



Small Business
Development Centers



2009 California SBDC Conference positioning small business for success

April 13-14, 2009
Portola Hotel & Spa, Monterey CA

guest speakers

Antonio Doss
U.S. Small Business Administration

Rob Eyler, Ph.D.
Sonoma State University

Marty Keller
Governor's Office of Planning and Research

training

Business Valuation

Constant Contact

Economic Impact

WebCATS

Online Media

Quality Improvement

SBA Lending

thank you for your support



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Positioning Small Business for Success
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SCHEDULE AT A-GLANCE

Day 1- April 13, 2009

10:00-1:45 pm	New Center Directors Training
Noon-4:30 pm	Business Advisor Certification
3:00-6:00 pm	Registration Check-In
4:30-6:00 pm	Networking Business Expo hosted by Intuit
6:00-7:00 pm	CA SBDC Directors Dinner
7:00-9:00 pm	CA SBDC Directors Dinner— Closed Session

Day 2- April 14, 2009

7:00-10:00 am	Registration Check-in
7:00-8:00 am	Continental Breakfast
7:15-Noon	Business Expo
8:00-9:00 am	Opening Session
9:15-10:30 am	Training Series I
10:00-3:00 pm	Late Arrival Check-in
10:45-Noon	Training Series II
10:45-Noon	SBA/SBDC Leadership Meeting—Closed Session
12:15-1:45 pm	Luncheon & Keynote
1:45-2:30 pm	Networking Business Expo
2:45-4:00 pm	Supercharging CA SBDC Performance—Closed Session
2:45-4:00 pm	Training Series III
4:15-5:00 pm	Closing Plenary

**THIS EVENT HOSTED BY THE
CALIFORNIA REGIONAL SBDC
NETWORKS**



CALIFORNIA
SBDC

Small Business
Development Centers

Northeastern CA Regional Network

CSU Chico
(530) 898-5443
www.necsbdc.org
Serving California Northeast of Sacramento

Northern CA Regional Network

Humboldt State University
(707) 445-9720
www.northcoastsbdc.org
Serving the Greater San Francisco Bay area

UC Merced Regional Network

UC Merced
(559) 241-7406
<http://sbdc.ucmerced.edu>
Serving Central California

Los Angeles Regional Network

Long Beach Community College District
(562) 938-5020
www.smallbizla.org
Serving Los Angeles, Ventura & Santa Barbara Counties

Santa Ana Regional Network

CSU Fullerton
(714) 278-2719
www.leadsbdc.org
Serving Orange, San Bernardino & Riverside Counties

San Diego & Imperial Regional Network

Southwestern Community College District
(619) 482-6388
www.sandiegosmallbiz.com
Serving San Diego & Imperial Counties

FEATURED CO-SPONSORS



**ECONOMIC &
WORKFORCE
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through the
CALIFORNIA
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COLLEGES



2009 California SBDC Conference
Positioning Small Business for Success
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Welcome to the 3rd Annual California SBDC Conference!

Take advantage of the valuable professional development training workshops and events designed for:

- SBDC Center Directors
- Business Consultants
- Training Facilitators
- Administrative Staff

Learn how to maximize the many tools at your disposal to bring success to your region. Network with SBDC colleagues and explore ways to build partnerships and create new opportunities for growth.

How to Register

Registration is due by March 23, 2009. All SBDC personnel must register through their local SBDC Director. SBDC Directors and Visitors may register by completing the CA SBDC Conference Registration Form. Each SBDC Director must provide a list of all confirmed counselors and staff attending from their program. Registration forms may be submitted to JAMES ALVA, 562-938-5020, fax: (562) 938-5030, or e-mail: sbdc@lbcc.edu.

Vendors and exhibitors may contact Dan Ripke at (530) 519-3486 for exhibit and sponsor package.

Hotel Registration

Portola Hotel & Spa
Two Portola Plaza
Monterey, CA 93940
(888) 222-5851, Direct (831) 649-4511

Few Monterey, California hotels capture the essence of Monterey like the Portola Hotel & Spa overlooking Monterey Bay. Set against the picturesque backdrop of Monterey Bay, Fisherman's Wharf and downtown Monterey, the Portola Hotel & Spa reflects the captivating spirit of a rich, historical setting surrounded by everything that is the Monterey Peninsula. The hotel is within walking distance to the world-class Monterey Bay Aquarium, pristine beaches, Monterey Bay harbor and hundreds of dining and entertainment options.

Hotel reservation deadline date is March 23, 2009 (or until room block is sold out). Please contact the hotel right away to assure your lodging. Provide conference code: **CALED Conference**, to secure the rate of \$140.00 per night (plus applicable tax).

Transportation

GETTING TO MONTEREY

The Monterey Peninsula is located on California's Central Coast, making very convenient travel from many California locations.

Getting to the Monterey Peninsula from outside California couldn't be easier. Fly directly into Monterey's hassle-free airport located just 10 minutes from the hotel. Airlines servicing the Monterey Peninsula Airport include American, United and US Airways, offering 80 flights daily. Other travel options include flying into San Jose International Airport, a quick one-hour drive or San Francisco International Airport, a 1.5 hour drive down the picturesque California coast.

Shuttle service is available to the hotel from both San Francisco and San Jose airports, offering 11 scheduled trips daily to and from the hotel.

For more information, contact Monterey/Salinas Airbus, 831.373.7777.

<http://portolahotel.com/media/docs/pdfs/airbus.pdf>

AREA AIRPORTS

San Francisco (SFO)

Hotel direction: 100 miles South

Monterey (MRY)

Phone: 1.831.372.4186

Hotel direction: 3 miles West

Estimated taxi fare: 15.00 USD (one way)

San Jose (SJC)

Hotel direction: 70 miles South

Estimated taxi fare: 125.00 USD (one way)

DRIVING DIRECTIONS TO PORTOLA PLAZA

The Portola Hotel & Spa website has detailed driving directions from multiple directions.

<http://www.portolahotel.com/maps-directions-monterey.cfm>

Hotel Parking

On-Site Parking

Valet Parking: \$18 per day

Self Parking: \$15 per day

Both offer unlimited in/out privileges. Rates are subject to change.

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SESSION DESCRIPTIONS

Small Business Life Jacket—What's in the Stimulus Package for Main Street?

Antonio Doss, Associate Administrator for the U.S. Small Business Administration, shares the latest update on the stimulus plan rollout.

Presenter: Antonio Doss, SBA
Opening Plenary (8:00-9:00AM)

WebCATS on Steroids—Tools You Might Not Know About! (Advanced Users Only)

A session for experience WebCATS users to share new features and advanced reporting tools. Includes Q&A.

Presenter: Bob Judevine, Northern California SBDC
Training Series I (9:15-10:30AM)

Low Cost Promotions Through Constant Contact (Part 1 of a Two-Part Series)

Build successful e-mail campaigns for your center and clients through this easy-to-use and inexpensive system.

Presenter: Ron Cates, Constant Contact
Training Series I (9:15-10:30AM)

SBA Lending: What Consultants Need to Know to Help Their Clients

The new federal stimulus plan involves new financing opportunities for small business. Learn the latest requirements to help you facilitate access to capital for your SBDC clients.

Presenter: Mark Quinn, SBA San Francisco
Training Series I (9:15-10:30AM)

What the Heck is Economic Impact and Why Should I Care?

Applications of ECenter are shared to enhance your center's capability of capturing economic impact.

Presenter: Len Price, SoftShare
Training Series I (9:15-10:30AM)

Low Cost Promotions Through Constant Contact (Part 2 of a Two-Part Series)

Part two of a training session designed to advance your skills with this effective and inexpensive system.

Presenter: Ron Cates, Constant Contact
Training Series II (10:45-Noon)

"Grade A" Results: Implementing a Quality Improvement Cycle—A Case Study

Quality service delivery requires a comprehensive system of processes, communications and measures that are applied in a consistent fashion. Learn how to build a system that will get you the results you seek.

Presenters: Steve Karp, Northern California SBDC, and

Michael Kraft, North Coast SBDC
Training Series II (10:45-Noon)

Stop the Bleeding! Counseling Tools for Businesses in Peril

This session will help SBDC advisors counsel troubled businesses. Providing encouragement dosed with reality, tips on financial analysis, creative marketing tips and new loan programs will be discussed.

Presenter: Teresa Thomae, Central Coast SBDC
Training Series II (10:45-Noon)

Where Do We Go From Here? Small Business and Economics in California

Dr. Rob Eyler, an expert in monetary economics and history, applied microeconomics and econometrics, provides an economic outlook that includes a macro and small business perspective on the challenges and opportunities that face California.

Presenter: Rob Eyler, Ph.D., Sonoma State University
Luncheon Plenary (12:15-1:45PM)

Fresh Approaches to Using Online Media

The interest in online training is growing and the opportunities for SBDC's are endless. Learn how to quickly set up an online program at your SBDC and grow your client base through creative on-demand services.

Presenter: Dante Layton, Intuit
Training Series III (2:45-4:00PM)

What's It Worth? Business Valuation Fundamentals for Business Advisors

Members of the National Association of Certified Valuation Analysts (NACVA) share business valuation steps and strategies.

Presenter: Chris Hamilton, NACVA
Training Series III (2:45-4:00PM)

WebCATS Basic Skills Q&A

Are there some elements in WebCATS that still have you perplexed? Are some reports nearly impossible to generate? Attend this session and get answers that will help you reduce 'trial and error' and become more efficient and knowledgeable.

Presenter: Len Price, SoftShare
Training Series III (2:45-4:00PM)

SPECIAL EXHIBITS

Emerging Markets in Renewable Energy: CIRD Exhibit

The CIRD exhibit will showcase the forthcoming Renewable Energy in the Emerging Markets of Africa, Latin America and the Caribbean Conference, (REEM09.net) in San Francisco, CA, April 27-29, 2009.

Young Entrepreneurs Project Showcase Exhibit

The exhibit showcases the different ways in which YEP has been offered in the state to benefit young entrepreneurs and spreading entrepreneurship as a lifetime career path.

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- 4:30-6:00 pm** **Networking Business Expo**

- 6:00-7:00 pm** **CA SBDC Directors Dinner**
- 7:00-9:00 pm** **CA SBDC Directors Meeting (Closed Session)**

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- Low Cost Promotions Through Constant Contact (Part 1 of 2)
 - WebCATS on Steroids—Tools You Might Not Know About!
 - What the Heck is Economic Impact and Why Should I Care?
 - SBA Lending: What Consultants Need to Know to Help Their Clients

- 10:45-Noon** **Training Series II**
- Low Cost Promotions Through Constant Contact (Part 2 of 2)
 - “Grade A Results: Implementing a Quality Improvement Cycle—A Case Study
 - Stop the Bleeding: Counseling Tools for Businesses in Peril

12:15-1:45 pm **Luncheon Plenary**
 Guest Speaker: Rob Eyler, Ph.D., Sonoma State University

1:45-2:30 pm **Networking Business Expo**
 Opening Remarks: Marty Keller, Small Business Advocate, Governor’s Office of Planning and Research

- 2:45-4:00 pm** **Training Series III**
- Fresh Approaches to Using Online Media
 - Business Valuation: Understanding the Engagement
 - WebCATS Basic Skills Q&A

2:45-4:00 pm **Supercharging California SBDC Performance (Closed Session)**
 Closed session for SBDC Service Center Directors, Regional Leads, SBA and EWD Representatives.

4:15-5:00 pm **Closing Plenary—Next Steps for California**

CASBDC PROFESSIONAL DEVELOPMENT COMMITTEE

The California SBDC program extends its appreciation to the following committee members for planning the conference workshop curriculum.

- Debbie Trujillo, Chair
- James Alva
- Victor Castillo
- Lorraine DuVernay
- Sophie Konuwa
- Vincent McCoy
- Becki Walker
- Diane Howerton
- Kristen Johnson
- Dan Ripke
- Jesse Torres

PRESENTER BIOS

Antonio Doss is the Associate Administrator for the SBA Office of Small Business Development Centers (OSBDC). He was appointed as in April 2004. With over 19 years of experience in financial services, community affairs, and the Federal government, his career demonstrates an evolution of progressively responsible management roles with a reputation for performance, leadership, customer outreach and personal integrity.

