DOWNTOWN LONG BEACH ALLIANCE

The Entrepreneurship Education Series

A partnership between the Downtown Long Beach Alliance and the Institute for Innovation & Entrepreneurship (IIE) at California State University Long Beach

The series is focused on providing the tools and skills needed to start and run a successful business.

IIE at California State University Long Beach will provide a certificate of completion to those who complete the entire program.

- **Week 1: The Value of a Business Plan, April 7**
  - **DLBA Introduction including PitchFest review and requirements**
  - **Module 1: Starting your business – overview (Mr. Bruce Sparks, CSULB)**
    - **Assess your business idea – what makes a successful business idea**
    - **Research your business idea**
    - **Business plan development**
    - **Resources for small businesses**
    - **What will be covered in this workshop**
  - **Module 2: What is a Business Plan**
    - **Elements of a business plan**
    - **Organizational plan**
    - **Marketing plan**
    - **Financial Projections**
    - **Competitive Analysis**
- **Week 2: Your Marketing Plan, April 14**
  - **Module 3: Writing your Marketing Plan (Dr. Hieu Nguyen, CSULB)**
    - **Competitive analysis – SWOT**
    - **Who are my target customers?**
    - **Customer Acquisition**
    - **What channels do I use to reach them?**
    - **How do I price my products/services?**
  - **Module 4: How to do digital marketing (Dr. Scott Flexo, CSULB)**
    - **Design and construct your website**
    - **Types of social and digital media**
    - **Email marketing**

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- **Week 3: Accounting & HR Basics, April 21**
  - **Module 5: Accounting Basics (Mr. Bruce Sparks, CSULB)**
    - **Basic accounting principles**
    - **Types of accounting platforms**
    - **Financial statements**
  - **Module 6: Human Resource Basics (MaryEllen Johnson, CSULB)**
    - **Hiring employees (EEOC and discrimination questions)**
    - **W-2 vs. Independent contractors**
    - **Employee handbook**
    - **Payroll**
    - **Employee subsidies**
- **Week 4: Where to Locate Your Business, April 28**
  - **Module 7: Site selection (Mr. Graham Gill, Lee & Associates & Mr. Adam Carrillo, DLBA)**
    - **Appropriately zoned site for your business**
    - **Foot traffic and parking requirements**
    - **Office specific requirements/suggestions**
    - **Retail specific requirements/suggestions**
    - **Restaurant specific requirements/suggestions**
  - **Module 8: Negotiate a lease (Mr. Graham Gill, Lee & Associates & Mr. Adam Carrillo, DLBA)**
    - **Do I need a broker?**
    - **Understand lease options**
    - **Who pays for tenant improvements**
    - **What can I negotiate?**
    - **Research the area prior to lease negotiations**
- **Week 5: Legal Issues & Funding Opportunities, May 5**
  - **Module 9: Legal Structures (Ashleigh Stone Esq., Stone Law & Consulting)**
    - **Business entities (sole proprietorships, partnerships, LLCs, Series LLCs, B-corps, corporations)**
    - **Formation, duration, taxation, and liabilities**
    - **Partnership agreements**
    - **Current business issues**
  - **Module 10: Funding Opportunities (Mr. Frank McNulty, CSULB)**
    - **Traditional types of funding opportunities**
    - **Non-traditional types of funding opportunities**
    - **Applying for funding**
    - **How to choose the right bank**
    - **Lender's panels**
  - **Pitch Breakout: IIE Instructors will break out into groups to finalize pitch & business plan competition**
- **Week 6: May 12, *PitchFest**
- **Week 7: May 17, DLBA Economic Development Committee**

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Presenting Sponsors:

Downtown Long Beach Alliance (DLBA)

Institute for Innovation & Entrepreneurship at California State University Long Beach

Port of Long Beach

City of Long Beach

- **Location:**
  - **Weeks 1-6 InterTrend Communications, 228 E Broadway, Long Beach, CA 90802**
- **Time: 8am-12noon each consecutive Saturday**
- **Target Audience: Existing and Potential Downtown Business Owners, Entrepreneurs, Start-Ups, and Small Business owners**
- **Potential Class Size: 45-90 per session**
- **Goal: Have the same group matriculate through all 5-weeks to create new businesses and high paying jobs in Downtown resulting in the leasing of available office space.**
- **Cost to Attend: Free to attend for Existing and Potential Downtown Business Owners and CSULB Students (Value of $1,350)**
- **Timeline: April/May 2018**

