

OFFICE OF PERFORMANCE MANAGEMENT AND OVERSIGHT

REPORTING AGENCY OVERVIEW

Reporting Agency Overview

Provide Information below for the Agency for Fiscal Year 2019

Reporting Agency Name

Massachusetts Office of International Trade and Investment (MOITI)

General Description

The Massachusetts Office of International Trade and Investment (MOITI) is the international business development agency charged with promoting trade and investment with global partners in Massachusetts and around the world.

Agency Mission

MOITI promotes trade at home and around the world. Our mission is to create global networks and partnerships that bring new opportunities and investments to our state. This includes increasing foreign investment in MA, creating jobs, strengthening the local economy, and focusing on important trade partnerships.

Agency Budget funded by the Commonwealth of Massachusetts

STEP 7 MA Budget is \$166,667

Agency Total Budget (*including Commonwealth of Massachusetts funding*)

TOTAL STEP & Budget is \$666,667

Does the Agency have additional mandatory reporting requirements? - select Yes or No

Yes

If Agency has additional mandatory reporting requirements - provide Details.

The STEP Grant Program is run by the Small Business Administration (SBA). The SBA has required reporting that HED Finance Dept. manages and the SBA can audit MA's STEP program as well.

OFFICE OF PERFORMANCE MANAGEMENT AND OVERSIGHT
REPORTING AGENCY ENABLING LEGISLATION

Reporting Agency Enabling Legislation

Provide details for all Agency Enabling Legislation.

Include: Mass General Law; Session Law (published in the Acts and Resolves); House Bills; Senate Bills (examples: Economic Development Bill)

General Law Citations: The General Laws are laws that are general in nature and are organized by subject. Private companies publish "annotated" editions of the General Laws. Notes are included at the end of each chapter and section of these editions, which include when the law was added and revised.

Acts and Resolves Citations: Acts and Resolves are yearly compilations of laws passed by the Massachusetts General Court, the state's legislature. These laws are arranged chronologically. These session laws provide the exact text of the law passed by the legislature, including what chapters and sections of the General Laws should be changed.

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Citation for Legislation

N/A

Link to Legislation

OFFICE OF PERFORMANCE MANAGEMENT AND OVERSIGHT
REPORTING AGENCY'S FISCAL YEAR 2019 GOALS & TARGETS

Reporting Agency Fiscal Year 2019 Goals & Targets

All reporting agencies must provide 5 Agency Goals and Targets for Fiscal Year 2019.

Goal #1

Agency Fiscal Year 2019 Goal # 1

Promote Massachusetts (MA) to overseas investors, businesses, and government leaders. Enhance MA reputation for Foreign Direct Investment (FDI) and innovation.

Metric Fiscal Year 2019 Goal # 1 will be measured by

Number of events attended with industry groups, federal agencies, Consulates and Academia to promote MA FDI

Metric Source

MOITI Event Calendar

Target for Fiscal Year 2019 Goal #1

Organize and attend 24 events with industry groups, federal agencies, Consulates and Academia to promote MA FDI.

Was Fiscal Year 2019 Goal #1 Achieved? (*yes, no, partially*)

Yes

Fiscal Year 2019 Goal # 1

Results - *or* - Details if not achieved

MOITI has extensive FDI contacts during FY19, The MOITI Events Calendar reflects over 50 meetings with visiting investors, companies and government officials. MOITI coordinated many of its meeting with

Goal #2

Agency Fiscal Year 2019 Goal # 2

MOITI is the state's liaison with the diplomatic community. The MA-based Diplomatic Corps consists of over 60 consulates, Consul Generals and Economic Development Offices (EDOs). MOITI also coordinates the visits of senior international government officials.

Metric Fiscal Year 2019 Goal # 2 will be measured by

The number of visiting dignitaries, foreign officials and delegations that MOITI hosts.

Metric Source

MOITI's Event Calendar

Target for Fiscal Year 2019 Goal # 2

Support Diplomatic Corps by hosting requested visits by dignitaries, foreign officials and delegations to MA.

