



Ohio SBDC Monthly Report

General Instructions: This report is intended to keep the lead office generally aware of center activities and to help identify best practices that can be deployed across the SBDC network. Please keep answers informative and brief.

Due: Third Friday of Each Month

Submit to: sbdcreports@development.ohio.gov

Due Date: 01/18/2019

Center Name : 17023 Ohio SBDC at Terra State Community College

1. Red Flags

- None at this time.

2. Center Updates, Activities, Programmatic Achievements

- 60 Day Follow Up for New SBDC Clients – Request for Reportable Impact Data
- Monthly Follow Up for Existing Clients – Request for Reportable Impact Data
- On-Site Client Visits – Request for Reportable Impact Data
- Weekly Business Basics Seminars – Prospective Clients Intake Process

3. Notable stakeholder, collaborative partner engagement

- January 7th – Kern Center Meeting, Terra State
- January 7th – Sandusky County Chamber of Commerce Meeting
- January 10th – SBDC Statewide Network Update

4. Based on Current Performance, does the center expect to meet or exceed annual goals?

- Expecting to meet or exceed annual goals.



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Submit to: sbdcreports@development.ohio.gov

Date: 12/21/2018 - 1/18/2019

Center Name : 17047 & 17048 SBDC and EAN at The Entrepreneurs Center

Red Flags –

Center Updates, Activities, Programmatic Achievements -

SBDC

- 0 Workshops
- Marketed Boots to Business on WPAFB Transition Assistance Class on 1/8 & 1/15
- M. Lankford began working out of Russ Research Center on Tuesdays and Thursdays.

EAN

- Trade Mission: KM continues to recruit for the trade mission. Fecon, Stronghold Coatings and NicheVision have signed up to participate in the trade mission. One additional Columbus firm is under consideration too. Working with the companies to begin their travel plans and other logistics.
- SW Ohio Region: Continue to support companies in the SW Ohio areas through the Cincinnati, Clermont County, Warren County, and Hamilton SBDCs.

Notable stakeholder, collaborative partner engagement

SBDC

- M. Lankford Attended Miamisburg H7 Networking Mtgs 1/4, 1/11, 1/18, , Beaver Creek H7 Networking Mtgs 1/8, 1/15,; Miamisburg Merchants Association (MMA) 1/17; Met with lending agent/insurance resource Tim Walker of Insurance Works 1/4 - resulted in client referral.
- K. Woodbury met with P. Wiggins, Edison Workforce Development, on 1/15 to do event planning. Working on event during Small Business Week and potentially event on SBDC Day.
- K. Woodbury - program review with host 1/16
- K Woodbury worked with VBOC to coordinate upcoming Boots 2 Business

EAN

- TEC (Host): Working to design a program to be delivered to the TEC/AFRL Transition Accelerator Cohort. This cohort will participate in a 10-week program to expedite the development of small businesses and startups with concepts and prototypes for innovative technologies. It is a SBOR Phase 1 and will provide the Air Force with an improved capability to execute its Intelligence, Surveillance, and Reconnaissance (ISR) mission. We are providing export compliance support to the companies in this cohort.



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Date: January 1-31, 2019

Center Name : 17051 Ohio SBDC at Clermont Chamber

1. Red Flags

List any immediate and urgent challenges facing your center or the small business community.

James Buckner is settling in to the Center Director position. The center will continue retaining Joe Schiesler to fill and support James. Joe will act as an advisor on a as needed bases. Jim will be enrolling in the CBA program in the very near future and attend orientation in Columbus when such is scheduled.

Need to improve on Impact numbers and capital infusion. Gain an understanding of the Center IC program and its capabilities.

2. Center Updates, Activities, Programmatic Achievements

Please provide a brief update about what is exciting at your center. Include unique upcoming events (not standard trainings), awards, projects and efforts to implement strategic priorities. Please place emphasis on impactful best practices that could be replicated elsewhere.

Meet with two centers of influence monthly.

Conducted Steps to Starting a New Business class on January 28, 2019

Continue to work on a training schedule for 2019 calendar year.
Develop a training calendar.

Currently have tentative approval for \$500,000+ in capital infusion.

3. Notable stakeholder, collaborative partner engagement

Please include recent or upcoming meetings with elected officials, funders, economic development organizations, resource partners, business associations, chambers of commerce etc.

Continue to meet with directors of the Brown County, Clermont County and Anderson Twp. Chambers. Presently scheduling training and counseling sessions for members of both mentioned chambers

4. Based on Current Performance, does the center expect to meet or exceed annual goals?

If not please provide a brief action plan with specific benchmarks to address any shortcomings
- include any assistance the lead center can provide.

