



# What Powerful Data Can Do For You: WBCs Measure Up!

September 10, 2020



# General Info



- **Everyone's audio is muted**
  
- **Zoom menu --- drag cursor down screen.**
  - **Mic icon on left.**
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THANK YOU



ASSOCIATION OF  
WOMEN'S  
BUSINESS  
CENTERS



U.S. Small Business  
Administration





# AGENDA



- Welcome and Introductions
- Project Purpose and Results
- Accomplishments and Lessons Learned
- Network Present and Future Measures Up!
- Q&A and Wrap-up



# Project Overview

- Marian Doub, Measures Up! Manager, Principal, Marian Doub Consulting
- Project Purpose, Process, and Results





# Overview – Purpose of the Project

Increase WBC, CA WBC Network  
and CAMEO members'  
technological and staff capacity to  
strengthen program performance and  
client outcome tracking for powerful  
impact for all.



# California WBC Network Measures Up! Project



October 2019-September 2020



FUNDING



ASSISTANCE



RESULTS



# Project Team

Amy Fletcher,  
Measures Up!  
WBC Liaison & Mentor

- Women's Economic Ventures (WEV),  
Director of Impact and Engagement



Julann Jatczak,  
Measures Up!  
Peer Mentor

- WWBIC, Vice President, Impact



Nancy McLain,  
Measures Up!  
Peer Mentor  
& Content Specialist

- WESST, Impact Manager







# Project Team

**14. New Economics for Women (NEW) WBC**  
7500 Alabama Ave., Canoga Park, CA 91303  
(213) 483-2060, ext.401 [www.new-wbc.org](http://www.new-wbc.org)

Joined May 2020

1

**Women's Business Center at JEDI**  
a) 205 Chestnut St., PO Box 1586,  
Mount Shasta, CA 96067  
b) 1670 Market St., Ste. 112, Redding, CA 96001  
Phone: 530-926-6670  
[www.e-jedi.org](http://www.e-jedi.org)

2

**Mendocino Women's Business Center**  
a) 345 N. Franklin St. Fort Bragg, CA 95437  
b) 185 E. Church St, Ukiah, CA 95482  
Phone: 707-964-7571  
[www.westcenter.org](http://www.westcenter.org)

3

**The California Capital Women's Business Center**  
1792 Tribute Road - Suite 270  
Sacramento, CA 95815  
Phone: 916-442-1729  
[www.cacapital.org](http://www.cacapital.org)

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**AnewAmerica Women's Business Center - Oakland**  
1470 Fruitvale Ave. - #5,  
Oakland, CA 94601  
Phone: 510-532-5240  
[www.anewamerica.org](http://www.anewamerica.org)

5

**Renaissance Entrepreneurship Center**  
275 Fifth Street  
San Francisco, California 94103  
Office: (415) 348-6217  
[www.rencenter.org](http://www.rencenter.org)

6

**AnewAmerica Women's Business Center - San Jose**  
210 N. 4th ST - Ste. #205,  
San Jose, CA 95112  
Phone: 408-326-2669  
[www.anewamerica.org](http://www.anewamerica.org)

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**Mission Community Services Corp. Women's Business Center**  
a) 71 Zaca Lane, Suite 130, San Luis Obispo, CA 93401  
Phone: 805-595-1357  
b) 201 New Stine Road #300, Bakersfield, CA 93309  
[www.mcscorp.org](http://www.mcscorp.org)

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**Women's Economic Ventures**  
a) 333 South Salinas Street Santa Barbara, CA 93103  
b) 290 Maple Court, Suite 268 Ventura, CA 93003  
Phone: 805-965-6073  
[www.wevonline.org](http://www.wevonline.org)

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**Asian Pacific Islander Small Business Program WBC**  
231 East 3rd Street, G106  
Los Angeles, CA 90013  
Phone: 213-473-1603  
[www.apisbp.org/womens-business-center.html](http://www.apisbp.org/womens-business-center.html)

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**PACE Women's Business Center/**  
1055 Wilshire Boulevard, Suite 900B  
Los Angeles, CA 90017  
Phone: 213-353-9400  
[www.pacela.org](http://www.pacela.org)



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**Inland Empire Women's Business Center**  
a) 1003 E. Cooley Drive, Ste 109, Colton, CA 92324  
b) 3780 Market Street Riverside, CA 92501  
Phone: 909-890-1242  
[www.iewbc.org](http://www.iewbc.org)

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**Coachella Valley WBC**  
77806 Flora Road, Suite A  
Palm Desert, CA 92211  
Phone: 760-345-9200  
[www.cvwbcc.org](http://www.cvwbcc.org)