Was Fiscal Year 2019 Goal # 2 Achieved? *(yes, no, partially)*

Yes

Fiscal Year 2019 Goal # 2

Results - *or* - Details if not achieved

MOITI provided support to all MA-based and NY-based Foreign Consulates that are responsible for MA. The MOITI Events Calendar reflects over 40 activities where MOITI engaged with the Consulates,

Goal #3

Agency Fiscal Year 2019 Goal # 3

As required by the SBA, MOITI is designated by the Governor to support MA companies in pursuing international business opportunities through the STEP Grant program.

Metric Fiscal Year 2019 Goal # 3 will be measured by

FY19 STEP 7 Program will consist of providing training, stipends and trade show opportunities for MA small businesses.

Metric Source

STEP Documentation

Target for Fiscal Year 2019 Goal # 3

FY19 targets are MA Export Center training, 50 stipends to small business and host 1 trade show for 4 small businesses.

Was Fiscal Year 2019 Goal # 3 Achieved? *(yes, no, partially)*

Yes

Fiscal Year 2019 Goal # 3

Results - *or* - Details if not achieved

The STEP Program is going very well. MOITI passed the SBA audit with no Significant Findings and almost all the funds were expended. MOITI will be hosting 5 small businesses at the OI 2020 Maritime

Goal #4

Agency Fiscal Year 2019 Goal # 4

Reconfigure MOITI's outgoing branding, content, and methodology.

Metric Fiscal Year 2019 Goal # 4 will be measured by

Updating the website, MOITI's welcoming powerpoint, and the event page and its distribution.

Metric Source

MOITI's website and available media

Target for Fiscal Year 2019 Goal # 4

Updating the website, MOITI's welcoming powerpoint, and the event page and its distribution.

Was Fiscal Year 2019 Goal # 4 Achieved? *(yes, no, partially)*

Yes

Fiscal Year 2019 Goal # 4

Results - *or* - Details if not achieved

MOITI achieved its targets of reconfiguring its Brand, although, admittedly, the website, due to restrictions, should be much more robust to reflect the best of Massachusetts' Innovative Ecosystem.

Goal #5

Agency Fiscal Year 2019 Goal # 5

Ensure the MOITI Office performs to best of it's ability with minimal staff and budget.

Metric Fiscal Year 2019 Goal # 5 will be measured by

Fullfill four-fold mission: Recriut FDI; Support MA Companies Globally; Perform Diplomatic Liaison and manage HED administrative and reporting requirements.

Metric Source

MOITI's Event Calendar

Target for Fiscal Year 2019 Goal # 5

Effective use of interns, vetting of international inquiries, support to HED and Governor's Office. In FY19 MOITI will close the STEP 6 and administer the STEP 7 programs.

Was Fiscal Year 2019 Goal # 5 Achieved? *(yes, no, partially)*

Yes

Fiscal Year 2019 Goal # 5

Results - *or* - Details if not achieved

To fullfill its four-fold mission MOITI manages on average 231 events a year, with a staff of two and some intern support.

OFFICE OF PERFORMANCE MANAGEMENT AND OVERSIGHT

PROGRAM & INITIATIVE OVERVIEWS, GOALS & TARGETS

Provide program information, goals, and targets for all agency programs and initiatives that connect with economic development and that receive funding from the Commonwealth of Massachusetts.

Program / Initiative Information, Goals, Targets

Program / Initiative #1

Program Overview

Name

State Trade Expansion Program (FY18 - STEP 7)

Program / Initiative Website Link - if one exists

www.mass.gov/export/step

Description of Program / Initiative

The State Trade Expansion Program (STEP) is a trade and export initiative to make matching-fund grants for states to assist “eligible small business concerns,” enter and succeed in the international marketplace. The program’s objectives are to increase the number of small businesses that are exporting, and to increase the value of exports for those small businesses that are currently exporting.

Fiscal Year 2019 Budget

\$666,667.00 (Step 7: Oct. 2018 - Sept. 2019)

Total Budget (Total \$, including other sources)

\$666,667.00

Details of additional funding sources

\$500,000 from SBA and \$166,667 matching funds from MA.

