Welcome!!!!

We are excited you could join us!!

Please go to iesbga.org to access the conference portal.

1. Click on “Lobby” so you can log in and create your avatar.
2. Type in your full name and click continue
3. Select your avatar
4. Enter the lobby

To ensure a quality experience, please review the information below once you have entered a session:

- Stay muted – reduces sound interference
- Ask questions in the Chat box section anytime during the presentation
- Be sure to edit your settings so that when you log into the event, the name you are registered under is displayed. If it is not, you will not receive any credit for participating.
- Check in early! Please log in at least 10 minutes before start time. By logging in early, it allows for troubleshooting of technical difficulties.
WELCOME, ATTENDEES!
2021 IESBGA
CONFERENCE

Thank you for all you do to educate and counsel the entrepreneurial sector. We’re proud to be associated with such an impressive roster of business advisors!

After the conference, we hope you’ll remember to include the SBA 504 Loan Program in your arsenal of resources. This program expands capital access for America’s small businesses and fills a market gap in long-term financing. The interest rates with 504 Loans are fixed for the life of the loan, and the terms extend as long as 25 years. That’s why the 504 Loan Program is extremely successful in helping small businesses kick-start growth and advance to the next level in an affordable way!
Proud to be partnering with Illinois SBDC since 2012
Champaign County EDC: https://champaigncountyedc.org/
Bridge, Champaign County’s Virtual Incubator: https://www.bridgeincubator.com/
You’re Welcome CU: https://yourewelcomecu.com/

Website: https://www.startupspace.us/
Video: https://youtu.be/gmTGdGY1Wns
Important Information

The Illinois Entrepreneurship and Small Business Growth Association would like to thank the 2021 Conference Sponsors:

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**Certification Hours**
Certification hours will be available for each session. There will be a monitor in each session keeping track of who is in the session. To receive credit for attending the session, please remain logged in during the entire session.

**2021 IESBGA Planning Committee**
- Don Elmore, Chair
- Greg Bouhl
- Melissa Brown
- Joann Di Maggio May
- Keli Krueger-Huhra
- Tamora Hughes
- Mariel Huasanga
- Amy Lambert
- Jean Lin
- Ericka Perkins
- Mark Petrilli
- Andy Pham
- Charlene Raickett
- Jim Ryan
- Darryl Thomas
- Ute Westphal
- Brett Whitnel

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- Jim Ryan
- Ute Westphal
- Ad Hoc
- Mark Petrilli
- Ericka Perkins
- Darryl Thomas
- Jackie Welch
WEDNESDAY, August 4, 2021

12:45 PM–2:15 PM                       General Session I

Welcome, New Member Orientation and Annual Meeting of IESBGA
Don Elmore, IESBGA President

Join this Zoom meeting:    https://zoom.us/j/93767105787

2:15 PM–3:45 PM                    Session I Workshops

1) There isn’t a workshop during this session

2) Utilizing Neoserra to Positively Impact Daily Operations
   Rita Haake, Illinois PTAC at College of DuPage
   Don Elmore, Illinois SBDC at Champaign County EDC
   Sara Troyer, Illinois SBDC at College of DuPage
   Jo Ann Di Maggio May, Illinois SBDC at SIU Edwardsville
   Facilitator: Ericka Perkins, Assistant State Director, Illinois SBDC Network

Join Zoom Meeting                https://zoom.us/j/97483453732

The use of Neoserra is required for data collection and processing to stay compliant with grant requirements. But wait...there is more. Neoserra is a professional contact management system:
- Client sign-up
- Client processing
- Advising session notes keeping
- Communication with clients via email
- Document safe
- Client surveys and data collection
- Webinar/On Demand/Workshop management
- Time management
- Community stakeholder management

Hear from our directors in different areas of the state of Illinois how they maximize Neoserra in their day-to-day operations in the field. Also hear the challenges they face to utilize Neoserra to the fullest. Our goal is to increase efficiency and professionalism, get idea and questions answered. Move your center operations to the next level either on an individual, program or center level.
3) **Setting Expectations via Onboarding**  
Amy Lambert, Executive Director, Illinois SBDC at Starved Rock Country Alliance

Join Zoom Meeting  
https://zoom.us/j/95718670083

One of the most important goals of our center is to make sure that every client has the same first experience, thus we developed a delivery called “The Two and Half Lectures.” This interaction helps our center to instill a strong understanding toward how the SBDC can assist them and what they can expect from our center. During this session, we will share the outline and narrative of our “Script” as well as the format used to document their first session.

Amy Lambert is a leader in visioning emerging businesses. Her passion for nurturing creative talent, applying innovative technologies, and local investment have shifted the landscape of central Illinois and built a foundation for new regional economies. She was named 2019 Illinois SBDC Network Shining Star for performance in outreach and economic impact by the Illinois Entrepreneurship and Small Business Growth Association. Amy holds a BS in Business with emphasis on Organizational Innovation from the University of Phoenix and an AAS from Illinois Central College where her focus was Design.

4) **Challenges and Successes During COVID: Lessons Learned from Exporters and Advisors**
   Silvia Torres Bowman, CGBP, Illinois SBDC International Trade Center, SIU Edwardsville  
   Tom Dustman, CGBP, Dustman Consultants  
   Craig Eversmann, President, MSSC, LLC  
   Marshall Girtman, International and Domestic Sales Specialist, Special Mine Services  
   Karen Tinsley-Sroka, Founder and Creative Executive, My Scratch Offs

Join this Zoom meeting  
https://zoom.us/j/94402676308

As disruptions spread across industries and whole sectors of the economy due to the COVID-19 pandemic, many Illinois small businesses continued exploring and developing new export markets with the support of the SBDC International Trade Center Network as well as federal partners. Join us for a panel discussion with Silvia Torres Bowman, Tom Dustman and three SME exporters from the southern Illinois region who will discuss the impacts, lessons learned and successes in dealing with COVID, including their virtual participation in round table discussions, export training / matchmaking sessions as well as exhibiting via a virtual booth at an international trade show, all made possible with relief funding assistance through CARES Act and ISTEP dollars and the ongoing support of the Illinois SBDC ITC at SIUE. Craig Eversmann from Marsh Shipping Supply Company in Collinsville, Marshall Girtman from Special Mine Services in West Frankfort and Karen Tinsley-Sroka from My Scratch Offs in Swansea will be featured on the panel. They will also share their personal experiences in working with the Illinois SBDC/ITC Network, the Illinois Office of Trade and the U.S. Department of Commerce, provide suggestions for improvement and the types of services and programs they would like to see in the near future. Best practices in client recruitment and assistance will also be made available for open discussion.

Silvia Torres Bowman As director, Silvia spearheads entry into global markets for entrepreneurs as well as small and medium-sized businesses in the southern Illinois region. She manages a program of export consulting and training in international business planning, marketing, logistics and trade finance. Several of her clients have been honored with the Governor’s Export Award as well as the President’s
“E” Award. As a native of Lima, Perú, Ms. Torres has unique knowledge, a solid network of connections and years of experience in promoting and expanding trade opportunities in Latin America. She has led and participated in trade missions and industry shows both nationally and internationally to promote Southern Illinois and the St. Louis metro region as the "Gateway to the World". Silvia’s career spans the private sector, academia, and public service. She was honored twice with the Governor’s Export Awards, co-founded the Southwest Illinois Trade and Investment Council and is an active member and partner of several international trade organizations. Ms. Torres is highly regarded for her expertise and passion for export business, community engagement and Latin American trade. She holds an MBA from Webster University and is a Certified Global Business Professional (CGBP).

Tom Dustman is the Co-founder of Dustman Consultants and the International Sales Director for Sunnen Products Company, headquartered in St. Louis, Missouri. Sunnen is a family owned business celebrating 95 years as a leading supplier to the machine tool industry. Sunnen has exported for more than 80 years and has a global network of subsidiaries and independent distributors focused on precision bore finishing. Mr. Dustman has been involved with sales leadership at Sunnen for over 20 years and currently directs the sales efforts in the Americas while supporting the company’s international sales channel. As part of Sunnen’s global expansion program he coordinated the creation of joint ventures in China and Brazil and established direct sales in Canada on behalf of the company. Additionally, over the course of his career, Mr. Dustman has shared his knowledge of bore finishing and international business via numerous speaking engagements in various countries around the world. Tom was appointed by U.S. Secretary of Commerce Wilbur Ross to serve on the U.S. Investment Advisory Council, where he advises on national strategies and efforts to increase foreign direct investment. As a member of the Investment Advisory Council, he co-chairs the work force development sub-committee. He is also a past chair of the Missouri District Export Council and a member of the National District Export Council Steering Committee. Mr. Dustman's contributes to the Illinois SBDC ITC at SIUE team as a consultant. CARES Act funding is leveraging Tom’s tried and true exporting experience to proactively educate clients in the southern Illinois region. He has been moderating a series of virtual export round table sessions hosted by the SBDC ITC at SIUE since September 2020. Mr. Dustman is a graduate of the University of Missouri–Rolla with a degree in Ceramic Engineering and is a Certified Global Business Professional (CGBP).

Craig A. Eversmann is president and chief executive officer of Marsh Shipping Supply Company LLC in Collinsville. He has served in this capacity since 2012. Prior to that, Eversmann worked as vice president of manufacturing for Marsh Shipping Supply. He graduated from Southern Illinois University Edwardsville with a Bachelor of Science in Industrial Engineering in 1984 and a Master of Business Administration from Webster University in 1997. Marsh Shipping Supply manufactures and sells and exports industrial stencil machines, stencil applicators and inks worldwide. Marsh also manufactures and globally sells carton closure equipment such as water-activated gummed tape dispensers. A growing market and product line are the company’s inkjet printers, also sold worldwide. Marsh’s longstanding worldwide distribution network serves 130 countries.
**Marshall Girtman**, International and Domestic Sales Specialist for Special Mine Services, looks for new ways to do things, rather than seeing blockages. Leaning on his military experiences, and having started his professional career in chemistry analyzing results for industries ranging from pharmaceuticals to coal mining, he uses those same precision skills to help his company and customers find the best connection for their success—in manufacturing, mining, entertainment, and other industries. Strong in his faith, knowledgeable in his products, and caring for others’ growth, he enjoys helping others to succeed.

My Scratch Offs Founder and Creative Executive **Karen Tinsley-Sroka** partners world experience and love of design to bring fresh novelty and custom scratch off products to businesses and consumers nationally and internationally. In 2008, My Scratch Offs was founded. A company that started in a living room, is now a leader in their novelty and print marketing niche through a broad e-commerce footprint. She, and her team of 7, have unique sets of talents that set the stage for My Scratch Offs, and now looks to use the International market to take My Scratch Offs to the next level.

**3:45 PM-4:00 PM**
**Break**

**4:00 PM-5:30 PM**
**Session II Workshops**

1) **PTAC Roundtable Discussion of Best Practices and Tools**
   Moderator: Darryl Thomas, Program Manager, Illinois Procurement Technical Assistance Center

Join Zoom Meeting [https://zoom.us/j/96500605200](https://zoom.us/j/96500605200)

Darryl will facilitate a round table discussion for PTAC members with the topic “Best Practices Using PTAC Resources”. This is an opportunity for all PTAC staff to network, exchange ideas, discuss resources and share best practices on the important issues that are currently affecting the Illinois PTAC Program. Come prepared with questions for the PTAC Program Manager and other PTAC directors. Take advantage of the chance to learn, teach and vent. An agenda will be provided at the start of the session.

**Darryl Thomas** has been the Program Manager for Illinois Procurement Technical Assistance Center since 2016. Prior to that he served as the Program Manager for First Stop Business Information Center at the Illinois Department of Commerce and Economic Opportunity (DCEO) for 10 years. Mr. Thomas began his career in state government in 1991 as Transportation Compliance Auditor with the Illinois Commerce Commission. In 1994 he became the first employee hired by the agency for its new First Stop Program. A single, statewide resource for entrepreneurs and existing business owners who have questions or concerns about state and federal business requirements, business assistance programs and the regulatory process. Mr. Thomas is a 1990 graduate of Western Illinois University with a Bachelor of Business in Transportation Physical Distribution (now Supply Chain Management). Prior to graduating from WIU, Darryl completed internships at two Fortune 500 Companies in Illinois.
2) Designing Your Inclusive Entrepreneurial Ecosystem Using Technology and Data
David Ponraj, CEO, Startup Space

Supporting small businesses in today’s complex world requires a collaborative system-based approach. Learn how the infrastructure to accelerate entrepreneurship, leverage collaborative partnerships, measure impact and achieve scale is being built in rural and urban entrepreneurial communities nationwide. This discussion, led by the founder and CEO of a minority-owned small business, will draw on real-world cases of entrepreneurship-led economic development strategies to map, connect and measure an inclusive ecosystem using data-driven technology.

David Ponraj is a serial entrepreneur with deep experience implementing community initiatives and consulting with over 70 communities nationwide to implement entrepreneurship infrastructure. A thought-leader and innovator, David founded Startup Space, a 100% minority-owned small business, in 2018 to provide a platform for entrepreneurship ecosystems and small business starts. Ponraj previously led corporate teams at Nielsen and now speaks extensively at economic development conferences and events, including numerous local panels focused on ecosystem development.

3) Understanding the Role of PTACs in Supporting SBDCs in Government Contracting
Rita Haake, Director, Illinois PTAC at College of DuPage

Learn how a PTAC can work collaboratively with your SBDC to benefit your clients.

Rita has been the Center Manager for the Business Development Center at College of DuPage since July, 2011. The Business Development Center houses the Illinois Small Business Development Center (SBDC), Illinois International Trade Center (ITC) and the Illinois Procurement Technical Assistance Center (PTAC); College of DuPage has been a strong host since 1985. Her career at the college has spanned thirty years with twenty four (24) of those years focused on the development and growth of small business in government contracting. Her varied responsibilities include running the operations at the administrative level for the three centers while still working within her passion of advising on government contracting. She is proud that her team has been able to substantially increase annual performance measures of all programming year over year. Rita is certified as a Certified Procurement Professional (CPP), Contracting Assistance Specialist (CCAS), US Veteran Administration Federal Contracting Certification Mentor (FCC), US Veteran Administration Verification Certification Counselor and holds a Bachelor’s Degree in Business Administration from Northwood University, Michigan. She is a member of many professional organizations and has been actively involved in leadership within many of those organizations. Associations include National Contract Management Association (NCMA), North Central Regional Council (NCRC), Midwest Small Business Liaison Officer Group and the Illinois Entrepreneurial and Small Business Growth Association (IESBGA) and the West Suburban Chamber of Commerce & Industry.
4) **Customs and International IP Enforcement - From the Borders and Beyond to Your Doorstep**
   Holly Lance, U.S. Patent and Trademark Office
   Alaina van Horn, U.S. Customs and Border Protection

**Join Zoom Meeting**  [https://zoom.us/j/97340431874](https://zoom.us/j/97340431874)

This joint program hosted by U.S. Customs & Border Protection (CBP) and the U.S. Patent and Trademark Office (USPTO) will introduce Illinois SBDC professionals to the work that CBP performs to stop counterfeit and pirated goods from entering the country, and how entrepreneurs can use the resources of CBP as part of their IP enforcement arsenal. The program will begin with an introduction to the USPTO and the basics of IP with a representative from the USPTO's Elijah J. McCoy Midwest Regional Office. Holly Lance, an Attorney Advisor from the USPTO's Office of Policy and International Affairs, will speak about international IP enforcement and the USTPO's IP Attaché Program. Finally, Alaina van Horn, Chief of the Intellectual Property Enforcement Branch at CBP, will discuss the IPR e-Recordation system and resources for recordation holders.

**Holly Lance** is an Attorney Advisor in the Office of Policy and International Affairs at the U.S. Patent and Trademark Office (USPTO). As a member of the Enforcement Team, Ms. Lance focuses on anti-counterfeiting and anti-piracy issues domestically and abroad. She devotes substantial time to public awareness work, including the USPTO’s Go For Real Anti-Counterfeiting campaign (https://www.ncpc.org/goforreal). Ms. Lance’s international work focuses on Sub-Saharan Africa, where she promotes and advocates for improved protection and enforcement of intellectual property rights in the region through capacity building and technical assistance programs. Prior to joining the USPTO, Ms. Lance was in private practice, where she worked with clients of all sizes – from startups to Fortune 500 companies – on trademark, copyright and internet law issues, including counseling, trademark and copyright prosecution, enforcement and litigation. Ms. Lance holds a Bachelor of Arts degree, cum laude, in Cultural Anthropology and Public Policy Studies from Duke University, and her Juris Doctor degree from the University of Michigan Law School.

**Alaina van Horn** currently serves as the Chief of the Intellectual Property Enforcement (IPE) Branch of U.S. Customs and Border Protection, Office of Trade, where she supervises a team of attorneys and paralegals specializing in border enforcement of intellectual property rights. Prior to this position she served a one year detail in the Office of the U.S. Intellectual Property Enforcement Coordinator (IPEC) in the Executive Office of the President, as a Policy Advisor specializing in customs law. Prior to joining the IPEC she was a Senior Attorney-Advisor in the Intellectual Property Rights Branch of CBP’s Office of Trade for over a decade, where she provided legal support to all ports of entry on border enforcement of trademarks and copyrights, adjudicated administrative petition for relief from seizure, issued binding rulings and infringement determinations, and administered patent and trade secrets based exclusion orders issued by the U.S. International Trade Commission. Ms. van Horn has conducted numerous capacity building trainings on border enforcement
of intellectual property rights to foreign governments, international organizations, and domestic audiences in both the public and private sectors. Ms. van Horn received a bachelor's degree in philosophy from New York University, a Juris Doctor (J.D.) degree from Catholic University, Columbus School of Law as well as a Masters of Arts (M.A.) degree from Catholic’s Graduate School of Philosophy, and a Master of Laws (LL.M.) from The George Washington University Law School.

THURSDAY, August 5, 2021

8:00 AM-9:00 AM Coordinating Council Meeting

Join Zoom Meeting https://zoom.us/j/96429223254

9:00 AM-10:30 AM Session III Workshops

1) Estimating and Bidding for Federal Contracts - Federal Contracting Readiness Program Overview
Eric Ruffin, CEO/President, Ruffin Consulting

Join Zoom Meeting https://zoom.us/j/91268067059

Under a grant from the SBA, Ruffin Consulting provides 7(j) M&TA with the goal of taking participants to 8(a) certification to better position themselves in the Federal contracting arena. The material covers:

- Is the "Federal Government" market right for you?
- Understanding "Potential For Success"
- Federal Contracting Readiness Assessment
- Providing 7(j) M&TA in preparing & submission of 8(a) applications
- How to become and maintain your Federal contracting readiness
- FAR 9 - Contractor Qualifications / DCAA Compliance – “Responsible and Responsive Contractor"
- Preparing and submission of your SBA approved Business Plan (1010C)
- Performing effective market research
- Developing a preliminary capture plan
- Advanced 8(a) BD M&TA training

Eric possesses over 15 years of professional experience including accounting, auditing consultancy, project management, training and business development. Currently, he provides management and technical assistance to an array of clients. However, early professional experience included work on audit and internal audit engagements with a public accounting firm and “Big 4 CPA Firms” via joint-venture arrangements. Mr. Ruffin has managed the audits of Federal contractor clients since 2007. He’s garnered over 14 years of experience managing A-133 audits and is experienced in managing audit services to HUD, State, Local Government and Other Federal regulated entities. In addition, Eric has worked as a consultant providing internal audit consulting duties, FIAR assistance services, estimating and bidding and DCAA and FAR services. Lastly, Mr. Ruffin specializes in providing
management and technical assistance and consulting services to minority, women, and veteran-owned businesses.

2) **Lean Startup 101: Using the Approach with Entrepreneurs in Plan for Profit Program**  
Maura Mitchell, Illinois SBDC at Women's Business Development Center

**Join Zoom Meeting**  
https://zoom.us/j/95957409967

Starting a business is risky. The Lean Startup method is a common-sense approach for dealing with this uncertainty. It is a useful concept that can help clients confirm that there's a market need for their products or services before spending too much money (e.g., website, business license, and legal advice). The objective of the Lean Startup 101 presentation is to introduce the concepts, terminology and approaches. This practical, interactive presentation will provide a foundation:

1. What is the Lean Startup Method?  
2. Why use the Lean Startup Method in your programming or one-on-one advising sessions?  
3. How to develop a program using the Lean Startup method?

Maura will explain the process the Illinois SBDC at the WBDC relies on to use the Lean Startup method in its multi-week Plan for Profit program. She'll cover the Plan for Profit: 1) Recruiting process; 2) Multi-week schedule; and 3) Content basics. Plan for Profit helps clients avoid the unnecessary failure of building a perfect product or service that nobody buys by guiding participants to answer the question, Should we build this? Plan for Profit covers the key areas of:

- Business model development  
- Unique value proposition creation  
- Niche definition  
- Business hypotheses creation  
- Customer discovery  
- Product-market fit assessment  
- Competitive analysis  
- Marketing strategy development  
- Financial viability analysis

**Maura Mitchell** is a dynamic, detail oriented, and collaborative leader who pairs her passion with performance, resulting in a successful record of accomplishment in public service initiatives. She is the Director of the Illinois SBDC at the Women’s Business Development Center (WBDC). The WBDC is a nationally recognized nonprofit in the field of women’s economic development providing programs that accelerate women’s business ownership and strengthen the impact of women on the economy. After running her own consulting business, obtaining a JD/MBA, running a family-owned manufacturing business, and working with thousands of startups at the Illinois SBDC at the WBDC, she has accomplished at providing leadership to early stage entrepreneurs in the areas of ideation, business development, strategic planning, financial forecasting, and legal compliance. She likes to partner with each entrepreneur to clearly state their mission and to organize their goals. She is also a researcher at heart and so she asks the difficult questions to ensure entrepreneurs have conducted their market research, developed a business/strategic plan, tested their idea, and are ready to compete. Maura has a B.A. in Mathematics/Computer Science from St. Mary’s College, an MBA from The University of Chicago’s Booth School of Business, and a J.D. from DePaul University’s School of Law.
3) **Advising Artists and Creatives**  
Amy Lambert, Executive Director, Illinois SBDC at the Starved Rock Country Alliance

Join Zoom Meeting  
[https://zoom.us/j/96397604199](https://zoom.us/j/96397604199)

This session focuses on common needs of artists and creative entrepreneurs as well as best practices in working with them as clients. We will visit the different revenue streams commonly used as well as ongoing grant programs, business growth activities, and how to network and market effectively.

**Amy Lambert** is a leader in visioning emerging businesses. Her passion for nurturing creative talent, applying innovative technologies, and local investment have shifted the landscape of central Illinois and built a foundation for new regional economies. She was named 2019 Illinois SBDC Network Shining Star for performance in outreach and economic impact by the Illinois Entrepreneurship and Small Business Growth Association. Amy holds a BS in Business with emphasis on Organizational Innovation from the University of Phoenix and an AAS from Illinois Central College where her focus was Design.

