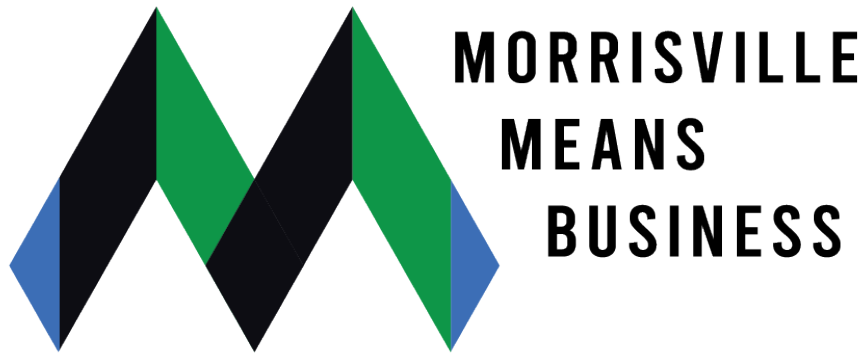


# Town of Morrisville Small Business Outreach Program: Year One Summary



Funded through a Grant with the U.S. Small Business Administration

Prepared by Sara Ellis, Small Business Program Specialist

August 22, 2023, Presentation and Report to Town Council

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## Overview

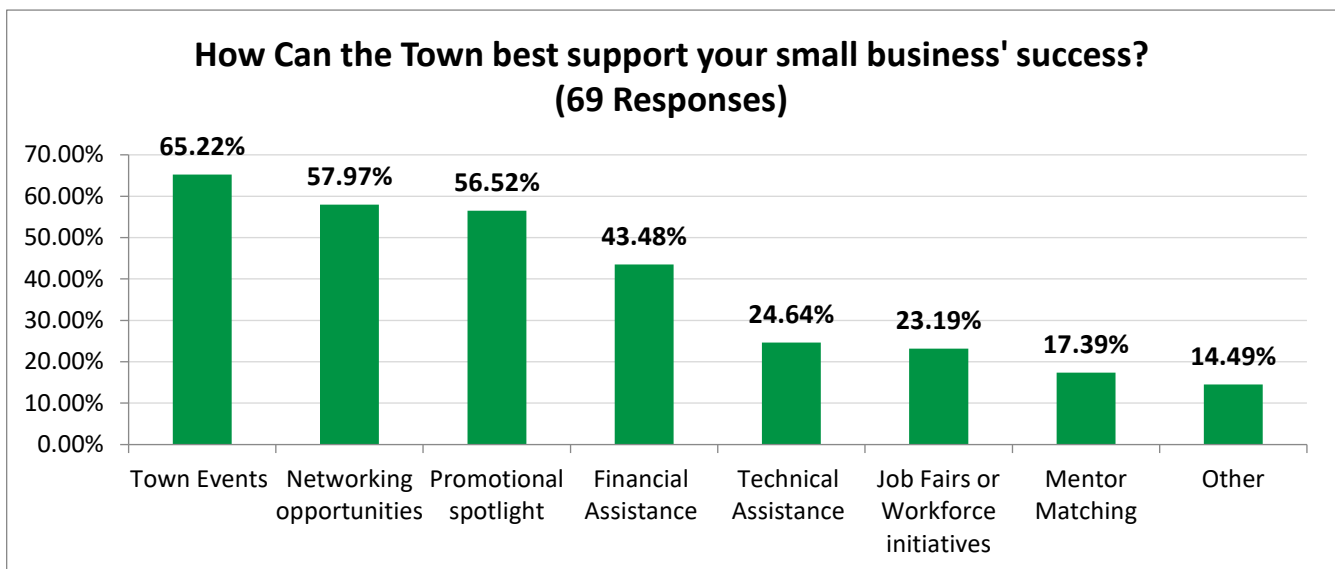
The Town of Morrisville received a Congressional Community Project Award Grant from the U.S. Small Business Administration (SBA) in September of 2022, in the amount of \$300,000. The goal of this grant was to provide financial assistance through micro-grants and sponsored programming to support the Town's unique small business ecosystem. To determine the types of programming to offer, and to provide the Town's small businesses with information about the micro-grant program, a three-phase engagement plan was developed. The following report details the outreach and engagement efforts to ensure all small businesses had an equal opportunity to apply for funding or programming. The report also captures the second part of the three-phase engagement plan that covers the grant performance period ending in August 2024.

### Phase One Engagement Summary

The goal of the first phase of engagement was to gather data from internal and external stakeholders to set a baseline for the small business community's needs and the Town's ability to address those needs. This included assembling a database of all Morrisville small businesses, and their contact information. Once that database was established, staff developed and administered a survey to understand how the Town's small businesses would like to be communicated with, what their biggest challenges were and how we can best support them.

The survey received a total of 70 responses, which made up about 23% of the Town's small businesses targeted for this engagement effort. The full Phase One engagement report including all survey questions and detailed responses is available on the Town's [website here](#). The Town's Indian-owned businesses were largely missing from the response data, which was an area that saw considerable improvement during Phase Two. This improvement is the result of several modifications staff made to tailor the outreach efforts to Morrisville's unique small business ecosystem. Staff connected with all the Town's cultural, religious and affinity organizations including the Asian American Store Owners Association of NC, the BAPS Shri Swaminarayan Mandir, the Carolina Chinese Chamber of Commerce, the Islamic Center of Morrisville, the Triangle Gujarati Association and the Triangle United Telugu Association, to ensure they were aware of the program offerings and sharing that information with their communities. Additionally, continued in person visits and interactions with small business owners has built a sense of trust and shared understanding that is resulting in more engagement.

The following chart from the Phase One survey summarizes areas respondents asked for support:



### *What defines a Morrisville Small Business?*

A small business for the purpose of this engagement effort met the following criteria as defined by the Morrisville Town Council in October of 2022:

- The business is physically located within the Town limits of Morrisville.
- Does not have franchise locations outside of the Triangle.
- Target industries most negatively impacted by the COVID-19 pandemic.

### *Data Collection*

To understand who and where the Town's small businesses are located, staff receives a twice-yearly data delivery from a marketing company that sources data through public records, phone calls and other collection methods. Town Staff then clean the dataset to pull out only businesses who meet the definition of a Morrisville small business.