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DLBA Small Business Grant

The DLBA's Small Business Grants are designed to assist new businesses and support the expansion of existing businesses by providing grant funds in an effort to defray costs associated with the starting or expanding of a business therefore creating jobs in Downtown Long Beach. The program will award UP TO 7 businesses from a $20,000 total award bucket (includes Business Improvement District (BID) assessment fee reimbursement for each winner):

- Up to 7 businesses will be awarded a DLBA funded grant from a total award bucket not to exceed $20,000 (requires matching funds & award includes BID assessment reimbursement)
- Included in your award the DLBA will reimburse you up to $500 1st Year BID assessment fee reimbursement (requires receipt provided by City of Long Beach)
- Up to 7 businesses will receive as part of their award free one-hour, one-on-one legal and business strategy with Stone Law & Consulting, Ashleigh Stone, Esq meeting to create their legal "to do" list including legal structure, IP protection, and other business best practices (award must be utilized within 30 days of receiving award confirmation from DLBA's Economic Development Committee meeting (date TBD)

Criteria for Participation; Your business may qualify for the grant if it satisfies ALL of the following requirements:

1. **To Apply:** All applicants must submit a PowerPoint presentation by May 9 including:
    a. Proposed business financial model
    b. Business plan
2. The business is located within the boundaries of the Property Based Improvement District(PBID) managed by the Downtown Long Beach Alliance (DLBA).
3. Applicant to participate in the program must enroll in **The Entrepreneurship Education Series** held in partnership with **Institute for Innovation & Entrepreneurship** and complete the following 10 modules* within the scheduled 5 weeks:

    - Week 1: The Value of a Business Plan, April 7
        - Pitchfest & Small Business Grant Overview
        - Starting a Business
        - Business Planning
    - Week 2: Your Marketing Plan, April 14
        - Writing your Marketing Plan
        - How to do Digital Marketing
    - Week 3: Accounting & HR Basics, April 21
        - Accounting Basics
        - Human Resource Basics
    - Week 4: Where to Locate Your Business, April 28
        - Site Selection
        - Negotiating a Lease
    - Week 5: Legal Issues & Funding Opportunities, May 5
        - Legal Structure

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    - Funding Opportunities
    - PitchFest Presentation Break Out
- Week 6: May 12, *PitchFest:
    - A certificate ceremony – Participants that have attended all 10 modules will walk out with a certificate and a self-developed business plan in hand.
    - Pitchfest is for all qualified potential award recipients to present their business plan. All start-up or expansion costs are itemized and defined in the applicant's week 6 pitch. All business plan items presented will be subject to removal, editing, and approval by the award committee composed of members from DLBA's Economic Development Committee.
- Week 7: May 17, DLBA Economic Development Committee:
    - Up to 7 proposed award recipients' business plans are presented and financial awards are confirmed.

*Applicant(s) eligibility will be confirmed by review of all original signatures of each week's sign in sheet kept on file as of May 5.

4. Applicant(s) must attend 10 of 10 offered workshop modules within the 5-week course schedule.
5. Applicant(s) must participate in the final pitch workshop during week 5.
6. If proposed or existing business operates out of an OFFICE space it must be located within one of the office buildings outlined in our DTLB Snapshot Office Report.
7. If proposed or existing business operates out of a RETAIL space it must be located in a commercial storefront located on the ground floor of a building with an individual address and an entrance accessible to the public within one of the buildings outlined in our DTLB Snapshot Retail Report.
8. Copy of identification (DUNS Number) is not required with your PitchFest application.
9. All City of Long Beach fees must be paid and business license is on file as "active" within 90 days of official award notification date and the business license is located within boundaries of the Property Based Improvement District(PBID) of the DLBA.
10. Applicant(s) business or proposed business, including its affiliates, has no more than 24 employees as reported by the City of Long Beach Financial Management department on date of application of program.
11. Is organized FOR PROFIT, which operates primarily within the United States or which makes a significant contribution to the United States economy through payment of taxes or use of American products, materials or labor. The entrant and its business plan cannot be a 501(c)3 non-profit organization.
12. Is in the legal form of an individual proprietorship, partnership, limited liability company, corporation, joint venture, association, trust or cooperative, except that where the form is a joint venture.
13. Must have a dedicated business banking checking account open within 30 days of completion of the education workshops.
14. The entrant and its business plan cannot be a franchise or a home based business.
15. Other restrictions may apply.
16. The DLBA reserves the right to change or update the criteria for participation at any time.
17. Call Adam Carrillo, Economic Development Manager at (562) 480-2232 to verify business application eligibility.

