



FY23 SERVICE PROVIDER REQUEST FOR APPLICATIONS

The Vermont Farm & Forest Viability Program, a program of the Vermont Housing & Conservation Board (VHCB), is pleased to announce FY24 funding for in-depth, individualized working lands business assistance. Eligible applicants are entities that work to increase the viability of Vermont farm, food and forestry enterprises through providing business coaching. VHCB expects to make approximately \$300,000-\$500,000 in contracts to provide in-depth, one-on-one assistance to clients enrolled in the VT Farm & Forest Viability Program.

Applications are due October 2nd, 2023, and decisions will be finalized by early December, 2023 at the latest. Funds are available for contracts beginning as early as November 1st, 2023 and ending as late as May 31st, 2025. Short extensions may be available if needed. Submit completed applications and required materials to this link: <https://www.surveymonkey.com/r/Z5V785J>

APPLICATION INSTRUCTIONS

Timeline:

1. **August 30th, 2023** – Request for Applications released
2. **October 2nd, 2023** – Full Application Due Date
3. **–October-November, 2023** – Staff Review
4. **Late November/early December, 2023** – VHCB Board Review
5. **Early December, 2023** – Decisions Announced
6. **December 2023 to January 2024** – Contract drafting & finalization

Online Application:

We are moving to an online application. You will be asked to submit your application in two parts: narrative and budget, and all required organizational documents. Please use [this link](#) to apply by October 2nd, 2023.

Required Organizational Documents:

At the time of application, you will be required to submit the following through the online application. Historically we required one set of organizational documents at the time of application and one set at the time of making the contract, but because this significantly extends the time required to sign contracts we have decided to require everything up front, even if your policies have not changed since your last application.

- ✓ 501c3 documentation and organizational bylaws
- ✓ Cost Allocation Plan: We will need to see documentation for how your organization calculates overhead, ideally a Cost Allocation Plan, if you are requesting this as part of your budget. We require the overhead determination to meet best accounting practices and will need to approve these calculations before we allow the organization to request funding for overhead expenses. If you do not have a Cost Allocation

Plan, please submit a detailed description of how your organization calculates overhead or other management/administrative rates that are being requested.

- ✓ Organizational procurement policy: if you do not have a procurement policy, please submit an explanation of how your organization procures services in a fair, systematic, and equitable manner. We may ask that you create a policy as part of VHCB's contracting process; if this is the case we will provide examples of other organization's policies.
- ✓ Certificate of insurance
- ✓ Certificate of worker's compensation
- ✓ Audited financial statements or external third party review of financials

Questions?

Please contact Liz Gleason and Calley Hastings with any questions. The Viability Program team is happy to set up meetings to talk through your ideas for this application and any questions or concerns you might have.

Liz@vhcb.org and calley@vhcb.org.

Funds available:

FY24 funding is available for individualized business assistance with a focus on farm and forest businesses enrolling to complete a business or transfer plan. This bucket of funding is focused on long-term, in-depth services, with the typical client receiving at least 40 hours of services over 6-18 months through their enrollment.

Program Guidelines:

All program guidelines, which should be followed unless exceptions are discussed and agreed on, are available on our website: <http://www.vhcb.org/Farm-Forest-Viability/resources/>. For service types that do not have established guidelines, including any Complementary Services, VHCB will work with the service provider to identify what deliverables will be required.

For business planning, please use the [2014 Business Plan Guidelines](#).

For farm transfer planning, please use the [2014 Farm Transfer Planning Guidelines](#).

For enterprise and cash flow analyses, please use the [2007 Cash Flow and Enterprise Analyses Guidelines](#).

For Year Two Reports/Business Plan Revisions, please use [Guidelines for Year Two Services](#).

What we will fund:

Applicants can apply for a variety of categories of funding, including business planning, transfer planning, cash flow & enterprise analysis, and other relevant business coaching. The majority of our funding is focused on providing in-depth, one-on-one business planning that follows our program guidelines. VHCB will allow a few slots to be filled by re-enrollments, in cases where the new plan will be significantly different in scope from the original plan or the need for business planning is high.