Here is the January 18 2019 to date year capitulation.

Counseling Hours;

Goal: 700
Actual: 129.50
18.5% of goal

Capital Infusion:

Goal: 6,000,000
Actual: 0
0 %of goal

Training Attendees:

Goal: 200
Actual: 85
42.5% of goal.

New Business Starts

Goal: 15
Actual: 8
53% of goal

Long Term Clients

Goal: 40
Actual:6
15% of Goal

Clients Reporting Impact:

Goal: 30%
Actual: 0
0% of Goal

- HCBC: Talked with Karla Boldry to discuss meeting with one of her companies, Automated Machine Systems, to help with export planning. AMS is one of the companies involved in the economic gardening program through Hamilton County.
- USDOC: Reached out to Debbie Dirr to understand what the furlough allows and disallows them to do. Working on a few joint projects.
- SBDC: Viewed the January Director's webinars.
- Matchmaker Event: Planning on hold due to government shutdown.
- EAN: KM continues to recruit companies for the EIP program, for the trade mission to Colombia and Brazil (as well as the Germany, Vietnam and Thailand) and continues to marketing the IMAGE grant to clients.
- EAN continues to work with our foreign offices on market research reports and foreign partner searches for six companies: Biowish, Roboworld, GMD, Third Wave Water, PUI, Graphel, and Polymet.
- EIP: Conference call with Sara Zieglar and Wendi Howell to cover the number of companies that we reached out to and provide feedback on their responses. Discussed the recruitment plan for the final two weeks of company recruitment.
- EAN Colleagues: Project: List of Export Compliance Resources in Ohio. Requested data from the other EAN colleagues for their contacts in the export compliance area. Performed research to identify a number of compliance resources. Talked with a few Directors and no statewide list exist.
- New Partner – Goering Center at University of Cincinnati: Meet with Carol Butler (President), Steve McLemore (Engagement Director), and David Miller (Director of new Membership Engagement) and Wendi Howell (EIP Manager) to determine how we can work closer and expand our network and footprint in the Cincinnati area. The Goering Center focus primarily on family businesses provide a holistic approach to family business. They have over 350-member business in OH, KY and IN. We discussed how we could support each other's programs. They provided additional contacts in the College of Business that may have more synergy with the SBDC network.
- Global Dayton Task Force: Working with Montgomery County to help with their global objectives. Will have formal meeting at the end of the month.
- Number of Partners: 5 (Goering Center, USDOC, Global Dayton Task Force, HCBC)

Based on Current Performance, does the center expect to meet or exceed annual goals?

SBDC - Hopeful but not overly optimistic about capital formation goals

The OEAN at the TEC does plan to exceed the goals set for the upcoming FY. Behind in entering counseling hours but will devote more time to the process.



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Date: 01/18/2019

Center Name : 53 Hamilton Mill (Butler County SBDC)

1. Red Flags – Still talk of Mill being sold

2. Center Updates, Activities, Programmatic Achievements

01/08: Lunch meeting with Social Media presenter Ms. Hummel
01/09: Hosted Social media work shop
01/10: All Directors call
01/11: Kim met with our Web designer Denise Chaney
01/15: SBDC lunch with Keon Briggs
01/16: Riggs attended Butler Tech Advisory board meeting at P&G
01/22: we attended Mark Lankford's SBDC open house
01/23: Hosted Cyber security workshop at Middletown Chamber
01/25: District 5 Quarterly meeting at Union Institute
01/29: Riggs met with Mary at Middletown Visitors bureau

3. Notable stakeholder, collaborative partner engagement

01/08: Riggs and Kim attended meeting with Sinclair College workforce
01/14: SBDC and Host meeting
01/17: Riggs met with 1st financial bank rep Gina Wallace
01/17: Riggs attended Oxford Chamber Awards banquet where he received Chamber Champion award
01/28: SBDC and Host meeting
01/29: Meeting scheduled for Jim, Diane and Riggs to talk with Miami

Based on Current Performance, does the center expect to meet or exceed annual goals?

If not please provide a brief action plan with specific benchmarks to address any shortcomings - include any assistance the lead center can provide. (yes)



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Date: January 1-31, 2019

Center Name : 17054 Ohio SBDC at WARREN COUNTY

1. Red Flags

List any immediate and urgent challenges facing your center or the small business community.