Program Goals and Targets

Program / Initiative's

Fiscal Year 2019

Goal #1

Provide, via the MA Export Center (MEC), export training for small business. Training will include assistance with the STEP program.

Metric Goal #1 will be measured by

Number of export training sessions and numbers of participants

Source of Metric for Goal #1

MA Export Center

Target for Fiscal Year 2019 Goal #1

New goal for MA STEP program. Targets to be coordinated with MEC.

Was Fiscal Year 2019 Goal #1 Achieved? - select yes, no, or partially

Yes

Fiscal Year 2019 Goal # 1

Results - *or* - Details if not achieved

In support of the STEP Program and to support MA exporting companies MOITI coordinated specific training webinars for MA companies. There were two STEP webinars and Export-related webinars were held throughout the year.

Program / Initiative's

Fiscal Year 2019

Goal #2

Host 4 MA small businesses at international industry trade show

Metric Goal #2 will be measured by

Number of small businesses attending trade show. Trade show location and industry represented.

Source of Metric for Goal #2

MOITI

Target for Fiscal Year 2019 Goal #2

4 small businesses attend trade show

Was Fiscal Year 2019 Goal #2 Achieved? - select yes, no, or partially

Yes

Fiscal Year 2019 Goal #2

Results - *or* - Details if not achieved

MOITI will host 5 MA small businesses at OI 2020, a maritime trade show being held in London in March 2020.

Program / Initiative #2

Program Overview

Name

Continuation of STEP 7 Program

Program Goals and Targets

Program / Initiative's

Fiscal Year 2019

Goal #1

Issue Stipends up to \$12,000/each to MA small businesses

Metric Goal #1 will be measured by

Number of Stipends issued during two rounds of applications.

Source of Metric for Goal #1

Applications submitted by MA Small Businesses

Target for Fiscal Year 2019 Goal #1

MOITI expects to issue 40-50 Stipends

Was Fiscal Year 2019 Goal #1 Achieved? - select yes, no, or partially

Yes

Fiscal Year 2019 Goal # 1

Results - *or* - Details if not achieved

MOITI issued Stipends to 46 small businesses. Annually the number of Stipends varies due to whether MOITI will host a trade show pavilion (using funds) and the amount of Stipends that are awarded to companies.

Program / Initiative's

Fiscal Year 2019

Goal #2

Diversification of Stipend recipients based on New-To-Export (NTE) and Market Expansion (ME) companies.

Metric Goal #2 will be measured by

Number of NTE and ME companies issued Stipends

Source of Metric for Goal #2

Company applications

Target for Fiscal Year 2019 Goal #2

75% - ME Companies / 25 NTE Companies

Was Fiscal Year 2019 Goal #2 Achieved? - select yes, no, or partially

No

Fiscal Year 2019 Goal #2

Results - *or* - Details if not achieved

The ratio of NTE to ME companies for STEP 7 was 85% - ME Companies and 15% for NTE Companies. The target was missed by 10%.

Program / Initiative #3

Program Overview

Name

Continuation of STEP 7 Program

Program Goals and Targets

Program / Initiative's

Fiscal Year 2019

Goal #1

Company Return on Investment (ROI) of Stipends

Metric Goal #1 will be measured by

Self-reported analysis provided by company

Source of Metric for Goal #1

Awardees provide ROI estimate

Target for Fiscal Year 2019 Goal #1

Total return of investment in excess of 3 million dollars (20% ROI) on \$574,215 in Stipends issued

Was Fiscal Year 2019 Goal #1 Achieved? - select yes, no, or partially

Yes

Fiscal Year 2019 Goal # 1

Results - *or* - Details if not achieved

Companies are self-reporting sales in excess of \$10 million, exceeding the target ROI of 20%.