As of August 2023, the Town of Morrisville has about 303 small businesses, which is a number that changes daily as businesses open and close. The following table shows a summary of the types of small businesses in Morrisville:

### *Morrisville Small Business Industry Mix*

| Business Category                   | Total Number of Morrisville Businesses |
|-------------------------------------|----------------------------------------|
| Desserts & Drinks                   | 9                                      |
| Educational & Recreational Services | 26                                     |
| Grocery Stores                      | 6                                      |
| Hair, Nails, Spa & Massage          | 42                                     |
| Health Care                         | 24                                     |
| Home & Family Services              | 50                                     |
| Restaurants                         | 53                                     |
| Retail                              | 22                                     |
| Businesses Serving other businesses | 71                                     |
| <b>Total</b>                        | <b>303</b>                             |

### *Phase Two Engagement Summary*

The Morrisville Means Business COVID-19 relief micro-grant and professional support services program launched on May 21. The Morrisville small business community is as diverse as the Town of Morrisville itself and required an engagement approach tailored to match. The following sections detail Phase Two of the three-part engagement plan designed to engage businesses during the grant performance period. Phase Two engagement took place between May 2023 -July 2023.

## Engagement Approach – Building on what we learned

Phase Two of the engagement effort focused on strengthening existing relationships and building new ones with businesses who were not engaged during Phase One in November – December of 2022.

## Engagement Goals

To evaluate what was working with the engagement efforts, and where staff needed to pivot, the following goals were developed for Phase two:

- Ensure 95% of the grant eligible, priority small businesses have been directly contacted about the grant opportunity.
- Increase the diversity of the response rate to better reflect the Town of Morrisville’s rich cultural heritage and ensure they are being engaged.
- Continue to better understand how to best engage and support the Town’s small businesses.

These goals were accomplished and exceeded through direct visits over several months, working with community partners, and expanding our digital toolbox to help with communication.

## Engagement Tools

- 154 in-person visits to Morrisville Small businesses to personally invite them to apply for programming.
- 36 Social media posts across the Town’s Twitter, Instagram, Facebook, and LinkedIn platforms.
- 4 informational presentations to Town Advisory Committees.
- 8 Direct email campaigns to businesses.
- Coordination with numerous community contacts, local non-profits, and religious organizations to enhance and increase engagement.
- Emails to 10 Morrisville shopping center property managers to share information with tenants.
- New tools including WhatsApp for Business and text messaging to open communication channels with small businesses.
- Over-the-phone interpretation services available in over 250 languages, including Hindi, Urdu, Kannada, and Spanish.

## Engagement Results

Staff made considerable progress reaching a more diverse cross section of Morrisville’s small businesses. The tangible nature of the grant and programming applications were an easier entry point to starting a relationship with many businesses who may not have interacted with Town staff on non-regulatory issues. Staff learned about the challenges small businesses face, their successes, and a very clear love for the Town of Morrisville as a nice place to do business.

The goal of this phase of engagement was to recruit businesses to apply for micro-grants and Town sponsored programming. The Town received a total of 29 eligible COVID-19 micro grant applications from Morrisville Small businesses. Most micro-grant applications were from Hair, Nails, Spa & Massage businesses. Based on conversations with business owners, Town restaurants who survived the COVID-19 closures made more than \$500,000 in gross annual revenue and were not eligible for the grants.

To ensure all businesses most impacted by the COVID-19 pandemic were receiving and understanding information, staff visited all priority businesses. During these visits, staff would introduce the Morrisville Means Business Program and encourage them to apply for a grant or programming. When businesses expressed an

interest in the programming but didn't follow through with an application, staff would return to follow up and provide extra support. The following page contains a summary of direct outreach efforts and applications received by business type.

### Phase 2 Engagement Summary

| Category                            | Number of Businesses | Number of Storefronts | Paper Flier Delivered | Grant Applications | Programming Applications |
|-------------------------------------|----------------------|-----------------------|-----------------------|--------------------|--------------------------|
| Deserts & Drinks                    | 9                    | 9                     | 8                     | 3                  | 0                        |
| Educational & Recreational Services | 26                   | 24                    | 23                    | 6                  | 1                        |
| Grocery Stores                      | 6                    | 6                     | 6                     | 0                  | 0                        |
| Hair, Nails, Spa & Massage          | 42                   | 20                    | 20                    | 11                 | 6                        |
| Health Care                         | 24                   | 23                    | 15                    | 1                  | 2                        |
| Home & Family Services              | 50                   | 25                    | 16                    | 3                  | 3                        |
| Restaurants                         | 53                   | 51                    | 51                    | 6                  | 6                        |
| Retail                              | 22                   | 18                    | 16                    | 4                  | 1                        |
| Businesses Serving other businesses | 71                   | 58                    | 2                     | 0                  | 1                        |
| <b>Total</b>                        | <b>303</b>           | <b>234</b>            | <b>157</b>            | <b>34</b>          | <b>20</b>                |
| <b>Percentage</b>                   | 100%                 | 77%                   | 67%                   | 11%                | 7%                       |

*\*There are two restaurants in Morrisville that are not yet open for business, and still under construction.*

### COVID-19 Relief Micro-Grants

COVID-19 Relief Micro-Grants of \$4,500 each are available for up to 30 qualifying Morrisville Small Businesses. These micro-grants are intended to help offset the impacts of the pandemic and provide enough support to allow a business to purchase a new piece of equipment or expand their capacity to otherwise recoup lost revenue. The application was open for approximately two months from Monday, May 22<sup>nd</sup> to Friday, July 21<sup>st</sup>. The following section details the eligibility criteria for the grants, engagement efforts and snapshot of the applicants and their needs.

#### *COVID-19 Relief Micro-Grant Eligibility Criteria Includes:*

- For-profit businesses located in the Town of Morrisville
- Current annual gross revenues of \$500,000 or less
- Experienced 15% or greater decline in revenues between 2019 and 2020
- If the business has multiple locations, locations must be limited to the Triangle region for the business to be eligible

#### *Applications were available in the following ways:*

1. Online on the Town's website
2. Downloadable PDF on Town's website
3. Delivery available upon request
4. Town buildings and lobbies

Applicants selected for grants will be awarded funding in August of 2023 through a direct deposit to their business checking account. All awardees must provide a written statement and photos to the Town sharing how the funding was used within six months of receiving the funding.

