



U.S. Small Business
Administration

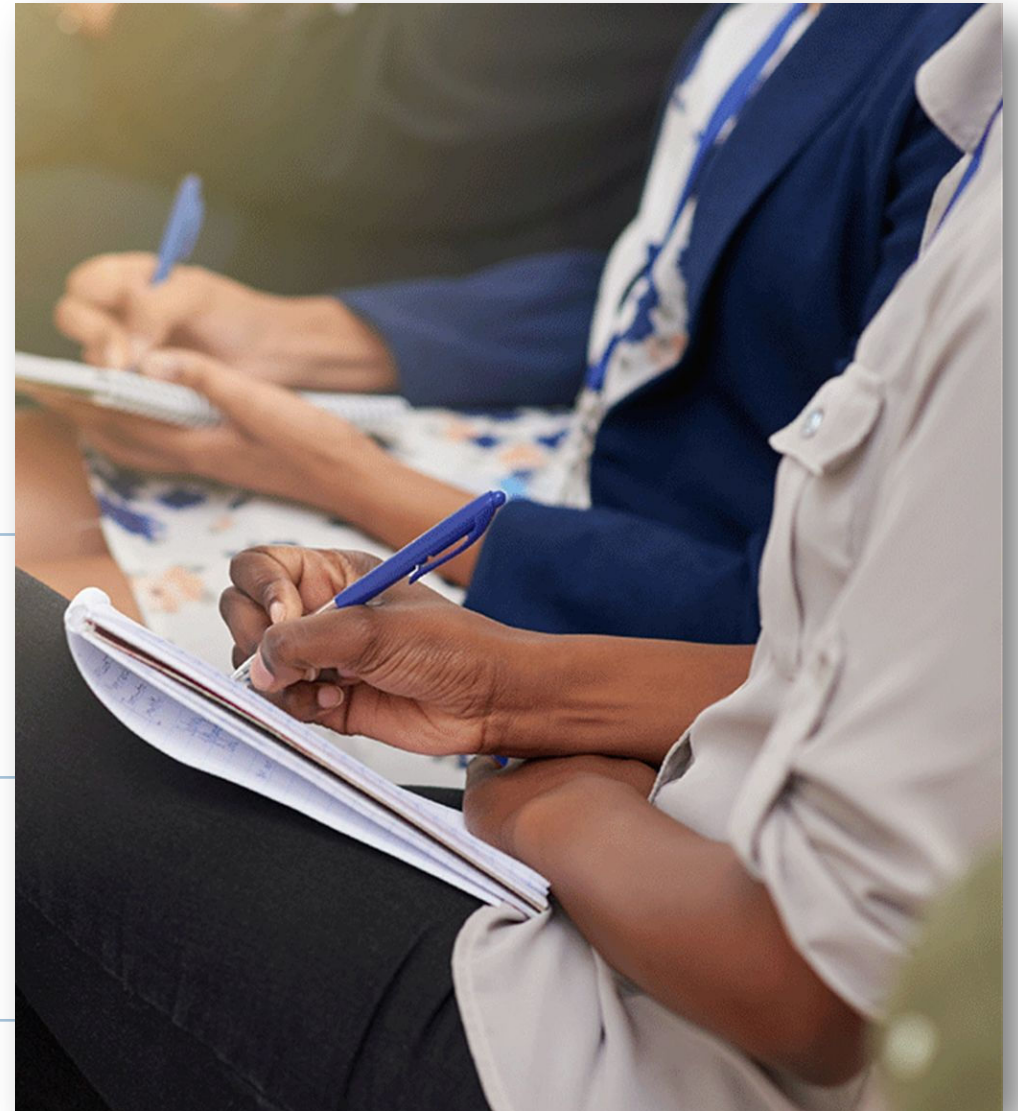
Communication!