4) **Market Updates for Canada and Mexico with the Illinois Office of Trade and Investment**  
Jeffrey Johnson, Managing Director, State of Illinois Canada Office  
Omar Mendoza, Managing Director, State of Illinois Trade & Investment Latin America Office

Join Zoom Meeting  
[https://zoom.us/j/92941208865](https://zoom.us/j/92941208865)

How will the new normal affect the trade relationship under the USMCA framework? This presentation will address the changes between NAFTA and USMCA that may impact the Illinois’ trading relationship with Mexico and Canada and prospects for Illinois exports to its neighbors. Our speakers will delve into country specific examples, such as the inclusion of a chapter in the USMCA related to "Digital Trade" and its effect on trade with Mexico, and a reduction in Canadian trade barriers in the dairy sector and its impact on Illinois companies. The presentation will also address the industries that DCEO/OTI have identified for Illinois export promotion to Canada and Mexico, suggestions for working together to get the best results for clients, and an opportunity for ITCs to ask questions and provide feedback on resources and services.

**Jeffrey Johnson** is the Managing Director of the State of Illinois Canada Office based in Toronto, Ontario, Canada. Mr. Johnson's responsibilities encompass Illinois' trade promotion, foreign direct investment and tourism activities in the Canadian market. Mr. Johnson's tenure with the Illinois Department of Commerce and Economic Opportunity has also included management of the State’s Enterprise Zone Program. Mr. Johnson holds a bachelor's degree from Northern Illinois University and a master's degree from the Johns Hopkins School of Advanced International Studies with an emphasis in Canadian Studies.

**Omar Mendoza**, is Managing Director of the State of Illinois Trade and Investment Latin America Office, based in Mexico City, since 2016 and has 21 years of service with the Illinois Trade and Investment
Office, and has 33 years of experience collaborating in the public and private sectors of both Mexico and the USA. Mr. Mendoza holds a Master's Degree in Business Administration and a degree in Industrial Engineering, majoring in Production Management from Mexico’s National Polytechnic Institute (IPN by its Spanish acronym) - UPIICSA Campus. With more of 30 years of experience in: Manufacturing processes, International Trade, Foreign Affairs and Management, in both private and public sector in Mexico and the United Stated of America. In the private sector, Mr. Mendoza has been worked in important business groups from Mexico and USA, as Productividad de Hoja de Lata (Zapata Group – Mexico), Tapetes Luxor (Pulsar Group – Mexico) and Carter Custom Carpets, Inc. (Atlanta, GA, USA). Mr. Mendoza served in the Mexican public sector in the State of Mexico’s Economic Development Deputy Secretariat. In the community, he does community services with Mathematics and Mexico’s History lessons and consultancies. He does biking and hiking.

10:30 AM-10:45 AM  Break

10:45 AM-12:15 PM  Session IV Workshops

1) PTAC Roundtable Discussion Part 2 - CMMC Client Referral Resources and Cybersecurity Webinar Series Engagement
   Keli Krueger-Huhra, Director, Illinois PTAC at Bradley University

Join Zoom Meeting  https://zoom.us/j/98684556530

"Do Your Part. #Be Cyber Smart" This session is a group discussion in regards to resources and referrals for clients inquiring about Cybersecurity and CMMC requirements. The intent is to discuss the opportunities and challenges of using each one through the experiences of the practitioners who utilize them. This feedback can also assist in analyzing areas where additional support would be beneficial. For client development, we have reached out to three (3) consulting firms with subject matter expertise in Cybersecurity to facilitate a webinar series for Cybersecurity Awareness Month - October 2021. We will use this session to discuss the proposed dates, presenters, and webinar topics as well as the logistics necessary to present this opportunity throughout the network.

Keli Krueger-Huhra has been with the Illinois Procurement technical Assistance Center at Bradley University’s Turner Center for entrepreneurship for four years. Prior to joining the Illinois PTAC, she experienced more than 25 years of progressive career growth in automotive manufacturing integrating Procurement and Supply with the organization’s strategic objectives. She was General Manager/ Director, Procurement and Supply at Mitsubishi Motors North America Manufacturing Division responsible for 32 direct and indirect management and staff engaged in procurement administration, cost engineering, production purchasing, material and services purchasing, supplier quality assurance and new model engineering and development, directing annual spends of $740M in global sourcing with suppliers in 266 global locations. Ms. Krueger-Huhra has received the globally recognized CPSM designation by the Institute for Supply Management (ISM). She is a past president and held numerous positions on the Board of Directors of the National Association of Purchasing Management – Central
Illinois, Inc. an affiliate of the ISM. In May of 2017, she was awarded New Rotarian of the Year for District 6490 of Rotary International. Ms Krueger-Huhra is Past President for Daybreak Rotary Club in Bloomington-Normal, IL and is a Paul Harris Fellow. She is a recent graduate from the University of Illinois Urbana-Champaign, Giles College of Business with an MBA and has a Bachelor of Science in Economics from Illinois State University.

2) SBA 7a Lending: General Overview
   Chris McDonald, SBP, Harvest SBF
   Eric Bacon, Vice President, SomerCor

   Join Zoom Meeting   https://zoom.us/j/99738385202

   This presentation will address:
   
   - Who the SBA is
   - What an SBA loan is
   - Major SBA programs
   - Basic credit requirements
   - SBA 7a program details
   - Items needed for loan application

   Chris McDonald has been in the banking and finance industry for 18 years with experience in commercial lending, government guaranteed lending, and commercial real estate finance. Prior to Harvest he has worked for organizations such as Wintrust, Citizens Bank, Associated Bank, and a non-profit providing SBA 504 financing. Chris truly appreciates working with business owners and understands the importance of working as accurately and efficiently as possible to meet his clients’ needs. He is a trusted advisor and provides valuable solutions as he fully understands the challenges of owning a business. Chris graduated from Northern Illinois University with a degree in Finance. When he’s not working or spending time with his wife and 2 boys Chris enjoys traveling, playing sports, and strumming his guitar.

   Eric Bacon is a commercial lending professional focused on delivering SBA financing solutions to small and middle market businesses. He joined SomerCor as a credit analyst in 2016 and transitioned into the loan origination team in 2018. He quickly distinguished himself as one of SomerCor’s top loan producers and was promoted to Vice President in 2020. Bacon received his B.S. in Finance and Economics at North Park University.

3) Cyber Security at a Glance
   Ryan Neace, General Manager, Northbridge Professional Technologies

   Join Zoom Meeting   https://zoom.us/j/92116128137

   In this presentation we will look into the types of attacks threat actors will use against small businesses and ways of defending against these attacks across all platforms. We will go over a few common cyber security myths and truths that are often misunderstood.
Ryan is a Security Specialist and the General Manager for Northbridge Professional Technologies in Murphysboro, IL. Ryan currently holds several certifications in security and compliance standards. He has been in the IT field professionally for about 12 years but has had a technology background since his early childhood. He has spent the majority of his time pursuing a role on the front-lines of IT by supporting small and large businesses as a Technician but recently made the vertical transition in his career to the general manager of Northbridge. There he manages a staff of 10 including 5 full time technicians.

4) **Introduction to Digital Strategy Counseling**  
   James Bledsoe, Director, eCommerce Innovation Lab, US Commercial Service

Join Zoom Meeting [https://zoom.us/j/91304291522](https://zoom.us/j/91304291522)

This presentation was created to provide an overview of the ecommerce sales channels, and how developing a digital strategy can help you to organize your business processes. We will first cover some basic considerations and definitions of the ecommerce sales channels, with case studies to illustrate the importance of having a digital strategy. Then we will explore the ecommerce resources available on trade.gov/ecommerce for businesses.