#### *Summary of COVID-19 Relief Micro-Grant Applications*

The Town received 48 total applications. A total of 29 met the eligibility criteria. The 19 businesses who did not meet the Town's criteria fell into one or more of the following categories:

- Not located within Morrisville
- Business had locations outside of the Triangle Region
- Did not experience 15% or greater decline in revenue between 2019-2020

#### *Snapshot of Grant Applicants*

- Majority of applicants were Nail and Hair Salons.
- Approximately 44% of the 48 applicants reported they did not receive any prior COVID-19 relief funding.
- Grant-eligible businesses lost an average revenue of 47.68% during the COVID-19 calculation period of January 1, 2020 – January 1, 2021.

#### *COVID-19 Impact on Morrisville Businesses*

Applicants were asked to share up to 500 words on the impact the COVID-19 pandemic had on their business. The following is a summary of those responses:

- Businesses had to continue paying rent, insurance, and other expenses despite not bringing in any revenue. Some owners used personal savings to keep themselves financially stable.
- Cancelling shows and closing doors due to the state restrictions.
- Employee layoffs due to a lack of revenue during closure period.
- Equipment deteriorated from lack of use.
- Revenue loss for restaurants due to customers working from home.
- Social distancing and new sanitization requirements were difficult for small businesses who had to reduce the number of customers they could serve. It also required new purchases, spacing out of appointments and other burdens resulting in a loss of revenue.
- Supply chain issues resulted in product delays, which reduced revenue for uncertain periods of time.

#### *How the grants will be used*

Applicants were asked to share up to 500 words on how they will use the funding. The following is a summary of those responses:

- Equipment repairs and purchases. Restaurants had to replace equipment that sat unused for long periods of time during the closures.

- Hiring employees or training existing staff. Several businesses had to lay off employees during the closures.
- Marketing support was one of the most popular requests, which is in line with the Phase One survey results.
- Rent, utilities and payroll were common uses for the businesses. Several noted the cost of employment has gone up, and not kept pace with their revenue.
- Several businesses listed PPE equipment as a continued need.

#### *Demographics of Grant Applicants*

As this project is receiving federal funding, all engagement and outreach activities will be conducted in compliance with Executive Order 13985: Advancing Racial Equity and Support for Underserved Communities. To ensure compliance, the Town collected voluntary demographic data from grant program participants.

| <b>Is your company at least 51% owned and operated by someone who identifies with one or more of the following categories? (48 Respondents)</b> |     |
|-------------------------------------------------------------------------------------------------------------------------------------------------|-----|
| American Indian/Alaskan Native                                                                                                                  | 2%  |
| Asian                                                                                                                                           | 44% |
| Black or African American                                                                                                                       | 21% |
| Hispanic or Latin(x)                                                                                                                            | 6%  |
| Middle Eastern or North African                                                                                                                 | 2%  |
| Native Hawaiian or Other Pacific Islander                                                                                                       | 2%  |
|                                                                                                                                                 |     |
| Female                                                                                                                                          | 63% |
| Prefer not to answer                                                                                                                            | 2%  |
|                                                                                                                                                 |     |
| A person with a disability                                                                                                                      | 10% |
|                                                                                                                                                 |     |
| Veteran or person who currently, or previously served on active duty in the U.S. Armed Forces, Military Reserves, or National Guard             | 6%  |

#### *Town Sponsored Professional Services*

The Town Sponsored Professional Services Application was open for approximately two months from Monday, May 22<sup>nd</sup> to Friday, July 21<sup>st</sup>. Eligible Morrisville Small Businesses could apply for up to \$3,000 in services from three different professional service providers. Businesses are setup with their service provider of choice for a confidential, initial assessment. The provider then develops a tailored plan for that business within the budget and administers their services.

When asked in the Phase One survey, 65% of respondents requested technical assistance in the form of marketing and advertising support to be most helpful to them. This was followed by finance, accounting and planning at 58% and legal at 53%.

The Town received 27 total applications with 20 able to meet the eligibility criteria. Ineligible applicants were located outside of Morrisville. All businesses are asked to provide a quote and photo or testimonial on the service, and how it impacted them.



### *Marketing Services*

The marketing firm reported their most common recommendation is an audit of a business's social media and/or website, and assistance with messaging. However, many businesses have been able to stretch their budgets by taking the recommendations they received and implementing the recommendations themselves. Morrisville small businesses received the following services:

- Brand Strategy Consulting
- Marketing Plan
- Message Development
- Product Naming Exercise
- Social Media Audit/Support
- Website Updates

### *Financial Services*

The Certified Professional Accountant (CPA) reported most businesses needed help with record and bookkeeping software and setting up the appropriate entity type for tax purposes. These are topics that could be covered in future educational programming to help a broader range of businesses benefit from the information. Morrisville small businesses received the following services:

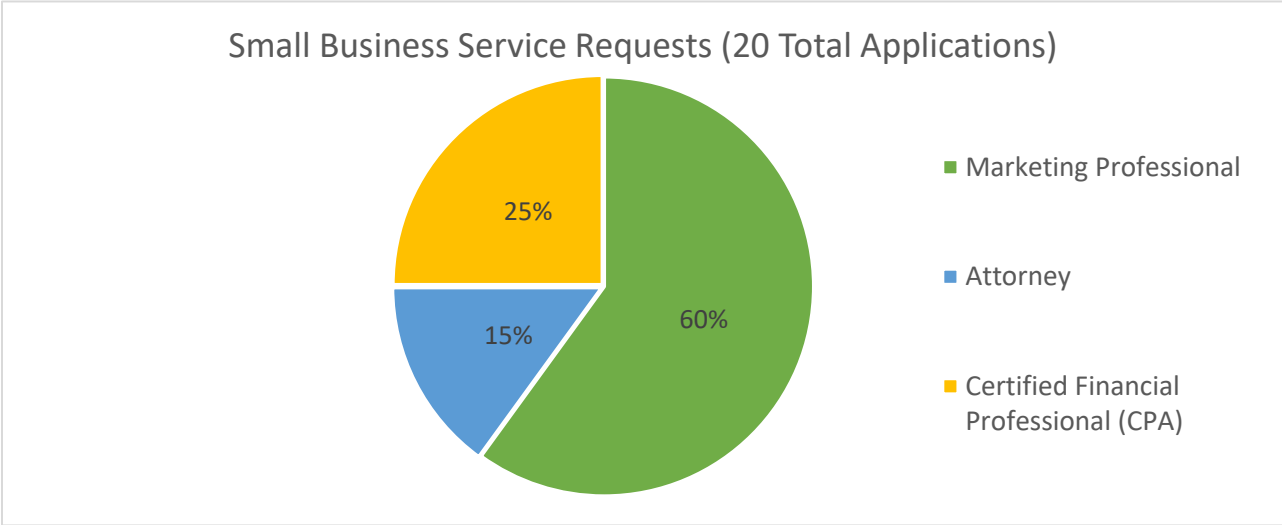
- End of year financial planning
- Payroll setup review
- QuickBooks Cleanup
- QuickBooks setup and training