Business Planning: We continue to focus the majority of our funding on offering two complete years of services for *farm, food, forestry and forest products businesses* that have never before participated in the Vermont Farm & Forest Viability Program, and in select cases for enterprises re-enrolling in the program for the second time.

BUSINESS PLANNING AND TECHNICAL ASSISTANCE FOR THE FORESTRY SECTOR: If applicable, please identify these services separately from farm business planning activities in your application and budget, and talk with us prior to submitting your application if you are considering requesting funding for this purpose.

TECHNICAL ASSISTANCE FOR CLIENTS: We expect all service providers to offer each participant working toward a Business Plan additional technical assistance related to the farm's immediate goals or business needs during the business planning process, and also as a part of the Year Two process. Cash-flow and enterprise analysis budgets may also include technical assistance if necessary. TA can include marketing, market research, agricultural production (soils, crops, livestock), agricultural engineering, and improvement of record-keeping systems. TA providers can be subcontracted private consultants, extension personnel, NRCS or FSA staff, SBDC staff, farmer mentors, nonprofit organization staff, etc. The opportunity to integrate TA with a business planning process is a key component of the Vermont Farm & Forest Viability Program and should not be overlooked! Please build realistic funding into your budgets to allow for appropriate TA.

Transfer Planning: Transfer planning may take more resources and time than a typical business plan. We expect service providers to include a technical assistance budget and incorporate existing transfer planning services into the process when applicable. This might mean working closely with Ag Mediation, requiring participants to attend a transfer planning workshop, using [UVM Extension's online resources](#) or [Land For Good's resources](#), working with lenders such as Farm Credit, FSA, and VEDA/VACC, and small business programs such as SBDC. Viability funds may be used for business planning, family mediation or counseling services, overall coordination of transfer planning, and for a portion of financial or legal advice that may be needed to plan and/or implement the transfer. Because of the high cost of some of these services (such as legal and professional accounting) the farm family will be expected to cost share in this process; the Program can help defray the expense, covering consultative services rather than document preparation, filing fees, tax accounting, etc.

Short-term in-depth business advising: Applicants may now apply for more than 20% of their contract to go to slots for short-term business advising, with a cash-flow analysis or enterprise analysis as the primary deliverable. This also may include services such as exit strategy/business sale or other scenario planning, follow-up assistance to previously enrolled clients, or business/technical support to clients not yet interested in or a good fit for full enrollment but may be in the future. VHCBC will accept other deliverable templates in those cases. The majority of Viability Program funding will still be directed at longer-term business plan and transfer planning services but we recognize the need for shorter-term assistance.

Year 2 services: In the year following completion of a business plan or transfer plan, further planning services should be offered to all enterprises that have completed a business plan through the Program. For most enterprises, this should occur the year following the completion of their plan. The purpose is to provide individualized assistance to each participating business through updating their financial information, reviewing their goals and implementation to date, and offering technical assistance, as applicable to each enterprise.

Review Criteria:

Applications will be assessed based on the ability of the applicant to deliver services according to the Viability Program guidelines. The following factors will be critical:

- Employee and/or contractor familiarity with business planning, financial analysis, agricultural and/or forest product marketing, and agricultural and/or forestry production practices.
- Ability and potential to offer high-quality services to participants in keeping with the mission of the Program, including ability to meet participants' needs in a timely manner, ability to communicate clearly with participants, and ability to educate participants effectively around business and financial management.
- Skill of employees and/or contractors in acting as educators and facilitators with small and family-run businesses.

- Ability and potential to provide services equitably to eligible participants, including those of various ethnic and racial backgrounds, as demonstrated by training, background and/or lived experience, as well as programming designed to be accessible to BIPOC participants, including new Americans.
- Ability to coordinate between individual service providers and Viability Program staff.
- Capacity to complete business planning, related services, invoicing and reporting in a timely fashion and in accordance with Program Guidelines.