

2010 All-CA SBDC Conference

Breakout Session Snapshot (draft)

Day/Time	Type of Breakout	Topic	Topic	Topic	Topic	Topic	Topic
Monday 8:00 am- 9:50 am	Pre- Conference Training	WebCATS Basics (Softshare)					
Monday 10:10- 12:00 pm	Pre- Conference Training	WebCATS Scorecard (Softshare)					
Monday 1:45- 3:45pm	Plenary Sessions	Procurement					
Monday 4:00- 5:00pm	Discussion Sessions	Profit Mastery: Tips and Tricks	Youth Entrepreneurs	Administrative Assistants Group	Loan Preparation	Restaurants and Hospitality	Use of Social Media to Promote SBDC
Tuesday 8:00- 10:00am	Breakout Sessions	Social Media Train the Trainer	Presentation Skills for the Already Skilled	Non-Traditional Finance	Raising Cash Match		
Tuesday 10:15- 12:15pm	Breakout Sessions	Equity Capital Panel	Hands-on Facebook	"Internationaliz ing" Your Center	Quickbooks for Construction		
Tuesday 2:00- 4:00pm	Breakout Sessions	Lender Update Panel	Presentation Skills	Using sbdcglonal.net to Match Clients with Foreign Buyers	Quickbooks for Restaurants		
Wednesda 8:30-5:00	Post- Conference Training	SBIR Consultant Training	"T" Designation Training: Directors Only				

Breakout Session Descriptions (draft)

Pre-Conference Training

Both WebCATS trainings will be conducted by James Escareno, Senior Trainer at Softshare. James has been with the company for 11 years and been actively involved in the many recent upgrades to WebCATS. Both sessions will have plenty of time for Q&A. Pre-conference training requires advance registration. There is still time to register at www.californiasbdc.org

Title	WebCATS Basics
Description	This course is aimed at new users and those that have not used WebCATS regularly since many of its recent updates. The session will start with an overview of the system and explanations of "subsetting" and reporting. Attendees will learn tips and tricks of getting around the system with ease, watch demonstrations of sample inputs and queries, as well as learn some lesser known features of CATS. There will be plenty of time for questions.
Presenter	JAMES ESCARENO , Senior Trainer, Outreachsystems (Softshare)

Title	Advanced WebCATS: Scorecard
Description	Designed for those who already use WebCATS and/or those interested in goaling/measurement. "Advanced WebCATS: Scorecards" will start off with a walkthrough of the new custom scorecard feature. Then attendees will watch as James creates a scorecard, sets up sample goals for the scorecard, then sets up a scheduled report to send directly to the attendees. James will also discuss setting a single (combined) scorecard and how to use it to create a custom (individual) scorecard with goals for staff and advisors to see when they log in.
Presenter	JAMES ESCARENO , Softshare Senior Trainer

Breakout Sessions

Following are the core breakout sessions of the conference. This year we have many visiting presenters from California and beyond. These sessions are all two hours in length. See Breakout Session Snapshot (at the beginning of this document) for dates and times each session is offered.

Title	Equity Capital Panel: Interactive Session with Live Pitch
Description	Learn about the funding landscape and how to make a professional pitch to qualified investors-from qualified investors. Then, put your "investor hat" on to discuss

	<p>presentations made on-site with an audience panel and evaluate what makes up a good “pitch”. Last, vote for your winner through SMS-text polling. Don’t forget your phone!</p> <p>10:15 – 10:45 The Funding Landscape (Steven Mednick) 10:45 – 11:15 The “Investor Pitch” (Don Kasle) 11:15 – 12:00 Presentations and Evaluations 12:00 – 12:15 Questions & SMS Text Vote</p> <p>This session will fill up—make sure to arrive early if you want a seat.</p>
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<p>Presenters</p>	<p>STEVEN MEDNICK, Founder of Plenum Revenue Group, LLC,</p>  <p>Steve brings more than 20 years experience in multiple industries, with an extensive background in complex global sales, business development, corporate development, marketing and operations. With Steve's unique combination of business, technical, finance and legal skills learned in-house at companies ranging from 20 - 400,000 employees, he operates at the speed of business with a keen sense for the bottom line.</p> <p>Steve's selected accomplishments include the establishment of the corporate ventures office for a Silicon Valley headquartered \$2.3 billion global company in the IT industry which contributed \$80 million+ in revenue through investments, strategic sales and alliances. He has led a team of industry consultants selling \$100 million in IT solutions for a global computer hardware company and grew revenues 945% in 30 months for an Orange County company in the data services industry; expanded marketing reach from California to nationwide and attracted venture capital investment and a subsequent buy-out.</p> <p>DON KASLE, Managing Partner of Alldas</p>  <p>Don Kasle, a retired bank CEO, is Managing Partner of Alldas Partners, a financial services consulting company. He has over 40 years experience in executive management and service on boards of directors, as well as commercial banking and capital formation.</p> <p>Mr. Kasle is also an active investor in and a coach for start-up companies through his membership in the Tech Coast Angels where he also serves on the Board of Governors as well as a member of the executive committee for the Orange County Network. During his career, Mr. Kasle has served on over 30 Boards of Directors in the public, private and not-for profit sectors, including 7 bank boards. Most recently he was Lead Director and Chairman of the Executive Committee at De Novo Bank in downtown Los Angeles.</p>
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Title	SBDC Facebook Pages: Tips for Those that Administer Sites
Description	This is a “roll up your sleeves” session for attendees who already administer Facebook sites for their local SBDCs (and those who want to)! Join in for a brass-tacks discussion on essentials for a successful SBDC site, a reality check on maintaining content, and “how-to” advice for building your fan base. This discussion will include content for beginning and more advanced Facebook users and “lessons

	learned” from the Norcal Region’s film project.
Presenters	<p>MICHAEL NEUENDORFF, Owner of The Growth Coach</p>  <p>Michael Neuendorff is a Sales and Marketing Advisor for both San Francisco and Silicon Valley SBDCs. He regularly leads seminars and workshops on social media marketing for small businesses. He is active on Facebook, LinkedIn and Twitter, blogs, and has a channel on YouTube.</p> <p>ANN JOHNSON-STROMBERG, Communications & Marketing Manager, Norcal SBDC</p>  <p>Ann is a public relations expert with a background in journalism, small business and economic development. She currently manages regional SBDC marketing efforts and recently completed a short films project that resulted in 10 filmed success stories for strategic social media marketing purposes.</p>

Title	<p>RESULTS EVERY TIME YOU TALK: Presentation Skills for the Already Skilled Presenter</p>
Description	<p>“Each one of us have a job that is more than transferring information, regardless of the situation or the audience,” says Dan Sapp. In this engaging, interactive program, Dan Sapp offers a process for developing and delivering a compelling, “value-focused” message that demonstrates your organization’s ability to meet the objectives of the most important people you talk to. This process allows you to develop a unique, results-driven communication experience based on the needs and objectives of the people you are talking to for every important meeting. Dan Sapp helps business leaders differentiate their offerings, their firms, and their value proposition—every time they talk.</p> <p>Dan’s sessions include live video taping and coaching of participants. He offered this course to the Norcal SBDC Directors last fall—and won rave reviews.</p> <p>Dan’s sessions will fill up. Arrive early if you want to participate in these interactive sessions.</p>
Presenter	 <p>DAN SAPP, Owner of Dan Sapp, Inc.</p> <p>Dan has been a thought leader in the business communication field for 20+ years. In 1997, he founded Dan Sapp Inc., and quickly gained a reputation for helping business leaders brand</p>

	<p>their leadership through strategic communication. His clients include senior executives in industries ranging from AEC to financial services to technology including Anshen & Allen, Gensler, WRT, Cannon Design, the Graduate School of Business at Stanford University, Berkeley's Haas School of Business, Hellman and Friedman LLP, Mellon Capital Management, JMI Equity, the international VC firm 3i, Silicon Valley Bank, Northern Trust Bank, Nokia, Cisco and others. Dan is also the author of the published article, "How PowerPoint Ruined the U.S. Economy."</p>
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Title	Raising Cash Match
Description	This session is for Lead/Service Center Directors <u>only</u> . Brainstorm with center directors across the state and share best practices on raising match (cash and in-kind) from public, private, and corporate entities. Learn what works, what doesn't and what others are doing to "keep the lights on".
Presenter	<p>MARK MITCHELL, Director, Tri-Tech SBDC</p>  <p>First and foremost, Mark Mitchell is a strategist who is passionate about helping entrepreneurs. He is a speaker, trainer and consultant with a mission to support businesses and individuals alike in defining and achieving greater success. His background includes more than 25 years of experience in sales, marketing, management and consulting.</p> <p>As President and consultant of the Mark Mitchell Group, establish in 1988, Mark provided businesses and clients with customized strategies and techniques in the areas of marketing, leadership development, customer service, and sales. Mark began working with the Orange County Small Business Development Center in 2002 and is currently the Director of the TriTech Small Business Development Center focusing on assisting high technology, high growth businesses raise equity funding and compete in the marketplace.</p>