Not really a Red Flag, just more of a point of information re: our newest advisor- Jill Shuller. Jill joined the staff on Dec. 4 and did some training with 2 seasoned SBDC veterans for 2 weeks. After the holidays, she has progressed to making client contacts on her own, filing session info into our CenterIC database system, and helping administer our January Steps class. Her January 22 Orientation class in Columbus was postponed by the State Director (personal matter). Jill met with the Hamilton County SBDC staff to learn their best practices. Director will continue to offer more prospects and opportunities to Jill to build her metric pipeline. We will have a 90-day checkup at end of February.

2. Center Updates, Activities, Programmatic Achievements

Please provide a brief update about what is exciting at your center. Include unique upcoming events (not standard trainings), awards, projects and efforts to implement strategic priorities. Please place particular emphasis on impactful best practices that could be replicated elsewhere.

WARREN CO SBDC NOMINATED FOR SBA 2019 AWARD FOR EXCELLENCE & INNOVATION !

- *Jan. 10: Starting to create May Biz Expo agenda with speakers.
- *Jan. 16: Staff attended SBA/ SBDC Webinar on new compliance reporting rules and forms. (1 hour)
- *Jan. 16: Mike attended conf call on ASBDC Cyber Security Task Force; now creating nat'l info repository.
- *Jan. 18: Continue to work on WCSBDC website 2.0; goal is now a Jan. 31 launch.
- *Jan. 25: Mike to submit Director evaluation essay to SBDA Board for upcoming review.
- *Jan. 25: Staff attended SBDC Ohio District 5 Qrtly meeting at Hamilton Co Center; Jill did more training there.
- *Jan. 25: Mike attended group conf call for next week's Chamber Alliance Columbus Drive-In.
- *Jan. 29: Mike to attend Warren Co Chamber Alliance Cbus Drive In and lead a team to meet w/ Sec of State.

3. Notable stakeholder, collaborative partner engagement

Please include recent or upcoming meetings with elected officials, funders, economic development organizations, resource partners, business associations, chambers of commerce etc.

- *Jan. 3-Director attended Springboro Chamber monthly breakfast with County Auditor Nolan.
- *Jan. 7-Jill attended Lebanon Chamber New Member Orientation meeting to rep the SBDC.
- *Jan. 8-Staff attended SBDA Board meeting where new officers were elected for 2019.
- *Jan. 9 and 24- Director retention visits with SBDA members.
- *Jan. 14- lunch meeting with new SBDA Board President, Mr. Dwight Packard.
- *Jan. 16- Jill attended Springboro Chamber New Member Orientation to rep the SBDC.
- *Jan. 23- WCCC hosts our first Steps to Start a Business class of 2019.
- *Jan. 28- Director attends Franklin Chamber monthly lunch at WCCC.
- *Jan. 31- Director attends annual breakfast for WCCC Adult Education department.

4. Based on Current Performance, does the center expect to meet or exceed annual goals?

If not please provide a brief action plan with specific benchmarks to address any shortcomings - include any assistance the lead center can provide.

- *We finished **89%** of our 2018 local fiscal budget & **\$98k** Balance Sheet as of Dec. 31, 2018.
- *Alliance membership renewals are starting to roll in. Last year we had 37 paid for \$39,000.

FINAL FFY2018 SBDC RESULTS

- *Client Intake at 68% of annual quota.
- *C&P Session Hours at 75% of annual quota.
- *We are at 22.06% SI clients. Our annual goal is 30% (but we beat the OH overall network #)
- *Capital Impact- Blew the Goal number away !! +278% of Goal thx to a long-term client.
- *Business starts met goal at 20.
- *Long Term Clients Goal is 60. We finished at 56. That's 93%. (last year was 69, or 115%).

Warren County continues to lead the state in average attendance per class/event @ 24.
Ohio network attendance @ 14 per.
That is actual attendance, not pre-registration.
That is better than our 2017 rate of 20 per class. Not bad.

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Date: 1/17/2019 January 2019 Report

Center Name : 17061 Ohio SBDC at Ashland University

1. Red Flags

None

2. Center Updates, Activities, Programmatic Achievements

Please provide a brief update about what is exciting at your center. Include unique upcoming events (not standard trainings), awards, projects and efforts to implement strategic priorities. Please place particular emphasis on impactful best practices that could be replicated elsewhere.

- The December WISE Women networking session was a session on improving your brand and was attended by approximately 80 women. The co-collaborators of this event (SBDC, Richland Area COC, and the Mind Body Align group make individual announcements at each session about our current events, etc, so this is a great marketing opportunity for the SBDC.

3. Notable stakeholder, collaborative partner engagement

Please include recent or upcoming meetings with elected officials, funders, economic development organizations, resource partners, business associations, chambers of commerce etc.