James Bledsoe is the Director of the U.S. Department of Commerce-U.S. Commercial Service’s eCommerce Innovation Lab (EIL), based out of Tacoma Washington. James is a U.S. Air Force veteran (‘99-‘10) and holds a Master’s Degree in International Relations from the University of Washington’s Jackson School of International Studies (JSIS), where his focus was China’s heavy and light industries and market access; James also holds an undergraduate degree (B.A.) in Political Science and China Studies from Washington State University. The eCommerce Innovation Lab (EIL) is an office within the U.S. Department of Commerce's U.S. Commercial Service, that focuses on advancing the expertise and knowledge of cross-border ecommerce and digital strategy among all U.S. small and medium-sized businesses. Visit [https://www.trade.gov/ecommerce](https://www.trade.gov/ecommerce) for more information.

**12:15 PM-12:45 PM**   
Break

**12:45 PM-1:45 PM**   
General Session II

Join Zoom Meeting [https://zoom.us/j/99361521382](https://zoom.us/j/99361521382)

**Leveling the Field: Equity in Small Business Recovery**  
Gerri Aglipay, Director,  
Midwest Region and National Women’s Entrepreneurship Small Business Majority

When the United States declared the COVID-19 pandemic, a public health disaster on February 3, 2020, it marked the start of a devastating economic crisis that will have repercussions not only upon how small businesses recover, but also how business development and support organizations
deliver advisement services and resources to help owners start-up, scale-up and sustain profitable operations in a post-pandemic new economy. The negative impacts upon every small business has spanned across rural, micropolitan and metropolitan areas. However, widespread disparities such as access to federal, state and local disaster relief funding have also magnified more severe systemic inequities which existed before the COVID-19 pandemic that disproportionately affects local owners and their employees in underserved communities. Next to owning a home, owning a small business is a means to build wealth and assets that can help close the racial and gender wealth gap for thousands while fostering an inclusive, diverse and fair economy. However, the social and economic unrest during the pandemic has exposed the reality of an uneven playing field to thrive in entrepreneurship and the barriers are characterized by a lack of opportunities to access and manage financial capital, social capital, and knowledge capital, especially by owners in underserved and under resourced areas. As recovery plans continue to rebuild for a new economy and infrastructure, there is a high confidence fueled by the fact that small businesses create the most jobs. If an inclusive economy is built on the foundations of an equitable recovery, then it’s essential to acknowledge the vital role and influence of small business development and entrepreneur support organizations in creating and supporting equitable systems and services.

Geri Aglipay directs Small Business Majority’s outreach, education and policy efforts in the Midwest concentrated in Illinois, Wisconsin and Indiana to enhance financial capacity and wellness for small business owners, their employees and their families working. She works collaboratively with partners such as the Illinois SBDC, government entities, business organizations, community lenders and financial institutions and vested community stakeholder partners to strengthen entrepreneurship. She also manages Small Business Majority’s national outreach to women entrepreneurs and women-centered small business organizations to address gender disparities in entrepreneurship services, products and resources. Combined with her experience in workforce development and being a former solo-entrepreneur, Geir is ardent about helping entrepreneurs strengthen their asset building and building an inclusive economy that works for all through entrepreneurship, especially for women and particularly women with low wealth and assets, owners of color, immigrants and those located in underserved and under-resourced areas. She is an alumna of Cultivate: Women of Color Leadership Program, which aims to strengthen women leaders of color in Chicago working to advance economic, social and racial justice issues; serves as commissioner of the Cook County Commission for Social Innovation; and, is a member of the Chicago Women in Philanthropy Racial Equity and Social Justice Committee. Under her leadership, she guided the development of Chicago Inclusive Growth Coalition’s recommended metrics to help entrepreneur service organizations assess their impact in underserved areas entitled, Inclusive Growth Toolkit: Standard Outcomes and Recommended Metrics. In recognition of building collaborative activities, she recently received the Rogers Park Business Alliance’s Community Partner Award helping to improve the business community and neighborhood by brokering and leveraging subject matter expertise and partnerships to strengthen service delivery.

1:45 PM-2:00 PM Networking Break

2:00 PM-3:30 PM Session V Workshops

1) Illinois FAST Center Services - Helping Clients Obtain Critical Funding
Shelley Maves, PhD, Manager of Illinois FAST Center, University of Illinois Research Park

Join Zoom Meeting https://zoom.us/j/93571190918
Securing federal grant funding for a small business's innovative idea or technology is a critical step towards commercial success. The SBIR and STTR programs, often referred to as “America’s Seed Fund,” are an excellent source of undiluted funding, but are highly competitive. The FAST Center at the University of Illinois Urbana-Champaign provides the resources, support, and expertise necessary to submit a highly competitive proposal – and helps startups and companies bridge the gap between research and commercialization. The FAST center has helped companies acquire millions of dollars in federal SBIR/STTR funding – at no cost whatsoever to them. An overview of what the SBIR/STTR program offers your clients, how to determine if clients are ready for the program, the services provided by the FAST center, and how to access these services will be presented.

Shelley Maves is the manager of the FAST Center at the University of Illinois Research Park. She coordinates outreach, training, and individual assistance to entrepreneurs throughout the state of Illinois looking to secure funding through the Small Business Innovation Research (SBIR) or the Small Business Technology Transfer (STTR) programs. Shelley has a background in the pharmaceutical and biotech industry serving as a technical consultant to both start-up health-care and large pharmaceutical companies. Prior to that, Shelley was an entrepreneur herself when she co-founded a startup company with technology spun out of Baxter Healthcare, where she had started her career in exploratory research. Under Shelley’s leadership as Director of Research, the startup was successfully awarded an SBIR grant from the NIH, which sparked her passion for assisting other entrepreneurs to become successful in obtaining this flavor of funding. Shelley received her bachelors and doctorate degrees from the University of Illinois in Biochemistry.

2) Actionable Ways to Review Your Clients' Websites
Ken Stoner, Illinois SBDC at SIU Carbondale

Join Zoom Meeting  
https://zoom.us/j/98422562439

We all have clients using websites to promote their businesses or for ecommerce purposes. However, not all of us are comfortable analyzing and evaluating those sites. This presentation will give you tools you can use to provide your clients with actionable feedback on their websites. It includes a fillable worksheet, which takes you through each step, that you can use with or give to your clients. The topics covered include gathering information, backlinks, keyword rankings, registrations, ensuring components are current, checking for Google Analytics, running a speed test, and looking for a sitemap and robots.txt file. Don’t feel overwhelmed. Each of these steps is easy and can be completed by working through the worksheet. This session is not for web designers; it’s for novices in this area who want to learn more.

Through his role with the Illinois Small Business Development Center at SIU, Ken Stoner actively works with small businesses in Illinois. As a former educator and business owner, he brings real-life experience and works hard to turn that into advising and training that is concrete and actionable rather than theoretical, leading workshops on starting a business in Illinois, getting your business online, trade show best practices, 3d modeling/printing, and many other topics as the need arises. In his eight years with the SBDC, Ken has worked with over 1,000 new and existing business owners.
3) **Intellectual Property Basics and SBA Resources**  
Timothy M. Speer, Supervisory Patent Examiner (SPE), MWRO/USPTO

Join Zoom Meeting [https://zoom.us/j/96131756203](https://zoom.us/j/96131756203)

Unfamiliar with patents, trademarks, copyrights, and trade secrets? Don’t miss this opportunity to learn from USPTO experts about intellectual property (IP) basics and potential ways to protect your innovation as you transition from idea to product. The discussion will cover:
- An overview of intellectual property types: patents, trademarks, copyrights, and trade secrets
- Why innovators and entrepreneurs should consider protecting their IP
- Local resources and assistance available through the USPTO and other agencies

Tim Speer is a Supervisory Patent Reexamination Specialist in the Central Reexamination Unit (CRU) at the United States Patent and Trademark Office (the Office). In his role as a supervisor in the CRU, Mr. Speer oversees reexamination, supplemental examination and reissue proceedings in the chemical and biotechnology arts. Mr. Speer started his career as a patent examiner in 1992. In 2000, Mr. Speer took a position as a patent agent at a Washington, DC, law firm and returned to the Office in 2005. He has been a supervisor in the CRU since 2016. In September 2019, Mr. Speer relocated from Washington, DC, to become a permanent supervisor at the Elijah J. McCoy Midwest Regional Office in Detroit, MI. In addition to his duties in the CRU, Mr. Speer provides assistance to examiners working from the Detroit office, assists in general operations of the facility, and supports outreach efforts undertaken on behalf of the Office of the Under Secretary of Commerce for Intellectual Property. Mr. Speer attended graduate school at Duke University, in Durham, NC, focusing on synthetic main group chemistry, following undergraduate studies in chemistry and mathematics at Albion College, in Albion, MI.