### *Legal Services*

Legal services received the least number of requests, with three total. Two of the three services are still in progress, which means there is not enough data to report on their broader legal needs. That information will be delivered in a future report. Morrisville small businesses received the following services:

- Corporate Consents
- Initial Risk Assessment
- Operating Agreement
- Website Terms of Use

The 20 applications received by the Town reflected the initial survey’s mix with a majority requesting marketing assistance, as reflected in the following chart:



*Small Business Technology Development Center (SBTCD) Referrals*

A handful of entrepreneurs and businesses looking for planning advice were referred to the Small Business Technology Development Center (SBTCD). The SBTCD is a business advisory resource that provides management counseling and free educational services for small and mid-sized businesses. As the SBTCD is funded by the U.S. SBA, part of the grant requires that we do not duplicate their services.

*Demographics of Programming Applicants*

The following voluntary demographic data was collected to ensure compliance with Executive Order 13985: Advancing Racial Equity and Support for Underserved Communities. This order seeks to invest government resources in small and disadvantaged businesses. The following is a summary of program applicant demographics:

| Question Asked: Is 51% or more of the business owned by someone who identified as the following? (20 Responses)                     |     |
|-------------------------------------------------------------------------------------------------------------------------------------|-----|
| Woman                                                                                                                               | 59% |
| Person of Color                                                                                                                     | 56% |
| Veteran or person who currently, or previously served on active duty in the U.S. Armed Forces, Military Reserves, or National Guard | 4%  |

*Morrisville Means Business Ongoing and Future Programming*

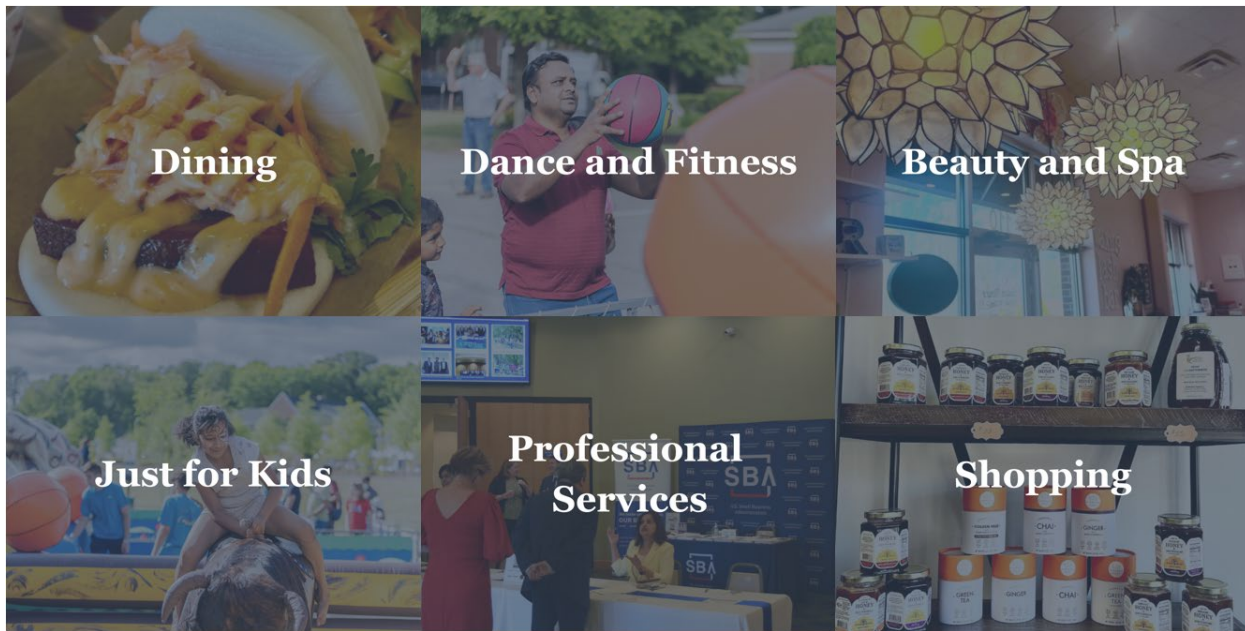
In addition to the one-time COVID-19 Relief Micro-Grant and Professional Services programming, staff continues to develop ongoing programming for Morrisville small businesses. This ongoing programming will connect the Morrisville Means Business to the Town’s larger economic development strategy. These strategies may include opportunities for supporting a thriving minority and women-owned business community or connecting cultural events featuring local artisans and food vendors.

### *Morrisville Restaurant Week*

As we heard, 65.22% of businesses from the Phase One Survey wanted to participate in Town events. To support this interest, the Town is hosting Morrisville Restaurant Week from September 28<sup>th</sup> to October 8<sup>th</sup>. Any restaurant physically located in the Town of Morrisville is welcome to participate by providing a prix-fixe (fixed price) menu at an affordable price to let new customers try out different foods. All participating restaurants will be provided with promotional table tents, posters, and assistance with menu design.

### *Small Business Directory*

To highlight the Town's unique small business ecosystem, staff developed an online small business directory, shown below and on the [Town's website here](#). New businesses can apply to be listed, and existing businesses can submit any changes to the Town through an online form.



