New Mexico Small Business Development Center (NMSBDC) Statewide Business Plan (SBP) Measures

January 1 – December 31, 2022, Statewide SBA Goals	
Jobs Supported	5337
New Business Starts	97
Capital Infusion (Dollar Amount)	$34,319,865
Unique Clients Served	1480

NOTE: The words Client Economic Impact Report, Measures, Benchmark, Entrepreneurial Development Management Information System (EDMIS), Neoserra, and eCenter are explained at the end of this document.

Wildly Important Goal (WIG) 1 - ~~Assist, train, and counsel~~ Counsel and train entrepreneurs to start new businesses, grow existing businesses and stay in business.

Measures

The Cost Per Jobs Created or Saved is a New Mexico Accountability Measure from the New Mexico Department of Administration (NMDFA) to Santa Fe Community College for the NMSBDC Program and is calculated based on adding the Jobs Created plus the Jobs Saved and then dividing that total number by the State fiscal year funding allocated to a Service Center. A lower Cost Per Jobs Created or Saved shows a higher Return on investment (ROI). This being a State measure the data and funding allocation used is for the State Fiscal Year period of July 1 - June 30. Use the Neoserra Calculation Criteria Worksheet posted on the Intranet to assist in the data entry of this measure (Sevastian is creating).

Jobs Created: A job may be reported as created if a client creates and fills a new position ~~person has been hired by a client~~ as a direct result of assistance from the NMSBDC Program. The business must meet the definition of an NMSBDC Client and complete a Client Economic Impact Report signifying that the NMSBDC Program's assistance has resulted in the creation of a new job. ~~in order for credit to a Service Center to be realized in Neoserra.~~

What to Count as 'Jobs Created':
  o Jobs resulting from expansion
  o Jobs resulting from start-ups, in which case the owner(s) should also be counted as new job(s) created.
  o In cases where a business is purchased, the new owner is a job created if they are actively managing the business. Any new positions hired by the new owner are also counted as a job(s) created.
  o New positions that are on the business owner's payroll should be counted as a job created. Seasonal workers that are employed for at least 30 consecutive days are legitimate job creation.

What Not to Count as 'Jobs Created':
  o In cases where a business is purchased, the jobs that existed with the old owner and will continue to exist with the new owner should not be counted as jobs created. These should be classified as jobs saved if the company received direct SBDC assistance and therefore the client will not have to: lay off positions.

o Jobs that were created indirectly as a result of a business start-up or expansion. Examples include day-jobs, or a contractor hired by the client to construct or remodel a building would not qualify as a job created.

Jobs Saved: **A job may be counted as saved if the NMSBDC has provided counseling to a client** ~~warning them~~ **of an action they need to take or not take to avoid negative business impact** ~~future failure of their business~~ **and the client follows the advice**. A job may be counted as saved if the ~~company~~ small business received direct SBDC assistance and therefore the client will not have to: lay off positions, temporarily or permanently; move out of the NMSBDC ~~Subcontracted~~ Service Center's Assigned Service Area; close business or declare bankruptcy. In situations where the business is closing, but the NMSBDC assists in selling the company then the jobs that continue to exist may be counted as saved. The business must meet the definition of an SBDC client, ~~and~~ complete a Client Economic Impact Report signifying that SBDC assistance has resulted in job(s) saved and a Jobs Saved milestone must be entered in Neoserra. ~~in order for credit to be realized in Neoserra.~~

Number of new business starts: (U.S. Small Business Administration (SBA) Measure) Clients that were able to start (indicated they are in business) as a result of services received from the SBDC Program.

Computed by EDMIS-NG, businesses are considered "Started" if, at the previous counseling or training session (whether in the current federal fiscal year or a past one), the client was not "in business," and at a subsequent session or update (in the federal fiscal year being reported) was "in business". (SBA Form 641)

A new business start is counted for any counseling or training session within the specified time frame, fiscal year or quarter, that indicates the client is in business (the ***In Business*** flag is marked yes) and where all prior sessions, including sessions outside the time frame, indicates the client was not in business (the ***In Business*** flag is marked no).

