

ANNEX D BGA QUARTERLY REPORT TEMPLATE.

PRE-IMPLEMENTATION RETORTING TEMPLATE

Schedule Of Dates

QUARTERLY REPORT #	START DATE	END DATE	SUBMISSION DATE
1			
2			
3			
4			
5			
6			

Quarterly Report 1: Pre-Program Assessment & Participant Overview

MARKETING & OUTREACH			
MARKETING			
Online media	Print Media	TV	Radio
# of media outlets used	# of media outlets used	# of media outlets used	# of media outlets used
# of people reached	# of people reached	# of people reached	# of people reached
<i>Describe and or comment on marketing efforts, challenges, and opportunities</i>			

OUTREACH	
In-person Outreach	Online Outreach
# of outreach conducted	# of outreach conducted
# of people reached	# of people reached
<i>Describe and or comment on outreach efforts, challenges, and opportunities</i>	

RECRUITMENT	
PRE-ASSESSMENT	
Expression of Interest	Assessments
# of expression of interest received (<i>Service vs</i>	# of assessments conducted (in-person, online,

<i>Consulting)</i>	interviews, site visits)
# of applications received (<i>Service vs Consulting</i>)	# of selected firms (<i>Service vs Consulting</i>)
<i>Describe and or comment on overall pre-assessment challenges and opportunities</i>	

CURRICULUM & TRAINING DEVELOPMENT

1. CURRICULUM

Curriculum Topics:	# of curriculum topics developed	# of attendees
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Describe and or comment on curriculum development, its challenges, and opportunities

2. TRAINING

Technical Assistance

# of technical assistance providers/partners	# of types of technical assistance provided	# of technical assistance events (<i>planned vs organized</i>)	# of technical assistance hours (<i>planned vs delivered</i>)	# of attendees
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Describe and or comment on overall training efforts, challenges, and opportunities.

One-On-One Counseling

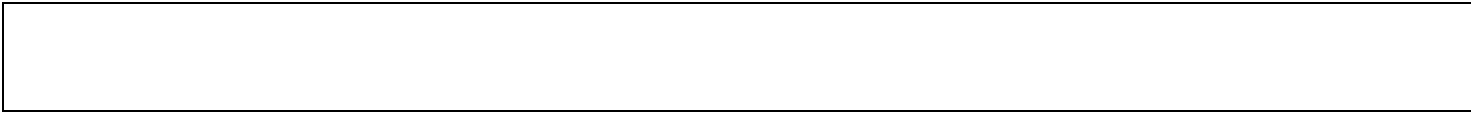
# of one-on-one counselors	# or Types of counseling provided	# of one-on-one counseling events (<i>planned vs organized</i>)	# of one-on-one counseling hours (<i>planned vs delivered</i>)	# of attendees
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Describe and or comment on overall one-on-one counseling efforts, challenges and opportunities.

Mentorship

# of mentors	# or nature of the mentoring provided	# of technical assistance hours (<i>planned vs delivered</i>)	# of attendees
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Describe and or comment on overall Mentorship efforts, challenges, and opportunities.



IMPLEMENTATION RETORTING TEMPLATE

Schedule Of Dates

QUARTERLY REPORT #	START DATE	END DATE	SUBMISSION DATE
1			
2			
3			
4			
5			
6			

Quarterly Report 2 -5: Business Growth Accelerator Program execution, monitoring, and evaluation

CAPACITY & CAPABILITY DEVELOPMENT				
3. TRAINING				
Technical Assistance				
# and types of technical assistance provided	# of technical assistance events (planned vs organized)	# of technical assistance hours (planned vs delivered)	# of attendees	
<i>Provide an overview of the technical assistance activities, challenges, and remediation actions for the past quarter and opportunities for the next quarter.</i>				
One-On-One Counseling				
# of one-on-one counselors	# or Types of counseling provided	# of one-on-one counseling events (planned vs organized)	# of one-on-one counseling hours (planned vs delivered)	# of attendees
<i>Provide an overview of the one-on-one counseling activities, challenges, and remediation actions for the past quarter and opportunities for the next quarter.</i>				
Mentorship				
# of mentors	# or nature of the mentoring provided	# of mentoring hours (planned vs delivered)	# of attendees	
<i>Describe and or comment on overall Mentorship efforts, challenges, and opportunities.</i>				

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MARKETING & BRAND DEVELOPMENT
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MARKETING, OUTREACH

Advertisement

# of success stories, editorials published	# of press release issues	# Number of tweets, LinkedIn, Facebook posts and reach/views (if possible)
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- Describe how your marketing efforts contributed to the participants' brand development during this quarter.
- Describe the challenges encountered during this quarter
- Describe the opportunities that you can leverage during the following quarter.

