

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.



2023 Massachusetts STEP Program Application

***Applications must be completed and submitted online at
www.mass.gov/export/step***

Prior to completing your STEP application, please complete or update your [Request for Counseling](#) record with the Massachusetts Export Center / Massachusetts Small Business Development Center Network. We cannot consider STEP applications submitted by companies without a Request for Counseling already on file.

IMPORTANT NOTE: The Massachusetts Office of International Trade and Investment and the Massachusetts Export Center are no longer able to consider STEP applications for companies that have received three or more STEP grants in the past.

Thank you for applying to the Massachusetts State Trade Expansion Program ("STEP"). We suggest that you complete the application on a computer rather than a mobile device. 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.

Please save your answers as a separate Word document before entering the data into the online application. There is no functionality to save partial applications. With this information compiled in advance, we anticipate that it will take less than 45 minutes to complete this application. Please note that answers to all questions are required.

The Massachusetts Export Center offered a free 1.5 hour webinar about the STEP application process on Wednesday, September 20, 2023 at 12:00 p.m. EDT. The webinar discusses the parameters of the Massachusetts STEP program and walks participants through the STEP grant application process. Please note that there are important changes to the scope of the program this year. For details on the webinar and to register, visit our website at www.mass.gov/export and click on the training tab.

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.

The deadline for application submission is Saturday, September 30, 2023 at 5:00 p.m. EDT.



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

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 AND the U.S. content requirements in order to be eligible for the STEP program. In addition, you must verify your understanding of the other statements.

I certify that the business meets the definition of an eligible small business concern as defined by Section 503 of the Trade Facilitation and Trade Enforcement Act of 2015. [Click hereto 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. Small businesses engaged in STEP-supported export activities must be an export-ready U.S. company seeking to export goods or services of U.S. origin or have at least 51% U.S. content. STEP applicants should reference existing U.S. government regulatory guidance for determination of U.S. content. [Click here for STEP U.S. Content Definition/Formula](#).

- 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 for details on eligible and ineligible activities.](#)

- Yes
 - No
-

I understand that federal funding for the 2023-2024 Massachusetts STEP program has not yet been appropriated. I am submitting my application with the full understanding that there is a risk that the program will not be funded.

- Yes
 - No
-

I understand that the Massachusetts Export Center and MOITI reserve the right to reduce grant amounts awarded, depending upon funding level appropriated for the STEP program.

- 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: _____

Check the box for any applicable designation(s) that represents your business ownership status (at least 51% share):

- Minority-owned
- Women-owned
- Veteran-owned
- Service-Connected Disabled Veteran-owned
- Rural
- Not applicable

Product or Service Description:

Year Established: _____

Number of Employees in MA: _____

Number of Employees Worldwide: _____

Annual Revenue: _____

Year Started Exporting: _____

EXPORT ACTIVITIES, READINESS & COMMITMENT

	<i>Export Sales</i>	<i>Exports as a % of Total Revenue</i>
2021		
2022		
2023 (estimated):		

If your business is currently exporting, list your most important 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.

Does your company have a formal, written export compliance program?

- Yes
- No
- Don't know

Please check any applicable export controls for your products, technology or services:

- ITAR Controlled
- EAR Controlled
- EAR99
- Don't know

Does your company have a procedure for screening against transactions involving restricted parties, restricted end uses, and/or restricted destinations?

- Yes
- No
- Don't know

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. [Click here for details on eligible and ineligible activities.](#)

Note: Applications for vague or ineligible activities will be automatically disqualified. MOITI, the Massachusetts Export Center and the SBA do not endorse, recommend or partner with any 3rd party vendor for delivery of services associated with STEP-reimbursable activities.

- Exhibiting at foreign trade shows or conferences and directly related costs
 - U.S. Department of Commerce international business development or matchmaking services
 - Compliance testing for entry into an export market
 - Design of export market-specific marketing media
 - Localization of websites for target export markets
 - Export research tool subscription
 - International intellectual property protection filing fees with the USPTO
 - Export credit insurance policy fees through EXIM Bank
-

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:

2024: _____
2025: _____
2026: _____



Job creation projections resulting from STEP-funded activities:

2024: _____
2025: _____
2026: _____



PROPOSED BUDGET

Please note that STEP applications must be made for a minimum of \$6,000 and grants will be capped at \$15,000 per business to reimburse for costs associated with qualified project activities undertaken during the grant period of October 1, 2023 - March 31, 2025. The Massachusetts Export Center and MOITI reserve the right to reduce grant amounts, depending upon funding level appropriated for the STEP program.

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 minimum of 10% match requirement and all other firms have a minimum of 20% match requirement. Applicants are encouraged to list the full amount of anticipated match, even if it exceeds minimum requirements.

Do you meet the definition of "new-to-export" for the purposes of this grant (no export experience at all, only "accidental" or "novice" export experience, or no export experience within 24 month)?

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 be at least \$6,000 and not exceed \$15,000.

Activity 1

Title/Location/Description: _____

Dates: _____

Requested STEP Reimbursement Amount: _____

Activity 2

Title/Location/Description: _____

Dates: _____

Requested STEP Reimbursement Amount: _____

Activity 3

Title/Location/Description: _____

Dates: _____

Requested STEP Reimbursement Amount: _____

Activity 4

Title/Location/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 and U.S. content requirements.
- 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 the Massachusetts STEP program is funded in part by a grant from the U.S. Small Business Administration (SBA) and that my contact details may be shared with the SBA for promotion of other SBA programs and services.
- I understand that grant awards are made on a competitive basis and that there is no guarantee that my application will be funded. I also understand that federal funding for the 2023 - 2024 Massachusetts STEP program has not yet been appropriated. I am submitting my application with the full understanding that there is a risk that the program will not 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

Electronic Signature

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.

I hereby certify that I am an authorized representative of the company indicated and that all information provided in this document, as well as any accompanying documents, is true and complete to the best of my knowledge.

Applicant's Name: _____

Title: _____

Company Name: _____

Date: _____