CLIENT GROWTH ASSESSMENT

Business: _____   Name: _____

Address: _____   City: _____ State: TX Zip: _____

Email: _____   Advisor(s): _____

Description of Project: _____

We focus on making a substantial, positive difference for the businesses we serve – so we only record client impact that is attributed to SBDC assistance by our clients. **Please indicate the results from working with your SBDC Business Advisor below:**

START OR GROWTH MILESTONE

[   ] Started my business with SBDC assistance on _____/_____/_____
[   ] Grew or expanded my business with the help of the SBDC
[   ] Temporarily Altered Business   [   ] Temporarily Closed Business
[   ] Saved Business   [   ] Reopened Business

FINANCIAL

$_____   SBA Loan *(7a, 504, **EIDL, PPP**)*
$_____   Commercial Loan _____
$_____   Owner Investment
$_____   Venture/Equity Capital _____
$_____   Line of Credit_____
$_____   Microloan_____
$_____   ***Disaster:**_____
$_____   ***Other:**_____

JOBS

_____ Current number of employees: (_____Fulltime _____ Part-time)
_____ Jobs saved or retained: (_____Fulltime _____ Part-time)

REVENUES

$_____   Increased sales *(existing businesses only)*
$_____   Prime Contract/Subcontract _____
$_____   Exports
$_____   Other: _____

MY GROWTH PLAN

The SBDC can be a continued resource to assist with future growth. Your Business Advisor will follow up in 3-6 months unless otherwise requested. Please describe how we might be of future assistance - for example, exploring:

[   ] New markets and customers
[   ] Debt restructuring
[   ] Exporting
[   ] Managing employees
[   ] Other:_____

_____

Client Comments:

_____

_____

_____

_____

Please continue on back if more space is needed

Other Assistance Provided

_____ Certifications: [   ] 8a [   ] HUB [   ] DBE [   ] M/WBE [   ]_____
_____ Cybersecurity - Federal Systems Security Plan
_____ Licenses, Permits, Registrations, Regulatory compliance

_____ Employee handbook
_____ Management:
[   ] QuickBooks [   ] Leadership [   ] Planning

By signing below, I grant permission for the Small Business Development Center (SBDC) and the U.S. Small Business Administration (SBA) to use this information for public information and educational purposes. I further grant permission to use still photographs, audio and and/or video file, of me, my business and its employees on SBDC publications (printed, website, and social media. I understand that it is used to gain support for future program funding. Check here [   ] if you do <u>not</u> want your specific information used publicly, but approve use of your data in summary reporting.

Client Signature:_____   Date: _____/_____/_____

MIS Definitions for Critical Impact Reporting Areas
All impact entered must be client-attributed and a direct result of SBDC assistance.

Category	MIS Field	MIS Module	Definition
Started My Business	Dollar Value	**Milestones** Enter $0. *If there was a loan associated with the business start or expansion, enter the $ amount under Investments. Carefully maintain the **Business Status** field (under Details) to reflect "Pre-venture" or "In Business".*	The pre-venture business now meets the SBA definition for existing business (See SOP): MIS advising sessions must occur <u>before and after</u> the business start date. (*Business are considered "Started" if at the previous session the client was not in business, and at a subsequent session was "in business".*)
Grew or Expanded My Business			<u>For existing businesses only</u>, growth in the business such as capital injected* or contracts acquired, increased sales, number of employees, additional location, new product line, etc, for each project *(multiple expansions are allowed in a fiscal year).*
Saved My Business	Yes/No	Milestones	***In most cases, disaster-related funding types lead to a Save rather than Growth**
Current Number of Employees	Number Where job loss is noted, edit the client profile but do not record a milestone.	**Milestones** *"Change in FT/PT Staff" fields are used to enter the current employment level in "Current Staff" MIS box, which is compared to "Initial jobs" by the MIS in the client profile.* **The difference = jobs created.**	For newly started businesses, include "1" for each owner in addition to other employees initially hired. For existing businesses, enter the new employment level - including owner(s).
Jobs Saved or Retained			For existing businesses only, the number of existing employees (including the owner) who kept their jobs as a result of SBDC assistance. *Jobs Retained may only be counted once per fiscal year.*
SBA Loan	Dollar Value	**Investments** *Watch the difference between "Approved" vs. "Requested"*	SBA guaranteed and direct (business disaster) loans that have been approved by SBA and disbursed. This includes SBA-funded 7(a) and 504 term loans, microloans, and lines of credit for the startup or expansion of the business.
Commercial/Bank Loan	Dollar Value	**Investments**	Loans from a financial institution (bank, non-bank lender, credit union) for startup or expansion business. Includes non-SBA loans, microloans, and lines of credit.
Owner Investment	Dollar Value	**Investments** *If there is <u>also</u> a loan, do not enter "approved" until the funds are actually disbursed.*	Includes the cash and/or market value of assets actually injected into the business start or expansion.
Increased Sales	Dollar Value	**Milestones** *"Change in Sales": Enter updated gross annual sales and the MIS will calculate the difference between that and the current profile amount.*	<u>For existing businesses only</u>. <u>Projected Sales are not allowed.</u>
Prime Contract/Subcontract	Dollar Value	**Awards**	Enter the value of prime or subcontracts awarded.

Category	MIS Field	Definition
Temporarily Altered Business, Temporarily Closed Business, Saved Business, Reopened Business	Milestone	Four new business status categories to complement our traditional Start & Growth categories
Disaster	Capital Funding	Include all $ disbursed. Specify type (grant, loan, etc) and check the COVID-19 Related? MIS box
Other	Capital Funding	Could include owner financing, small business contest award, etc.