In-Business: An "in business client" is defined as one that has completed required registration(s), if applicable, with the local, state, and/or Federal Government (e.g., DBA registration, get a business license, agency issued tax identifications, etc.) AND at least one of the following:
   o Has documented a transaction from the sale of a product or professional or personal service for the purpose of gain or profit; or
   o Has contracted for or compensated an employee(s) or independent contractor(s) to perform essential business functions; or
   o Has acquired debt or equity capital to pursue business operations (e.g., to purchase inventory, equipment, building, business, etc.); or
   o Has incurred business expenses in the operation of a business.

The business must meet the definition of an SBDC client and complete an Client Economic Impact Report signifying that the SBDC Program assistance has resulted in a new business start in order for credit to be realized in the Neoserra.

Dollar amount of capital infusion: (SBA Measure) Capital infusion includes all forms of capital debt and/or investments from all sources (i.e., lines of credit, consumer debt products used specifically for the business, angel investors, owner's capital contributions, etc.). Credit lines and other revolving debt facilities/instruments such as credit cards are to be recognized for the full amount of the line of credit when established and not to be based on individual draw-downs. It is

the aggregate total of the dollar amount of SBA loans plus dollar amount of non-SBA loans plus dollar amount of equity capital (to include private investment). The business must meet the definition of an SBDC client and complete an Client Economic Impact Report signifying that the SBDC Program assistance has resulted in the capital infusion in order for credit to be realized in Neoserra. It is segregated in Neoserra as:

- o Dollar amount of SBA loans
- o Dollar amount of non-SBA loans
- o Dollar amount of Equity Capital (to include private investment)

NOTE: Capital infusion measures and reporting should not contain sales increases or events such as private or government contracts awarded since these are distinguished separately on the Form 641 and subsequently in EDMIS-NG.

Number of jobs supported: (SBA Measure) Total number of employee positions supported by services provided. Computed by EDMIS-NG as a sum of jobs created and jobs retained.

Jobs Created: See earlier definition.

Jobs Retained: Is the total number of full and part time employees in a client record carried over from the previous calendar year to the current calendar year after use of SBDC services provided in the current calendar year. This is an automatic calculation within Neoserra and therefore doesn't require a Client Economic Impact Report.

Number of unique clients served: (SBA Measure) Number of unique clients counseled and/or trained. Computed by EDMIS-NG as a count of unique SBA client IDs with a reported counseling session or training in the time period indicated. In order to be counted, counseling clients and training clients must register through eCenter and have signed the electronic SBA Form 641. Training attendees who have not been accepted within Neoserra as a training client will not get counted as a unique client served. Therefore, this does require specific action within Neoserra by the counselor to make training attendees also a unique client.

Wildly Important Goal (WIG) 2 -   Ensure the value of the Program is demonstrated to stakeholders, partners, clients and the community by the services we provide. NOTE: This will be further defined as part of the CY22 WIG 2 Statewide Action Step and the Measures that follow are Interim Measures for CY22.
Measures (These are all NMSBDC Measures)

Number of legislative visits: A legislative visit is a phone, two-way electronic dialog, or in person visit with a New Mexico state or federal legislator or key legislative staff by SBDC Program funded staff. Legislative visits entered into Neoserra must outline the date, location, legislator or legislative staff name and description of the conversation.

Number of third-party endorsements: A third-party endorsement is any form of written communication about the NMSBDC program that is sent directly to a stakeholder or to the Lead Center by an SBDC client or SBDC partner.