Program / Initiative's

Fiscal Year 2019

Goal #2

Successful audit of MA STEP 7 Program

Metric Goal #2 will be measured by

SBA Audit Team Report

Source of Metric for Goal #2

SBA Audit Team

Target for Fiscal Year 2019 Goal #2

Satisfactory Audit Rating

Was Fiscal Year 2019 Goal #2 Achieved? - select yes, no, or partially

Yes

Fiscal Year 2019 Goal #2

Results - *or* - Details if not achieved

MOITI passed its SBA (STEP 5, STEP 7 won't be audited for 2 years) audit with no Significant Findings. A first for the Commonwealth and recognized by the SBA.

OFFICE OF PERFORMANCE MANAGEMENT AND OVERSIGHT
INVESTMENTS AND GRANTS AWARDED OR PROVIDED BY THE AGENCY
DURING FISCAL YEAR 2019

Please provide details on Investments and Grants awarded or provided by the agency

Award Overview				Award Address Information where project/award is located			
Name of Award Program - or - Investment	Name of Recipient	Description of Award or Investment	Amount (if applicable)	Street #	Address	Street Ending (Avenue, Street, Lane...) <small>spell out</small>	Municipality of Recipient *if regional or state-wide, please indicate
STEP 7	Adaptive Surface Tech	European Coatings Show, Germany	12,000	85	Bolton	Street	Cambridge
STEP 7	Advanced Radiation Therapy, LLC	ESTRO 38 Milan, Italy; Arab Health, UAE	10,000	One	Industrial	Way	Tyngsboro
STEP 7	Aimtek, Inc.	Paris Air Show, France	12,000	201	Washington	Street	Auburn
STEP 7	Andover Healthcare	British Veterinary Nurses Association, UK	12,000	9	Fanaras	Drive	Salisbury
STEP 7	Aware, Inc.	Trade Show, Brazil; Gold Keys to Japan and Korea	12,000	40	Middlesex	Turnpike	Bedford
STEP 7	Busek Co., Inc.	Electric Propulsion Conference, Austria	12,000	11	Tech	Circle	Natick
STEP 7	CPS Technologies Corporation	PCIM Europe Trade Show, Germany	12,000	111	South Worcester	Street	Norton
STEP 7	Davico Inc	Automechanika Mexico	12,000	95	Brook	Street	New Bedford
STEP 7	Diamond-Roltran LLC	ESMATS 2019, Germany	5,325	59	Porter	Road	Littleton
STEP 7	Dimension Insight	2018 HIMSS Annual Meeting of Greater China; South China Hospital	12,000	60	Mall	Road	Burlington

OFFICE OF PERFORMANCE MANAGEMENT AND OVERSIGHT

Technical Assistance PROVIDED BY THE AGENCY
DURING FISCAL YEAR 2019

Award Overview				Award Address Information where project/award is located			
Name of Award Program - or - Investment	Name of Recipient	Description of Award or Investment	Amount (if applicable)	Street #	Street Name	Street Ending (Avenue, Street, Lane...) <i>spell out</i>	Municipality of Recipient *if regional or state-wide, please indicate
N/A	Various Countries	MOITI hosted 50 meeting with international investors, businesses government representatives from various countries to promote MA as an FDI destination.	N/A	N/A	N/A	N/A	N/A
N/A	Various Country Consulates and Honorary Consul Generals	MOITI is the state's liaison with the diplomatic community. The MA-based Diplomatic Corps consists of over 60 consulates, Consul Generals and Economic Development Offices (EDOs). MOITI hosted over 40 meetings with the Diplomatic Corps.	N/A	N/A	N/A	N/A	N/A

Award Overview				Award Address Information where project/award is located			
Name of Award Program - or - Investment	Name of Recipient	Description of Award or Investment	Amount (if applicable)	Street #	Street Name	Street Ending (Avenue, Street, Lane...) spell out	Municipality of Recipient *if regional or state-wide, please indicate
N/A	See Company Listings under Tab 6	As required by the SBA, MOITI is designated by the Governor to support MA companies in pursuing international business opportunities through the STEP Grant program.	N/A	N/A	N/A	N/A	N/A



Point of Contact for Head of Agency

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