### *Permitting Education*

Staff developed a food truck one-pager to help small businesses understand the steps required to obtain a Town of Morrisville Food Truck Permit. This was identified during Phase One as an opportunity to encourage more small and local businesses to apply as food truck vendors for Town Events.

### *Small Business Forum*

In partnership with the Morrisville Chamber of Commerce the Town is participating in a Small Business Forum to talk about government contracting and resources for growth. The forum includes networking opportunities and education. This corresponds with the 57.79% of Phase One survey respondents interest in networking opportunities.

### *Small Business Resource Guide*

In a cross-departmental effort to provide Morrisville small businesses with information about zoning, permitting, how to participate in Town events and other helpful resources, this guide will be an online document with clickable links to common small business resources tailored to Morrisville's unique small business ecosystem and will be updated quarterly.

## Morrisville Means Business Program Next Steps and Opportunities

As we complete the first year of small business programming and near the halfway point for the U.S. SBA grant, staff has identified the following options for consideration with remaining funding:

### *Façade grants*

Staff received feedback from several businesses that signage is a challenge. This is consistent with their feedback that marketing has also been a challenge. Many of the Town's older shopping centers have significant setbacks from the main road making frontage signs difficult to see. Additionally, several Morrisville restaurants opened within the past year or two and need to update their exterior signage. However, as a small business that can be a cost that is unattainable. The signage challenge then results in businesses resorting to signage placement that may not follow the Town's Sign Ordinance. Surrounding municipalities have offered façade grant and improvement programming. The Towns of Apex and Cary and City of Raleigh currently offer façade grant programs that reimburse a portion of the cost to make improvements to a building's exterior. The opportunity also exists to better educate business owners on broader sign regulations and requirements to ensure compliance with the Town's Sign Ordinance.

### *Additional Program Grants*

A total of 21 businesses received programming services through the Morrisville Means Business Program. Funding remains for approximately 4 to 5 more businesses to receive services depending on the final cost of what is proposed for each business.

### *Micro-Business Setup*

Staff identified a need to help micro-businesses, or home-based businesses with the tools to legally incorporate. The Town of Morrisville's many festivals and cultural events are wonderful opportunities to showcase food, artisan crafts and goods from the many cultures represented by the Town's small business owners. However, many may lack the appropriate license to do business in the state of North Carolina. The Town can provide business registration and entity type setup services to qualifying home-based businesses to increase opportunities for vendors at Town events and festivals.

### *Remaining grant funds*

A total of 29 businesses were found to be eligible for the COVID-19 relief micro grants. The program was budgeted for up to 30 businesses to receive COVID-19 relief micro-grants. There is \$4,500 in remaining grant funding available to be allocated.

## Appendix A – Social Media Engagement Analytics

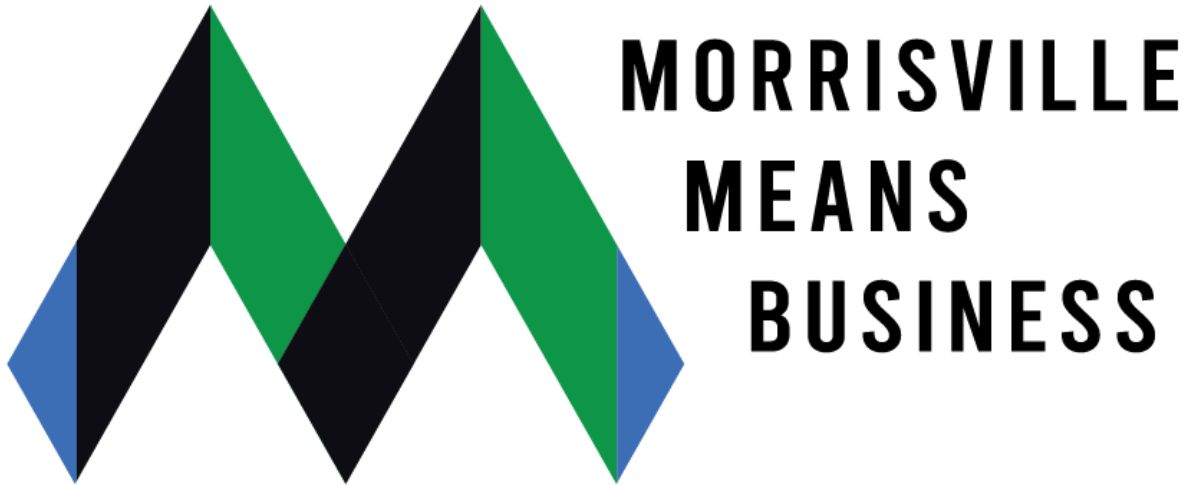
| 5.22.23-7.21.23 Social Media Engagement Statistics |       |        |
|----------------------------------------------------|-------|--------|
| Platform                                           | Reach | Clicks |
| Facebook                                           | 3887  | 27     |
| Instagram                                          | 2607  | 17     |
| LinkedIn                                           | N/A   | 30     |
| Twitter                                            | N/A   | 19     |

