



DUBLIN
CALIFORNIA

Small Business Navigator Program

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Background

In September 2021, the City of Dublin City Council allocated a portion of the City’s American Rescue Plan Act funds to support economic development through a variety of programs. City staff subsequently developed a Business Recovery Playbook (“Playbook”) to devise a strategy that would determine the most strategic use of funds.

The three-phase Playbook started with an “Assessment” phase wherein staff would connect with local businesses via various mechanisms including a business survey, walking tours, and business roundtables. The assessment found that small businesses in the City were in need of broad support as well as technical assistance in areas such as staffing and marketing in addition to acknowledging issues like inflation and supply chain disruptions.

The Small Business Navigator Program is an innovative approach to addressing the concerns of the local business community by providing small businesses with timely, relevant, and specific support and expertise. It also is meant to demonstrate the City’s support of and commitment to its existing and future businesses.

Purpose

The Small Business Navigator Program is intended to provide small businesses in Dublin with access to timely technical support in key functional areas via qualified service providers.

Objectives

- Address concerns and challenges raised by the Dublin Small Business Community
- Develop an innovative mechanism for ongoing small business support
- Provide tailored technical support to small local businesses to assist in their sustainability, growth, and success

Description

The Dublin Small Business Navigator program provides small business owners with access to free technical resources and support via qualified service providers in all areas of business needs including:

- | | |
|--|---------------------------------|
| a. Business Planning & Development | h. Graphic Design |
| b. Marketing & Advertising | i. Legal Services |
| c. Architecture & Space Design | ○ Real Property |
| d. Technology Consulting | ○ Employment |
| e. Broker Services | ○ Insurance and Liability |
| f. Diversity, Equity, and Inclusion training | ○ General Services |
| g. Disaster Preparedness & Resiliency Planning | j. Human Resources & Management |
| | k. Financial Guidance |

Eligibility

The Small Business Navigator program will accept requests on a first-come, first-served basis while funds are available. The program is open to brick-and-mortar businesses and home occupation businesses that are actively looking to transition to a brick-and-mortar location, provided they meet the following criteria:

Small Businesses

- Must be physically located in the City of Dublin.
- Must possess an active City of Dublin Business License.
- Must be in good standing with the City.
- Must not be a corporately owned chain/franchise store.
- Must have less than 50 full-time employees.

Home Occupation Businesses

- Must be a home occupation business operating in Dublin.
- Must possess an active City of Dublin Business License.
- Must be in good standing with the City.
- Must not be a corporately owned chain/franchise store.
- Must have less than 50 full-time employees.
- Must be requesting assistance related to transitioning from a home occupation to a physical location in Dublin.

Program Parameters

- Each eligible business will have up to five (5) hours of consulting per business matter
 - The City may grant additional hours per business matter on a case-by-case basis
- Requests will be reviewed on a first-come, first-served basis, and accepted on a rolling basis until program funding has been exhausted. The program will be available to eligible businesses as consultant capacity allow with priority given to certain businesses as described in the “priority criteria” section.
- There is a maximum of three uses
 - The City may grant additional hours per business matter on a case-by-case basis

Priority Criteria

Small Business Navigator program requests are typically accepted on a first-come basis. However, businesses may be granted first access to program consultants if they meet any of the following conditions.

- Demonstrated hardship
- First time user of the program
- Participating in existing City program
- Microbusiness (has 25 or fewer employees)

Program Process Steps

1. Business owner submits a request for assistance.
2. Economic Development staff reviews the submission for completeness and eligibility.
3. Business Owner and Staff will meet to discuss needs and program guidelines and determine project eligibility.
4. If the business is deemed eligible, City Staff will send match the business owner with a consultant and send referral to consultant.

5. Consultant follows up with business owner within three business days.
6. Consultant and business owner work to address the business need specified in the original request within their specified number of sessions.
7. Technical assistance concludes.
8. Evaluations and reports requested.
9. Invoice processed.