4) **ITC Partner Updates and Roundtable Discussion**  
Elizabeth Ahern, Director, U.S. Commercial Service, Peoria, U.S. Department of Commerce  
Mike Fazio, Export Finance Manager, SBA  
Kim Hamilton, Programs/Services for IL Food & Agribusiness Companies, IL Department of Agriculture  
Abby Martinez, Regional Director - Western Region, EXIMBank US  
Margo Markopoulos, Director, DCEO Office of Trade and Investment  
Monica Toporkiewicz, Sr. International Trade Specialist, U.S. Department of Commerce

Join Zoom Meeting [https://zoom.us/j/93743130956](https://zoom.us/j/93743130956)

Elizabeth Ahern serves as director of the U.S. Commercial Service Office in Peoria for all industries in IL - South of I-80. Prior, she was director/consultant for the ITC at KC in Centralia, IL; she served as director of cross cultural and international academic programs and professor of international business and strategy at Greenville University; and worked in the private sector in global development for more than 10 years. Elizabeth holds an MBA in international business from Saint Louis University and an BA in history/political science and Spanish from Greenville University. She is the proud parent of two brilliant university students and has called Illinois home for more than 20 years.
Mike Fazio is an Export Finance Manager with the U.S. Small Business Administration (SBA). Based in Chicago, he works with banks and SBA Resource Partners throughout Illinois and Wisconsin to increase access to capital for small business exporters. Previously, he was a Financial Analyst in SBA’s Office of Credit Risk Management, a Lender Relations Specialist and the District International Trade Officer at SBA’s Wisconsin District Office, and most recently an Export Development Officer for SBA’s Office of International Trade. Prior to joining SBA, Mike’s career positions included work in commercial asset review with the Federal Deposit Insurance Corporation (FDIC) and commercial lending with a Midwest-based regional bank. He is a graduate of the University of Wisconsin-Milwaukee’s Executive MBA program, which featured an international residency in Vietnam.

Kim Hamilton is a 31-year employee of the Illinois Department of Agriculture’s Bureau of Marketing, Promotion, & Grants. She has aggressively worked with the Illinois food industry in helping companies access overseas markets and is currently the Acting Bureau Chief. Kim has coordinated various food buyers’ missions from around the world for both the Illinois Department of Agriculture and the Food Export Association of the Midwest. She has organized Illinois food companies’ participation in major trade shows around the world. Kim consults with Illinois food companies on export procedures and import requirements and is responsible for educational workshops that teach Illinois agribusinesses how to expand their export businesses. Kim has been the project manager for several USDA Foreign Agriculture Service (FAS) projects that help Illinois firms gain access to federal marketing programs. She has coordinated advertising campaigns in several international trade publications. Kim has on numerous occasions been asked to speak to companies and international marketing professionals about exporting and resources within the industry. A graduate of Western Illinois University with a degree in marketing and Bradley University with a Certificate in International Marketing, Kim has represented the Illinois Department of Agriculture during travels to Europe, Asia, Latin America and Canada including a historic trip to Cuba. She has been recognized by the Food Export Association of the Midwest for her contributions in activity management and was featured as “40 leaders under the age of 40-Profile of 40 Young Export Leaders” in the American Food and Ag Exporter Magazine as one who is dedicated to furthering the export trade of American food and agricultural products. In December 2011, Kim received the Illinois Department of Agriculture’s Director’s Achievement Award and in 2021 received the Assistant Director’s Fellowship Award at the annual Employee Awards.


Margo Markopoulos has served as the Director of the Illinois Department of Commerce, Office of Trade and Investment since 2015, and as Export Program Director since 2012. Bringing over 20 years of international experience to her position, Margo leads the Department’s strategies to increase Illinois’ exports and attract Foreign Direct Investment (FDI) to the State. In her capacity as Office Director, Margo manages Illinois’ regional foreign offices, located in six countries and the Illinois State Trade and Export Promotion (ISTEP) program, which assists hundreds of companies annually to expand globally through exports. Prior to joining the Department of Commerce, Margo worked in the Governor’s Office of Consular Affairs, where she worked closely with the Chicago Diplomatic Corps and planned gubernatorial trade missions for several Illinois Governors, including the State of Illinois’ historic...
humanitarian mission to Cuba in 1999, which brought the first sitting U.S. Governor to the island in over four decades. Margo also previously worked as an Expatriate-Repatriate Policy Consultant for Fortune 500 corporations, and she managed foreign business delegations to encourage bilateral trade. Margo received a Bachelor of Arts degree in Political Science from the University of Illinois in Chicago and is a certified International Protocol consultant. Since 2003, Margo has been a member of Children’s Service Board of the Ann and Robert H. Lurie Children’s Hospital in Chicago and is active in several international trade organizations. Margo is a native of Illinois and resides in Chicago with her husband.

Monica Toporkiewicz is a Senior International Trade Specialist at the U.S. Commercial Service in Chicago, Illinois. Since 2005, she has supported U.S. companies by providing customized solutions to foster their international expansion efforts. Monica counsels companies in the healthcare industry, which includes medical devices, health IT, international patient services, pharmaceuticals and biotech sectors, and assesses their readiness to enter their first global market, expand into additional markets, or take on more challenging, high-growth export markets. A native of Chicago, Monica speaks Polish and Spanish. She holds an M.A. in International Affairs, with a concentration in International Economics, from The George Washington University Elliott School of International Affairs. She also holds a B.A. in International Studies and Spanish from Illinois Wesleyan University.

3:30 PM–3:45 PM Networking Break

3:45 PM–5:15 PM Session VI Workshops

1) COVID and New Legislation’s Impact on State Procurement and the Increasing Importance of the Unified Procurement Program
   Joe Kim, Small Business Team, Chief Procurement Office for General Services

Join Zoom Meeting https://zoom.us/j/97036933915

COVID and new legislation has changed State procurement in significant ways. Additionally, the Unified Procurement Program is becoming an increasingly important procurement consideration for agencies and vendors. Presentation will cover:

• New Joint and Cooperative Bidding Opportunities
• Managing Electronic Bid Submission during the Pandemic
• Easy Steps to Avoid Being Non-Responsive
• How Recent Legislative Changes Affect Procurement

2) Cornfields, Cows, and E-Commerce
   Greg Mason, Dean of Workforce Innovation, Adult Basic & Continuing Education, Shawnee Community College
   Phil McAbee, Project Manager/Consultant, Cox Communications

Join Zoom Meeting https://zoom.us/j/99493065840

Even before Amazon became the dominant force it is today the online selling of goods and services was well-established. Yet despite the evidence that online tools and technology help rural small
businesses expand their customer base in their own community, neighboring states, and in some cases, outside of the country as well, the technology is still not widely adopted by rural small businesses. This presentation examines the challenges faced by rural small businesses in embracing online selling and how Shawnee Community College is attempting to mitigate the barriers to e-commerce and support greater participation through its SBDC sponsored e-commerce website. Topics of discussion will include:

- How a lack of wide-spread broadband access limits e-commerce growth for rural small businesses.
- Understanding how rural small business owners’ comfort level with technology acceptance affects their attitude toward the adoption of internet technology.
- Identifying key factors in the business owner’s experience that influence their decision to implement internet marketing and selling strategies.
- How Shawnee Community College is using its e-commerce website to familiarize rural small business owners with on-line selling.

