

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.**



Massachusetts STEP Program Readiness Assessment & Application

Application Deadline: Friday, December 16, 2016

Thank you for applying to the Massachusetts STEP program. We advise that you compile all necessary information before you begin to complete the application form. Following is a listing of 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 approximately 60 minutes to complete this application. Please note that answers to all questions are required. [Click here](#) to download a PDF of the entire application. You may save the application and come back and complete it at a later date. 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. You will have 72 hours to return to the survey to complete it.

** The Massachusetts Export Center offers a free 1.5 hour webinar about the STEP program. The webinar will discuss the parameters of the Massachusetts STEP program and walk participants through the STEP application process. [Click here](#) to register for the webinar.

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

SBA ELIGIBILITY REQUIREMENTS

Company Name:

Federal Tax ID Number:

Per the U.S. Small Business Administration (SBA), please note that you MUST meet the following requirements in order to be eligible for the STEP program.

Has the business been operating for a year or more?

- Yes
- No

Does the business meet the definition of an eligible small business concern? **

- Yes
- No

** 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.

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:

Is this business an affiliate or subsidiary? If yes, please state name and location of parent company.

- Yes _____
- No

EXPORT ACTIVITIES & READINESS

	Export Sales	Exports as a % of Total Revenue
2014:		
2015:		
2016:		

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?

Dedicated Personnel:

- Yes
- No

Dedicated Time:

- Yes
- No

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 6 hours of dedicated export training is required. Training requirement may be met by participating in the Export Expo on Friday, December 9, 2016.

If necessary, is the business willing and able to make changes to its product to meet foreign requirements?

- Yes
- No

Explain:

Has your business received STEP Grant funding in the past?

- Yes
- No

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

Also, please describe any outcomes resulting from STEP-supported activities.

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

If yes, check all that apply.

- Massachusetts Export Center
- U.S. Department of Commerce
- U.S. Small Business Administration
- Other: _____

If yes, please describe any outcomes, including estimated export sales 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:

- Foreign trade shows or conferences
- MOITI-organized trade shows (click here for trade show flyer)
- U.S. Department of Commerce Gold Key or other service
- Foreign trade mission
- Localization-related and/or translation services
- Advertising in a foreign industry trade journal
- Other international marketing or regulatory activities

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:

2017:

2018:

2019:

Job creation projections resulting from STEP-funded activities:

2017:

2018:

2019:

PROPOSED BUDGET

Please note that STEP grants will be capped at \$10,000 per business to reimburse for costs associated with qualified project activities or services undertaken during the grant period. Costs associated with foreign language translation of web sites and marketing collateral and targeted advertising in overseas industry trade publications may not exceed a combined maximum of \$3,000. 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 Program 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 \$10,000.

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:

1. To the best of my knowledge, the data in this application is correct and supporting documentation will be available to MOITI for review upon request;
2. 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;
3. My company meets the SBA eligibility criteria for the STEP program, including size and ownership requirements;
4. STEP funds will only be used for those activities included in the project budget and approved pursuant to the written application;
5. 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.
6. 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.
7. I understand that MOITI will not authorize release of information given, 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 purposes of financial audits.

I agree

I do not agree

Information provided below serves as an electronic signature.

Applicant's Name:

Title:

Company Name:

Date: