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2007-2009 Performance

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Welcome to the 2007-2009 Performance System

This system is built to capture the clients being served, the types of business consulting services being provided to those clients, the strategic partners you establish, the extraordinary relationships you garner, and finally, the resulting reports which show your accomplishments. As you have probably already noticed, our look has changed and along with that we have added some new functionality that we hope you will find useful.

As a Grantee Organization, or as a Project Director you are responsible for ensuring that your center accurately reports their activities. In the new Performance System, you have full access to all clients, services and Strategic Partners. You can also view up-to-the-minute reports on your centers' activities, as well as perform several administrative tasks including managing your centers' Performance user accounts and contact information. As a BDC Consultant, you will have the same responsibilities and access but on a more limited basis.

REMINDER: Clients and the services provided them must be entered within seventy-two (72) hours from the date of those services.

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Add Client

! Notice

In the event that contractual obligations require that the name of the client not be disclosed, please select "NO"

Is this client currently in business AND willing to participate in the Phoenix program?

YES NO

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**Please indicate your acceptance to receive service.
Your data will not be accepted if this step is not completed.**

PRIVACY NOTICE:

The information entered in this database will be used to assist your firm with marketing and procurement opportunity matching services.

The purpose for collecting this information is to track the development of the minority business for use in statistical surveys and other research. In that regard, the information entered into the form will be available to the general public.

In addition, information collected on this form will be made available to federal, state and local agencies for use in statistical surveys and other research to track the development of minority businesses. By entering data in this form you certify that you are authorized to make this information available to the public and agree to all the terms and conditions as specified herein.

Please print a copy of this form for the client to sign, and place a copy of the signed print out in the client record.

When this is complete, please type "Yes" in the box below to indicate agreement to all of the above terms and conditions.

Signature: _____ Date: _____

Enter "Yes" here to continue:

! Notice

Consent to Information Collection / Sharing: Generally, Minority Business Development Agency will not share any personally identifiable information you give us with any other government agency, private organization, or the public, except with your consent or as required by law. **By pressing the 'Submit' button, each client constitutes consent to use the information for purposes stated in this policy.**

Information Protection: The Minority Business Development Agency will protect all information consistent with applicable law including, but not limited to, the Privacy Act of 1974 and the Freedom of Information Act.

Your Rights under the Privacy Act: Information concerning the Privacy Act can be found on the following Web site: <http://www.cftc.gov/foia/foiprivacyact.htm>

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**Please indicate your acceptance of these terms.
Your data will not be accepted if this step is not completed.
This is step 1 of 6.**

"I certify that I represent a Minority Business Enterprise. MBDA defines a Minority Business Enterprise as a business which is owned or controlled by socially or economically disadvantaged persons who are members of one of the following eligible groups: African Americans, Aleuts, Asian Indians, Asian Pacific Americans, Eskimos, Hasidic Jews, Native Americans, Puerto Ricans, and other Spanish-Speaking Americans. I understand that false certification may result in a fine or imprisonment under applicable Federal law."

Please type "Yes" if you agree to all of the above terms and conditions:

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ADD CONTACT INFORMATION - Step 2 of 6

*** Required Fields**

Salutation:

* **First Name:**

MI:

* **Last Name:**

Suffix:

Title:

Address:

Country: USA

City:

State: -- please select --

* **Zip Code(+4):**
(e.g., 55555-2121)

* **Phone:** Ext:

Fax:

* **E-mail Address:**

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THE BASICS.

*** Required Fields**

! Important

In the event that contractual obligations require that the name of the client not be disclosed, please enter ND(*Your Center Name*)nnn where "nnn" signifies the number of "Non-Disclosure" clients managed by your center. Example: for the first ND client you enter the name would be ND(*Your Center Name*)001. The tenth ND client would be ND(*Your Center Name*)010

* Company Name:

* Address:

! For Non Disclosure companies, enter your own contact details

* Country: USA

* City:

* State: -- please select --

* Zip:

Web Site:

* What eligible group best describes you or your company?

-- please select --

Service Disabled Veteran: Yes No

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BUSINESS INFORMATION - THIS IS STEP 3 OF 6.

* **Business Start Date:** -- please select --
 --
 Enter 4-digit years (e.g. 1997)

* **Business Type:** -- please select --

State of Incorporation: -- please select --

* **Business Description:**

* **Keywords:**
What keywords best describe your product or service?
 Please separate keywords with commas (i.e. computer services, marketing, construction).

* **Number of Employees:** * (Full-Time):
 * Note - a business owner is not considered an employee of a business. * (Part-Time):
 * (Minority):

* **Annual Sales:**

* **Annual Export Sales:**

If you would like more information on export opportunities,

YES NO

Accounting Period Closes: -- please select --

Facilities Security Level: -- please select --

Max Bonding Level (\$):

Current Bonding Level (\$):

Do not enter a "\$" sign, a comma ",", or decimal points ".".

* **Is this company registered with CCR?:**

 -- please select -- 
Verify registration with CCR

DUNS Number:

Does your company accept the government credit card (VISA)?

YES NO

* VALUE of largest single contract sale in the past 3 years?(\$)

Do not enter a "\$" sign, a comma ",", or decimal points ".".

What is your VALUE Added Network number?

What is your cage code?

Does your business possess a "Minority-Owned" certification?

YES NO

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CERTIFICATION STATUS THIS IS STEP 4 OF 6

Please list the issuing agencies, certification numbers, and dates granted:

** In order for the system to capture information, you need to enter Certification Agency, Certification Number and Certification Date for each list of agency.*

Agency Name:

Number:

Date:

Agency Name:

Number:

Date:

Agency Name:

Number:

Date:

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ADD INDUSTRY CODES

You may search for applicable industry codes (NAICS, SIC or both) by number (i.e. 61142) or by Description (i.e. Computer Training). If you are having trouble finding codes, try using shorter strings such as "computer" instead of "computer training" or "comp" instead of "computer."

Search Industry Codes	
Find NAICS or SIC or NIGP codes using the form below. Specify whether you would like to search by the industry code itself or the text description of the category.	
Industry Code:	All <input type="button" value="v"/>
Search Name:	<input type="text"/>
Search Type:	<input type="radio"/> Code <input checked="" type="radio"/> Description
<input type="button" value="Search"/>	

Industry Codes

! Notice

This company is currently associated with no NAICS or SIC or NIGP industry codes.

To add codes, use the form to the left.

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ADD OPERATING LOCATIONS

The Minority Business Development Agency (MBDA) matches Minority Business Enterprises (MBEs) with commercial and government business Opportunities based on location. Please be sure to add all locations where your company does business. You may specify the location down to the zip code, but keep in mind that doing so will narrow the criteria by which you are matched. The greater the area you specify, the greater your chances are of being matched.

Add Operating Location	
Specify an operating location by selecting a country from the list below. You can select multiple countries by holding down the CTRL key. Non-U.S. countries will be automatically added to your list of operating locations. Press the 'Next' button to continue.	
Country:	<ul style="list-style-type: none"> USA Afghanistan Albania Algeria American Samoa Andorra Angola Anguilla

Operating Locations

! Notice.

No operating locations identified.

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Operating Location		Operating Locations	
Click on the links below to edit the country, state, or city of a location.			
Country:	United States	<input type="checkbox"/> All <input type="checkbox"/> Aguilá <input type="checkbox"/> Ajo <input type="checkbox"/> Alpine <input type="checkbox"/> Amado <input type="checkbox"/> Apache Junction <input type="checkbox"/> Arivaca	For U.S. operating locations, you can select the states, cities, and zip codes where this company operates. Please select the cities(s) of operation, and hit the 'Next' button to proceed. Select multiple cities by holding down the control key. Selecting the 'All' option will indicate your company operates throughout the selected state.
States:	AZ		
When this location is complete, press the 'Add This Location' button to proceed.			

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Company Search

You may choose to search for a Performance client using **any one** of the following criteria. For each search, you may enter a value or leave the field blank for a complete list of your clients.

Company Name:

Client ID:

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Task Order

Acme Wabbit Corp

Client #185292

! Notice

This form allows you to enter multiple task orders for the chosen client. Enter task order product information below and press the 'Add This Task Order' button. Your new task order appears in the 'Consultant Information' table, and you can add additional task orders in this manner. Once all your task orders are entered, press the 'Complete' button below to commit them to the system. **New Tasks will not be permanently saved to the system until you press 'Complete'.**

NEW TASK ORDER INFORMATION	
* Category:	Please Choose... <input type="checkbox"/> Administrative Management <input type="checkbox"/> Architecture <input type="checkbox"/> Business Plan Development
* Service Initiated:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

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New Work Product

Acme Wabbit Corp
Client #185292

! Notice

This form allows you to enter multiple work products for the chosen client. Enter new work product information below and press the 'Add This Work Product' button. You new work product appears in the 'Consultant Information' table, and you can add additional work products in this manner. Once all your work products are entered, press the 'Complete' button below to commit them to the system. **Work products will not be permanently saved to the system until you press 'Complete'.**

NEW WORK PRODUCT INFORMATION			
* Category:	Please Choose... <input type="button" value="v"/>		* Consultant:
* Service Date:	April <input type="button" value="v"/>	20 <input type="button" value="v"/>	2009 <input type="button" value="v"/>
* Fee Billed:	<input type="text"/>		

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If you have a shared transaction ID, Please click the following link to update the transaction.

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Edit Awarded Transaction

Acme Wabbit Corp

Client #185292

! Notice

Prior to entering an awarded transaction, please ensure the associated work product has been closed. Awarded transactions cannot be recorded without an associated work product.

Financing Opportunity

*** Required Fields**

* **Associated Work Product:** Choose...

* **Transaction Source:** Choose...

* **Contracting Officer:**

* **Source Phone:**

Source Email:

* **Type of Transaction:** Choose...

Guaranteed Programs: None

* **Date Transaction Approved:** April 20 2009

* **Transaction Amount:**

Is It A Joint Venture?

Major Accomplishments/Success Story:

Add to Narrative Report?

Share Awarded Transaction: No

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Edit Awarded Transaction

Acme Wabbit Corp

Client #185292

! Notice

Prior to entering an awarded transaction, please ensure the associated work product has been closed. Awarded transactions cannot be recorded without an associated work product.

Procurements / Contract Opportunity

*** Required Fields**

* **Associated Work Product:** Choose...

* **Transaction Source:** Choose...

* **Contracting Officer:**

* **Source Phone:**

Source Email:

* **Type of Transaction:** Choose...

Contract Assistance Program: None

* **Date Transaction Approved:** April 20 2009

* **Transaction Amount:**

? * **Contracting Method:** Single Year Contract

Is It A Joint Venture?

Export Contract: Choose...

Major Accomplishments/Success Story:

Add to Narrative Report?

Share Awarded Transaction: No



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Edit Awarded Transaction

Acme Wabbit Corp
Client #185292

! Notice

Prior to entering an awarded transaction, please ensure the associated work product has been closed. Awarded transactions cannot be recorded without an associated work product.

Bonding Opportunity

*** Required Fields**

* **Associated Work Product:** Choose...

* **Transaction Source:** Choose...

* **Contracting Officer:**

* **Source Phone:**

Source Email:

* **Type of Transaction:** Choose...

* **Date Transaction Approved:** April 20 2009

* **Transaction Amount:**

Is It A Joint Venture?

Major Accomplishments/Success Story:

Add to Narrative Report?

Share Awarded Transaction: No

You are logged in, Jill...



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Edit Awarded Transaction

Acme Wabbit Corp
Client #185292

! Notice

Prior to entering an awarded transaction, please ensure the associated work product has been closed. Awarded transactions cannot be recorded without an associated work product.

Merger and Acquisition Opportunity

*** Required Fields**

* **Associated Work Product:** Choose...

* **Second Party Client:** Yes No

* **Merger Date:** April 20 2009

* **Increase in Company Value**

Major Accomplishments/Success Story:

Add to Narrative Report?

Share Awarded Transaction: No

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Edit Awarded Transaction

Acme Wabbit Corp
Client #185292

! Notice

Prior to entering an awarded transaction, please ensure the associated work product has been closed. Awarded transactions cannot be recorded without an associated work product.

Sales Opportunity

*** Required Fields**

* **Associated Work Product:** Choose...

* **Period Beginning:** April 20 2009

* **Period Ending:** April 20 2009

* **Increase in Sales:**

Major Accomplishments/Success Story:

Add to Narrative Report?

Share Awarded Transaction: No

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Awarded Transaction - Jobs Created

Acme Wabbit Corp
Client #185292

! Notice

Prior to entering an awarded transaction, please ensure the associated work product has been closed. Awarded transactions cannot be recorded without an associated work product.

Jobs Created

** Required Fields*

* **Associated Work Product:** Choose...

* **Full Time Jobs:**

* **Part Time Jobs:**

Total Jobs:

* **Period Beginning Date:** April

* **Please Select an option:**

Note: If you select the option "On-Going Job" then "End Date" is not required field.

Job Ended **On-Going Job**

End Date: -- please select --

Major Accomplishments/Success Story:

Add to Narrative Report?

Share Awarded Transaction: No

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Non-Client Services

WORKSHOP/SEMINAR/TRAINING

*** Required Fields**

* **Category of Assistance** Choose...

Hours of Assistance:

MBDA Assistance Tool: Choose...

You may only choose dates in the following ranges:

- Apr 1, 2009 and Jun 30, 2009
- Apr 1, 2009 and Jun 30, 2009
- Apr 1, 2009 and Jun 30, 2009
- Apr 1, 2009 and Jun 30, 2009
- Apr 1, 2009 and Jun 30, 2009
- Apr 1, 2009 and Jun 30, 2009
- Apr 1, 2009 and Jun 30, 2009
- Apr 1, 2009 and Jun 30, 2009
- Apr 1, 2009 and Jun 30, 2009

* **Start Date:** April 20 2009

* **End Date:** April 20 2009

* **Total Attendees:**

* **Description of Event:**

Continue

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[Workshop/Seminar/Training] **[Non-Client Services]**

Non Client Services

[Market Promotion]

[Company Referral]

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BUSINESS APPLICATION

[BEC 2007-2009 Performance](#) > [Services](#) > [Outreach Effort](#)

MARKET PROMOTION

*** Required Fields**

*** Name**

You may only choose dates in the following ranges:

- Apr 1, 2009 and Jun 30, 2009
- Apr 1, 2009 and Jun 30, 2009
- Apr 1, 2009 and Jun 30, 2009
- Apr 1, 2009 and Jun 30, 2009
- Apr 1, 2009 and Jun 30, 2009
- Apr 1, 2009 and Jun 30, 2009
- Apr 1, 2009 and Jun 30, 2009
- Apr 1, 2009 and Jun 30, 2009

* **Start Date:** April 20 2009

* **End Date:** April 20 2009

Description of Event:

* **Event Originator**

* **Strategic Partner** -- please select --

* **BDC Analyst** Ms Jane Doe
Ms Jane Doe

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COMPANY REFERRAL

*** Required Fields**

* Referral Date: April 20 2009

Minutes of Service Choose...

Purpose Choose...

Specify if other

* Analyst Choose...

Referred Company

Referred to Company

Client

MBDC

Non Client

Strategic Partner

Other

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[Home](#) [BEC 2007-2009 Performance](#) > [Strategic Partners](#) > [Add Partner](#)

Add Partner

Add Partner Information	
* Partner Name:	<input type="text"/>
* Address:	<input type="text"/>
* City:	<input type="text"/>
State:	-- please select -- <input type="button" value="v"/>
Country:	-- please select -- <input type="button" value="v"/>
Zip:	<input type="text"/>
Web Site:	<input type="text"/>
* Transaction Source Type:	Federal Government <input type="button" value="v"/>
* Start Date:	April <input type="button" value="v"/> 20 <input type="button" value="v"/> 2009 <input type="button" value="v"/>
<p>You may only choose dates in the following ranges:</p> <ul style="list-style-type: none"> • Apr 1, 2009 and Jun 30, 2009 • Apr 1, 2009 and Jun 30, 2009 • Apr 1, 2009 and Jun 30, 2009 • Apr 1, 2009 and Jun 30, 2009 • Apr 1, 2009 and Jun 30, 2009 • Apr 1, 2009 and Jun 30, 2009 • Apr 1, 2009 and Jun 30, 2009 • Apr 1, 2009 and Jun 30, 2009 	
* Partnership Goals:	Dollar Value of Contracts <input type="button" value="v"/> Financials <input type="button" value="v"/> Increase in Sales <input type="button" value="v"/> Number of Jobs Created <input type="button" value="v"/>
<input type="button" value="Add Partner"/>	

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BUSINESS APPLICATION

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[2. Summary of Accomplishments] [3. Administrative management & Operational Quality] [4. Bonus Points] [5. End of Year Summary]

Test 09 NABDC

Award No: 11-11-11111-14

Report Period: 01-Jul-2009 - 31-Dec-2009

1. Cumulative Performance: Semi-Annual Assessment

	Assigned Points	Q3 Actual	Q3 Goal	Cum Points Earned	% of Annual Goal	Q4 Cum Actual	Q4 Cum Goal	Cum Points Earned	% of Annual Goal
Dollar Value of Contracts and Procurements	27	0	30,999	0.00	0.00	0	340,090	0.00	0.00
Financials	27	0	31,111	0.00	0.00	0	230,778	0.00	0.00
Increase in Sales	6	0	1	0.00	0.00	0	3	0.00	0.00
Number of Jobs Created	10	0	1	0.00	0.00	0	2	0.00	0.00
New Clients Served	5	0	1	0.00	0.00	0	2	0.00	0.00
Maintenance of SGI Portfolio	3	0	1	0.00	0.00	0	2	0.00	0.00
Customer Relationship Management	3	4	0	0.00	0.00	4	2	3.30	110.00
Management Assessment	3	4	0	0.00	0.00	4	2	3.30	110.00
Partnerships	5	52	5	5.50	110.00	52	5	5.50	110.00
Consulting Hours	3	0	2	0.00	0.00	0	388	0.00	0.00
Maintenance of Non-Federal Cost Share	3	0	0	0.00	0.00	0	2	0.00	0.00
Market Promotion	1	0	0	0.00	0.00	0	2	0.00	0.00
Resource Entries	2	0	1	0.00	0.00	0	-1	0.00	0.00
Facilitated Matches	2	0	-4	0.00	0.00	0	0	0.00	0.00
Joint Ventures	5	0	0	0.00	0.00	0	5	0.00	0.00
Total Score for Test 09 NABDC NABDC				5.50				12.10	

	YTD Cum Actual	YTD Cum Goal	YTD Cum Points Earned	YTD % of Annual Goal
Dollar Value of Contracts and Procurements	21,330,000	343,434	29.70	110.00
Financials	12,206,666	234,234	29.70	110.00
Increase in Sales	0	34	0.00	0.00
Number of Jobs Created	260	23	11.00	110.00
New Clients Served	5	23	1.09	21.74
Maintenance of SGI Portfolio	10	23	2.00	43.48
Customer Relationship Management	4	4	3.00	100.00
Management Assessment	3	4	2.25	75.00
Partnerships	52	5	5.50	110.00
Consulting Hours	129	434	0.89	29.72
Maintenance of Non-Federal Cost Share	0	4	0.00	0.00

Market Promotion	0	4	0.00	0.00
Resource Entries	30	4	2.20	110.00
Facilitated Matches	0	4	0.00	0.00
Joint Ventures	1	5	1.00	20.00
Total Score for Test 09 NABDC NABDC			88.33	

The Test 09 NABDC **met** its overall quantitative goals. This achievement does not include: (a) number of facilitated matches, (b) market promotion, (c) client satisfaction, (d) operational quality, and (e) extraordinary performance, which are allocated by MBDA.

The Test 09 NABDC did not meet goals in the following areas.
 (Your input is limited to 2500 characters including spaces)

Input area

The table above represents an overall anticipated **Good** rating for the performance period beginning July 1, 2009 through December 31, 2009 , with a cumulative score of 12.10 points.

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- [\[3. Administrative Management & Operational Quality \]](#)
- [\[4. Bonus Points \]](#)
- [\[5. End of Year Summary \]](#)

Test 09 NABDC

Award No: 11-11-11111-14

Report Period: 01-Jul-2009 - 31-Dec-2009

2. Summary of Accomplishments

Step 2: 2.2. Dollar Value of Contracts & Procurements

Client ID - Client Name

Ethnicity	Transaction ID	Transaction Type	Source Name	Award Date	Award Amount
-----------	----------------	------------------	-------------	------------	--------------

2. Steps for Summary of Accomplishments

2.2. Dollar Value of Contracts & Procurements [Help?](#)

A. Major accomplishments and/or Success Stories
 (Your input is limited to 2500 characters including spaces)

2.1. [Total Dollar Value of Transactions](#)

Input Area

2.2. [Dollar Value of Contracts & Procurements](#)

2.3. [Dollar Value of Awarded Financial Transactions](#)

B. Key operational activities that led to the success
 (Your input is limited to 2500 characters including spaces)

2.4. [Increase in Sales](#)

Input Area

2.5. [Number of Jobs Created](#)

2.6. [Number of New Clients Served](#)

C. Areas of improvement
 (Your input is limited to 2500 characters including spaces)

Input Area

D. Lessons learned for the following performance areas
 (Your input is limited to 2500 characters including spaces)

Input Area

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Test 09 NABDC

Award No: 11-11-11111-14

Report Period: 01-Jul-2009 - 31-Dec-2009

3. Administrative Management & Operational quality

Step 7: 3.1. Maintenance of SGI Client Portfolio

Client ID

Client Name

Client Start Date

3. Steps for Administrative Management & Operational Quality

3.1. [Maintenance of SGI Client Portfolio](#)

3.2. [Partnerships](#)

3.3. [Consulting Hours](#)

3.4. [Maintenance of Non-Federal Cost Share](#)

3.5. [Resource Entries](#)

3.6. [Facilitated Matches](#)

3.1. Maintenance of SGI Client Portfolio [Help?](#)

A. Key operational activities that led to the success
(Your input is limited to 2500 characters including spaces)

Input Area

B. Areas of improvement
(Your input is limited to 2500 characters including spaces)

Input Area

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- [\[5. End of Year Summary \]](#)

Test 09 NABDC

Award No: 11-11-11111-14

Report Period: 01-Jul-2009 - 31-Dec-2009

4. Bonus points

Step 13: 4.1. Joint Ventures

Client Name	Work Order Type	Service Date	Consultant	Hours	Outcome
-------------	-----------------	--------------	------------	-------	---------

4. Steps for Bonus points

4.1. [Joint Ventures](#)

4.1. Joint Ventures

A. Major accomplishments and/or Success Stories

(Your input is limited to 2500 characters including spaces)

Input Area

B. Key operational activities that led to the success

(Your input is limited to 2500 characters including spaces)

Input Area

C. Areas of improvement

(Your input is limited to 2500 characters including spaces)

Input Area

D. Lessons learned for the following performance areas

(Your input is limited to 2500 characters including spaces)

Input Area

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BUSINESS APPLICATION

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- [1. Cumulative Performance] [2. Summary of Accomplishments] [3. Administrative Management & Operational Quality] [4. Bonus Points]

Test 09 NABDC

Award No: 11-11-11111-14

Report Period: 01-Jan-2009 - 31-Dec-2009

5. End of Year Summary

Step 1: 5.1. End of Year Summary

	YTD Cum Actual	YTD Cum Goal	YTD Points Earned	YTD % of Annual Goal
Dollar Value of Contracts and Procurements	21,330,000	343,434	29.70	110.00
Financials	12,206,666	234,234	29.70	110.00
Increase in Sales	0	34	0.00	0.00
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New Clients Served	5	23	1.09	21.74
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Management Assessment	3	4	2.25	75.00
Partnerships	52	5	5.50	110.00
Consulting Hours	129	434	0.89	29.72
Maintenance of Non-Federal Cost Share	0	4	0.00	0.00
Market Promotion	0	4	0.00	0.00
Resource Entries	30	4	2.20	110.00
Facilitated Matches	0	4	0.00	0.00
Joint Ventures	1	5	1.00	20.00
Total Score for Test 09 NABDC NABDC			88.33	

5. Steps for End of Year Summary

Performance

5.1. [End of Year Summary](#) The center achieved approximately 41.60 cumulative points earned with an anticipated **Outstanding** rating for the program year 2009.

5.2. [Performance Review Staffing](#) The center underperformed in the following areas:
(Your input is limited to 2500 characters including spaces)

Input Area

5.3.a. [Dollar Value of Contracts and Procurements](#)

5.3.b. [Dollar Value of Financial Transactions](#)

5.3.c. [Increase in Sales](#)

- 5.3.d. [Number of Jobs Created](#)
- 5.3.e. [Number of New Clients Served](#)
- 5.3.f. [Number of SGI Clients](#)
- 5.4. [Project Budget Analysis](#)

Highlights

The center recorded the following success stories and key achievements during the program year:
(Your input is limited to 2500 characters including spaces)

Input Area

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