Title	Social Media Panel of Experts (Wow!)
Description	<p>Come listen to the foremost experts on social media and its importance to the survival of small businesses. Studies show that in 7 years, those small businesses that are not engaging in social media will no longer exist. Come learn from the experts how to speak intelligently to your clients about social media. Learn how and when small businesses should incorporate social media.</p> <p>This session will fill up. Come early if you want a seat!</p>
Panelists	<ul style="list-style-type: none"> • Rieva Lesonsky, Founder and CEO, GrowBiz Media • Hazel Quimpo, Senior Community Manager, Yelp • Adam Gerston, Partner Manager, Facebook (invited) • Ann Murray, Executive Director and Co-Founder of @6PR • Jesse Luna, SBDC Business Consultant

Bios



RIEVA LESONSKY, Founder and CEO, GrowBiz Media

Rieva Lesonsky is CEO and president of GrowBiz Media, a content and consulting company specializing in covering small businesses and entrepreneurship. A nationally known speaker and authority on entrepreneurship, Lesonsky has been covering America's entrepreneurs for nearly 30 years. Before co-founding GrowBiz Media, Lesonsky was Editorial Director of *Entrepreneur Magazine*.

Lesonsky's work can be found on her blog, SmallBizDaily.com. In addition Lesonsky is an editor-at-large for AllBusiness.com, the editor-in-chief at GrowSmartBusiness.com, and also writes about small business for AOL Small Business, SCORE, Small Business Trends, SBA.Gov, AT&T Small Business, American Express OPENForum and BusinessonMain. In 2009, she was named to Folio Magazine's "Folio 40" list, which honors publishing's top innovators.

HAZEL QUIMPO, Senior Community Manager, Yelp



Hazel Quimpo has spent the last three years living, breathing, eating and drinking all things Yelp. As Senior Community Manager she does business owner outreach, hosts events for yelpers, and partners with local events and businesses to help them gain exposure through Yelp. She's an avid social media user and is enthusiastic about all things local, well that and anything to do with bacon.

ADAM GERSTON, Partner Manager, Facebook (invited)



Adam Gerston serves as Partner Manager at Facebook, where he manages relationships with many of the company's top Ads API developers, as well as related strategic projects. Previously, he spent six years at advertising and brand marketing agencies McCann Erickson, Jack Morton Worldwide, and BBMG. Adam began his career at the nonprofit Center for Civic Education, following his undergraduate work at UCLA. While earning his masters degree at NYU, he worked at New York City's Department of Small Business Services, where he helped develop a new platform program for Minority and Women Business Enterprises (MWBES). Adam resides in San Jose, CA, and is hopelessly in love with his eleven month old daughter, Gia.

ANN MURRAY, Executive Director and Co-Founder, @6PR



Ann is the Executive Director and Co-Founder of @6PR, recipient of the Verizon Small Business Leadership Award. Early on in her social media career, she was part of the original guerilla marketing team that catapulted the first MySpace Records band to success in 2005. While a PR graduate student

at USC, she worked as Microsoft/Harvard researcher Dana Boyd’s R.A. at USC’s Digital Youth Lab, studying social media youth practices and at M80 social media marketing as an account executive. She has also worked at Hispanic market agency La Agencia de Orci, with clients such as Verizon, and UK-based ThinkJam PR where she conducted major social media campaigns for Twentieth Century Fox Home Entertainment.