Attached - Appendix B, C, D, E

## APPENDIX B - Small Business Engagement Metrics

| Date      | Outreach Tool                                       | Outreach Tool Metrics and Details                                                                                                                         | Grant & Programming Applications                   |
|-----------|-----------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|
| 5/22/2023 | Website                                             |                                                                                                                                                           |                                                    |
|           |                                                     | Facebook - 11 Clicks (Highest click rate of all platforms), LinkedIn 10 Clicks, Twitter 3 clicks, IG 3 Clicks                                             |                                                    |
|           | Social Media                                        |                                                                                                                                                           |                                                    |
|           | Press Release                                       |                                                                                                                                                           |                                                    |
|           | Fire Inspectors                                     | Morrisville Fire Inspectors handed out information during regular business visits.                                                                        |                                                    |
| 5/23/2023 | Email Signatures                                    | Added MMB Link and logo to email signature                                                                                                                | 1 Grant Application/3-Programming Applications     |
|           | Mailchimp Email Blast #1                            | 89 unique opens (209 total) - 55.6% open rate<br>11 clicks - 6.9% click rate                                                                              |                                                    |
|           | Emails to Property Management Companies             | Personal emails with toolkit and flier requesting help sharing the program. 1 out of 10 responded.                                                        |                                                    |
|           | Town Advisory Committee                             | Presented to Smart Cities Advisory Committee                                                                                                              |                                                    |
|           | In-Person Visits                                    | Dropped off fliers at 38 small businesses                                                                                                                 | 1-Grant Application/ 1-Programming Applications    |
| 5/25/2023 | NWIM                                                | 1,313 unique opens (2,226 total) - 31 clicks on MMB                                                                                                       | 1-Grant Application                                |
| 5/26/2023 | In-Person Visits                                    | Dropped fliers with 32 small businesses & Morrisville library                                                                                             | 2-Grant Applications                               |
| 5/27/2023 | Community contact                                   | Worked with community contact to get help spreading the word to other beauty salons.                                                                      | 1 Grant Application                                |
| 5/30/2023 | Personal emails                                     | Followup emails to Property Management Companies who didn't respond to first email.                                                                       |                                                    |
| 5/31/2023 | Mailchimp Email Blast #2 - to 1st blast non-openers | 75 unique opens (140 total) - 75% open<br>3 clicks - 3% click                                                                                             |                                                    |
|           | In-Person Visits                                    | Dropped fliers with 32 small businesses and at the Morrisville library.                                                                                   |                                                    |
| 6/1/2023  | Paper applications in Town facilities               | Setup fliers and applications display rack in Fire Administration, Planning/Inspections Administration, Town Hall and Engineering Services/Public Safety. | 3-Grant Applications/3-Programming (Including 6/5) |
| 6/2/2023  | Social Posts                                        | 0 Clicks LinkedIn/Twitter                                                                                                                                 |                                                    |
| 6/6/2023  | Presented at Advisory Committee Meeting             | Presented to Morrisville Performance Measures and Advisory Committee                                                                                      |                                                    |
|           | Community contact                                   | Reached out to additional non-profits who may work with small businesses to increase awareness of programming.                                            |                                                    |
|           | In-Person Visits                                    | Dropped fliers with 18 businesses.                                                                                                                        | 2-Grant Applications                               |
|           | Social Posts                                        | LinkedIn 4 clicks, FB 3 clicks, Twitter 1 click, IG 1 Click                                                                                               |                                                    |
| 6/7/2023  | Community contact                                   | Continued following up with community contacts who didn't respond.                                                                                        |                                                    |

| Date      | Outreach Tool                                  | Outreach Tool Metrics and Details                                                                                    | Grant & Programming Applications                    |
|-----------|------------------------------------------------|----------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------|
| 6/12/2023 | Presented at Advisory Committee Meeting        | Town discovered we're not able to use the Desi Mom's Facebook Group                                                  | 1-Grant Application (6/11)                          |
|           | Mailchimp Email Blast #3                       | 75 unique opens (127 total) - 58.6% open<br>2 clicks - 1.6% click                                                    | 3-Grant Applications/1-Programming (Including 6/13) |
| 6/13/2023 | 8X8 Test Messaging                             | Staff began using text messaging to better communicate with busy businesses.                                         |                                                     |
| 6/14/2023 | Radio Nyra                                     | Coordinated with Radio Nyra to advertise the small business programming on air.                                      |                                                     |
|           | Community Contacts                             | Worked with additional community contacts, shared progress and number of applications and asked for additional help. | 4-Grant Applications/2-Programming                  |
|           | In-Person Visits                               | Dropped off fliers at 20 businesses.                                                                                 |                                                     |
| 6/15/2023 | Mailchimp Email Blast #4                       | 103 unique opens (169 total) - 50.2% open<br>3 clicks - 1.5% click                                                   |                                                     |
| 6/16/2023 | Community Contacts                             | Continued working with community contacts and Town colleagues who work with small businesses.                        | 6-Grant Applications/2-Programming (6/17-6/20)      |
|           | In-Person Visits                               | Dropped fliers at 23 businesses                                                                                      |                                                     |
| 6/20/2023 | WhatsApp for Business                          | Staff began using WhatsApp for business to better communicate with small businesses.                                 |                                                     |
| 6/20/2023 | Social Posts                                   | Linkedin 5 Clicks, IG 3 Clicks, 0 FB/Twitter                                                                         |                                                     |
| 6/21/2023 | Mailchimp Email Blast #5                       | 64 unique opens (95 total) - 52% open<br>3 clicks - 2.4% click                                                       |                                                     |
| 6/27/2023 | Social Posts for Information Session           | LinkedIn 4 clicks,                                                                                                   |                                                     |
| 6/29/2023 | NWIM                                           | 1,284 unique opens (2,100 total) - 28 clicks on the MMB links                                                        | 1-Grant Application/2-Programming                   |
|           | Phone calls                                    | Personal phone calls to Hair and Nail salons encouraging them to apply.                                              |                                                     |
| 7/5/2023  | Social Media                                   | Best FB engagement of any post - 8 clicks                                                                            |                                                     |
| 7/7/2023  | In-Person Visits                               | Dropped fliers off at 8 businesses.                                                                                  |                                                     |
|           | Email Blast #6                                 | 80 unique opens (130 total) - 53% open<br>6 clicks - 4% click                                                        |                                                     |
| 7/7/2023  | Social Posts for Information Session           | Highest engagement rate on Facebook, 8 Clicks (Related to Utsav Event)                                               |                                                     |
| 7/10/2023 | NWIM                                           | 1,422 unique opens (2,263 total) - 72 clicks on the MMB links                                                        | 7-Grant Applications/4-Programming                  |
| 7/14/2023 | Social Posts                                   |                                                                                                                      |                                                     |
|           | Email Blast #7                                 | 81 unique opens (128 total) - 52.9% open<br>4 clicks - 2.6% click                                                    | 1-Grant Application/2-Programming                   |
|           | Email Blast #8                                 | 80 unique opens (118 total) - 49.4% open<br>3 clicks - 1.9% click                                                    | 2-Programming                                       |
| 7/15/2023 | Morrisville Means Business Information Session | 9 Attendees                                                                                                          | 1-Grant Application/2-Programming                   |
| 7/17/2023 | Social Posts                                   | Twitter 5-Clicks, LinkedIn 3-Clicks, Instagram 0-Clicks, Facebook 0-Clicks                                           | 2-Grant Applications/3-Programming                  |
| 7/21/2023 | Grant and Programming Applications Closed      |                                                                                                                      |                                                     |



# Small Business Micro-Grant Application

For the Town of Morrisville

The Town of Morrisville, in partnership with the U.S. Small Business Administration, is offering micro-grants to businesses recovering from the COVID-19 pandemic. The Town will be offering **30** total grants of **\$4,500** each to qualifying small businesses located in Morrisville. Information on eligibility criteria and the process can be found at this link.