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**San Diego & Imperial Women's Business Center**  
a) 880 National City Blvd. National City, CA 91950  
b) 990 Highland Dr #314, Solana Beach, CA 92075  
Phone: 619-216-6719  
[www.sandiegowbc.org](http://www.sandiegowbc.org)





# What We Did!

## October 2019 - September 2020

PLAN: Capacity  
Assessment  
Survey, Key  
Performance  
Indicator Report

LEARN BY  
DOING:  
Produce & Use  
for advocacy  
2019 Fact Sheet  
for the Network  
and each WBC

Measures  
Up! Action  
Plans &  
Coaching

70+ 1:1  
Mentor, WBC  
Meetings  
7+ peer  
sharing  
special topic  
webinars



*Creating an action plan was helpful, since we already had many goals, the action plan went hand in hand with achieving them.*

*- Ingrid Marthy*

*With Amy as my mentor, I was able to connect with her about reporting on another level. She also provided a lot of insight for how I can improve our data collection process.*

*– Sophia Kanaan*



# WBCs Measure Up! Network-wide Results



- 2019 Fact Sheets for the Network and each WBC

**Invest in  
California's Women  
Entrepreneurs**

[www.californiawbc.org](http://www.californiawbc.org)

### California Women's Business Centers Build Economic Vitality

We provide a diverse range of entrepreneurs with the skills they need to start and grow successful small businesses. In the past two years, we assisted close to 15,000 individual women entrepreneurs with training, advising and financing. Their businesses created new jobs, increased household wealth, and generated more inclusive local economies. Women's Business Centers build a pipeline of strong women-owned businesses, ensuring that women of color, women with low resources, rural women and all women benefit from the path that entrepreneurship can provide to a better life and a healthy community. Our results in 2019:

<b>7,300</b> clients served	<b>6,000</b> jobs created/retained	<b>5,000</b> biz started/expanded
<b>\$50 million</b> capital leveraged	<b>\$350 million</b> gross revenues	

**Build resilient communities. Grow our economy. Invest in Women's Business Centers of California.**

<p style="font-size: x-small;">To Organics Salon &amp; Spa Start-up Inland Empire WBC</p>	<p style="font-size: x-small;">Jenny Lemons Retail Gifts 2 employees Renaissance San Francisco WBC</p>	<p style="font-size: x-small;">Cynthia Torres New Dawn Counseling 20 employees WEY Ventura WBC</p>
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For more information on the California Women's Business Centers: [www.californiawbc.org](http://www.californiawbc.org)



# WBCs Measure Up! Network-wide Results



- *Key Performance Scorecard Report worksheet: to guide and assess capacity to report; educate; and build consensus and standard practice*

Fiscal Year 2020 (September 30, 2019 - September 29, 2020), to be completed by each WBC about their results and in aggregate for the CA WBC Network	FY2020 Goal	Results as of 9/29/20	Compare (% of Annual Goal)	WBC FY 2019 Actual Results (for trend analysis/	Notes:
<b>Who did we serve in FY2020?</b>					
All participants served (unduplicated count of individual people served)					
All clients served** (unduplicated count of individual people counseled or trained with a completed 641 or equivalent)					
Women served (clients)**					
Disabled people served (clients)*					
People of Color ('minorities') Served (clients)**					
Race/ethnicity (clients)**					
African American					
Asian					
Native Hawaiians & other Pacific Islanders					
Native American/Alaska Native					
Latino/Hispanic					
Caucasian					
New clients Counseled*					
Active duty military (clients)**					
Military Veterans (clients)**					
HUD Low Annual Household Income (80% and below) at entry (clients)**					



# WBCs Measure Up! Network-wide Results



- *Key Performance Indicator (KPI) Guide: standard definitions, data collection question and protocols, and purpose of 35 recommended KPIs*

## Information on Each KPI

### Definition

A brief description of the information that you are requesting and/or reporting.

### Tips for Collecting the Information

As available or defined we will provide more information on best practices in collecting the information from your clients.

### Sample Questions

Examples of data collection questions to be used at intake and follow up. Basic req the SBA-641 but additional information can be incorporated into your own custom forms.

### When to Request the Information

Some data points are collected at intake and during your annual follow-up survey ongoing consulting and training interaction.

### Data Recording Purpose

We will define the use of the information in your reporting and management c

### Funding Sources - Who Wants This Information?

GO-Biz TAEP – Governor's Office of Business and Economic Development – Te Program

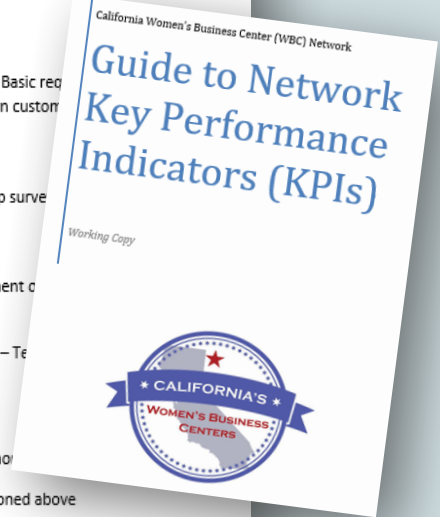
SBA-WBC – Small Business Administration – Women's Business Center

CARES Act SBA-COVID19 Supplemental – Coronavirus Aid, Relief and Econo

OTOWBO - Other than OWBO, grants that are not related to those mentioned above

### Other Information

If there are other key aspects to the information, we will add them here. When needed, screenshots of how to report this data in Neoserra and Outcome Tracker will be available.





# WBCs Measure Up! Network-wide Results

- **Other Tools** used with and available to WBCs: standard data collection forms online and in Spanish, e-signature policies & options, outcome survey forms and emails, database needs and product assessment tools, compliance binder outline, and more
- **Use of standard recommended KPIs by almost all WBCs for more complete and accurate reporting.**
  - **Examples of gaps or under reported KPIs as of 2019: Low to moderate income households (HUD, HHS income limits) to show services and outcomes with low income/economically disadvantaged entrepreneurs; annual business revenue (sales) and profit; equity investments**



# Overview – Diverse WBC Data System Capacity Building Goals

10 WBCs had goals to improve their Outcome Evaluation practices including establishing complete baseline; integrating and implementing outcome follow up with clients into services; training staff

This results in overall improved:

- Survey response rates
- Customer service and outcomes
- Economic impact story





*Clean data in clean data out. Weekly monitoring of data, so when EDMIS reporting is due we are not stressing or working late hours to fix mistakes.*

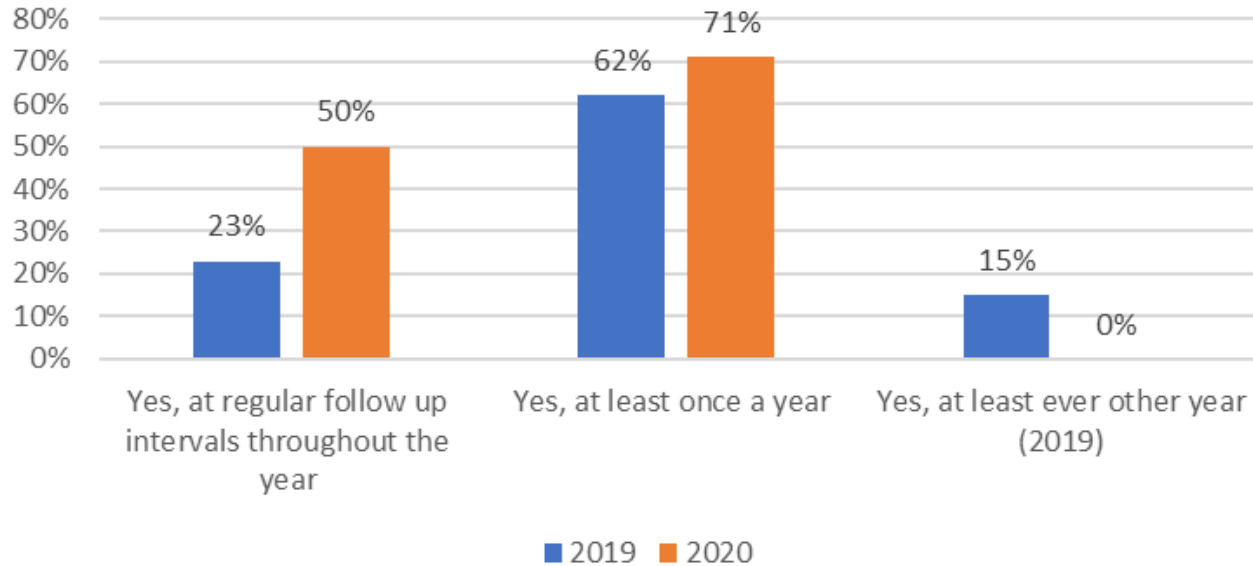
*- Chuck Jehle*

*With a sample email and data collection form, we were able to develop an easy survey that people responded to more readily.*

*- Kim Scanlan*

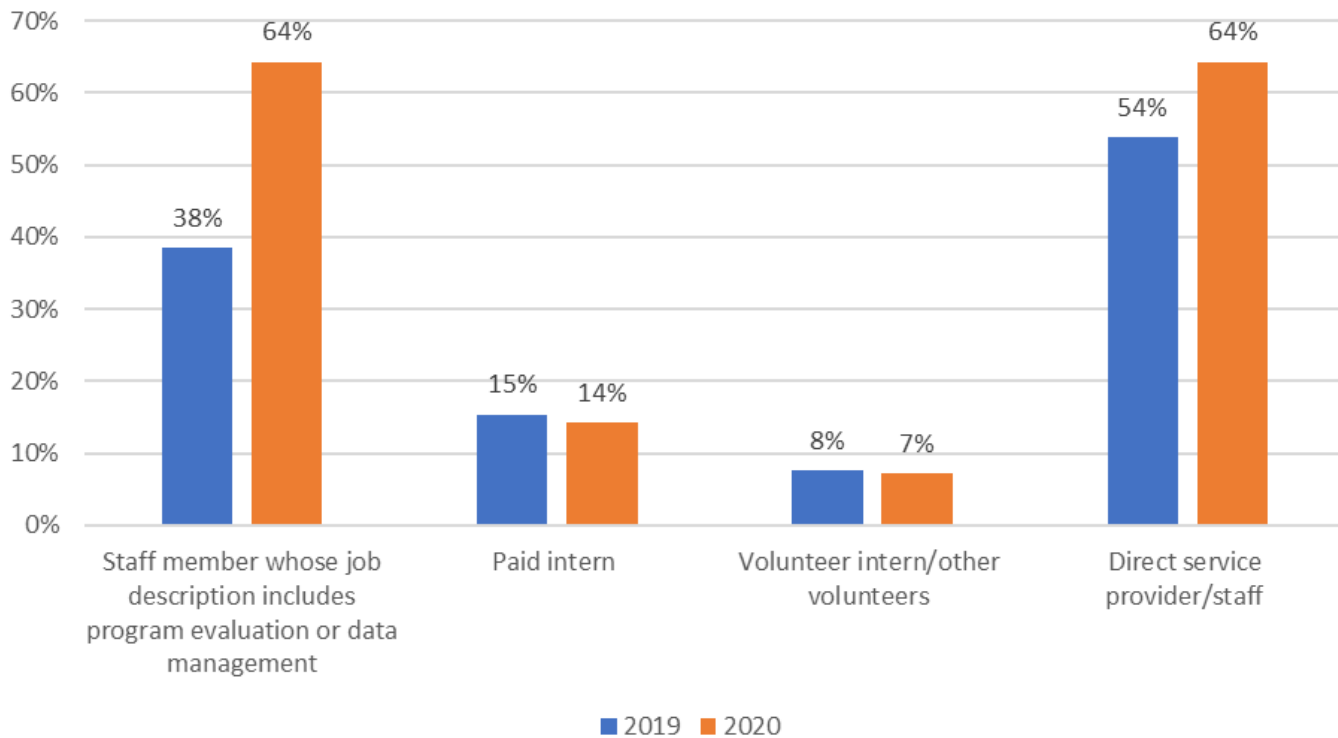


## 12) Do You Regularly Conduct Client Outcomes Surveys Or Follow Up Assessments By Staff?



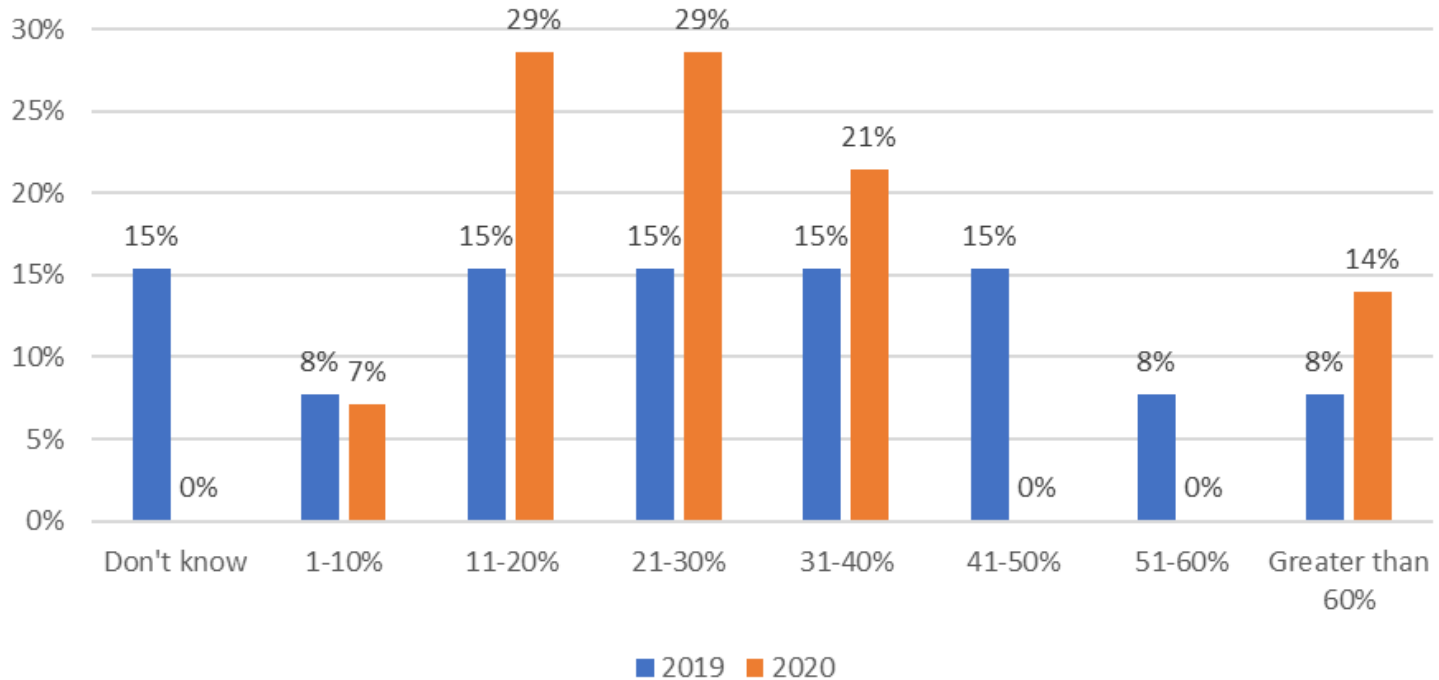


## Who Is Responsible For Collecting Outcomes Data?





## What Is Your Survey/Outcome Follow Up Response Rate?





# Overview – Diverse WBC Data System Capacity Building Goals

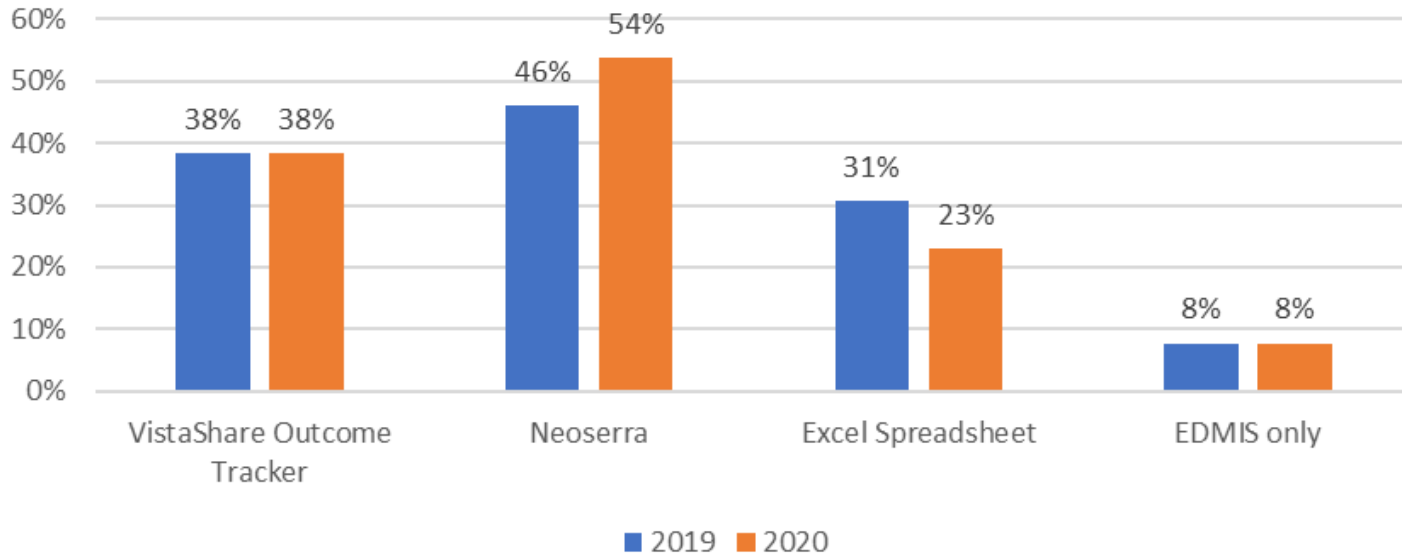
4 WBCs had goals to improve their capacity to use and maintain their database