JESSE LUNA, SBDC Business Consultant



Jesse P. Luna specializes in helping SBDC clients with sales and marketing and technology, including social media/networking; online/ digital marketing, Web design and optimization, ecommerce, business blogging, and marketing and information systems (especially distribution systems). He is fluent in Spanish.

An SBDC Business Advisor since 2010, Jesse is also a technology blogger whose blog is listed in AllTop.com’s Tech section. In 2010 he was nominated for Best California Latino Blogger by Latinos In Social Media.

A former schoolteacher who has lectured in the Business Department at California State University Channel Islands, Jesse loves helping small businesses become successful. Jesse has a B.A. in African and Afro-American Studies from Stanford University, and an MCIS (Masters in Computer Information Systems) and MBA from the University of Denver.

Title	Non-Traditional Financing: After the Bank Says “No”
Description	Most SBDC consultants are knowledgeable about traditional lending, some are versed in helping clients with equity capital, but <i>few</i> really know what exists beyond these two! This session will explore non-traditional ways that companies find money—through production financing, factoring, peer lending and other methods of capitalization. Attendees of this session will become more valuable to their clients and the SBDCs they work at—they will know alternatives to finance after the bank says “no.”
Presenters	 <p>TERRY GUBATAN, Business Development Officer, Commercial Financial Group (Bio to follow)</p> <p>MATT MURRAY, Partnership Officer, Prosper.com (invited) (Picture and Bio to follow)</p>

Title	“Internationalizing” Your Center
Description	Is your Small Business Development Centers (SBDC) beginning to assist clients in international trade activities? The International Trade Center in San Antonio will detail what is needed to have your SBDC begin assisting clients with international trade needs. Whether your SBDC has questions regarding internal administration, funding, consulting, or training programs, this session will provide the information and resources needed to have your SBDC engage in international trade assistance.
Presenters	<p>MÓNICA ALCOZ, Sr. International Trade Consultant, ITC</p>  <p>Mónica Alcoz is a Sr. International Trade Consultant with the International Trade Center (ITC). Under this position she provides support to domestic and foreign small and medium size businesses interested in exploring international business opportunities. She is the project manager of the Southern U.S. Trade Association Export Readiness Training, an export training program that helps high-value food and agricultural companies expand into foreign markets.</p> <p>Before joining the ITC in 2001, Mónica was an Agricultural Engineer (Ingeniera Agrónoma) working as a crop consultant for farmers in her native country of Uruguay.</p> <p>Mónica holds a Bachelor’s degree in Agricultural Engineering from the Universidad de la República in Uruguay and an MBA in International Business from the University of Texas at San Antonio. Mónica is a NASBITE Certified Global Business Professional and a Certified Business Advisor. She is a member of the North America Small Business International Trade Educators Association and the Hispanic MBA Association. Mónica is fluent in English, Spanish, French and Portuguese.</p> <p>CARLA GONZALEZ, Sbdcglob.com Site Specialist, ITC</p>  <p>Carla Gonzalez is the SBDCGlobal.com Site Specialist at the International Trade Center. As the SBDCGlobal.com Site Specialist, Carla oversees the development, maintenance, usage and promotion of the online trade platform, which connects the small business clients of the U.S. and Mexican SBDC networks for bilateral trade opportunities and education. Carla joined the International Trade Center in 2008 and previously served as an International Market Research Specialist. In this position Carla conducted and provided market research for the small and medium-sized businesses of the 79-county South-West Texas Border Region.</p> <p>Carla holds a Bachelor of Arts in International Relations with a minor in Business Administration as well as a Master of Arts in International Relations with a concentration in International Development, both from St. Mary’s University in San Antonio, Texas. She was born and raised in San Antonio and is fluent in English and Spanish.</p>

Title	Quickbooks for Construction Companies
Description	We will discuss the effect of industry specific QuickBooks and Bookkeeping workshops on 1:1 counseling numbers and your center’s economic impact.

