



Impact and Evaluation

There are 2 potential ways to approach this assignment. You can either describe your evaluation process of a single program or broadly all of them at once. Please share this with your peer either way you approach the assignment.

Scenario 1: Imagine you are evaluating and assessing one of your signature WBC programs. Answer the following questions (in blue boxes) as if they pertained to that single program, i.e. business plan workshop series.

OR

Scenario 2: Imagine you are evaluating the effectiveness of the overall annual WBC program. Answer the following questions as they pertain to all of your programs collectively.

Define how your organization measures success in the areas of client impact.

Describe how the training program(s) you offer meets your WBC goals.

Sample response: Our business plan workshop series supports the WBC objective to train businesses with the skills and tools they need to start new businesses.

What standards of performance must be reached for your training programs to be considered successful?

Sample response: As a performance outcome, our WBC sets a target of 50% of the business plan workshop series trainees will complete their business plan. Further, the WBC measures the number of new business starts and targets a 40% rate of new business starts.

- *100 clients took the business plan workshop series in 2022.*
- *55 clients completed business plans.*
- *48 registered their news business in our state.*



Describe your WBCs methods for data collection and how it is used for advancing client success.

Sample response: ABC WBC uses “Overachiever CRM” system to track clients at intake. Each client that enters into the business plan workshop series is assigned a business stage, such as “concept,” “early stage,” or “established” business. In 2022, all clients attending the business plan workshop series were coded at the “concept” stage upon training start.

Workshop trainers collected feedback after each session indicating client satisfaction with the training series after each lesson. After the final lesson, the trainer reviewed the client business plans and tracked the number of completed business plans from each cohort.

At each training and counseling session, clients are asked to provide a status update to include questions related to:

- *Have you secured any new capital (loans or equity capital)?*
- *Have you hired new employees?*
- *Have you retained/sustained your existing number of employees?*
- *Have you seen revenue change (growth or decline)?*
- *Have you registered a new business with the state of ABC?*
- *Has your business received a new certification (i.e. WOSB, 8a, Veteran, etc.)*

How do you track retention and attrition rates for your training programs?

Sample response: ABC WBC tracks the training registrations in the “Overachiever CRM” and provides certification of training completion which is tracked per attendee. The system allows us to track and report virtual versus live training so that we can see the attrition or retention rates by training class (Business Plan Workshop, Childcare, etc.) and by type (Virtual or Live). Clients who fail to attend more than one lesson in this training series are invited to return and take the training class again or provide a reason for why they didn’t complete it.



How do you promote or share the success of your training programs? (i.e., success stories or case studies)

Sample response: Trainers, as part of their scope of work, are required to refer at least one client success story (form is provided the contractor trainer) to the WBC Director for further consideration. Success stories are shared with SBA, AWBC, Social Media channels and retained for use in grant proposals and other communication channels.

The success story form is signed by the client for them to provide written consent to use the information in the success story in ABC WBC communications.



EXAMPLE PROGRAM OVERVIEW TEMPLATE:

| Description of Training and Desired Outcome |
|---|
| <i>The Business Plan Workshop Series is offered twice a year to educate and train business owners on the fundamentals of developing and implementing a business plan. Participants will have a current business plan document they can maintain throughout the launch and growth of their business.</i> |
| Deliverables |
| <i>Training presentation(s) and handouts are provided to participants who are enrolled. Presentation designed by facilitator.</i> |
| Curriculum Outline / Hours |
| <p><i>The Business Plan Workshop series consists of 4-parts:</i></p> <ul style="list-style-type: none"> <i>• Business idea and foundations</i> <i>• Business strategy and marketing plan</i> <i>• Financial basics and marketing analysis</i> <i>• Developing the business plan and funding goals</i> <p><i>The training workshop(s) are offered four consecutive weeks for 1-hour from 10:00 a.m. - 11:00 a.m. on the following dates: November 7, 14, 21, and 28.</i></p> |
| Method of Delivery |
| <i>The workshop series will be offered in a hybrid format. Participants may attend in-person or virtually with a shared zoom link. The workshop will not be recorded. Pre-event registration is required through the ABC WBC website.</i> |
| Training candidate profile / target audience |
| <i>Ideal participants include aspiring and emerging business owners.</i> |
| Trainer qualifications |
| <i>Trainer to include ABC WBC business coach, financial expert, and marketing/brand expert.</i> |
| Marketing and promotions |
| <p><i>The workshop series is promoted through the following channels:</i></p> <ul style="list-style-type: none"> <i>• Posted on ABC WBC calendar of events</i> <i>• Shared with resource partner network and posted on SBA District Office website</i> <i>• Social media posts on LinkedIn, Facebook, and Instagram</i> <i>• Reel created to share on stories via FB and Instagram</i> <i>• Included in weekly newsletter to ABC WBC network of clients</i> |
| Resources and Tools Utilized / Budget |
| <i>This program will use a portion of the following tools: LivePlan subscription (\$XX), "Overachiever CRM" (\$XX), Zoom annual subscription (\$XX), Learning Management System (LMS) (\$XX), Facilitator Fees (\$XX), Books and Materials purchased (\$XX)</i> |
| Sponsorship opportunities |
| <i>Seeking \$1,500 program sponsorship to offer workshop series at no cost to participants.</i> |



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