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Houston District Office***

[Housekeeping Items

- Please put your phones on silent
- There will be time for Q&A at the conclusion of the presentation
- Presentation slides will be available to you after the event



Good Communication is Essential

*The WBC should have a **strong relationship** with the District Office - especially the DOTR and District Director.*

[Good Communication is Essential (continued)]



- Is there good communication?
- Does the WBC work with the District Office to establish goals?
 - *Unique Clients Served, New Business Starts, Capital Infusion # of Transactions, Jobs Retained*
- Is the District Office invited to participate in the WBC events?
- Does the District Office invite the WBC to participate in their events?

Primary Contact: WBC Director

*With over 152 grants to oversee, and frequent changes of personnel, OWBO's policy is that **the primary contact will be the WBC Director.***

[Primary Contact: WBC Director (continued)]



- It is the responsibility of the WBC Director to make sure that other members of the host organization are informed and up-to-date, and that OWBO is kept informed of any changes at the WBC and Host Organization.
- The WBC Director should ensure there is a connection among all parties involved in administering the grant so key information, policy changes, new forms and other developments are consistently communicated.

[Primary Contact: WBC Director (continued)]

Does the WBC Director forward information, links, etc., from the SBA and others to all appropriate parties in their organization?

Examples of what the WBC Director should forward:

- SBA requirements (program announcement, Notice of Award (NoA), program guide, OMB circulars, and current forms and worksheets)
- Policies and procedures
- Updates for contact information

[Primary Contact: WBC Director (continued)]



- Does the WBC Director notify the DOTR and OWBO Program Manager of updates and changes at the center such as new personnel or changes in address or phone number?
- Does the WBC Director participate in the monthly calls with the AA/DAA/OWBO and the monthly calls with the Program Manager?
- Does the WBC Director contact the DOTR and Program Manager when issues and questions arise?

[Primary Contact: WBC Director (continued)]

- Does the WBC Director know what's going on with the budget and, at minimum, have sign-off authority on all expenditures?
- Does the WBC Director ensure that new personnel familiarize themselves with the governing documents – including the program announcement, notice of award, program guide and circulars – as well as forms and workbooks?
 - This includes new personnel in the financial department as well as executive directors, board members, etc.
 - Everyone involved with the grant should know the requirements and expectations of the project, as well as where to find guidance/get help.

Reporting

Reporting is how the SBA monitors the progress of the project.

[Reporting (continued)]

- Does the WBC work closely with the District Office to establish reasonable goals?
- Does the WBC meet or exceed its annual goals? If not, does the WBC provide adequate justification for why a goal was not met?
- Are data reported via NEXUS each quarter?



[Reporting (continued)]

- Are Financial Reports submitted correctly and on time? If not, the WBC Director should know why and work within their organization to correct issues.
- Does the WBC Director submit their Mid-Year and End-of-Year Performance & Financial Reports correctly and on time?
- Is the WBC well-prepared for the Annual DOTR Onsite Reviews?



Success Stories

Success stories are very important - they are often requested by the SBA Administrator, White House, etc., on short notice. The WBC should submit them to the DOTR and copy the OWBO Program Manager.

[Success Stories (continued)

- Is the WBC well-prepared for the semi-annual DOTR site reviews?
- **NOT optional**; if they have a story that qualifies, they need to submit it.
- Must be cleared through District Office Public Information Officer (PIO):
 - DOTR may need to follow up to make sure success stories go through the clearance process.
 - The more complete the information provided, the more likely it will get put into the SBA system.

[Success Stories (continued)