	<p>This is a hands-on workshop with laptops and sample data provided, covering QuickBooks techniques and processes tailored for Construction Subcontractors. Learn how QuickBooks can be used for job costing and estimating. We will demonstrate proper industry-specific data entry techniques, how to appropriately classify expenses, and more. We will show how to generate job cost reports, track estimates and change orders, calculate indirect cost multipliers and labor job costing, enter vendor bills and credit card statements.</p>
Presenter	<p>TED HILLIARD, Managing Consultant, Hilliard Management Group</p>  <p>Ted Hilliard is a graduate of University of California at Berkeley with over twenty years of financial accounting and cash flow management consulting experience, including fourteen years as the managing consultant for Hilliard Management Group (HMG), www.hilliardmg.com. HMG works with the U.S. Small Business Administration and other small business development organizations to expand their training programs in QuickBooks and bookkeeping.</p> <p>In 2005, Ted served with the US Army in Iraq. He was instrumental in the revitalization and reorganization of the Kirkuk Business Center. In 2009, Ted returned to Iraq and worked with the U.S. Embassy in Baghdad to support businesses and further economic development in the region.</p>

Title	Lender Panel- What's New in Lending?
Description	<p>If you are someone who works with many clients on loan packaging, don't miss this session jam-packed with updates on all sorts of lending products. Topics covered include: detailed account of changes in SBA loans, new loan products available from community lenders, and a discussion about "where we are at" in terms of a revival of small business lending. This strong panel is sure to leave attendees with new and relevant information that is immediately applicable.</p> <p>Come early if you want a seat! Likely to fill up.</p>
Panelists	<ul style="list-style-type: none"> • Mark Quinn, SBA District Director, San Francisco • Stacey Sanchez, Executive Director, CDC Small Business Finance • Bob Holguin, Director of Business Services, VEDC • Heather Endresen, SVP, Manager of SBA and Government Lending Business Banking Group, Union Bank (invited)
Bios	<p>MARK QUINN, SBA District Director, San Francisco</p>  <p>Mark Quinn is the District Director of the U. S. Small Business Administration. The San Francisco District covers the San Francisco Bay Area and Northern California counties from Crescent City to Santa Cruz. The San Francisco District covers a business loan portfolio of more than 10,500 loans worth \$3.7 billion. Annually, the District approves SBA</p>

guaranty loans, which, in 2005, totaled over \$750 million for 2,500 small business loans made through 100 lending institutions. Prior to his appointment, Mark served as Deputy District Director for the San Francisco District Office. He previously supervised the San Francisco District's Portfolio Management Division, handling the servicing of SBA lending throughout Northern California. Prior to coming to SBA in September 1986, he held positions as a Regional Economist and Economic Development Specialist with the U. S. Department of Housing and Urban Development in San Francisco and Philadelphia Regions.

STACEY SANCHEZ, Executive Director, CDC Small Business Finance



(Bio to follow)

BOB HOLGUIN, Director of Business Services, VEDC



Mr. Holguin is Director of Business Services for Valley Economic Development Center. He has over 20 years of experience in manufacturing, retail and publishing environments as well as non-profit organizations, with a high rate of success in the companies he has worked for. Mr. Holguin holds an MBA from the University of Phoenix, with concentration in business operations and strategic planning. He is also Chairman of the Pacoima Federal Development Credit Union Supervisory Committee, Adjunct Professor at Cal State University, Northridge and sits on various boards such as, El Proyecto del Barrio and the Economic Alliance, among others.

Title	Using SBDCGLOBAL.net to Match Clients with Foreign Buyers
Description	SBDCGlobal.com is a free on-line trade platform that will help your Small Business Development Center (SBDC) clients connect with counterparts in the US, Mexico, Colombia, and El Salvador for facilitated domestic and international business opportunities. The website provides small business clients working with an SBDC with prequalified trade leads coupled with the assistance of local SBDC Advisors so that they can increase their global competitiveness, expand sales, and create jobs. SBDCGlobal.com also provides SBDC Advisors with free international tools and market information which can be used to assist SBDC clients. Come learn how the features of SBDCGlobal.com can provide value to your SBDC.