- I recently had a lunch meeting with Ashland Economic Development Director; Kathryn Goon. I discussed the increased capital infusion goal of the program and indicated a need for higher impacting referrals for 2019.
- I had a meeting at the Mount Vernon Chamber this month so I took a few minutes to introduce myself to their new staff at the chamber and to talk with the director; Carol Grubaugh. I also attended a ribbon cutting ceremony afterwards in Mount Vernon.
- The Mount Vernon SCORE rep; Terry reached out to me and I met with him to discuss what we each do for clients. I indicated interest in a collaborative event in Mount Vernon for 2019, and he seemed very interested in this idea as well. (I have found collaborative events are much more well-attended than non-collaborative).

4. Based on Current Performance, does the center expect to meet or exceed annual goals? If not please provide a brief action plan with specific benchmarks to address any shortcomings - include any assistance the lead center can provide.

- I have concerns on meeting the substantially increased capital infusion goal but there are no red flags to report at this time. I am currently having my intern collect contact information for local banks so that I may reach out to them as a resource, in order to obtain more viable and higher-impacting clients.



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Date: January 18, 2019

Center Name : 17074 OSU South Centers Small Business Development Center

1. Red Flags

List any immediate and urgent challenges facing your center or the small business community.

None.

2. Center Updates, Activities, Programmatic Achievements

Please provide a brief update about what is exciting at your center. Include unique upcoming events (not standard trainings), awards, projects and efforts to implement strategic priorities. Please place particular emphasis on impactful best practices that could be replicated elsewhere.

- SBDC Counselors are hosting weekly and monthly livestream broadcasts at the OSU South Centers.
- SBDC Staff will be teaching sessions for the collaboration with the Pike County Community Action's Dream to Reality training that will begin in February.
- SBDC Staff will be teaching sessions in collaboration with the OSU Small Farm Conference that will be held in March.
- A SBDC Counselor spoke at the Ohio Produce Growers and Marketers Association on January 17th.
- The EAN Director is working to secure IMAGE funding for businesses throughout Southern Ohio.
- SBDC Staff will begin attending Chamber of Commerce annual meetings that take place in January – May.
- The SBDC Staff is participating in Strategic Planning Sessions as a part of the OSU South Centers as a whole to better programming and opportunities for small businesses in Southern Ohio. The OSU South Centers will be holding a Liaison Committee meeting with stakeholders on January 31, 2019.

3. Notable stakeholder, collaborative partner engagement

Please include recent or upcoming meetings with elected officials, funders, economic development organizations, resource partners, business associations, chambers of commerce etc.

- *December/January Meetings with Partners*
 - Shawnee State University
 - Grow! Highland County Director
 - Appalachian Partners for Economic Growth Coordinators
 - Community Action Community of Pike County

- Southern Ohio Agricultural and Community Development Foundation Director and Board
- Cincinnati Minority Business Assistance Centers
- Ohio University Innovation Center Director
- Chillicothe and Ross County Chamber of Commerce Staff
- Greater Chillicothe Economic Development Partnership
- Jackson County Economic Development Staff and Commissioners
- Fayette County & the City of Washington Court House Economic Development Directors
- University of Rio Grande Faculty Members
- Highland County Chamber Staff & CVB
- Brown County Chamber of Commerce
- Ohio Forestry Association
- Adams County Economic Development Director
- Lawrence County Economic Development Director
- Scioto County Convention and Visitors Bureau Staff
- Southern Ohio Port Authority Staff

4. Based on Current Performance, does the center expect to meet or exceed annual goals? If not please provide a brief action plan with specific benchmarks to address any shortcomings - include any assistance the lead center can provide.

Expected to meet all goals.



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Date: 01/18/2019

Center Name : 17083 Ohio SBDC at Lorain

1. Red Flags

List any immediate and urgent challenges facing your center or the small business community.

No red flags

2. Center Updates, Activities, Programmatic Achievements

Please provide a brief update about what is exciting at your center. Include unique upcoming events (not standard trainings), awards, projects and efforts to implement strategic priorities. Please place particular emphasis on impactful best practices that could be replicated elsewhere.

In 2019, we are having monthly scheduled onsite counseling days and workshops throughout Lorain County area. These include:

LCCC Wellington Center

Co-Work Oberlin

LCCC Lorain Center

Lorain County Urban League

Norwalk Economic Development Center

This allows us to maximize our reach. Lorain County does not have any significant public transportation so this insures access to our services. We are getting ready to launch ProfitMastery. I have talked with several banks about sponsoring this program. We hosted NEO ActionCoach quarterly GrowthClub. This is a full day planning session. It brings new people to our center as well as a great program for our clients.