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Criteria to Receive Grant Funds

- Up to $20,000 of DLBA grant funds (includes potential DPIA BID assessment fee reimbursements) will reimburse legitimate start-up costs associated with opening or expanding the business. Requirement(s) to perform will be outlined within business plan and submitted May 12 for official review and consideration of potential award.
    - Start-up costs that are itemized and defined in the applicant's week 6 pitch will be subject to removal, editing, and approval by the award committee composed of members of DLBA's Economic Development Committee.
- Up to $500 1st Year DPIA BID assessment fee reimbursement for each confirmed award recipient. Award recipient must provide receipt from City of Long Beach business license for DPIA BID assessment fee reimbursement.
- Up to $20,000 in seed monies is required to fund the award(s). All required seed monies dedicated to awarded business(es) will be reimbursed via check within 30 business days of deposit into the Downtown Development Corporation 501(c)3 checking account. Those seed monies deposited will be reimbursed with your award check. For example, if you are awarded $1,000, you must raise and deposit $1,000. The DLBA will reimburse you with a check for $2,000 within 30 days that all criteria to receive the grants are satisfied.
- All of the below must be part of the same business entity and included on the business banking account:
    - Business name/DBA on file with the City of Long Beach Business License
    - DUNS number
- The awarded business plan and applicant are responsible to raise up to grant amount awarded by PitchFest Panel of Judges made payable to "Downtown Development Corporation", a 501(c)3 organization. The awarded business is named in the donation and is required to be notated within the check's "Memo" line. Deadline to raise and deposit seed monies is 30 days after all criteria for participation is satisfied.
- What is the process or guidelines if Business ABC doesn't meet the match requirements?
    - Each awarded business entry that satisfies all criteria for participation and is officially awarded by the DLBA's Economic Development Committee will receive an award amount from the PitchFest Panel of Judges and must be matched in equal matching seed money prior to the award being funded by the DLBA.
    - Example: If Business A provides $100 in matching funds, the DLBA Grant will provide $100 in grant award monies available. If Business A does not meet the match requirements we do not match any funds against the award.
- If (Business TBD) is awarded and does not fulfill the criteria to receive grant funds by 90 days after or August 20 (whichever is later) the awarded grant money is dedicated back into the Economic Development Budget for use in the current fiscal year.

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- The DLBA reserves the right to change or update the criteria to receive grant funds at any time.

The DLBA intends to provide reasonable accommodations in accordance with the DLBA's Economic Development foci listed below as outlined in our DTLB Vision 2020: Strategic Plan:

- A1 Work with the City to streamline the business licensing, permitting and entitlement process
- A2 Track and evaluate economic and development trends Downtown
- A3 Promote Downtown housing developments and bring more residents Downtown
- A4 Support existing businesses and attract new businesses to Downtown Long Beach

About the Downtown Long Beach Alliance 501(c)6:
Downtown Long Beach Alliance (DLBA) is a non-profit organization that operates on behalf of tenants and commercial and residential property owners in Long Beach's Downtown and surrounding areas. It is dedicated to the management, marketing, security, maintenance, advocacy, economic and community development of its two assessment districts in cooperation with the City of Long Beach and the private sector. The Downtown Parking Improvement Area (DPIA) stretches from the waterfront north to 10th Street, and from Golden Avenue east to Alamitos Avenue and is assessed on business owners. The Property Based Improvement District (PBID) is assessed on property owners and incorporates areas surrounding the Downtown core. DLBA is governed by its bylaws and the PBID Management Plan, which was developed in 2012 as part of DLBA's renewal with the City of Long Beach

About the Downtown Development Corporation 501(c)3:
The Downtown Development Corporation (DDC) is an independent 501(c)3 non-profit organization that is closely affiliated with and managed by the Downtown Long Beach Alliance. As an independent corporation, the DDC has its own articles of incorporation and by-laws. The characteristics of the DDC board of directors include:

- Representation of specific areas of expertise, including finance, real estate law and development
- Downtown stakeholders, with representation of various geographic areas
- Representative of different stakeholder types, including property owners, businesses and residents
- Designated DLBA board liaison(s)
- Advisor representation by key civic agencies, including the City of Long Beach

Relationship to DLBA:
The DDC is closely affiliated with the DLBA in order to take advantage of cost, operating and leadership efficiencies. The DDC is viewed as complementing DLBA's existing array of services by adding development and finance expertise to the organization's strengths in the maintenance, marketing and management of downtown. DLBA can provide the DDC with immediate credibility, connections and administrative support. Most importantly, it is envisioned that the DDC and DLBA would work hand-in-hand to advance a unified vision and voice for downtown stakeholders. Upon formation, the DDC can contract with the DLBA for staff and administrative support. This arrangement provides the initial building

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block leading to a more sophisticated downtown organizational model that can best serve Long Beach.

Program Partners:

About the Institute for Innovation & Entrepreneurship at California State University Long Beach:
The Institute for Innovation & Entrepreneurship at CSULB provides programming and mentoring designed to unlock the creative energy of students, faculty, staff, and the community that engages stakeholders across campus and in the community focused on the common goal of innovation and entrepreneurship. The primary objective of the Institute is to leverage all this energy and entrepreneurial capital into a driving force for economic development for the greater Long Beach community. Creating economic opportunities will support long-term economic growth that is sustainable and improves the lives of all members of our community, the economy and the greater environment where we live. Establishing the Institute brings the structure necessary to create something that transcends the positive outcomes of individual actions. Providing leadership to generate new programming and support existing programs that have organically evolved on campus and in the community will result in an exciting and dynamic culture of innovation and entrepreneurship for all of Long Beach!

About the City of Long Beach:
Starting a business in the picturesque city of Long Beach is a snap. The city is a hotbed for startup activity, education and ingenuity. Every city department and employee understands that promoting economic development in the city is a primary concern. Long Beach also boasts a low-cost business license tax rate structure with streamlined and improved city services. Your next business should be in a place that can tout a friendly community, ease of hiring skilled workers, and available training and networking for business owners at a profit. The City of Long Beach can offer it all; it's where your business should be open.

About Stone Law & Consulting, Ashleigh Stone, Esq.:

Based in downtown Long Beach, Stone Law & Consulting empowers small business owners to implement best business and employment practices in order to reduce the risk of costly legal problems down the road. Specializing in areas of business and employment law, Ashleigh Stone is passionate about protecting small businesses and employers through preventive law. Whether starting or growing a business, Stone Law & Consulting can help protect your investment and give you the peace of mind that your business is properly formed, built on well-drafted contracts, operating with an up-to-date employee handbook, and legally compliant.

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Award: (Overall Program Proposed Award Bucket $20,000)

- Up to $20,000 of DLBA grant funds will reimburse legitimate start-up costs associated with opening or expanding the business. Requirement(s) to perform will be outlined within business plan and submitted May 12 for official review and consideration of potential award.
    - Start-up costs that are itemized and defined in the applicant's week 6 pitch will be subject to removal, editing, and approval by the award committee composed of members of DLBA's Economic Development Committee.
- Up to $500 1st Year DPIA BID assessment fee reimbursement. Applicant to provide receipt from City of Long Beach for the 1st year reimbursement. This reimbursement amount is included within the award by the judging panel during the PitchFest.
- Free one-hour, one-on-one legal and business strategy meeting with Stone Law & Consulting, Ashleigh Stone, Esq to create their legal "to do" list including legal structure, IP protection, and other business best practices (award must be utilized within 30 days of receiving award confirmation from DLBA's Economic Development Committee meeting (date TBD)
- All of the below must be part of the same business entity and included on the business banking account:
    - Business name/DBA on file with the City of Long Beach Business License
    - DUNS number
- The awarded business plan and applicant are responsible to raise up to the amount awarded in matching funds. Matching funds/see monies are made payable to "Downtown Development Corporation", a 501(c)3 organization. The awarded business name the donation is dedicated to must be notated within the check's "Memo" line. Deadline to raise and deposit seed monies is 30 days after all criteria for participation is satisfied.
- A check will be made payable to the winning entry inclusive of the following:
    - Amount awarded to winning business + BID fee (up to $500) + Amount provided in matching funds.
        - Example: $1,000 Awarded which includes BID fee + $1,000 Matching funds provided by award winner or private contributions = $2,000 Check made payable to winning business name
    - Please allow up to 30 days of receiving matching funds for a check that will be made payable directly to the winning business.
    - All checks are made payable to registered business name.
- What is the process or guidelines if a winning business does not meet the match requirements?
    - If the winning business is awarded and does not fulfill the criteria to receive grant funds by 90 days after or August 20 (whichever is later) the awarded grant money is dedicated back into the Economic Development Budget for use in FY18.