Julia Walker, the Town of Morrisville's Community Relations Liason, is available to answer questions about interpretation services, the application process, and eligibility. Please contact Julia at [jwalker@townofmorrisville.org](mailto:jwalker@townofmorrisville.org) or (919) 463-6129 for assistance.





# Primary Contact Information

Business Owner \*

First Name

Last Name

Business Name \*

Contact Number \*

E-mail \*

Address of Business \*

Street Address

Street Address Line 2

City

State

Postal / Zip Code

*Only businesses located within Morrisville's corporate limits are eligible. Some businesses may have a Morrisville address but are not within the corporate limits. You can verify your business's location using Wake County iMAPS at <https://maps.raleighnc.gov/imaps/> and searching for your business address. If you need help verifying your business's location, please contact Julia Walker at [jwalker@townofmorrisville.org](mailto:jwalker@townofmorrisville.org) or (919) 463-6129 for assistance.*

# Eligibility Questions

In order **to be eligible for this program your company must have:**

- Current annual revenues of \$500,000 or less
- Experienced 15 percent decling in revenues between 2019 and 2020
- Have no deliquenses on state income taxes or have any active bankruptsies, tax liens, or judgements.

Please indicate that you meet the elligibility criteria below. **A full list of eligibility criteria** can be found at <https://www.townofmorrisville.org/businesses/morrisville-means-business-program>

**Does your company have an annual revenue of \$500,000 or less based on most recent business tax returns or profit and loss statements? \***

Yes

No

**Did your company experience at reduction in gross annual revenues of 15% or more between calender Year 2019 and 2020? \***

Yes

No

*(2020 Gross Revenues - 2019 Annual Revenues) / 2019 Annual Revenues = at least -15%*

**Does your business have any active bankruptcies, tax liens, or judgements? \***

Yes

No

**Is your business delinquent on North Carolina state income taxes? \***

Yes

No



# Please answer the following questions in the space below or on a separate document and include with your application:

.....

**Please provide a brief statement describing the impacts of the COVID-19 pandemic on your business. The statement may include loss of revenue due to sales and/or workforce issues (500 words or less). \***

**How will the micro-grant be used within six months of receiving it? (300 words or less) \***

**Has your business received any COVID-19 relief funds from other sources? \***

Yes

No

**If applicable, please list other sources of COVID-19 relief funds \***

**If applicable, please describe in 300 words or less how the other COVID-19 relief funds your business received were spent (i.e., lease, personnel, etc.) \***

# Please include the following documents with your application:

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- Copy of valid, unexpired driver's license or government-issued identification for each business owner(s).
- Personal loss statements or tax forms for 2019, 2020, and 2021

**Note: If submitting tax forms please submit forms based on the following business types:**  
(Applicants may redact sensitive personal information from tax forms as they see fit.)

- Sole proprietorships: Form 1040 Schedule C
- Partnerships: Form 1065
- Corporations: Form 1120
- S Corporations: Form 1120-S
- LLCs should provide the appropriate income tax form from the list above according to their IRS classification.

# Is your company at least 51% owned and operated by someone who identifies with one or more of the following categories:

.....

**Veteran or person who currently, or previously served on active duty in the U.S. Armed Forces, Military Reserves, or National Guard \***

Yes No

**Any of the following racial or ethnic minority groups: \***

- American Indian or Alaskan Native
- Asian
- Black or African American
- Hispanic or Latin(x)
- Middle Eastern or North African
- Native Hawaiian or Other Pacific Islander
- N/A

**Female \***

Yes No Prefer not to answer

**A person with a disability \***

Yes No



**Applicants will be notified and awarded funds by August 31, 2023. If selected, recipients will sign a contract with the Town indicating that they will adhere to the following guidelines:**

.....

- Completed ACH form with your banking information including the business' routing, checking account numbers, and a copy of a voided check. Banking information must match the bank statement provided for the business. Funds will not be wired to non-business accounts.
- Grant recipients must provide the Town with a narrative statement on how the money helped your business. (500 words suggested)
- Grant recipients must provide the Town with a narrative statement on how the money helped your business. (500 words suggested)
- Photos to highlight the use of funds should be included in narrative statements where possible. The Town may use these photos to share on social media and in reports to the Town Council and the SBA.



## Morrisville Means Business Free Small Business Programming Application

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Free, one-hour business assessments are available to small Morrisville businesses. These assessments are funded through a grant from the U.S. Small Business Administration (SBA). They are available on a first-come, first-served basis, while funding lasts.

All business assessments will be conducted virtually. If you need accommodations, the Town can provide a meeting space.

**A member of Town staff will contact you within 48 business hours of receiving your form response.**

Program eligibility requirements:

- The business must be in the Town of Morrisville. If you are not sure whether your business is in Morrisville, use Wake County iMAPS ([maps.raleighnc.gov/iMAPS/](https://maps.raleighnc.gov/iMAPS/)) to search by address.
- If the business has multiple locations, locations must be limited to the Triangle in order to be eligible.

*If you need additional assistance, please call Julia Walker, Morrisville's community relations liaison, at 919-463-6129 or [jwalker@townofmorrisville.org](mailto:jwalker@townofmorrisville.org).*

# Section 1: Contact Information and Service Request

## 1. Business Name

---

## 2. Business Address

*To verify eligibility*

---

---

## 3. Contact Number

---

## 4. Contact Email Address

---

## 5. I would like the following service:

☐

One-hour legal assessment with an attorney

☐

One-hour financial health assessment with a certified professional accountant (CPA)

☐

One-hour marketing assessment with a marketing professional

☐

I would like a specific service from one of these professionals.