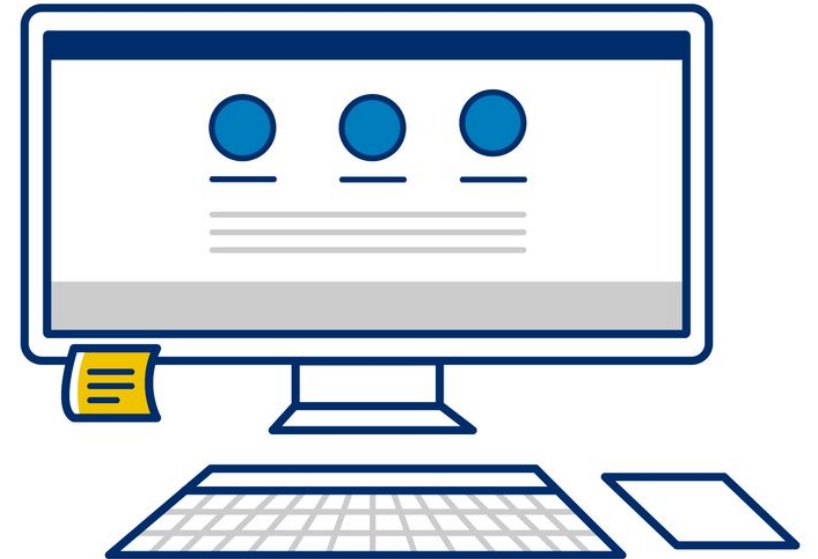
- Businesses typically must be 3+ years old.
- **The Success Story should show how SBA Assistance:**
 - Helped the business survive,
 - Achieve greater success, grow, etc.
 - It's not just that they received a loan – what did they do with the loan?

Internet & Website

The organization's website is its face to the world. It needs to be professional, up-to-date and easy to navigate.

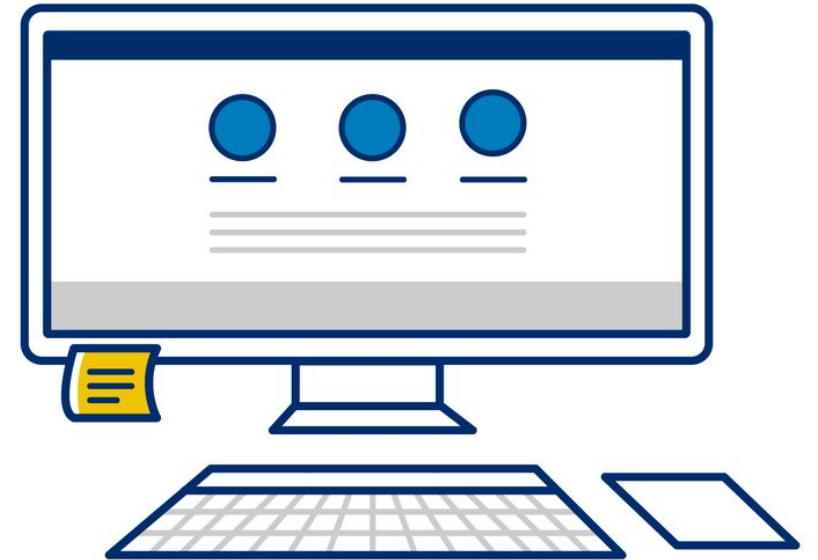
[Internet & Website (continued)]

- The WBC must provide Internet access for clients and staff.
- Staff must know how to use it and teach clients how to use it - **BOTH** with basic skills and business uses.



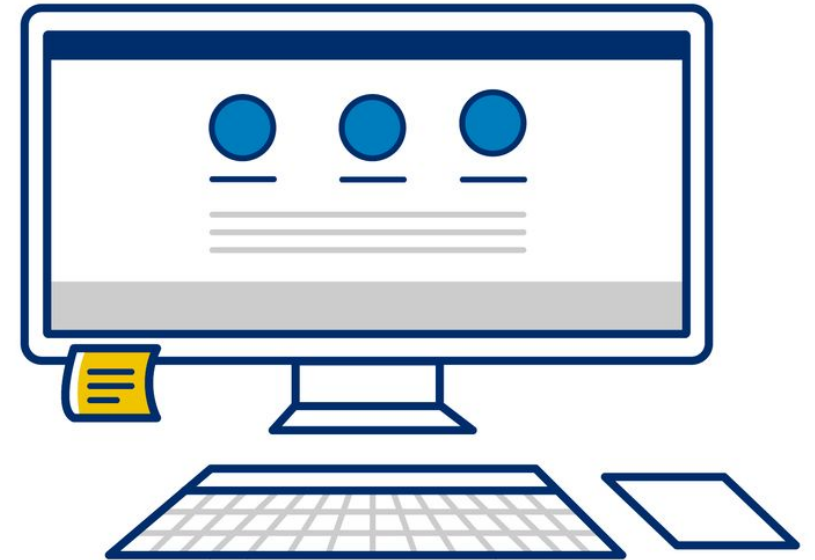
[Internet & Website (continued)]

