export activity (e.g., export sales information, key export markets, channels, international marketing activities, budget, etc.)
- Anticipated export goals and strategies over next three years (international marketing plan)
- Proposed export development activities under the STEP program, including sales projections, job growth projections and detailed budget information.

With this information compiled in advance, we anticipate that it will take less than 60 minutes to complete this application. Please note that answers to all questions are required.

You may save the application and come back to complete it at a later date. You will have 72 hours to return to the application to complete it. Please note that this function is browser-based, so you must start and finish the application on the same computer. Please enable cookies on your computer as a cookie will be stored on your computer to continue the application where you left off. We suggest that you complete the application on a computer rather than a mobile device.

The Massachusetts Export Center offers a free 1.5 hour webinar about the STEP application process. The webinar discusses the parameters of the Massachusetts STEP program and walks participants through the STEP grant application process. Visit www.mass.gov/export/step for details.

Please note: There is no advantage for early applicants. We encourage you to participate in the webinar and compile a thorough, thoughtful and strategic application for the greatest chance of approval.

Funded in part through a grant with the U.S. Small Business Administration.

The deadline for application submission is Friday, January 25, 2019 at 5:00 p.m. EST.

SBA ELIGIBILITY REQUIREMENTS & ACKNOWLEDGMENT OF RISK

Company Name: _____

Federal Tax ID Number: _____

Per the U.S. Small Business Administration (SBA), you MUST meet the following business size requirement in order to be eligible for the STEP program. In addition, you must verify your understanding of the other statements.

Does the business meet the definition of an eligible small business concern as defined by Section 503 of the Trade Facilitation and Trade Enforcement Act of 2015? [Click here](#) to view the official definition. Verification is the burden of the applicant.

Yes No

I certify that I am an export-ready U.S. company seeking to export goods or services of that are 51% or more of U.S. content.

Yes No

I understand that grant awards are made on a competitive basis and that there is no guarantee that my application will be funded.

Yes No

I understand that applications for vague or ineligible activities will automatically be disqualified. [Click here](#) details on eligible and ineligible activities.

Yes No

COMPANY INFORMATION

Contact Name: _____

Title: _____

Company Name: _____

Mailing Address: _____

City: _____

State: _____

Zip: _____

Telephone: _____

Cell Phone: _____

Fax: _____

Email: _____

Website: _____

Owner/President Name: _____

Owner/President Email: _____

Business Industry:

- Automotive
- Biomedical
- Building/Construction Products
- Consumer Products, Misc.
- Consulting
- Defense / Military / Aerospace
- Educational Products & Services
- Electronics
- Engineering
- Environmental/Energy
- Export/Import; Trading
- Export Services, Misc.
- Financial Services
- Food / Beverage / Agriculture
- Furniture / Wood Products
- Industrial Machinery
- Information Technology
- Instrumentation (non-medical)
- Marine / Ocean Technology
- Metal Industries
- Non-Profit / Government
- Paper
- Photonics / Optics
- Plastics
- Printing / Publishing
- Robotics
- Security / Safety
- Sporting Goods
- Textiles / Apparel / Footwear
- Other / Unspecified

Product or Service Description:

Year Established: _____

Number of Employees in MA: _____

Number of Employees Worldwide: _____

Annual Revenue: _____

Year Started Exporting: _____

EXPORT ACTIVITIES, READINESS & COMMITMENT

| | Export Sales | Exports as a % of Total Revenue |
|-------------------|--------------|---------------------------------|
| 2016: | | |
| 2017: | | |
| 2018 (estimated): | | |

If your business is currently exporting, list your top 10 export markets, ranked according to sales.

What channels or direct sales relationships has your company established to access export markets? Be specific.

What is the current annual export development budget of the business?

Does the business have staffing resources committed to developing international markets?

| | Yes | No |
|----------------------|-----------------------|-----------------------|
| Dedicated Personnel: | <input type="radio"/> | <input type="radio"/> |
| Dedicated Time: | <input type="radio"/> | <input type="radio"/> |

If yes to question above, please list name(s), titles(s) & estimated hours per week:

Please list any relevant international trade experience among key employees:

Please list any specialized training provided to employees over the past year related to exporting. Include date(s), title of training program(s), and number of training hours. At least 8 hours of dedicated export training is recommended.

Please describe your company's procedures for screening against transactions involving restricted parties and/or destinations:

Does your company develop or export items found on:

Commerce Control List

U.S. Munitions List

Both

Neither

Don't Know

Has your business received STEP grant funding in the past?

Yes No

If yes, list the year(s) STEP grants were received.

If yes, list estimated export sales resulting from STEP-supported activities.

2017: _____

2018 (estimated): _____

2019 (projected): _____

Please describe any additional outcomes resulting from STEP-supported activities.