EVENTS

Networking	Matchmaking	Complaints/Feedback
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# of networking events organized	# of match-making events organized	# of complaints/feedback from participants (received vs addressed)
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# of attendees (trainees vs partners)	# of attendees (trainees vs partners)	# of external/public/media complaints/ feedback (received vs addressed)
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		# of FOIL requests received
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- Provide an overview of the public event organized and challenges encountered during this quarter.
- Describe the opportunities for the next quarter.
- Provide a brief overview of the complaint(s) from both participants and the public received and how you addressed them during the quarter.
- Describe your prevention approach or system you put for the following quarter.

PARTNERSHIP & RELATIONSHIP

Partnership & Relationship development

of new partnerships developed

of state and government customers

of local, community, and neighborhood partners
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of private, industry, and business partners

of partnership events attended

- Provide an overview of partnership and relationship efforts and challenges encountered during this quarter.
- Describe partnership opportunities for the next quarter.

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PROCUREMENT & CONTRACT ADMINISTRATION	
PROCUREMENT	
Bids, Awards	
# of contracts/ opportunities identified and shared	
# of responses/submissions to contracts/ opportunities identified and shared	
# of contracts/ opportunities awards and bid amount received	
<ul style="list-style-type: none"> • Provide an overview of procurement efforts and challenges encountered during this quarter. • Describe partnership opportunities for the next quarter. 	

ACCESS TO CAPITAL			
1. FINANCING:			
Financing, Investment, Loans, Credit			
# of new financing & investment partnerships developed		# of financing & investment events attended/organized	
# of new investment and financing amounts obtained/leveraged (Plus total amount)		# of loans, credits and amount obtained	
# of firms with improved credit limit or capability			
<ul style="list-style-type: none"> • Provide an overview of your efforts to support participants financing and investment standing and challenges encountered during this quarter. • Describe financing and investment opportunities for the next quarter 			
2. INSURANCE			
Insurance, Bonding			
# of new insurance, bonding partnerships developed	# of insurance and amount obtained	# of bonds and amount obtained	Amount of insurance saving realized & reduced)
<ul style="list-style-type: none"> • Provide an overview of procurement efforts and challenges encountered during this quarter. • Describe insurance and bonding opportunities for the next quarter. 			

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BUSINESS SUSTAINABILITY

1. BUSINESS GROWTH PLAN

Business Growth Plan Progress

# of firms with business growth plan completed	<i>Share (%) of business growth plan completed by participating firms</i>
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- Provide an overview of the progress of the cohort business growth plan.
- Provide an overview of individual participant firm's business growth plan, including challenges, and strategy and action plan to overcome challenges during the quarter.
- Provide an overview participant business growth plan opportunities for the following quarter.

2. CAPITAL & HUMAN ASSETS

Business Capital

# and total of capital assets acquired per participating firm	<i># Total amount of capital assets acquired</i>
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- Describe the beneficiary participation to the program impacted the firm business capital grow during the quarter.
- Describe the action undertaken by the incubator.
- Describe the projected impact during the following quarter.

Employment & Jobs

# of new jobs created per participating firm	<i>Total number of jobs and employment created</i>
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- Describe the beneficiary participation to the program impacted the firm's employment and jobs growth during the quarter.
- Describe the action undertaken by the incubator.
- Describe the projected impact during the following quarter.

PROGRAM FUNDING

1. PROGRAM EXPENDITURE

Expenditure

# Amount of program fund expended by	<i># Amount of reimbursable expenses</i>
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category	
<p>•To the extent possible, please share any comments on the state of the program expenditure.</p>	
<p>2. PROGRAM FUND DISBURSEMENT</p>	
<p>Reimbursement</p>	
<p># or amount of requested disbursement/reimbursement amount</p>	<p># or share of MWBE utilization reached</p>
<p>To the extent possible, please share:</p> <ul style="list-style-type: none"> • Any concerns about your current • If you plan to submit requests for reimbursement. 	