

# National Women's Business Centers of Excellence



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WOMEN'S  
BUSINESS  
CENTERS

Inaugural Year Funding Provided by:



**DUTCH B**  
FOUNDATION

Applicant Orientation: Milestone 1  
June 29, 2023

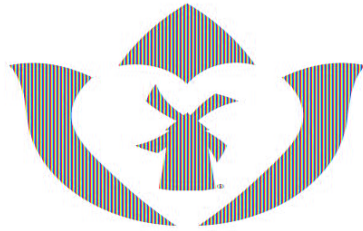
# Objectives for today:

- Meet Dutch Bros Foundation leadership
- Meet your fellow cohort members
- Review the National WBCs of Excellence
- Review updated 2023 timeline
- Assignment #1: The Customer Journey



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# Thank You Dutch Bros Foundation!

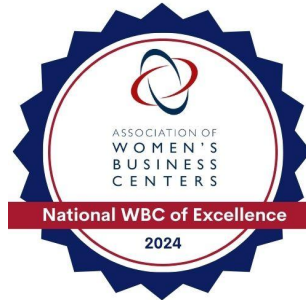


**DUTCH B**  
—  
F O U N D A T



# Purpose of National WBCs of Excellence

To recognize organizations that demonstrate commitment and efficacy of the mission, vision, and values of their Women's Business Center thereby achieving the greatest outcomes for women owned businesses.





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## Gwen Pokalo

Co-Chair, Capacity Building Committee

Center for Women & Enterprise

Burlington, VT



## Jackie Perrault

Co-Chair, Capacity Building Committee

Jacksonville Women's Business Center

Jacksonville, FL

# National WBCs of Excellence Task Force

- To guide the implementation of this inaugural program
- To review and recommend applicants for the inaugural cohort
- To counsel staff and board members on the effectiveness
- To serve as ambassadors to promote the program



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# 2023 National WBC Excellence Task Force

- Gwen Pokalo Hart - CWE Vermont
- Jackie Perrault - Jacksonville WBC
- Marian Doub - MDC Consulting
- Nancy McLain - Center Dynamics
- Whitney Brown - iHOPE Charleston, SC
- Nikki Hahn - WEDC
- Kathryn Walker - WBC of Northern VA
- Colleen McAluney - Patsy T Mink Center of Honolulu
- Dave Vedera - WESST



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# 2023 National WBC Excellence Cohort

- Mary Aldeis
- Andres Atra
- Bistany Bass
- Whitney Brown
- Sydney Brown
- Cindy Butler
- Minerva Calatayud
- Teleza Daniels
- Shawntay Dixon
- Jennifer Edwards
- Dawn Facka
- Meghan Florkowski
- Anne Flynn Schlicht
- Shara Gibson
- Rhonda Gilliam Smith
- Austin Goble
- Rocio Gonzalez
- Nikki Hahn
- Maria Hall
- Gwen Hart
- Humberta Hajar - Alvidrez
- Katty Ibarra
- Stephanie James
- Mara Keyes



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# 2023 National WBC Excellence Cohort

- Devanny King
- Danice Langdon
- Tianna Leger
- Eileen M. Soler Feneque
- Steve Maiorano
- Cynthia Marsh-Croll
- Colleen McAluney
- Olajumoke Michael
- Mona Miller
- Vonesha Mitchell
- Jackie Perrault
- Chandra Reber
- Charlene Rosales
- Jackie Scott
- Kim Shelton
- Erika Small-Sisco
- Laura Suarez
- Dave Vedera
- Sara Vescio
- Jessica Vidican-Neisius
- Yvonne Villalpando
- Kathryn Walker
- Ann Marie Wallace
- Ashley Whitley
- Odeidra Williams
- Margaret Wilson-Anaglia
- Persephone Zill



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# Why is this important?

- Standards of quality make the program better, nationwide
- Committing to quality helps clients get better outcomes
- Validation of our program integrity supports fundraising
- Learning about other programs is fundamental to progress
- Connecting with other WBC leaders develops us as leaders, too



# Milestone 1

## Orientation to National WBC Excellence

- Welcome! Share why you are here.
- Get to know your peer partner
- Review the process to designation attainment
- Affirm your commitment to the journey together

First Assignment: Be your partner's customer. Worksheet provided.



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# Milestone 2

## The Customer Experience: July 26 3:15pm

- You've "shopped" your partner's WBC and shared feedback directly.
- What did this experience teach you about your own WBC?
  - Breakout rooms for sharing
  - Discuss your WBC from the customer perspective
  - What are your takeaways from this exercise?
- What do you think is most important to clients "shopping" the WBC?
- Are there dead-ends or other barriers to entry that you can address?

**Second Assignment: Strategic Plan, Goals and Tracking**



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# Milestone 3

## Strategic Plans and Progress Tracking

- Do you already have a strategic plan for the organization or the Women's Business Center?
  - If so, share 2-3 of those goals and your targets with your peer (worksheet provided)
  - If not, and you had access to more resources and the power to control them, what would you hope to accomplish 5 years from now?
- We'll review why strategic planning and goal-setting is important and some tips to help you set achievable goals.

**Next Assignment: Program development & evaluation**



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# Milestone 4

## Program Development & Evaluation

- Using the worksheet provided, outline an existing program at the WBC
  - What are the learning or performance objectives?
  - What are the critical milestones of the project?
  - Who are the ideal candidates for your program?
  - What impact do you aim to achieve?
- How could you determine the effectiveness of this program?
  - Survey feedback
  - Client outcomes
- What did you learn about your program during this review?

**Next Assignment: WBC of Excellence Proclamation**



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# Milestone 5

## Pursuit of Excellence Proclamation

- Having reviewed the customer experience, a key program and your strategic goals, what area do you think is most in need for improvement?
  - Must be something you have control or influence to improve
  - Must be measurable
- Utilizing the worksheet provided, submit your WBC's Pursuit of Excellence Proclamation to the Task Force, after..
  - Advisory Board Signs-on in Support
  - Executive Director Signs-on in Support

**Next Assignment: Celebration and Promotion the WBC Excellence Designation**



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# Milestone 6

## Attainment Ceremony

- Share your Pursuit of Excellence Proclamation with the class
- Encourage each other
- Share what value this process has had for you, your WBC

**CONGRATULATIONS!**

*And, take the Promotion Toolkit with you...*



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# 2023 Timeline

- Applicant Info Session: June 7 1pm Eastern
- Deadline June 14 12am Eastern
- Task Force Meeting: June 15 2:30 Eastern
  - Review candidates
  - Finalize Materials
- Milestone 1: Orientation June 29 2:30 Eastern
- ~~● Milestone 2:~~ ~~July 13 2:30 Eastern~~
- Milestone 2: July 26 **conference session/ photo**
- ~~● Milestone 4:~~ ~~August 10 2:30 Eastern~~
- Milestone 3: August 24 2:30 Eastern
- Milestone 4: October 5 2:30 Eastern
- WBCs Announced at the virtual Annual Meeting 9/18 at 1 Eastern



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# Milestone 1

## Orientation to National WBC Excellence

First Assignment: Understanding the WBC Client Journey

### Discussion Questions

1. How do your clients find out about you?
2. Do you know how many call versus come in via website?
3. Steps to scheduling an appointment?
4. At what point does client complete intake form information?
5. Look for secret shopping guide and your target for discussion at conference.



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