Dr. Gregory Mason is a longtime college educator and workforce development facilitator. During his 30-year career, Dr. Mason has led workforce development initiatives in several states, directed strategic planning processes and project outcomes assessment, and built effective relationships between employers, local governments, educational institutions, and communities. Dr. Mason has developed programs focused on increasing access to the education, training, and support services for low wage workers, minorities, non-traditional students, and chronically under employed and under prepared individuals to improve their opportunities for family sustaining jobs and careers. Dr. Mason holds degrees in Anthropology, Community Planning, and Organizational Leadership. He is certified in Business Retention and Expansion, and has presented nationally for the American Association of Community Colleges on the role of the community college in workforce and economic development, and for the White House, and the US Department of Energy on the development of a Clean Energy workforce. He is the co-author of a White Paper on the potential impact of Artificial Intelligence on Healthcare.

Phillip McAbee is an instructional designer and project manager currently consulting for Cox Communications of Atlanta, Georgia. Mr. McAbee has over 20 years of leadership experience in instructional design, online course development, and training delivery for aerospace, legal, automotive, communications, and healthcare industries. Phil’s clients include University of California Los Angeles, California Louis Darling Medical Center, Boeing, Toyota Motors U.S.A, Cox Communications, Baltimore City Community College, and L.A. Healthcare Plan. Phil has served as a liaison to business/academic units, provided oversight and consultation for Learning Management Systems, IT implementation and migration projects that included engineering, cyber security, technical marketing, and proposal preparation of Department of Defense RFPs. He is a board member for Blackboard’s Open Source Committee and the co-author of a White Paper on the potential impact of Artificial Intelligence on Healthcare. Phil’s research interests include the application of artificial intelligence and machine learning methodologies to instructional design processes, and he is a current recipient of the Amazon Web Services Machine Learning Scholarship program. His academic experience includes being an instructor at UCLA, USC, and Loyola Marymount College. Mr. McAbee is a graduate of University of Los Angeles California, and New York School of Professional Studies. After reading Jon Krakauer’s “Into Thin Air” he hiked to the Mt. Everest base camp for the experience.
Building Company Resiliency

David Madié, Founder and CEO, GrowthWheel International Inc.
Elizabeth Binning, Head of Training and Learning, GrowthWheel International Inc.

Join Zoom Meeting https://zoom.us/j/96612282153

Helping a client through a crisis is one thing, but we also want to help them prepare before the next crisis hits. How do we help them to think beyond crisis management and disaster recovery? That is where business resiliency comes into play. We want to help clients think through resiliency planning:

- How can we help them create a more durable business concept
- A more self-sufficient organization
- A more loyal customer base
- More solid operations

David Madié is a lifelong serial entrepreneur, the founder and CEO of GrowthWheel International Inc., and the creator and designer of the GrowthWheel, a worldwide recognized visual toolbox that is used by business advisors in one to one sessions to help entrepreneurs make decisions and take action. As the creator of GrowthWheel, since 2008 David has trained and certified more than 2,000 business advisors, in 37 U.S. states and 34 countries around the world, including North America, South America, Europe, Africa, the Middle East and South East Asia.

With a lifelong interest in how people and organizations change, Elizabeth Binning earned her master’s degree in Counseling Psychology and worked in various entrepreneurial support organizations. During the eight years she worked at Bradley University, Elizabeth worked with a number of business outreach centers including the Center for Executive and Professional Development, Leadership Development Center, and the Turner Center for Entrepreneurship. She then served as the Director of the Illinois Small Business Development Center at Illinois State university for eleven years. With over 19 years experience advising entrepreneurs, Elizabeth has earned many professional designations including the Society of Human Resources Senior Certified Professional, Prosci Certified Change Manager, NASBITE Certified Global Business Professional, and InBIA Incubator Manager. Elizabeth has served on many professional boards including as President of the Illinois Entrepreneurship and Small Business Growth Association from 2009-2011. She served her community on various boards as well, including the Economic Development Council of Bloomington-Normal, Professional Women of McLean County, Bloomington-Normal YMCA, and McLean County Chamber of Commerce. In September 2006, the Pantagraph newspaper named Elizabeth one of the "20 under 40" most influential community leaders in McLean County, Illinois. In 2007 she was nominated for both the YWCA Women of Distinction and McLean County Chamber of Commerce Athena Award. Now the Head of Training and Learning with GrowthWheel, Elizabeth trains business coaches and advisors from around the world and presents at various international conferences. As the lead trainer in North America, Elizabeth also creates content for monthly webinars, GrowthWheel’s online certification academy, and various conferences presentations. When she isn’t traveling for work or to visit their daughter, Elizabeth enjoys singing and playing music with her husband, John.
4) **Annual ITC Roundtable on Best Practices and Tools**  
Moderators: IESBGA International Track Planning Committee

Join Zoom Meeting [https://zoom.us/j/99584542240](https://zoom.us/j/99584542240)

This open exchange will allow the Illinois SBDC ITCs to network, exchange ideas, discuss resources and share best practices among colleagues. The roundtable will provide an opportunity for experienced ITC directors to assist with the onboarding and information exchange with new members of the network and provide an opportunity for the newer members to ask questions and learn more about SBDC ITC resources. All participants will have an opportunity to share and also learn more about their colleagues’ vast experience, expertise and current activities.

**FRIDAY, August 6, 2021**

Join Zoom Meeting [https://zoom.us/j/99399160035](https://zoom.us/j/99399160035)

8:00 AM - 9:00 AM **Member Follow Up**

9:00 AM-10:00 AM **General Session III**

**Manifest Your Health Legacy – The Coreview Way**  
Mary A. Dierker, Integrative Wellness Strategist, Coreview Coach – The Coreview Way

Living a health legacy is a personal responsibility. You get to choose what your “best life” looks and feels like. Most of us don’t realize how many negative thoughts we have throughout the day. Whether it’s a negative or judgmental thought we send toward another or an attack that we launch on ourselves, negative thinking is something that can easily overpower our thoughts and our lives.

*When you look in the mirror, are your thoughts kind or unkind?*  
*When you think about your future, are your thoughts optimistic or defeating?*  
*Are you telling yourself that it’s silly to follow a dream?*

Integrative wellness strategist & coach, Mary A. Dierker, will present her lifestyle philosophy “The Coreview Way” for participants to learn healthy ways to cope with the stress and problems that are often a normal part of daily life in today’s fast paced society. How a person responds to these trials can affect health, a sense of wellbeing, and overall life satisfaction. Life being the grand adventure that it is, “The Coreview Way” understands there will always be a multitude of challenges, unexpected detours, and change, lots of change. Yet, the potentiality of living more healthfully is available when an individual chooses to utilize an intentional willingness to shift patterns which manifest increased happiness and create a lasting health legacy. The Coreview Way - 5 pillars for successfully living with increased zest, purpose, and joy:
1. Nutrition
2. Healthy Relationships
3. Fulfilling Vocation or Avocation
4. Physical Movement
5. Spiritual Awareness

There is never a better time than right now to take one step toward the joy of living well. Mary’s presentation will provide tips and techniques for each participant to retool a personal health legacy lifestyle. “You create your own universe as you go along.” -Winston Churchill

10:00 AM-10:15 AM  
Break

10:15 AM-11:15 AM  
General Session IV

Certificate Presentation & Program Excellence Award
IESBGA Wrap-up
Don Elmore, IESBGA President