Has your business received any other government-supported export assistance during the past three years?

Massachusetts Export Center

U.S. Department of Commerce

U.S. Small Business Administration

Other: _____

None

If yes, list estimated export sales resulting from assistance.

2017: _____

2018 (estimated): _____

2019 (projected): _____

Please describe any additional outcomes resulting from assistance.

INTERNATIONAL MARKETING PLAN & PROPOSAL

What are your company's export goals and growth strategies for the next three years? Include target international markets, export market entry channels, export business development strategies and other relevant information:

Has your company conducted market research in support of its international business plan, and if so, what sources have you used to attain market intelligence?

Yes No

Sources:

Please select activities for which you would like apply for STEP funding. NOTE: Applications for vague or ineligible activities will be automatically disqualified. [Click here](#) for details on eligible and ineligible activities.

Exhibiting at foreign trade shows or conferences

U.S. Department of Commerce Gold Key or other in-country service

Foreign trade mission with a business matchmaking element

Compliance testing for entry into an export market (\$3,000 cap)

Design of export market-specific marketing media (\$3,000 cap)

Localization of websites for target export markets (\$3,000 cap)

Please provide details on the above proposed activities, including information on how these activities will integrate into your company’s existing business operations and provide long-term benefit to your export development program.

Export sales projections resulting from STEP-funded activities:

2019: _____

2020: _____

2021: _____

Job creation projections resulting from STEP-funded activities:

2019: _____

2020: _____

2021: _____

PROPOSED BUDGET

Please note that STEP grants will be capped at \$12,000 per business to reimburse for costs associated with qualified project activities undertaken during the grant period of October 1, 2018 - September 30, 2019.

Each grant recipient will be required to provide a match to cover a portion of the total approved cost. New-to-export firms have a 25% match requirement and all other firms have a 40% match requirement.

Do you meet the definition of "new-to-export" for the purposes of this grant (no export experience, "accidental" or "occasional" export experience(s), or no export experience in over 18 months)?

Yes No

STEP Grant Totals

Total STEP Reimbursement Amount Requested: _____

Total Company Match Amount: _____

Please describe any activities and costs that will constitute the match:

STEP Activity Details

Note: The cumulative amount for all activities must not exceed \$12,000.

Activity 1

Title/Description: _____

Dates: _____

Requested STEP Reimbursement Amount: _____

Activity 2

Title/Description: _____

Dates: _____

Requested STEP Reimbursement Amount: _____

Activity 3

Title/Description: _____

Dates: _____

Requested STEP Reimbursement Amount: _____

Activity 4

Title/Description: _____

Dates: _____

Requested STEP Reimbursement Amount: _____

Activity 5

Title/Description: _____

Dates: _____

Requested STEP Reimbursement Amount: _____

CERTIFICATIONS

The applicant certifies that:

- To the best of my knowledge, the data in this application is correct and supporting documentation will be available to MOITI and the Massachusetts Export Center for review upon request.
- I understand that submitting false or misleading information may result in being found ineligible for reimbursement and permanent disqualification from any future participation in this program.
- My company meets the SBA eligibility criteria for the STEP program, including compliance with SBA size standards.
- STEP funds will only be used for those activities included in the project budget and approved pursuant to the written application. Modifications to the proposed budget and activities require prior approval.
- I understand that MOITI and the Massachusetts Export Center may conduct confidential surveys following the completion of the activity, and I will answer those surveys in a timely manner.

- I understand that I will be accountable for submitting paperwork, documenting expenses and meeting deadlines under the STEP program and that failure to do so may impact my eligibility for reimbursement under the program.
- I understand that MOITI and the Massachusetts Export Center will not authorize release of financial and other company-confidential details provided on this application, except when required under applicable federal and state statutes, rules and regulations. It is understood that release of such information will be made available for the purposes of financial audits. It is also understood that my company name and city/town may be released for STEP program publicity purposes.
- I understand that grant awards are made on a competitive basis and that there is no guarantee that my application will be funded.

I Agree I do not agree

VOLUNTARY CONSENT TO RELEASE INFORMATION

The U.S. Small Business Administration (SBA) would like to give eligible small business concerns the opportunity to expand your knowledge and resources of other programs that are offered by the agency. Please indicate if you would like for your company's name and contact information to be shared with other programs offered by SBA. Your choice to participate or not, will not change the status of your participation with STEP. SBA's aim is strictly to share information about other opportunities with you.

Yes No

Information provided below serves as an electronic signature. By contacting our office at 617-973-6610 and requesting at least two weeks in advance, every attempt will be made to reasonably accommodate persons with disabilities and those who need translation services.

Applicant's Name: _____

Title: _____

Company Name: _____

Date: _____
