



COUNSELING SESSIONS DESIGN TEAM CHARTER

Established February 7, 2019

PURPOSE: Develop and implement a standardized process for initial client counseling sessions and the first follow up counseling sessions across the state network.

BACKGROUND: The New Mexico Small Business Development Center Network offers two key client services – Counseling and Training. For “Counseling” we provide high quality business counseling that meets our clients’ specific needs, aligns with our mission and results in measurable outcomes. A “Storybook” was created and used in the recent past to serve as a guide for counseling sessions. In the spirit of continuous improvement, the network began discussing how a standardized counseling process for initial sessions could lead to even further value to our clients. This led to the network deciding that the FFY 2019 NMSBDC Statewide Business Plan would include a statewide action step for Wildly Important Goal 2 as follows: “Develop a standardized process for initial counseling sessions and the first follow up counseling sessions across the NMSBDC Network.”

SCOPE: During the first team meeting the team identified the project goals and the benefits that could be realized from this effort. The team should early determine what is in scope and what is out-of-scope for the action step. A project statement to include (1) the current state, (2) desired future state, and (3) the gap that the project is expected to close needs to be developed by the team. Assumptions and expectations such as timing, meeting schedule, resource availability and deliverables are to be part of this charter. Tasks may include review and discussion of the current initial counseling processes, tools, templates and guides used by each center in the network and developing a standardized process for these sessions. The process should include the screening prior to the first meeting, the content and suggested length for the first and second sessions, as well as the steps to standardizing the sessions across the network, while allowing for localized and customized inputs. Validation and justification for the proposed process(es) are required prior to implementation. This chartered team should determine implementation methods for the network,

which may include piloting, consideration of resistance and risks as well as any modifications in the cooperative agreements.

POSITIONS: CHAIR - JoAnn Garay; CO-CHAIR – Trish Livingston;
SCRIBE/SECRETARY - Scott Butcher

FACILITATORS: Glenn Walters/Michael Silva

PROJECT CHAMPION: Russell Wyrick, Executive State Director

MEMBERS: Volunteer NMSBDC members from the Network include:
Central New Mexico Community College - Fran and Tim; Clovis Community College – Sandra; Dona Ana Community College - Jo Ann; ENMU – Roswell – Scott; New Mexico Junior College - Brandon; NMSU – Alamogordo - Trish and Susan; NMSU – Grants – Denise; Northern New Mexico College - Juliana and Rita; San Juan College – Fran; Santa Fe Community College – Brian; UNM – Valencia, Chris; State Office - Adriene and Martin. All centers are encouraged to have a member on the team.

MEETINGS: The team established the meeting schedule as every other Tuesday from 8:30 am - 10:30 am starting February 26, 2019. Attendance may be telephonic, in-person and/or via on-line meeting.

INTERNAL & EXTERNAL KEY STAKEHOLDERS/POTENTIALPARTNERS: To be determined by the team

RESOURCES: Normal resources will be provided by NMSBDC to include a staff member to assist and offer advice to the team and conference call capabilities. Other resources, if needed, will be coordinated with NMSBDC leadership.

DELIVERABLES AND REPORTING REQUIREMENTS: The team is tasked with developing the draft policies and processes, sharing them with the entire network and consider inputs/comments/suggestions received. A final draft process would be provided to the Executive State Director by July 1, 2019.

TERM: This team is initially established for one year, which may be modified by the NMSBDC Executive State Director.