11:15 AM-12:00 PM  
General Session V

Illinois SBDC Network Updates
Mark Petrilli, State Director, Illinois SBDC Network

2020 Illinois SBDC State Star

ANDREW FOGATY serves as Director of The Illinois SBDC at the Greater Southwest Development Corporation and the 36Squared business Incubator, both on Chicago’s southside. In his more than 12 years doing economic development, Andrew has helped launch almost 70 companies, served as adviser to more than 600 others, and facilitated more than $34M in funding for his clients. In 2020, responding to the COVID-19 crisis, Andrew facilitated more than $4.2M in PPP and EIDL funding for his clients-some of whom credit him with saving their companies. Aside from his work at the Illinois SBDC, Andrew has served on the board of CanTV and as an expert adviser to the University of Illinois Chicagoland Entrepreneurship Education for People with Disabilities (CEED) program. Most recently he accepted an invitation to join the Gallery Accelerator/Investment group as a mentor, primarily in the areas of manufacturing. Andrew credits his early experience as a representative for the City of Chicago's Local Industrial Retention Initiative (LIRI) program with providing him a solid understanding of the challenges facing urban manufacturers, along with the wide range of benefits available to businesses by working with government programs. In 2016, Andrew's work to help blind Chef Laura Martinez open her own restaurant was chronicled in NPR StoryCorps book Callings by David Isa. This experience prompted him to start the 36Squared Business Incubator in 2017. This “all abilities” incubator actively seeks to include and fund disabled entrepreneurs in their programs. Another highlight of Andrew’s career was the 2008
launch of an EMT training program for underemployed women. To date, more than 450 women have graduated the program and been qualified to work in the healthcare field. As an economic development professional, Andrew has made a number of media appearances, including TV spots on CBS2, NBC5, FOX32, WGN-TV, ABC7, WYCC’s In the Loop and the PBS Whitney Reynolds Show. Radio appearances include WYCC, WCCP, WTMX The Mix, Lumpen Radio and WJOL. Prior to his career in economic development, Andrew was a serial entrepreneur, most notably in the commercial A/V leasing field. Born and raised in Canada, Andrew holds dual citizenship and was educated in both countries

2021 Illinois SBDC State Star

KEVIN KIM Jong Hyoungh (Kevin) Kim is a client-focused and result-driven international trade specialist at the Illinois SBDC ITC at the College of Lake County. Kevin provides professional and customized guidance for small business exporters to start or grow internationally. His services include export readiness assessment, export strategic planning, market and industry research, financial programs and analysis, export compliance, and resources in technical, marketing, and financial aspects through trade partners and networks. As the liaison between the EXIM Bank Regional Export Promotion Program (REPP) initiative and the Illinois SBDC/ITC Network, Kevin continues to build and maintain mutually beneficial relationships and collaboration for Illinois small business exporters. Also, he has developed collaborative cross-referrals with the U.S. SBA, Office of International Trade by implementing a protocol that promotes U.S. SBA export finance products and serves as a point of contact for the Illinois ITC Network. Kevin has an MBA degree from Pfeiffer University, North Carolina, and has been certified as a Certified Global Business Professional (CGBP). Over two decades as a seasoned exporter, he worked for the Schaeffler Group in export/import, logistics, sales, and marketing with an extensive background in global trade/supply chain management. As the International Trade Specialist, he continues to support clients’ efforts to enter, succeed, and expand in international trade markets.

Conference Zoom links

WEDNESDAY, August 4, 2021

General Session I 12:45 PM–2:15 PM

Welcome, New Member Orientation and Annual Meeting of IESBGA
Join this Zoom meeting: https://zoom.us/j/93767105787

Session I Workshops 2:15 PM–3:45 PM

2) Utilizing Neoserra to Positively Impact Daily Operations
Join Zoom Meeting https://zoom.us/j/97483453732
3) Setting Expectations via Onboarding
   Join Zoom Meeting https://zoom.us/j/95718670083

4) Challenges and Successes During COVID: Lessons Learned from Exporters and Advisers
   Join this Zoom meeting https://zoom.us/j/94402676308

Session II Workshops 4:00 PM-5:30 PM

1) PTAC Roundtable Discussion of Best Practices and Tools
   Join Zoom Meeting https://zoom.us/j/96500605200

2) Designing Your Inclusive Entrepreneurial Ecosystem Using Technology and Data
   Join Zoom Meeting https://zoom.us/j/96898427240

3) Understanding the Role of PTACs in Supporting SBDCs in Government Contracting
   Join Zoom Meeting https://zoom.us/j/99298849178

4) Customs and International IP Enforcement - From the Borders and Beyond to Your Doorstep
   Join Zoom Meeting https://zoom.us/j/97340431874

THURSDAY, August 5, 2021

Session III Workshops 9:00 AM-10:30 AM

1) Estimating and Bidding for Federal Contracts - Federal Contracting Readiness Program Overview
   Join Zoom Meeting https://zoom.us/j/91268067059

2) *Lean Startup 101: Using the Approach with Entrepreneurs in Plan for Profit Program*
   Join Zoom Meeting https://zoom.us/j/95957409967

3) Advising Artists and Creatives
   Join Zoom Meeting https://zoom.us/j/96397604199

4) Market Updates for Canada and Mexico with the Illinois Office of Trade and Investment
   Join Zoom Meeting https://zoom.us/j/92941208865

Session IV Workshops 10:45 AM-12:15 PM

1) PTAC Roundtable Discussion Part 2 - CMMC Client Referral Resources and Cybersecurity Webinar Series Engagement
   Join Zoom Meeting https://zoom.us/j/98684556530

2) SBA 7a Lending: General Overview
   Join Zoom Meeting https://zoom.us/j/99738385202

3) Cyber Security at a Glance
   Join Zoom Meeting https://zoom.us/j/92116128137

4) Introduction to Digital Strategy Counseling
   Join Zoom Meeting https://zoom.us/j/91304291522
General Session II  
12:45 PM-1:45 PM
Leveling the Field: Equity in Small Business Recovery  
Join Zoom Meeting https://zoom.us/j/99361521382

Session V Workshops  
2:00 PM-3:30 PM
1) Illinois FAST Center Services - Helping Clients Obtain Critical Funding  
Join Zoom Meeting https://zoom.us/j/93571190918
2) Actionable Ways to Review Your Clients' Websites  
Join Zoom Meeting https://zoom.us/j/98422562439
3) Intellectual Property Basics and SBA Resources  
Join Zoom Meeting https://zoom.us/j/96131756203
4) ITC Partner Updates and Roundtable Discussion  
Join Zoom Meeting https://zoom.us/j/93743130956

Session VI Workshops  
3:45 PM - 5:15 PM
1) COVID and New Legislation's Impact on State Procurement and the Increasing Importance of the Unified Procurement Program  
Join Zoom Meeting https://zoom.us/j/97036933915
2) Cornfields, Cows, and E-Commerce  
Join Zoom Meeting https://zoom.us/j/99493065840
3) Building Company Resiliency  
Join Zoom Meeting https://zoom.us/j/96612282153
4) Annual ITC Roundtable on Best Practices and Tools  
Join Zoom Meeting https://zoom.us/j/99584542240

FRIDAY, August 6, 2021
Join Zoom Meeting https://zoom.us/j/99399160035

Member Follow Up  
8:00 AM- 9:00 AM

General Session III  
9:00 AM-10:00 AM
Manifest Your Health Legacy – The Coreview Way
General Session IV
10:15 AM-11:15 AM
Certificate Presentation & Program Excellence Award and IESBGA Wrap-up
Don Elmore, IESBGA President

General Session V
11:15 AM-12:00 PM
Illinois SBDC Network Updates
Mark Petrilli, State Director, Illinois SBDC Network

Thank you for participating!
We hope you had enjoyed this year’s event!!!