- If the Women's Business Center is one project of the Host Organization, **the WBC MUST have its own page or pages**—or a separate site—and be clearly identifiable.
- If it is just on function of the host, the SBA Power By Logo and acknowledgment should only appear on the WBC pages, so it's clear what's being funded.



[Internet & Website (continued)]

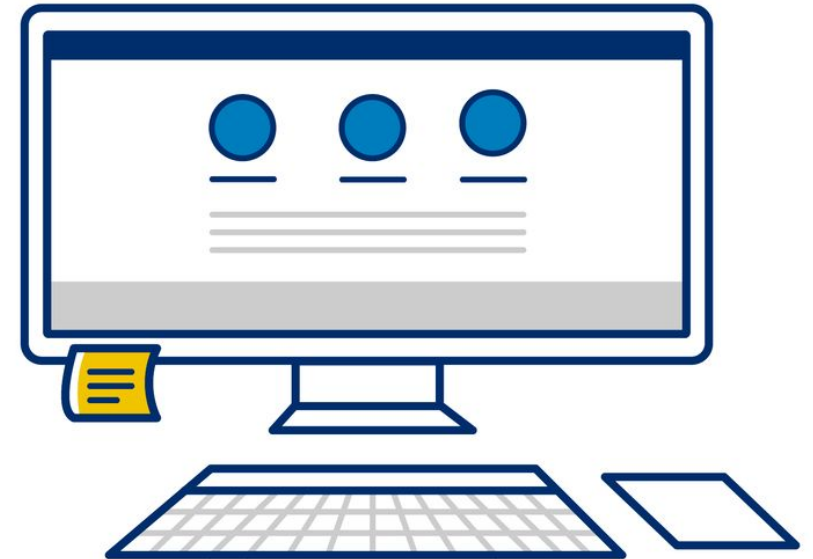
- If the host is also an SBA Microloan intermediary, that page may also have SBA identifiers, as required by that grant.
- The website should NOT state that the host has been “designated” as a women’s business center. A WBC is a specific project.
- Calendars should be up-to-date.



[Internet & Website (continued)]

The website or WBC pages should **focus on women**, including those who are socially and economically disadvantaged, and, if appropriate, women veterans—not “men, women, people who are socially and economically disadvantaged, and veterans.”

While we do not discriminate against men, they are not the focus of this grant. Women are.



Online Training & Counseling

The WBC should coordinate at least some training and counseling online.

[Online Training & Counseling (continued)]



- Includes webinars (may be through third-party providers), online training, modules, live online sessions, etc.
 - Must have a way to register online users
 - Must be able to track online users—track just like any other client.
- Counseling via email, chats, Zoom, etc.

SBA Logo & Acknowledgement

*The website (and any other marketing tools created using project funds) **must use the SBA Powered By Logo and acknowledgement** as specified in the program announcement and notice of award.*

[SBA Logo & Acknowledgement (continued)

- The SBA Powered By Logo must be the **current version (SEE EXAMPLE ON RIGHT)**.
- **Do NOT** use the SBA Powered By Logo and acknowledgement on a page with a request for donations.
- **Do NOT** group the SBA Powered By Logo and acknowledgement with other contributors.



U.S. Small Business
Administration

**Funded in part through a
Cooperative Agreement with the
U.S. Small Business
Administration**

*When you have questions, call and
email your DOTR and Program
Manager!*

**This is a team effort –
we're here to help!**



COMMUNICATE, COMMUNICATE, COMMUNICATE!

REMINDER: Share information with your District Office, OWBO Program Office, and HQ team along the way. We want to support and highlight your good news. Help us by keeping us in the loop every step of the way.

Questions and Answers