This results in overall improved:

- Use of relational, historical databases that integrate with SBA (EDMIS) and host agency requirements
- Data management efficiency and relevance
- Data integrity as staff use reports to identify gaps and know how to maintain clean and complete data about their clients

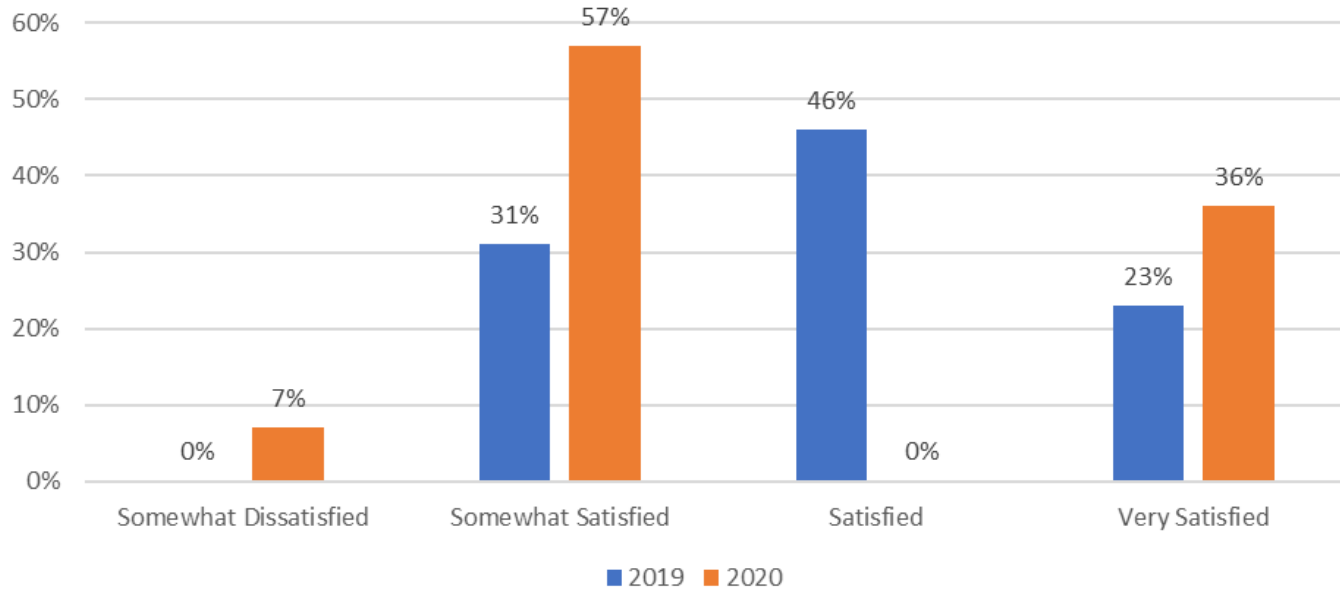


## What Database(s) Does Your WBC Use To Store And Manage Client Data?



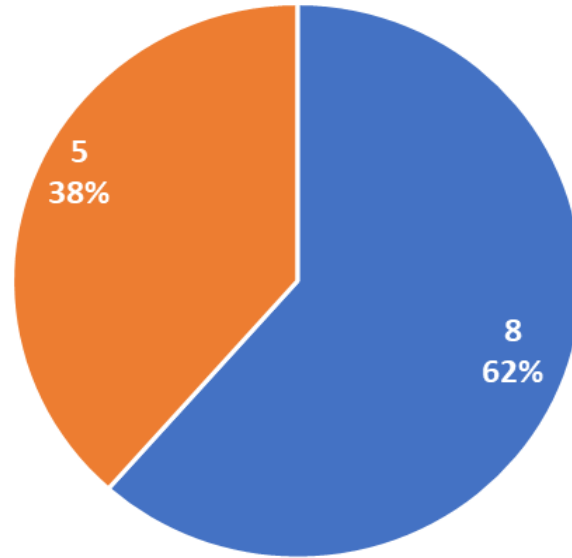


## How Would You Rate Your Satisfaction With Your Database In Terms Of Its Ability To Generate The Reports And Information You Need For Management, Evaluation And Funding Purposes?