Presenters	<p>MÓNICA ALCOZ, Sr. International Trade Consultant, ITC</p>  <p>Mónica Alcoz is a Sr. International Trade Consultant with the International Trade Center (ITC). Under this position she provides support to domestic and foreign small and medium size businesses interested in exploring international business opportunities. She is the project manager of the Southern U.S. Trade Association Export Readiness Training, an export training program that helps high-value food and agricultural companies expand into foreign markets.</p> <p>Before joining the ITC in 2001, Mónica was an Agricultural Engineer (Ingeniera Agrónoma) working as a crop consultant for farmers in her native country of Uruguay.</p> <p>Mónica holds a Bachelor’s degree in Agricultural Engineering from the Universidad de la República in Uruguay and an MBA in International Business from the University of Texas at San Antonio. Mónica is a NASBITE Certified Global Business Professional and a Certified Business Advisor. She is a member of the North America Small Business International Trade Educators Association and the Hispanic MBA Association. Mónica is fluent in English, Spanish, French and Portuguese.</p> <p>CARLA GONZALEZ, Sbdcglob.com Site Specialist, ITC</p>  <p>Carla Gonzalez is the SBDCGlobal.com Site Specialist at the International Trade Center. As the SBDCGlobal.com Site Specialist, Carla oversees the development, maintenance, usage and promotion of the online trade platform, which connects the small business clients of the U.S. and Mexican SBDC networks for bilateral trade opportunities and education. Carla joined the International Trade Center in 2008 and previously served as an International Market Research Specialist. In this position Carla conducted and provided market research for the small and medium-sized businesses of the 79-county South-West Texas Border Region.</p> <p>Carla holds a Bachelor of Arts in International Relations with a minor in Business Administration as well as a Master of Arts in International Relations with a concentration in International Development, both from St. Mary’s University in San Antonio, Texas. She was born and raised in San Antonio and is fluent in English and Spanish.</p>
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Title	Quickbooks for Restaurants
Description	<p>We will discuss the effect of industry specific QuickBooks and Bookkeeping workshops on 1:1 counseling numbers and your center’s economic impact. This is a hands-on workshop with laptops and sample data provided, covering QuickBooks techniques and processes tailored for Restaurants, Cafés, and other Food Service Businesses. Learn how QuickBooks can be used for entering daily sales, track back-of-house and front-ofhouse costs. We will demonstrate how to track daily sales, sales tax and tips, enter vendor bills and credit card statements, and generate financial reports</p>
Presenter	TED HILLIARD , Managing Consultant, Hilliard Management Group



Ted Hilliard is a graduate of University of California at Berkeley with over twenty years of financial accounting and cash flow management consulting experience, including fourteen years as the managing consultant for Hilliard Management Group (HMG), www.hilliardmg.com. HMG works with the U.S. Small Business Administration and other small business development organizations to expand their training programs in QuickBooks and bookkeeping.

In 2005, Ted served with the US Army in Iraq. He was instrumental in the revitalization and reorganization of the Kirkuk Business Center. In 2009, Ted returned to Iraq and worked with the U.S. Embassy in Baghdad to support businesses and further economic development in the region.

Peer Discussion Sessions

You asked for it—time in the agenda to share with each other about what’s working in your centers! Discussion sessions will be held on the following topics.

Title	Profit Mastery: User Group
Description	Profit Mastery has swept across the state and is now in use by over half of California’s SBDCs. This discussion is for those of you who use Profit Mastery to share about what’s working and challenges incurred.

Title	Youth Entrepreneurship
Description	Youth entrepreneurship continues to be a significant focus for many SBDCs. This discussion group will focus on “what’s working” in serving up and coming entrepreneurs.

Title	Administrative Assistants Group
Description	Whether your title is “Administrative Assistant,” “Office Manager,” “Services Coordinator” or something else—if a good chunk of your job has to do with keeping the SBDC running on all cylinders, this session is for you. Come swap info with others who focus on center operations, client screening and WebCATS.

Title	Loan Preparation: For Those of You Who Do Lots of Loan Prep!
Description	Every SBDC has a couple of consultants who do a lot of loan packaging for clients. If this sounds like you, come and talk with others who do the same.

Title	Restaurants and Hospitality
Description	Does your center work with a lot of restaurant owners? Come and share about how you help restaurants survive and thrive. Hear about specialty programs specifically designed for restaurant clients.

Title	Use of Social Media to Promote SBDC
Description	Have you started using social media to promote your services? Come chat with other folks who are learning what works (and doesn't) in social media promotion.