Number of media exposures: A media exposure is any form of published communication such as TV, radio, newspaper, online article and/or social media, chamber of commerce or college newsletter, etc. with the potential to expose the NMSBDC brand to stakeholders, partners,

potential clients or the community. To keep our measurement aligned with WIG 2, in the interim, and what we are trying to accomplish, SBDC ~~Subcontracted~~ Service Center newsletters sent to existing clients, will not be counted toward media exposures. A media exposure must use one of the following exact terms to be counted towards our measure: "New Mexico Small Business Development Center" or "New Mexico Small Business Development Centers" or "New Mexico Small Business Development Center Network" or "New Mexico SBDC" or "Small Business Development Center" or "SBDC @ Your center name". A media exposure should be entered for each publisher, for example, if the same story is covered in two different newspapers, two media exposures should be entered.

Number of community presentations: Presentations to groups such as, but not limited to, chambers, area legislative bodies and legislative committee testimony. Uploading the meeting agenda and/or the actual presentation to Neoserra is required to be counted as a community presentation.

NMSBDC client satisfaction level: The client satisfaction level as identified by the Lead Center methodology e.g., surveys, Neoserra data and listening posts.

Further explanation of words that are included within this document:

Client Economic Impact Report: The paper report that the NMSBDC Program uses to prove to stakeholders that the economic impact we reported actually occurred and was attributed to NMSBDC Program's assistance. Reports are not seen by stakeholders but serve as verification tool in the case of a programmatic audit. In cases where obtaining a physical signed report is not possible an email from the client stating that the impact has occurred as a result of NMSBDC Program assistance will be accepted. In rare cases where obtaining a physical signed report or email verification is not possible, an email from the NMSBDC Executive State Director indicating that the impact actually occurred, will be accepted. Client Economic Impact Reports must be attached to each milestone or investment within Neoserra.

Measures: A measure is an amount or degree of something. Measures are the indicators the NMSBDC Program tracks to identify if we are moving toward our Wildly Important Goals (WIG's) or away from them. It is very important to remember that the measures are not the WIG's. Measures are neither good nor bad, they simply indicate direction and tell us if we are moving towards or away from our WIG's. It is critical that measures are tracked with 100% accuracy, so we can identify if our improvement strategies are working.

Benchmark(ed): The NMSBDC sets benchmarks for ~~all of our measurements~~ the five measures from external sources (State and SBA), so we know if we are performing at an average level. Think of a benchmark as the equivalent of par when playing golf. ~~The NMSBDC~~ This identifies how ~~well~~ we are actually accomplishing our measures from external sources. ~~goals by looking at the overall levels we surpass our benchmarks.~~ Benchmarks are based on the fair share of the total network wide goals from the State and the SBA. ~~SBDC Subcontracted Service Centers who are not at minimum surpassing their assigned benchmarks are not doing their fair share to move the network forward towards our Wildly Important Goals (WIGs).~~

Entrepreneurial Development Management Information System – Next Generation (EDMIS-NG: The SBA database used to collect client activity data for counseling and training. It also collects the client impact data for SBDC's and Women's Business Centers, Veterans Business Outreach Centers (VBOC), Service Corps of Retired Executives (SCORE). SBA resource partners

that provide counseling and training report their data into EDMIS-NG by either directly keying the information into the system or attaching an XML data file containing their client activity. The captured EDMIS-NG data is the repository for client activity data and is used to ensure effective management of ED (Entrepreneurial Development) programs, as well as provide sound statistical reports for the Office of Management and Budget and Congress.

Neoserra: Outreach Systems' management informational system that the NMSBDC Program uses to record and calculate all our EDMIS-NG data. Neoserra handles all the EDMIS-NG entry and calculations under the hood, so you don't have to!

eCenter: The Outreach Systems' website used by new or existing clients to request counseling services by selecting "New Client Sign Up" and/or view and sign up for events by selecting "Training Events". Once new clients sign up and their request is processed, they will receive confirmation and a login password for their future use. eCenter is accessed on the Internet at https://nmsbdc.ecenterdirect.com The client signs up process serves as an approved electronic substitute for the SBA Form 641.