3. Notable stakeholder, collaborative partner engagement

Please include recent or upcoming meetings with elected officials, funders, economic development organizations, resource partners, business associations, chambers of commerce etc.

We are working with Lorain County Chamber of Commerce and 5 local Main Street organizations to plan events for National Small Business Week. Our center partnered

with the Lorain County Urban League and Huntington Bank to host a workshop on Financial Management. Lorain County Growth Partners hosted our first meeting of 2019. This group consists of Lorain County Economic Development, LCCC, JVS, Ohio Means Jobs, Lorain County Chamber of Commerce, Lorain County Port Authority and the SBDC. We focus on ways to work together and support each other's efforts. We meet monthly.

4. Based on Current Performance, does the center expect to meet or exceed annual goals?

If not please provide a brief action plan with specific benchmarks to address any shortcomings - include any assistance the lead center can provide.

We expect to reach our goals.



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Submit to: sbdcreports@development.ohio.gov

Date: January 2019

Center Name : 17085 Ohio SBDC at CSU

1. Red Flags –

None

2. Center Updates, Activities, Programmatic Achievements

Ran our Startup Essentials Workshop twice this month.

3. Notable stakeholder, collaborative partner engagement

Ideation Lab is complete and we are offering a workshop weekly in the lab. We are also going to offer some advising hours.

4. Based on Current Performance, does the center expect to meet or exceed annual goals?

If not please provide a brief action plan with specific benchmarks to address any shortcomings - include any assistance the lead center can provide.

yes



Ohio SBDC Monthly Report

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Due: Third Friday of Each Month

Submit to: sbdcreports@development.ohio.gov

Date: 1/18/2019

Center Name : 17087 Ohio SBDC at Urban League of Greater Cleveland

1. Red Flags

List any immediate and urgent challenges facing your center or the small business community.

None

2. Center Updates, Activities, Programmatic Achievements

Please provide a brief update about what is exciting at your center. Include unique upcoming events (not standard trainings), awards, projects and efforts to implement strategic priorities. Please place particular emphasis on impactful best practices that could be replicated elsewhere.

- o Entrepreneurship Workshop with college students at Cuyahoga Community College
- o Planning "wall of fame" event to highlight success stories from SBDC

3. Notable stakeholder, collaborative partner engagement

Please include recent or upcoming meetings with elected officials, funders, economic development organizations, resource partners, business associations, chambers of commerce etc.

- Partner engagement with Operation Hope resource to teach "Good Credit & Money Management workshop"

4. Based on Current Performance, does the center expect to meet or exceed annual goals?

If not please provide a brief action plan with specific benchmarks to address any shortcomings - include any assistance the lead center can provide.

Yes



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Submit to: sbdcreports@development.ohio.gov

Date: 1/17/2019

Center Name : 17088 CSU SBDC EAN (Cleveland-Akron)

1. Red Flags

List any immediate and urgent challenges facing your center or the small business community.

- The dual factors of a strong dollar and the ongoing trade war uncertainty have put a damper on client confidence in exporting to some markets. Many companies have had to either bear the weight of the increased tariff costs or re-think their international business. The prolonged gov't shutdown may have added some pressure on businesses that would have or need to seek out the help of US Fed export services.

2. Center Updates, Activities, Programmatic Achievements

Please provide a brief update about what is exciting at your center. Include unique upcoming events (not standard trainings), awards, projects and efforts to implement strategic priorities. Please place particular emphasis on impactful best practices that could be replicated elsewhere.

- Our Germany trade mission has secured three companies as of this writing, with several more highly interested to fill out our roster of five.
- We have developed our first ever sellout program for Jan 31st where the topic is on the trade uncertainty. Our max capacity is 50 attendees which we hit two weeks before the program happens.

3. Notable stakeholder, collaborative partner engagement

Please include recent or upcoming meetings with elected officials, funders, economic development organizations, resource partners, business associations, chambers of commerce etc.

- Our center has been speaking with export program officers from the following states in the past month: Indiana, Wisconsin and Vermont, to learn about how they run export program services. We've also formed a committee to reach out to other economic development agencies to discuss opportunities to collaborate on new export training initiative. We intend to set up appointments with TeamNEO, Greater Cleveland Partnership, and Magnet among others within the next month.

4. Based on Current Performance, does the center expect to meet or exceed annual goals? If not please provide a brief action plan with specific benchmarks to address any shortcomings - include any assistance the lead center can provide.