### 33) How Beneficial Was This Project To Your Wbc? (N=13 WBCs)



■ Very beneficial    ■ Somewhat beneficial





# California Capital Women's Business Center

## California Capital Financial Development Corporation



### Mission:

"Capital and Capacity to Serve Communities."



Sophia Kanaan, Women's Business Center Director



# Our Data Management Practices



- Carefully consider what data points to collect
- Document client demographic information in an SBA approved CRM.
- Perform in-depth client intake session with new clients
- Share the data collected with clients, sponsors, and funders to demonstrate the economic impacts of the services provided to small business.



## Before Measures Up!



- New clients were routed directly to the Administrative Intake Assistant
- Not all businesses registered to become clients within the system before connecting with a counselor
- Not every staff member felt comfortable using the CRM



## During Measure Up!



- Analyze current client data to identify common omissions from client records
- Improve client intake process by redesigning client intake forms to include more relevant information.
- Create best practices guide for client intake counseling and creation of action plans
- Train counseling staff on best practices for intake, data collection, and reporting success stories.



# After Measure Up!



- All staff that directly communicate with clients are well informed of the client intake process and how to perform an intake session.
- Client in-take sessions are as engaging and meaningful as an initial counseling session.
- Direct service providers are spending more time during their sessions collecting relevant information about their business.



## Words of Wisdom from One TA Provider to Another

- **INVEST** in your center's technology (CRM's, online marketing tools, webinar platforms etc. They all have the capacity to collect client demographic information.)
- **CAPTURE** as much information as possible during the client intake process. Collect data that can tell a story about who you serve.
- **TRAIN** every staff member that directly communicates with clients on the proper intake process.



**WOMEN'S  
BUSINESS  
CENTER**  
**INLAND EMPIRE**  
INLAND EMPIRE CENTER  
FOR ENTREPRENEURSHIP

# Inland Empire & Coachella Valley Women's Business Centers



CALIFORNIA STATE UNIVERSITY  
**SAN BERNARDINO**  
Jack H. Brown College  
Business and Public Administration

**iece**  
INLAND EMPIRE  
Center for Entrepreneurship  
CALIFORNIA STATE UNIVERSITY, SAN BERNARDINO

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SPIRIT SCHOLARS

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STUDENT  
FAST PRICE  
COMPETITION



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FOR ENTREPRENEURSHIP

INLAND  
**PROSPERITY**  
CONFERENCE

**CSUSB**  
entrepreneurship

AMERICA'S  
**SBDC**  
CALIFORNIA

**California STEP**  
California Small Business Export Program

**Entrepreneurial  
TECHNICIAN**

**OWN IT!**



**CSUSB** PALM DESERT CAMPUS  
entrepreneurship



**GLOBAL 20  
SUMMER 19**  
ENTREPRENEURSHIP & INNOVATION

**UpStarters  
Discovery  
COMP**

MASTER OF SCIENCE  
ENTREPRENEURSHIP & INNOVATION  
**MSEI**

**LUNCH WITH  
THE  
ENTREPRENEURS**

**DINNER WITH AN  
ENTREPRENEUR**

**UpStarters**  
ENTREPRENEURSHIP, LLC

**BEYOND the  
CLASSROOM**



**FACULTY  
FELLOWS**

**CSUSB  
INNOVATION  
CHALLENGE**



## IE & CV WBCs Mission Statement

*The WBCs will counsel,  
teach, encourage, and  
inspire women business  
owners at every stage of  
development and expansion.*



# Our Results—before Measures Up!

- Since 2003, the IEWBC & CVWBC have assisted under-served microentrepreneurs (<80% LMI, woman, and ethnic minority) to achieve:
  - Business counseling to 4,369 clients, entrepreneurial training for 71,572 participants, and the facilitation of mentoring for 3,440 women. Our data concludes 80% of clients and workshop attendees are socioeconomically or economically disadvantaged.
  - Over \$20 million in economic impact and create well over 2,000 jobs.