Post Conference Training

Title	SBIR Consultant Training
Description	<p>Topics include...</p> <ul style="list-style-type: none"> • Is The SBIR/STTR Program Right for Your Client? <u>Pre-screening is critical.</u> • Getting Your Client Ready to Write/Role Plays • Basics of Proposal Development including Budgets • Helping Your Client Plan for Phase II During Phase I • Hands On Exercises, Writing Samples, Observations (time permitting) • Developing the SBIR specialist • Team Building—Core team and Liaisons statewide • Counseling—Educating Clients • Marketing—accessing new clients • Events: How to plan, schedule, market and carry out • Funding programs
Presenter(s)	<p>MARK HENRY, VP of Operations, PBC</p>  <p>Mark H. Henry, V.P. of Operations, is a nationally known expert in the \$2.5 Billion federal Small Business Innovation Research (SBIR) and Small Business Technology Transfer (STTR) programs, which provide early-stage R&D funding for small, high-tech businesses nationwide. He has 28 years of experience in helping innovative small firms across the country win hundreds of government R&D grants and contracts. Mark provides client support in the planning, coordination, and production/writing/editing of proposals for obtaining grants and contracts that support client R&D efforts and product/service development. His expertise includes formulating funding strategies, establishing "corporate discipline" and procedures, managing public relations/marketing, and working with technical people to sell technical ideas.</p> <p>As a manager with SBIR firms and as a national consultant, Mark has been involved in the planning, preparation, and production of some 1,700 SBIR and STTR proposals, and he is known around the country as the "Vince Lombardi" of the SBIR Program. He has also been active throughout his career in national outreach, training, and</p>

advocacy for small, high-tech businesses. For 17 years (1980-1997) Mark managed the government proposal effort at Bend Research, Inc., in Bend, Oregon—a firm that won 175 of 350 SBIR proposals submitted. This research company was one of the top SBIR firms in the nation throughout that period, and was ranked number one in its follow-on commercialization and private-sector R&D success. Bend Research spun off five other companies and partnered with firms such as Pfizer, W.R. Grace, Chevron, Bethlehem Steel, and Boeing in commercial follow-on work.

JOHN UJVARI, SBIR Program Specialist, North Carolina SBTDC



John Ujvari is the SBIR Program Specialist with the North Carolina Small Business and Technology Development Center (SBTDC). His primary responsibilities include counseling clients on the effective use of this federal funding program and supporting and promoting SBIR educational opportunities throughout the state via numerous outreach efforts. These efforts include the publication of a monthly SBIR-focused newsletter, planning and execution of training events statewide, meeting clients one-on-one and reviewing proposals prior to submission. He also leads the SBTDC's MBA summer internship program. Since joining the SBTDC in 2001, SBIR and STTR awards in North Carolina have increased 5-fold.

Title	"T" Designation Training for Center Directors
Description	<p>Learning Objectives:</p> <ol style="list-style-type: none"> 1. Review the SB A and national accreditation requirements for "T" designation 2. Learn how North Carolina became a "T" designed state 3. Develop an awareness for core competency areas 4. Understand the process of integrating the "T" process and programs into the SBDC 5. Discover important resources, training and sources of information <p>Gain a foundation on a realistic timeline, financial commitments and requirements.</p>
Presenter	<p>SCOTT DAUGHTERY, Executive Director & Assistant Vice Chancellor, SBTDC North Carolina</p>  <p>Scott Daugherty was appointed by Governor Beverly Perdue to serve as North Carolina's first Small Business Commissioner. In this capacity he reports to the Secretary of Commerce and is a senior member of the Department of Commerce staff. Mr. Daugherty also serves as the Assistant Vice Chancellor for Extension, Engagement and Economic Development at North Carolina State University and directs the Small Business and Technology Development Center. The SBTDC is the business and technology extension service of The University of North Carolina system, administered by North Carolina State University. The SBTDC operates in</p>

partnership with the U.S. Small Business Administration and the North Carolina Department of Commerce.

Mr. Daugherty attended Wake Forest University, The University of Miami and The University of Florida. He has a law degree and has practiced as a corporate attorney in Florida, Mississippi and Washington, DC. He also has managed two large regional economic development organizations and organized and run a small business investment company. Just prior to joining The University of North Carolina system in 1984, Mr. Daugherty was a Vice President and Deputy General Counsel of a large quasi-public financing agency in Washington, DC.

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