- Yes.

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Date: January 18, 2019

Center Name : 17091 OSBDC at Summit Medina Business Alliance, Inc.

Red Flag: SMBA just recently received news that one of our Cash Match partners, City of Akron is reducing our FFY 2019 certified Cash Match by \$25,000. This change is significant. Action around this announcement has led the Director to contact other stakeholders to evaluate any consideration of an increase. City of Kent, Portage County Commissioners and County of Summit have been approached. Two of the three cannot make any increases, and am waiting for the third to respond. An email follow-up has been sent to the third stakeholder; no news to date. Local Banks for sponsorships to help decrease the deficit are still being contacted. This office will keep you informed of any success going forward. Open to additional funding options by ODSA. Thank you!

1. Center Updates, Activities, Programmatic Achievements

A Press Release is planned early next week- Both **Brian Walters** and **Jim Griggy** passed and completed their fourth and final segment of NDC Training. They are now entitled to show certification as an Economic Development Finance Professional (EDFP). Thanks Jim and State Lead for the recognition of these two top performing Advisors.

FFY 2019 1st Qtr. Business as usual, State and SBA deadlines have kept everyone busy during this after Holiday and New Year's timeframe. Center IC, Impact to record, Invoice preparations, identification of upcoming Success Stories, developing training schedules for 2019, SBA Compliance Training, and working with clients to achieve investment goals have been the focus of our staff engagements.

December 20, 2018 – MAJ and Jim Griggy had a Conference call with our local SEED organization, with Gary Spring and with two of his legal students regarding the consideration of making SMBA a 501 c-3. It sounded as if they need to conduct more research but hinted that perhaps another entity could be aligned with our 501c-4 to allow contributions from foundations and private companies to help support the SBDC. They did comment, it would be extra administration to keep them separate, separate Board of Directors, and could be difficult to accomplish. Another meeting will take place upon further investigation.

January 13, 2019 – **Crain's Cleveland Business** featured one of our SBDC and eBay clients, Whiskertin Lighting, a startup founded in March 2016. With obtaining advisement from SBDC and benefiting from participating in eBay's Retail Revival Program and taken to NYC to display their wares at a pop up retail site, this client is making progress and is stated as having tripled sales since its opening. Some of their customers include Great Lakes Brewing; J. M. Smucker Co. using design fixtures for several spaces at its Orrville headquarters; and our very own Bounce Innovation Hub. Another SBDC client, Hazel Tree Design Studio, hired them to use industrial relics removed from the old B. F. Goodrich steam plant, and repurpose them into custom lighting fixtures for the first floor co-working space in our building.

January 15, 2019 - - One of Jim's clients that was approved for **\$225k in SBIR** funding through the **National Science Foundation just returned from conducting 42/31 expected interviews in Las Vegas at a trade show**, as an expected outcome for receiving this investment and to continue to ground the integrity of their product. Jim started mentoring this client through the **University of Akron**

Research Foundation's I-Corps Sites program in the Fall of 2016. He continued to mentor them through the 2017 San Diego cohort of the national I-Corps Teams program. Last year they received a \$90k Spark fund grant to continue research and development on the product. Jim will continue to work with them through the I-Corp like boot camp that is part of the SBIR grant and will continue to advise them as they grow and develop their business.

January 17, 2019 – Jim Griggy is working with a new client who may be a great candidate for the new Kitchen Incubator. This client wants to make ice cream and needs a stand-alone facility in which to test his products based upon all of the Food regulations, which are many, etc.

February 7, 2019 – Susan McGann will be a speaker at **“Business Day” for Leadership Portage County.**

Future scheduled workshops: Brian Walters, Presenter

March 27, 2019, Wed. 6 p.m., Business Basics at Cuyahoga Falls Library

April 24, 2019, Wed. 6 p.m. – How to Write a Business Plan, at Cuyahoga Falls Library

May 22, 2019, Wed. 6 p.m. – Minority & Women-Owned Businesses, at Cuyahoga Falls Library

2 Notable stakeholder, collaborative partner engagement

Partners: SMBA staff have had contact this month with the following Resource Partners: Huntington Bank in Akron, First National Bank of Hudson ; PTAC; Bounce, ; County of Summit and the City of Akron; Akron/Summit Library; Hudson Library; MBAC; Portage Development Board; EXL of U of Akron; Akron U Research Foundation; Ravenna Chamber of Commerce; Portage County Commissioners, Kent Chamber of Commerce, City of Kent, Cuyahoga Falls Library, and University of Akron.