Roles & Responsibilities

Party	Role	Deliverables
Applicant	Initiate program participation and fully engage in program through completion.	<ol style="list-style-type: none"> a. Identify need for technical assistance b. Complete assistance request form c. Agree to program terms and conditions d. Participate in a discovery meeting with City staff e. Be responsive to consultant f. Complete requests from consultant g. Complete a post consultation survey
City Economic Development Staff	Facilitate process and manage program.	<ol style="list-style-type: none"> a. Review request forms as received; ensure eligibility b. Set up meeting with business owner to discuss need and review program guidelines c. Match business need to qualified consultant d. Make referral to consultant e. Issue evaluations to business owner and consultant f. Process invoices g. Monitor and document program happenings and outcomes h. Work with consultants to organize cohort trainings i. Execute and monitor consultant agreements j. Make continuous program improvements
Consultant	Provide technical assistance on an on-call basis and host learning forums in partnership with the City.	<ol style="list-style-type: none"> a. Follow up with referral within three business days. b. Provide up to five hours of one-on-one virtual and/or in-person technical assistance per each referral. c. Document one-on-one sessions including the request, time spent providing technical assistance, deliverables, and outcomes. d. Complete City requested surveys, reports, or other evaluations. e. Submit invoices for processing in a timely manner. f. Work with the City to host a virtual or in-person training for small businesses at least once a year.

FAQs for Business Owners

How does this Program work?

Local business owners who meet the eligibility criteria can apply for free one-on-one technical assistance from qualified consultants to address a specific business need. Assistance is provided on a first-come, first-served basis until all funding is exhausted.

What are the eligibility criteria for the Business Navigator program?

Dublin-based businesses with physical locations are eligible if they:

- Possess a valid City of Dublin Business License
- Are in good standing with the City
- Are not a corporately owned chain/franchise store and
- Have less than 50 full-time employees

Home occupations may also be eligible for assistance with transitioning from a home-based business to a brick-and-mortar location.

What types of assistance do the Business Navigators provide?

The Business Navigators offer one-on-one technical assistance for a specific business need. Examples of topics for one-on-one assistance include:

- Business planning
- Architecture and space planning
- Financial guidance
- Human resources/employment matters
- Strategic marketing and advertising

What types of items can I get assistance with?

The assistance is project-based (e.g. logo design, business plan revision, website development, marketing plan strategy development, etc.) with a specific scope and timeframe. It is not intended to provide ongoing support such as paying for Google Ads or maintaining a website.

How were Business Navigators selected?

The Office of Economic Development selected third-party partners for this program through a competitive Request for Proposals process in early 2022.

Is there a cost for services provided through the Business Navigator Program?

No, eligible applicants receive the services at no cost.

How are applicants assigned to a Business Navigator?

The Office of Economic Development will assign a Business Navigator based on the applicant's needs noted during the registration process and the discovery call.

What are the next steps after I submit my application form?

City staff will schedule a discovery meeting with you to learn more about your business need. After the meeting, the Office of Economic Development will work on matching you with a Business Navigator if

you are deemed eligible for the program. Once a match has been identified, you will be notified, and the assigned Business Navigator will reach out within the next three business days to set up your next meeting.

Can I apply for help with more than one business need? Is there a maximum number of times I can request?

Yes. Each eligible business can request assistance for up to three business matters while program funding allows.

What if I want to continue working with the consultant I was assigned to?

If you wish to continue working with the consultant you were initially assigned to, you have a couple of options. Firstly, if you haven't reached your three project maximum, you can submit an additional project request to work with the same consultant. Alternatively, you may choose to work with the consultant outside of the program and cover the costs independently.

What is required of me?

Applicants are expected to:

- Identify need for technical assistance
- Complete assistance request form
- Agree to program terms and conditions
- Participate in a discovery meeting with City staff
- Be responsive to consultant
- Complete requests from consultant
- Complete a post consultation survey

Projects within the Scope of the Program

The Business Navigators offer one-on-one technical assistance for a specific business need. Examples of topics for one-on-one assistance include:

- Business planning
- Architecture and space planning
- Financial guidance
- Human resources/employment matters
- Strategic marketing and advertising

The assistance available through the program is limited to project-based items with a narrow, defined scope and timeframe to support local businesses in getting to the next step. It is not intended to provide robust or ongoing support such as an extensive audit of financials or maintaining a website.

The following is a general outline of the project types that qualify and those that do not qualify for the Small Business Navigator Program. If you have any inquiries regarding a particular project, please contact economic.development@dublin.ca.gov.

Qualifying	Do not Qualify
Marketing strategy development	Paid ads
Website development	Ongoing website maintenance
Business financial review	Financial audit or five-year forecast
Flyer and postcard creation	Paid printing and mailing of marketing material
Site plan development	Construction related to the site plan
Business plan review and update	Business valuation