As Associate Administrator, Mr. Doss manages a \$90 million program that funds 63 Small Business Development Lead Centers in every state plus the District of Columbia, Guam, Puerto Rico, American Samoa and the U.S. Virgin Islands and more than 1,100 service locations nationwide.

Prior to coming to SBA, Mr. Doss was a senior vice president at Bank of America where he managed the bank's community development program in the Mid-Atlantic Region. Under his leadership, Bank of America received the highest ratings from the Office of the Comptroller of the Currency for its commitment and demonstrated results in community reinvestment. While at Bank of America, Mr. Doss also managed SBA lending teams, branch offices, a consumer lending product group and championed overall mortgage and real estate lending to low- and moderate-income communities.



Robert Eyster is an Associate Professor and Chair of Economics at Sonoma State University in California. He earned a Ph.D. from the University of California, Davis in 1998. He has published articles on the California wine industry, acted as a consultant in winery litigation, and has recently finished a book on international economic sanctions. His fields of specialization are macroeconomic and monetary theory, applied econometrics, regional economics, and economic history. He is also the director of the Center for Regional Economic Analysis at Sonoma State University. Dr. Eyster is a native Sonoma County resident.



Chris Hamilton is a principal of Arxis Financial, Inc., Arxis Technology, Inc., and Arxis Wealth Management. These firms are involved in tax and accounting consulting, business valuation, litigation consulting, technology consulting and financial planning.

The firms are located in Simi Valley, California. Chris is a Certified Public Accountant, Certified Fraud Examiner, Certified Valuation Analyst, and a Diplomat with the American Board of Forensic Accounting. He is a licensed life and disability insurance agent and a General Securities Representative. Most of his professional time is spent in the areas of business valuations, forensic accounting and litigation related engagements. He has served as an expert in civil, criminal,

probate and family court matters.

Chris has presented courses at national conferences, training institutes and seminars around the country. Chris is part of the team teaching the Advanced Business Valuation courses around the country for NACVA as well as Fundamentals Techniques and Theory. He is also an instructor with the NACVA "Certified Training Institute" (CTI) and the "Business Valuation and Certification Training Centers." He currently serves on the editorial board and is a regular contributor to the NACVA publication, *Insights on Valuation*. He is a co-author "Financial Valuation – Application and Models, 2nd edition," published May, 2006.



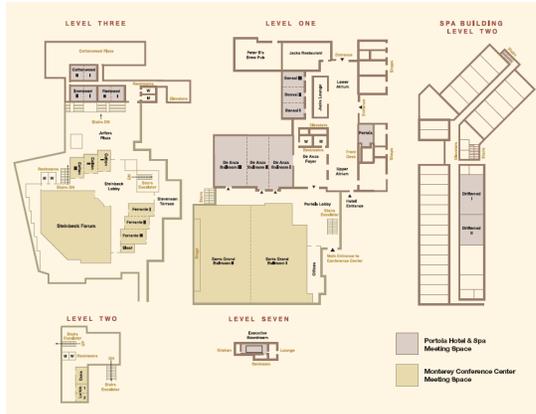
Bob Judevine has over 25 years leadership experience including 7 years as the owner of a regional ice cream manufacturing company. Bob spent the last 8 years helping entrepreneurs find success first at the North Coast SBDC, and more recently as Associate Director for the Northern California SBDC Lead Center. He is tasked with programmatic oversight for 10 SBDC service centers from the Oregon border to Monterey.

Marty Keller is the appointed small business advocate for the Governor's Office of Planning and Research. Previously, he served as executive director of the California Automotive Business Coalition, formerly the Automotive Repair Coalition of California. Prior to that position, Keller was previously a consultant and president of Greenslip Incorporated, an independent automotive inspection service. He was chief of the Bureau of Automotive Repair from 1995 to 1999. Additionally, Keller has served as chief of the Bureau of Home Furnishings and Thermal Insulation and the Bureau of Electronic and Appliance Repair.