3. Based on Current Performance, does the center expect to meet or exceed annual goals?

SMBA's is off to a great start booking some capital infusion due to SBIR grant, and are working on other current loan opportunities for our clients, working toward the new SBA compliance goals.



Ohio SBDC Monthly Report

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Date: 1/18/19

Center Name : 17093 Ohio SBDC at Kent State University at Stark

1. Red Flags – No Red Flags at this time

List any immediate and urgent challenges facing your center or the small business community.

2. Center Updates, Activities, Programmatic Achievements

Please provide a brief update about what is exciting at your center. Include unique upcoming events (not standard trainings), awards, projects and efforts to implement strategic priorities. Please place particular emphasis on impactful best practices that could be replicated elsewhere.

Currently, it is business as usual continuing with training programs that include the following: Small Business Orientation Classes, Quick Books Classes and special programs like “Leadership Blind Spots.”

3. Notable stakeholder, collaborative partner engagement

Please include recent or upcoming meetings with elected officials, funders, economic development organizations, resource partners, business associations, chambers of commerce etc.

We continue meet with chambers, governmental representative, economic development funders, foundations and sponsors of SBDC programs.

4. Based on Current Performance, does the center expect to meet or exceed annual goals?

If not please provide a brief action plan with specific benchmarks to address any shortcomings - include any assistance the lead center can provide. **Yes.**



Ohio SBDC Monthly Report

General Instructions: This report is intended to keep the lead office generally aware of center activities and to help identify best practices that can be deployed across the SBDC network. Please keep answers informative and brief.

Due: Third Friday of Each Month

Submit to: sbdcreports@development.ohio.gov

Date: January 18, 2018

Center Name : 17103 Ohio SBDC at Kent State University Tuscarawas

1. Red Flags

List any immediate and urgent challenges facing your center or the small business community.

- None

2. Center Updates, Activities, Programmatic Achievements

Please provide a brief update about what is exciting at your center. Include unique upcoming events (not standard trainings), awards, projects and efforts to implement strategic priorities. Please place particular emphasis on impactful best practices that could be replicated elsewhere.

- Center Director serves on the Tuscarawas County Chamber of Commerce's board, chairs the Finance Committee and serves on the Governance Committee.
- Center Director serves on Business Factory Board in Dover, Ohio (a general purpose business incubator located in Tuscarawas County).
- The regional committee for the State Leadership Committee continues to meet regularly. The meetings are rotated so each member can serve as a host and provide a tour of their facility.
- Center Director serves on the Latino Cultural Connections board.
- Doing "Conversation Corner" on the local radio station (WJER) to promote our Business Start-up workshop.

3. Notable stakeholder, collaborative partner engagement

Please include recent or upcoming meetings with elected officials, funders, economic development organizations, resource partners, business associations, chambers of commerce etc.

- The Tuscarawas County Economic Development Planning Committee has reached an agreement with all of the parties concerned and the consolidation of the two entities is forthcoming.
- A business planning committee has been formed to determine the feasibility of acquiring an existing section of railroad track that would be used for both passenger and cargo, creating economic development for the County. The Committee provided Congressman Johnson and Gibbs an Executive Summary of the project so that they can approach the existing owner of the rail line and gauge their interest in selling.
- Attending the Tuscarawas County Chamber of Commerce Annual Banquet.
- 12th Annual Groundhog Day International Trade Forecast Breakfast featuring Michael Weidokal.
- Collaborating with SBDC at YSU to offer a workshop titled "U.S. Tariff War."

4. Based on Current Performance, does the center expect to meet or exceed annual goals?

If not please provide a brief action plan with specific benchmarks to address any shortcomings - include any assistance the lead center can provide.

- For fiscal year 2019 (25%):
 - 3 months:
 - Long-term clients: 27 (34%)
 - Business starts: 8 (53%)
 - Capital Infusion: \$2,019,985 (58%)
 - Counseling hours: 460 (25%)
 - Training events and attendees: 5/356
 - Total clients: 69
 - Percentage of clients submitting impact: 16%
 - Action plan:
 - Results reflect that our Center is at or above where our goals for this time of year.
 - Clients are regularly reviewed to determine most recent impact. When relevant, an updated form is sent to the advisors to get the client to sign and acknowledge.

Ohio SBDC Monthly Report

General Instructions: This report is intended to keep the lead office generally aware of center activities and to help identify best practices that can be deployed across the SBDC network. Please keep answers informative and brief.