- Applicants will present their finalized business plan in week 6 to a panel of community partners including up to (3) member sub-committee from the DLBA's Economic Development Committee.

    - DLBA ED Chair Responsibilities: Review all potential award notifications and identify up to 7 potential business plans to nominate for ED Committee review

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and approval at the next DLBA Economic Development meeting where the committee will review and provide final approval of awards.
    - Adam Carrillo, ED Manager Responsibilities: Schedule time for up to top 7 recommended business plans to meet at the next DLBA Committee meeting.
- All required criteria for participation must be met within 90 days of official award date. If the criteria for participation are not met within the 90 days of official award date the granted funds are repurposed into the Economic Development programming budget.
- Up to 7 business plans will receive final award notifications sent via email within 14 days of the final presentation to the DLBA ED Committee.
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- The DLBA reserves the right to change or update the award at any time.

Measuring Success:

- DLBA Annual report:
    - Reporting total grant monies awarded in FY
    - Reporting total # of jobs created as measured by considering filed business license employment counts and (if applicable) comparing renewed business license employment data the following fiscal year.
    - Reporting the amount of square footage leased from graduating existing and potential businesses including both office and ground floor retail space within DPIA boundaries.
    - Reporting how much seed money was raised by DDC in FY
    - Reporting number of new businesses the program created in FY by measuring number of program winners filed business licenses within DPIA and Citywide.

For More Information Contact:
Adam Carrillo
Economic Development Manager
(562) 485-3130
www.DTLBbusiness.com

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The Entrepreneurship Education Series and Small Business Grant Program

APPLICATION FORM

Date Submitted: _____Business Opening Date: _____

Business Hours: _____

Business License No (if applicable): _____

Date Issued: _____ No. of Employees: _____

Business Name: _____

Business Owner(s):_____

Business Address: _____ _____ Zip Code:_____

Mailing Address: _____Zip Code:_____

Business Phone: ( )_____

Alternate Phone: ( )_____

Email Address:_____

Program Eligibility Guidelines (Please read above.)

Program Eligibility Questions: (circle answer)

1. Are you a new business owner or expanding your existing business? _____
2. Did you buy an existing business? **YES or NO**
    - Business Name & Address of other location(s):_____
3. Attach a copy of your (DUNS Number) which is required to be submitted with your application. Call 866-705-5711 to obtain your FREE DUNS number or go http://www.dnb.com/duns-number.html to learn more.
4. Do you acknowledge your business license is on file as showing pending or completed within 90 days of official award date and the business license is located within the DPIA Boundaries of the DLBA. **YES or NO**
5. Do you acknowledge all City of Long Beach fees must be paid and business license must be "active" prior receiving the grant? **Sign here**_____
6. Do you acknowledge applicants business or proposed business, including its affiliates, has no more than 24 employees as reported by the City of Long Beach Financial Management department? **Sign here**_____
7. Is your proposed or existing business a for profit organization? YES or NO

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8. Is your proposed or existing business in the legal form of an individual proprietorship, partnership, limited liability company, corporation, joint venture, association, trust or cooperative, except that where the form is a joint venture, there must be less than 50 percent participation by foreign business entities in the joint venture? YES or NO
9. Do you acknowledge the entrant and its business plan cannot be a franchise. **Sign here**_____
10. Other restrictions may apply.
11. Is your proposed or existing business now open to the public? **YES or NO**
12. The DLBA reserves the right to change or update the criteria for participation and/or award at any time.

Applicant Certification: I acknowledge and agree to the above eligibility requirements and certify that all information provided herein is true and complete to the best of my knowledge and belief. Verification will be provided, if requested.

Business Owner/Operator Name (Print or Type):_____

Business Owner/Operator Signature:_____

Signature Date_____

For More Information Contact:
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Adam Carrillo
Economic Development Manager
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Or visit our website:
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