Dante Layton specializes in the design of well organized and operated management systems for small businesses. Dante is a Certified QuickBooks ProAdvisor with Advanced Certification, and helps entrepreneurs in every industry use QuickBooks to become better financial managers. Since 2001, Dante has taught over 5,000 users of QuickBooks in over 20 states, and currently teaches QuickBooks online in the US, Canada, UK, and India. Dante also publishes a blog for business owners and managers who use QuickBooks at www.dantelayton.com.

Dante is also a member of the Intuit Accountants Speakers Bureau and a regular speaker at the annual California AICPA trade conference, AICPA associations, and other Intuit sponsored events.

HOTEL FLOOR PLAN



SPONSOR BENEFITS IMPLEMENTATION

Thank you for your involvement in the 2009 California SBDC Conference. We appreciate your support and are committed to helping you achieve long-lasting benefits from your involvement in the conference.

Shipment of materials for the conference:

- Shipments MUST reach the Portola Hotel & Spa by Monday morning, 11 a.m., April 13.
- Shipments must not arrive at the hotel before Monday, April 13. There will be no charges for shipping and drayage of materials stored less than two days. Sponsor is responsible for any charges that may accrue.

Ship to: Portola Hotel & Spa
ATTN: Donna Valentine
CA SBDC Conference
Two Portola Plaza
Monterey, CA 93940

Please advise Kristin Johnson via email (Kristin.Johnson@humboldt.edu) about your shipments (number of boxes, sizes, shipping method and tracking number).

EXHIBITOR INFORMATION CONFERENCE THEME

The theme for the 2009 California SBDC Conference is "Positioning Small Business for Success." We encourage sponsors and exhibitors to incorporate this theme into their marketing efforts.

EXHIBIT LOCATION

Exhibits will be set up in the De Anza I room of the Portola Hotel & Spa.

Exhibit space assignments are made at the discretion of the California SBDC leadership and based on a first-come, first-served basis.

EXHIBIT SPACE

Sponsors will receive one six-foot skirted table with two (2)

chairs. Small pop up exhibits are allowed if they can fit on top of the table. A banner stand may be placed behind your table. No banner stand or other signage can extend beyond the front of the exhibit table.

THE EXHIBIT SCHEDULE

Installation of Exhibits

Monday, April 13, 2:00 PM – 4:00 PM

Set up and installation

Exhibit Hall Hours

Monday, April 13, 4:30 PM - 6:00 PM

Exhibits will be open during registration and during the Networking Business Expo. Light refreshments and hors d'oeuvres will be served.

Tuesday, April 14, 7:15 AM to Noon

Exhibits open until the Luncheon Plenary session.

Other Times

Although not mandatory, for maximum exposure, we encourage exhibitors to also be at their booths during transition times throughout the conference – before breakfasts and lunches, during breaks, etc.

Exhibit Breakdown

Tuesday, April 14, 6:00 PM

All exhibits must be broken down by 8:00 PM

SIGNS

Exhibitors are responsible for their own signage to fit within exhibit space.

INTERNET AND POWER

If requested on the exhibitor registration form, California SBDC will provide one electrical outlet for each exhibitor. Exhibitors requiring outside telephone lines, internet connections or additional power must make arrangements directly with the California SBDC will not provide or be responsible for any of these additional service or charges.

RESTRICTIONS

Loud noises such as bells, sirens, buzzers, etc. will not be permitted in order to maintain a professional atmosphere. Microphones are not allowed in exhibits. Videos with sound must not disturb neighboring exhibits.

SECURITY

Although the hotel provides general security, do not leave computers, other equipment or valuable items in your exhibit booth overnight or during non-conference hours.

LIABILITY

It is mutually agreed that California SBDC and the Portola Hotel & Spa shall not be liable to an exhibitor for any damage to or for the loss or destruction of an exhibit, or the property of an exhibitor, or injuries to his/her person resulting from any cause. The exhibitor expressly waives all claims for such loss, damage or injury. Exhibitors shall provide their own insurance coverage for loss or damage as needed.