# Project Present & Future

## Nancy Swift

- Founding Executive Director of JEDI, host of the WBC at JEDI with 2 offices covering northernmost CA counties
- CA Network Steering Committee Chair
- CAMEO Board Member





# Network Lessons Learned and Tools Produced



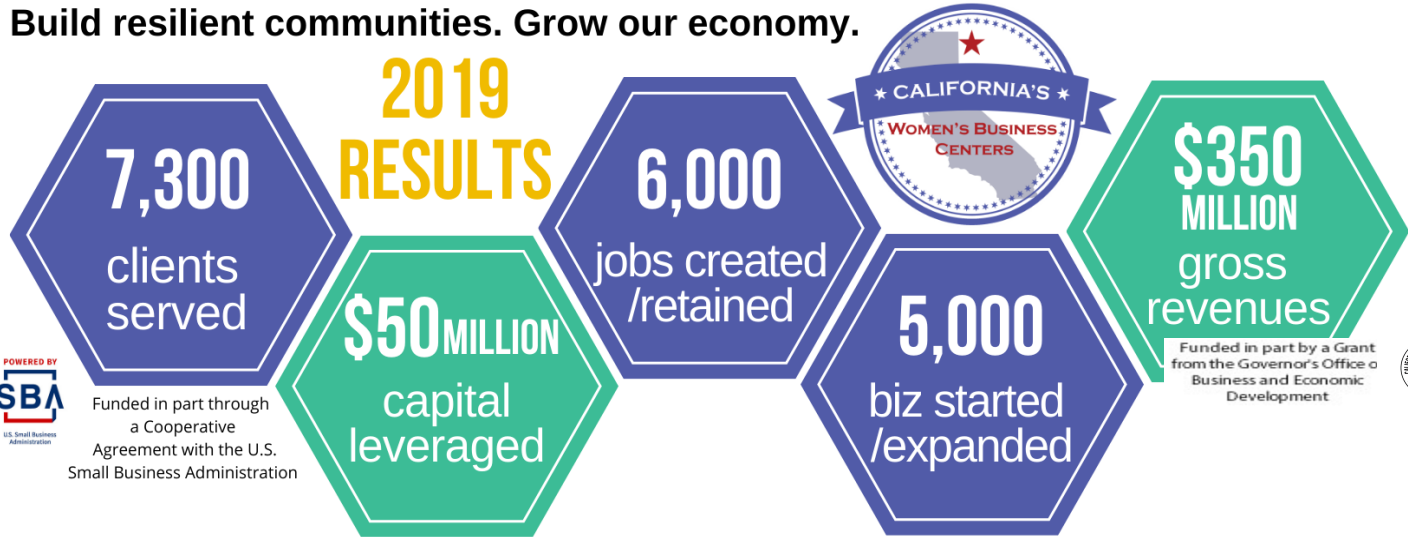
- Strategic Moment for the Network to Raise Awareness and Demonstrate Impact
  - Partnership with CAMEO allowed us to launch this tested model of industry-focused capacity building
  - Led to new partnerships and immediate impact response capability
  - “It’s about the process after all!”
  - Pledge to continue this work and benefit from the KPI implementation
- *Network2020 State Budget Request*
  - *Network KPI Guide*



# California WBC Network



Build resilient communities. Grow our economy.



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

Funded in part by a Grant from the Governor's Office of Business and Economic Development



Invest in Women's Business Centers of California.

[www.CaliforniaWBC.org](http://www.CaliforniaWBC.org)



## Next steps



- WBCs Complete 2020 Impact Survey
  - Update Fact Sheets with 2020 results
- Offer ongoing Measures Up! TA and Trainings (tbd)
- Quarterly update to KPI Guide



# California WBC Network



14 Centers in 19 Locations and Virtual Services Covering the State



WOMEN'S BUSINESS CENTER AT JEDI



MENDOCINO WOMEN'S BUSINESS CENTER



THE CALIFORNIA CAPITAL WOMAN'S BUSINESS CENTER



ANEWAMERICA WOMEN'S BUSINESS CENTER - OAKLAND



ANEWAMERICA WOMEN'S BUSINESS CENTER - SAN JOSE



RENAISSANCE ENTREPRENEURSHIP CENTER



MISSION COMMUNITY SERVICES CORP. WOMEN'S BUSINESS CENTER



WOMEN'S ECONOMIC VENTURES



ASIAN PACIFIC ISLANDER SMALL BUSINESS PROGRAM



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INLAND EMPIRE WOMEN'S BUSINESS CENTER



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NEW WOMEN'S BUSINESS CENTER

[www.CaliforniaWBC.org](http://www.CaliforniaWBC.org)



# California WBC Network



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# Question and Answer Time!





## Wrap up activity: share in the chat



One thing you LOVED...

- *What excites or interests you about what you've heard today?*
- 