## Section 2: Specific Services (if Requested)

### 6. Legal Services

- |                                                           |                                                           |
|-----------------------------------------------------------|-----------------------------------------------------------|
| <input type="checkbox"/> Risk Assessment                  | <input type="checkbox"/> Privacy Policy                   |
| <input type="checkbox"/> General Corporate Advice         | <input type="checkbox"/> Independent Contractor Agreement |
| <input type="checkbox"/> Entity Setup                     | <input type="checkbox"/> Client Services Agreement        |
| <input type="checkbox"/> Internal Corporate Documents     | <input type="checkbox"/> Website Terms of Use             |
| <input type="checkbox"/> Another legal service not listed |                                                           |

### 7. Certified Public Accountant

- |                                                                            |                                            |
|----------------------------------------------------------------------------|--------------------------------------------|
| <input type="checkbox"/> Assistance with QuickBooks                        | <input type="checkbox"/> Entity Type Setup |
| <input type="checkbox"/> New Business Financial Management                 | <input type="checkbox"/> Tax Planning      |
| <input type="checkbox"/> Another financial professional service not listed |                                            |

### 8. Marketing Professional

- |                                                                    |                                                  |
|--------------------------------------------------------------------|--------------------------------------------------|
| <input type="checkbox"/> Brand Strategy                            | <input type="checkbox"/> Brand Kit & Style Guide |
| <input type="checkbox"/> Graphic Design                            | <input type="checkbox"/> Website Development     |
| <input type="checkbox"/> Logo Design                               | <input type="checkbox"/> Website Audit           |
| <input type="checkbox"/> Social Media Strategy                     | <input type="checkbox"/> Social Media Audit      |
| <input type="checkbox"/> Another marketing service not listed here |                                                  |

## Section 3: Optional Demographic and Accommodations Information

*This data helps the Town serve the U.S. Government's goal of Advancing Racial Equity and Support for Underserved Communities. The data will be anonymized and shared with the Town Council and SBA to report on the use of the grant funding.*

### 9. Is 51% or more of the business owned by someone who identifies as the following?

- ☐ A woman
- ☐ A person of color
- ☐ A person with a disability
- ☐ A Veteran or person who currently, or previously served on active duty in the U.S. Armed Forces, Military Reserves or National Guard.

### 10. Do you need a meeting space?

*The Town can provide a conference room with video capabilities upon request.*

- ☐ Yes ☐ No

### 11. Do you need an interpreter?

*Interpreters are available over the phone in 250 languages, upon request. including Hindi, Telugu, Kannada, and Spanish.*

- ☐ Yes ☐ No

### 12. What language would you like interpretation services in?

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### 13. Can the Town contact you for a quote or short statement about how the program helped your business?

- ☐ Yes ☐ No



# Morrisville Means Business Promotional Language Toolkit

- **Newsletters**

The Town of Morrisville is launching free small business programming! Up to 30 Morrisville businesses may receive COVID-19 micro-grants. The micro-grants for \$4,500 are being distributed to help industries most affected by the pandemic.

To be eligible, businesses need to show:

- In operation since 2019
- Show a 15% revenue loss during 2019-2020

Small businesses in Morrisville can sign up for free business assessments with:

- An attorney
- A Certified Professional Accountant (CPA)
- A marketing professional

These assessments include free one-hour consultations, with the potential for more follow-up services. These services will be available on a first-come, first-served basis while funding lasts.

For more information, or to apply to receive services, visit the Town's website at [bit.ly/MorrisvilleMeansBusiness](https://bit.ly/MorrisvilleMeansBusiness). Contact Julia Walker, Morrisville's community relations liaison, at [jwalker@townofmorrisville.org](mailto:jwalker@townofmorrisville.org) or 919-463-6129 with any additional questions.

*Over-the-phone interpretation services are available in over 250 languages. These languages include Hindi, Urdu, Kannada, Spanish, and more.*

- 
- Social Media Content

*Each platform has their own image sizing requirements. These posts can be made with the specified graphics linked below or with a link to the Town's Morrisville Means Business webpage at [bit.ly/MorrisvilleMeansBusiness](https://bit.ly/MorrisvilleMeansBusiness).*

- **Facebook & LinkedIn**

The Town of Morrisville is launching free small business programming! Up to 30 Morrisville businesses may receive COVID-19 microgrants. The micro-grants for \$4,500 are being distributed to help industries most affected by the pandemic.

Small businesses in Morrisville can sign up for free business assessments with:

- An attorney
- A Certified Professional Accountant (CPA)
- A marketing professional

These assessments include free one-hour consultations, with the potential for more follow-up services. Free over-the-phone interpretation services are available on request. Visit the Town's website at [bit.ly/MorrisvilleMeansBusiness](https://bit.ly/MorrisvilleMeansBusiness) to apply for programming or to learn more.

- **Twitter**

Morrisville is launching free small business programming! Businesses can apply for a free consultation with an attorney, CPA, or marketing professional, and apply to receive COVID-19 relief microgrants for \$4,500. Visit [bit.ly/MorrisvilleMeansBusiness](https://bit.ly/MorrisvilleMeansBusiness) for more information.

- **Instagram**

The Town of Morrisville is launching free small business programming! Businesses can apply for a free consultation with an attorney, CPA, or marketing professional. Up to 30 Morrisville businesses will receive COVID-19 relief microgrants for \$4,500. For more information visit the Town's website at [bit.ly/MorrisvilleMeansBusiness](https://bit.ly/MorrisvilleMeansBusiness).





- **WhatsApp**

- *A graphic with the program eligibility criteria has been created to post with this message.*

The Town of Morrisville is launching free small business programming! Up to 30 Morrisville businesses may receive COVID-19 microgrants. The microgrants for \$4,500 are being distributed to help industries most affected by the pandemic.

For more information, or to apply to receive services, visit the Town's website at [bit.ly/MorrisvilleMeansBusiness](https://bit.ly/MorrisvilleMeansBusiness). Contact Julia Walker, Morrisville's community relations liaison at [jwalker@townofmorrisville.org](mailto:jwalker@townofmorrisville.org) or 919-463-6129 with additional questions. Over-the-phone interpretation services are available in over 250 languages. These languages include Hindi, Urdu, Kannada, Spanish, and more.

## Promotional Graphics

- [Facebook & LinkedIn](#)
- [Twitter](#)
- [Instagram](#)
- [WhatsApp](#)