Due: Third Friday of Each Month

Submit to: sbdcreports@development.ohio.gov

Date: 01/17/2019

Center Name : 17121 The Ohio SBDC and EAN at Youngstown State University

1. Red Flags – None

2. Center Updates, Activities, Programmatic Achievements

- Export Market Research survey ongoing for the “OH PA Stateline Export Initiative
- The Center has been nominated for the SBA “Service Excellence and Innovation Center Award”.
- Mousa and Ellen have developed the 2019 EIP curriculum. Class begins 1/18/2019
- The Center is developing new marketing materials
- The Center has selected three Beeghly interns and two graduate assistants for Spring, 2019

3. Notable stakeholder, collaborative partner engagement

- Working with area partners to assist with the impact of the GM Lordstown closure
- Center staff met with community funder, [Honeycomb](#) Credit on January 7th to introduce their crowd-financing platform to area partners. This is a very exciting and innovative platform which could be instrumental in helping non-traditional funding projects. The next meeting with additional community resources will be February 13 at YSU.
- Partnering with the Mahoning Valley PTAC to host the Center one day a week in the SBDC offices. Rich Delisio is assisting while Norma is on medical leave.
- Market research will be expanded at the Center through additional staff expertise.
- Partnership with the PA Northwest Commission on the Thailand Vietnam Trade Mission - filled!
- Partnership with the PA Northwest Commission on the Export Market Research project for region
- Met with the YSU Procurement Director to plan an event for 2019 on contracting with YSU. Next meeting will be in early February and Rich Delisio will help plan the event.
- Veisz and Kassis met with Mike Hripko on January 3. Mike is the new YSU VP for Economic Development and Government Affairs. Excellent meeting and the next one is scheduled for March 7th, when we’ll discuss the SBDC market research capabilities to impact companies and the region.
- In the process of conducting training for new interns and graduate assistants
- Working on the Chamber’s Economic Report Card for 2018, the Business Journal’s Growth Report for 2018, the SBA award nomination packet and the Q 1 Invoice
- Export Seminar on February 7 at KSU - Tuscarawas and conducted by the EAN at YSU

4. Based on Current Performance, does the center expect to meet or exceed annual goals?

YES, Center expects to meet or exceed 2019 goals



Ohio SBDC Monthly Report

General Instructions: This report is intended to keep the lead office generally aware of center activities and to help identify best practices that can be deployed across the SBDC network. Please keep answers informative and brief.

Due: Third Friday of Each Month

Submit to: sbdcreports@development.ohio.gov

Date: 17 January 2018 (January FFY 2019 – Report)

Center Name : 17169 Ohio SBDC at KSU – CAE

1. **Red Flags**

List any immediate and urgent challenges facing your center or the small business community.

We will be catching up reporting to reflect our current number of active clients and reported economic impact. We are increasing emphasis on collecting economic impact as we move forward with clients and as each client passed the long-term client threshold.

2. **Center Updates, Activities, Programmatic Achievements**

Please provide a brief update about what is exciting at your center. Include unique upcoming events (not standard trainings), awards, projects and efforts to implement strategic priorities. Please place particular emphasis on impactful best practices that could be replicated.

We launched progress tracking spreadsheet and began including economic impact. M. Heiferling completed review of all materials in 1st module of the CBA, and anticipates completing the remaining tests by the end of February. He is targeting May for completion of the CBA.

3. **Center Notable stakeholder, collaborative partner engagement**

Please include recent or upcoming meetings with elected officials, funders, economic development organizations, resource partners, business associations, chambers of commerce etc.

We connected with our first ever client through a referral from VetBizCentral. We will be meeting with this client yet this week. He is focused on entrepreneurship by acquisition. The preliminary contact with him indicates the nature of his acquisition target may result in co-counseling with SBDC at SMBA, but we wanted to be highly responsive to VetBizCentral to get through the initial work and thus we hope to gain future connections for Ohio SBDC from VetBizCentral.

4. **Based on Current Performance, does the center expect to meet or exceed annual goals?** If not please provide a brief action plan with specific benchmarks to address any shortcomings - include any assistance the lead center can provide.

Our current spreadsheet count shows 18 active clients, \$42k of capital infusion and 2 business starts. However, as we bring our data entry current we expect the total number of active clients to rise by 10 and capital infusion to rise above \$100k. Thus, we are on track to achieve our annual goal in long-term clients, and as we ramp up pursuit of capital infusion reporting we anticipate approaching 50% of that goal near the middle of FFY2019. Thus, we are ahead of our results at this point in FFY2018. We believe that activation of Affiliated Services Group, Ltd. by February and some continuous improvement will help us achieve our annual goals in long-term clients and capital infusion.