Digital Service Squad 2021 Program Guidelines and FAQs

## What is a Digital Service Squad?

As part of the Digital Main Street Grant program, funded by the Province of Ontario and FedDev Ontario, partnered with the Toronto Association of BIAs (TABIA), and administered by the Ontario BIA Association (OBIAA), Digital Service Squads (DSS) are a free resource of trained digital technology specialists situated throughout Ontario who will deliver personalized, one-on-one assistance designed to help **brick-and-mortar small businesses** navigate new tools and maximize their return on investment.

These trained specialists meet with small businesses, at no cost, to help them complete an online assessment, and introduce them to online training modules to build their knowledge and skills. They can also assist with the development of their Digital Transformation Plan (DTP) and then help them apply for a one-time $2,500 grant to implement it. This one-on-one DSS assistance also includes support for basic website set-up, Google My Business profiles, 360º photos, digital storefront set-up with e-commerce (basic information on the **ShopHERE** program), creation, or enhancement of social media presence, and much more. Where COVID-19 restrictions are in place, DSS members would provide outreach and one-on-one support through phone calls and video-based (Zoom) calls.

What is the objective of the Digital Service Squad?

Setting up a Digital Service Squad takes time and money. The Provincial and Federal governments have provided funding to help cover the costs to develop, train, and implement these squads. The objectives of the Digital Service Squad Grant (DSSG) program:

- To **provide** individual DSS applicants - BIAs, municipalities, Chambers of Commerce or Small Enterprise Business Centres, with **funding** to facilitate a DSS formation within their city.

- To **encourage collaboration** among BIAs, municipalities, Chambers of Commerce, or Small Business Enterprise Centres to create a partnership to form a city-wide or regional DSS.

- Once formed, these DSS will provide one-to-one assistance to **brick-and-mortar** small businesses **with resources, training, and support** for the adoption of digital technologies.

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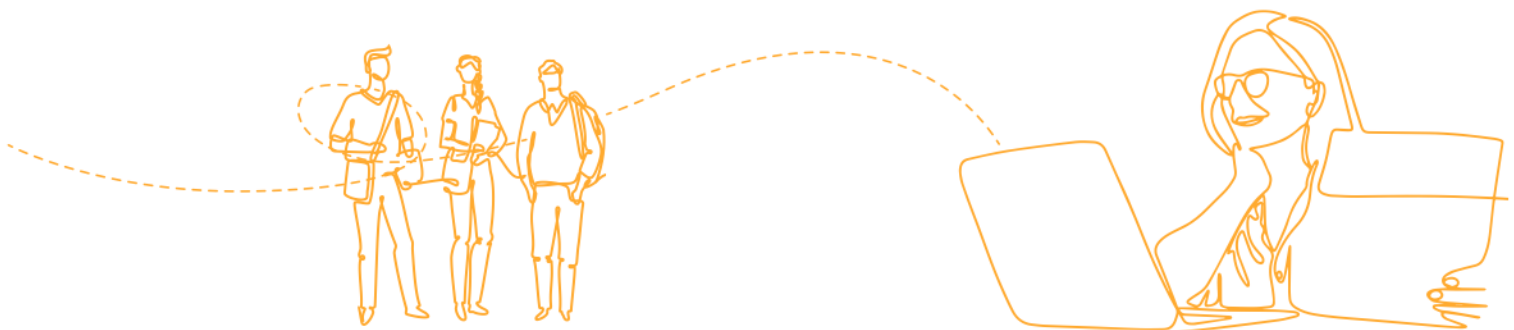
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Who is eligible?

The DSSG grant is open to applicants that meet the following requirements:

- Is a local BIA located in Ontario and/or
- Is a municipality, Chamber of Commerce or Small Business Enterprise Centre and is located in Ontario and/or
- Is an area where one of the following may apply on behalf of a collaborative partnership that includes: a BIA, a municipality, a Chamber of Commerce, and/or a Small Enterprise Centre

Additional Criteria:

- Must have the **infrastructure** to administer the goals of the project
- Must **submit** all monthly progress reports and a final report that includes all costs
- Must **submit a summary** of all costs be less any applicable HST rebate or discount
- Must commit to completing all **required reporting** and all HubSpot data entry by stated due dates

- Must have support, in writing, from all (partner) areas being covered
- Applicants are strongly encouraged to seek out and hire **recent graduates and youths** as their squad members

NOTE: Applications will be assessed based on:

- The strength of implementation
- The administrative infrastructure and ongoing management of the squads
- The financial controls to administer the grant
- Prior project performance

All applicants must complete the DSS application template that provides details of the following:

- The catchment area
- The number of eligible businesses to be served
- The number of potential hires (FT/PT)
- The project timeline
- The full budget breakdown

Can prior DSS grant recipients apply for this new round of funding?

Prior DSS grant recipients may be eligible to apply provided they meet one of the following requirements:

- the previous DSS grant project is **complete**. This includes, but is not limited to, up-to-date and thorough HubSpot data entry for all business interactions and a completed DSS Final Report submitted to the OBIAA office.

- **PLUS**, previous DSS grant recipients **must** also include the following with their application
  - Number of businesses <u>served</u> in the **prior grant** program and indicate the number of **new** businesses estimated to be served under the new project.
  - The need to purchase new equipment, if required equipment was purchased as part of the prior grant program.

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What is available through the grant?

- Exact funding amount per applicant will be based on the number of qualified small businesses with brick-and-mortar locations.

- Grant minimum of $5,000 to a maximum of $150,000.

- Maximum grant funds as follows (based on the number of **brick-and-mortar** small businesses in the catchment area that the DSS member(s) can reasonably serve):

  - Under 100 businesses   maximum $25,000
  - 100 – 200 businesses   maximum $50,000
  - 201 – 300 businesses   maximum $75,000
  - 301 – 400 businesses   maximum $100,000
  - 401 – 500 businesses   maximum $125,000
  - 501 – 600 businesses   maximum $150,000
  - Over 600 businesses   tbd

- Applicants must include the number of eligible businesses (potential reach) per application.

- Flexibility exists for outlier areas that are not accurately represented by the criteria.

What can the grant be spent on?

The eligible costs that can be offset by the grant are staffing costs, equipment costs, marketing material, and travel expenses.

More specifically, eligible costs include the following and exclude applicable HST discount/rebate:

Eligible costs include the following:

- Equipment (limited to $1,200 per squad member):
  - **Chromebook** or equivalent
  - 360-degree camera kit
    - > **Ricoh Theta S 360 Degree Camera** or equivalent
    - > **Anker Battery Pack** or equivalent
    - > **Tripod** or equivalent
  - **Mobile Hot Spot** or equivalent up to a maximum of $200.00 (monthly service costs not included and are not eligible costs)

- Print marketing (postcards/flyers promoting the service locally)

- Travel costs based on the posted provincial mileage rate (only applicable to outlier areas and applicants who cover multiple cities)

- Cell phone costs for squad members ($50/mth maximum)

- Zoom charges or equivalent platform fees

- Squad member salary/wages/contract fees

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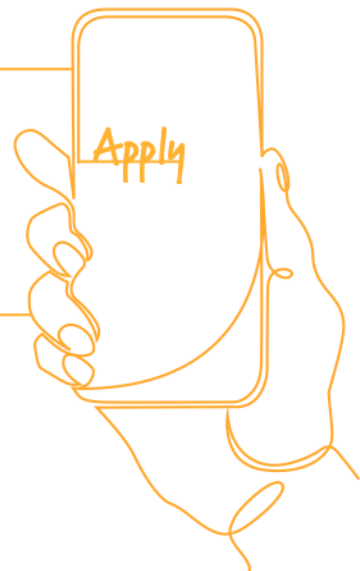
What are non-eligible expenses?

Ineligible costs those deemed unnecessary or excessive and include, but are not limited to the following:

Ineligible Costs include:

- Unnecessary or excessive equipment
- Third-party webinar costs
- Video production costs
- Administrative costs
- Repayment of other loans, past debts, software, repair of existing equipment
- Existing staff salary – i.e., paying a current full-time member of your team to execute the role of a Digital Service Squad team member
- Costs of land, building or vehicle purchase
- Costs of intangible assets such a goodwill, whether capitalized or expensed
- Depreciation or amortization expenses
- Interest on invested capital, bonds, or debentures

- Bond discount
- Monthly mortgage, loan and rent payments
- Refinancing of an existing debt
- Losses on investments, bad debts, and any other debts
- Fines or penalties
- Costs related to litigation
- Fees for administrators including payments to any member or officer of the Recipient's Board of Directors
- Opportunity costs
- Hospitality and entertainment costs
- Franchise fees and/or franchise license costs
- Lobbyist fees
- New capital expenditures
- Website or Marketplace for the BIA – no EXCEPTIONS

What is the application submission deadline?

Applications for DSSG will be accepted anytime between June 30, 2021 and September 30, 2021, or until grant funds have been fully exhausted. Applications must be received no later than 5:00 p.m. Eastern Time on September 30, 2021.

Apply

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How do we apply?

For entities applying for a grant, the process is as follows:

1. Go to **www.digitalmainstreet.ca/ontariogrants/** and complete an online profile (prior grantees may contact **dms@obiaa.com** for an application form

2. Complete an application form to include:
   a) Organizational structure and define who will be responsible for the administration of the contribution funds, along with applicable contact info
   b) Include details of any partnership formed for the purposed of executing the grant and copies of any applicable partnership agreements or Memoranda of Understanding
   c) Describe the geographic area including the number of BIAs (if applicable)
   d) Number of eligible businesses to be served

3. An action plan to include a timeline for:
   a) executing the project within the designated area
   b) hiring and training DSS members
   c) hosting DSS launch event/informational sessions for promoting DSS members, if applicable
   d) issuing press release, if applicable
   e) purchasing equipment, if applicable
   f) partnership informational sessions for promoting the squad services in the area

4. Any academic partnerships that will assist with potential student hires

5. A detailed budget to include a narrative on how the funds will be used

How long does it take for a DSSG application to be reviewed/approved?

Once submitted, OBIAA will review the application to ensure all requirements are met. A Grant Coordinator will follow-up with the applicant if there are questions about the application. This review process should take approximately five (5) business days (depending on volume).

Once the final review is completed, OBIAA will:

- Contact the applicant by email and inform them they are approved.
- Review all conditions of the contribution with the applicant, including disclosure of information to the stakeholders.
- Issue a DSSG agreement that must be signed within five (5) business days.
- **NOTE**: work can begin and costs can be incurred after the DSS Grant agreement is signed back.

When will we receive the grant funds?

Upon receipt of the signed agreement, OBIAA will contact the applicant to verify method of payment: EFT or cheque. Payment will be issued within one (1) week.

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What other responsibilities should we be aware of under the DSSG agreement?

All requirements will be detailed in the DSSG agreement, but approved applicants should pay particular attention to the following reporting requirements:

- DSS members **must use the HubSpot CRM to track all businesses contacted and served** within the project period.
- DSS members **must track all businesses who decline DSS service**.
- All **DSS members and/or administrators must attend the bi-weekly Mastermind calls**.
- DSS members should be **tagging OBIAA in all social media posts**.
- DSS Administrators **must submit regular DSS reports** by 5 p.m. ET on the 5th of the following month. Reports should include, but is not limited to the following info which can be obtained from HubSpot data entries:
  - Name of each business visited or served
  - Number of times a DSS member visited/served each business
  - How long DSS member spent with each business
  - Number of businesses declining the service
- DSS Administrators must complete the DSS Final Report template listing the details of the costs incurred and covered by the grant and signed by their Financial Officer/Treasurer and submitted by February 28, 2022. Copies of original receipts are not required to be submitted but should be kept for seven (7) years and must be made available upon request should the stakeholders decide to conduct an audit.
- All costs should be net of any applicable HST discount or rebate.
- Any budget shortfalls are payable and must be returned to OBIAA upon final reconciliation of the budget.

Is there a job description for a Digital Service Squad member?

OBIAA can provide a generic job description for a DSS member that each BIA/municipality/Chamber is free to modify depending on the responsibilities you want to assign to your squad member(s) and your overall expectations of the role. The job description is available to download from the Campaign-in-a-Box of the OBIAA website. Local health guidelines allowing, the expectation is for squad members to go door-to-door to introduce themselves and to better serve the local businesses. The job description does note the possibility of working remotely should COVID-19 restrictions required it.

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DSS 2021 Program Guidelines and FAQs *Continued*

Are there guidelines for hiring a DSS member and will training be provided?

Yes. Once you are ready to begin the hiring process and to make sure you are on the right track, OBIAA will make a virtual introduction to our DSS training team. They will guide you through the DSS hiring and squad member on-boarding.

There is mandatory DSS training once you have your squad member(s) in place. DSS members complete the training via a half-day LIVE webinar session that take place every Tuesday from 10 a.m. to 1 p.m. and ideally, should be scheduled two (2) weeks in advance. The "Kick off DSS training" is not on hard skills i.e., proven best practices and procedures are reviewed. It will provide a comprehensive overview of the Digital Service Squad conduct, the Digital Service Squad Toolkit, Digital Main Street best practices (including ongoing COVID-19 and other safety precautions), the daily HubSpot reporting requirements and a short information session on the **ShopHERE** program so the squad member will be able to identify and refer any business that may require e-commerce assistance. There are several different DSS teams across Ontario, and we need to ensure that all DSS members perform consistently, but will allow for local adjustments as required. **NOTE:** All DSS Administrators must take the DSS mandatory training alongside their DSS member(s) and be comfortable using HubSpot to obtain necessary reporting info.

Is there any marketing support material available for our DSS members?

Yes. To help your DSS member(s) better serve your local businesses and promote the Digital Transformation Grant, OBIAA has developed a set of marketing tools and handouts, collectively called the Campaign-in-a-Box (CIAB). Some handouts are designed to be a template that you can customize with your local messaging and contact details. These digital/downloadable pieces can be found at:

https://obiaa.com/projects/digital-main-street-phase-3/campaign-in-a-box/

Also, a "How to Apply" video has been produced and the link to it can be posted on your website. It is a handy tool for your DSS members designed to take Digital Transformation Grant applicants through the step-by-step process of applying for the grant.

Can DSS Grant funds be used to build a marketplace website?

No. Squad members can help the individual businesses develop a better presence on these marketplace sites, but a squad member's time cannot be used to build the marketplace website.

DSS 2021 Program Guidelines and FAQs *Continued*

Can we re-hire the same DSS member we used last time?

Yes, provided they are not an existing staff member. DSS members must be NET NEW HIRES. The only exception to this requirement is in situations where a current part-time staff member may be increased to full-time to take on DSS responsibilities, but wages must be tracked separately. If it is not possible to source university/college students or recent graduates as DSS members, contracting a third-party tech company is allowed (**NOTE:** some restrictions do apply), All new DSS members **must** participate in the mandatory DSS training.

Is there an easy way for a business to determine which Digital Main Street program (Digital Main Street Ontario Grants vs. ShopHERE) to apply for or can they apply for both?

- *Digital Transformation Grants*
  - A program that provides businesses with grant funding for digital transformation
  - Good for any business that meets the eligibility criteria and is looking for financial support to implement transformation.

- *ShopHERE powered by Google*
  - A program that provides independent small businesses and artists with a quick, easy, and no-cost way to get selling online right away. If a business is looking for a transactional website and to sell on Shopify (or similar platform), this is a good fit.

IMPORTANT TO NOTE: Both programs are independent of each other, albeit very complementary. There is nothing prohibiting a business from going through both programs if they qualify and there is no specific order in which a business needs to approach the programs.

How long is the grant period?

The DSS Grant program **ends on February 28, 2022**. DSS Grant administrators must submit their final report within two weeks of their grant agreement end date.

How can I learn more?

Visit **digitalmainstreet.ca/ontariogrants/** for more information on timing and instructions for applying for Digital Service Squad Grants.

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