

**Appendix B-1 Director Survey Instrument**

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***Veterans Business Outreach Centers***

**Welcome!**

Thank you for your willingness to participate in this survey. Your participation is very important to the U.S. Small Business Administration (SBA). The information collected in this survey will be used by SBA to evaluate the performance of the Veterans Business Outreach Center (VBOC) program, improve the program, and assess its impact on the business goals of VBOC clients. The SBA's Office of Veterans Business Development (OVBD) has contracted Optimal Solutions Group, LLC (Optimal), to conduct a fair and independent evaluation of the program, which includes the administration of this survey. Topics included in this survey include your role as a director, staff capacity, client characteristics, services provided, client tracking, and your VBOC's referral network. Your participation in this survey is extremely valuable, because the information you provide will help SBA achieve its goals.

As required by the Paperwork Reduction Act, SBA (OVBD) may not conduct this survey unless it has been approved by the Office of Management and Budget (OMB). SBA has obtained that approval under OMB control #3245-xxxx.

The survey will take approximately 80 minutes to complete. You can stop the survey and start a new session by clicking the link again. Your previous answers will be saved, allowing you to resume the survey where you stopped. You are not required to answer any specific question, although we would greatly appreciate your answering all of them. Please complete the survey by December 4, 2015. Optimal will send you periodic reminders and can be reached by phone for technical support at 301-306-1170.

Thank you!

**Survey Consent Form**

The U.S. Small Business Administration's (SBA's) Office of Veterans Business Development (OVBD) has contracted Optimal Solutions Group, LLC (Optimal), to conduct a fair and independent performance evaluation of OVBD. Optimal has designed this survey to learn from directors by exploring their processes, successes, and challenges while implementing the grant. Topics include information about their role as a director, staff capacity, client characteristics, services, client tracking, and the referral network. The primary purpose of this survey is to obtain more information about the VBOC program to find ways in which it can be improved.

**Confidentiality and Usage**

Optimal, an independent contractor, will securely store, tabulate, and analyze survey responses. Optimal will ensure respondents' confidentiality and anonymity by reporting all findings to SBA in the aggregate only rather than at the individual level. No respondent will be identified or

named in any internal SBA report, publicly available report, or other such publication without his or her prior, explicit approval.

Storage and Access

The survey results will be stored on a secure server accessible only to the Optimal research team. The survey data will be retained for no fewer than 3 years after the completion of the surveys.

Please click *Next* below to proceed. **Clicking *Next* will be considered equivalent to an electronic signature, and grants the Optimal research team permission to conduct the survey as described above for the above-referenced study.** The research team will not use the information provided for any reason other than those stated in this consent form without your permission.

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**Instructions**

*All data will be held in strict confidentiality and will be reported only in the aggregate without identifying any individual respondent.*

The questions below pertain to the last 12 months.

For open-ended questions, if you are presented with a question you do NOT know the answer to, enter “Not Known” into the text box. If you are presented with a question that you would prefer NOT to answer, enter “PNA” into the text box. For example:

How large is the universe?

Not Known

For ranking questions, please rank each item according to your preference using each number only once. Do not rank options that are not applicable to you. For example:

What is your favorite beverage?

- Coffee                    1
- Tea
- Water                    4
- Soda                     3
- Juice                     2
- Do not know
- Prefer not to answer

If you would prefer not to answer the question or do not know the answer, place a 1 next to the appropriate answer. For example:

What is your favorite beverage?

Coffee

Tea

Water

Soda

Juice

Do not know

Prefer not to answer 1

## VBOC GOALS AND CAPACITY

### VBOC Goals

*The questions below pertain to the last 12 months*

- 1) What Veterans Business Outreach Center (VBOC) are you the director of?
  - a. Guam
  - b. Hampton Roads-Old Dominion University
  - c. Louisiana
  - d. New Jersey-Rutgers Business School
  - e. New Mexico
  - f. Northeast
  - g. New York State-Research Foundation of SUNY at Farmingdale SBDC
  - h. Rocky Boys Veteran's Association
  - i. Seattle Business Assistance Center
  - j. University of Texas-Pan American
  - k. University of West Florida in Pensacola
  - l. VetBiz Central, Inc.
  - m. Veterans Advocacy Foundation, Inc.
  - n. Fayetteville State University Region
  - o. Veterans Business Outreach Center IX
  
- 2) Does your VBOC work to meet internal goals in a specified timeframe (e.g., monthly, quarterly, or annually)? Please provide a brief list of your high level goals.  
< Text box here >
  
- 3) To what extent do you agree that your VBOC has reached its goals and measurable objectives set out in respect to your VBOC plan?
  - a. Strongly agree
  - b. Agree
  - c. Undecided
  - d. Disagree
  - e. Strongly disagree
  - f. Prefer not to answer
  
- 4) Has your VBOC used a documented staff training handbook (or some other type of document for training staff)?
  - a. Yes
  - b. In the process of developing a handbook
  - c. No
  - d. Don't know
  - e. Prefer not to answer

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**VBOC Capacity**

***The questions below are about you.***

- 5) What is your highest level of education?
- a. High school (grades 9-12, but no degree)
  - b. High school graduate (or equivalent)
  - c. Some college (1-4 years, but no degree)
  - d. Associates degree (for example: including occupational or academic degrees)
  - e. Bachelor's degree (for example: B.A., B.S., A.B., etc.)
  - f. Master's degree (for example: M.A., M.S., M.Eng., M.S.W., etc.)
  - g. Professional school degree (for example: M.D., D.D.C., J.D., etc.)
  - h. Doctoral degree (for example: Ph.D., Ed.D., etc.)
  - i. Other (Please state)
    - i. < Text box here >
  - j. Prefer not to answer
- 6) Are you a veteran?
- a. Yes
  - b. No
  - c. Don't know
  - d. Prefer not to answer
- 7) What is your language proficiency? (Select all that apply)
- a. English
  - b. Spanish
  - c. Other
  - d. Don't know
  - e. Prefer not to answer
- 8) Do you have experience working with veterans? (If yes, approximately how many years?)
- a. Yes
    - < Text box here >
  - b. No
  - c. Don't know
  - d. Prefer not to answer
- 9) Do you have experience providing business counseling? (If yes, approximately how many years?)
- a. Yes
    - <text box>
  - b. No
  - c. Don't know
  - d. Prefer not to answer

- 10) Do you have previous entrepreneurial experience? (If yes, approximately how many years?)
- a. Yes  
<text box>
  - b. No
  - c. Don't know
  - d. Prefer not to answer
- 11) How many years have you worked at this VBOC?  
<text box>
- 12) For the last 12 months, how many hours have you been working per week?  
<text box>
- 13) For the last 12 months, have you been a paid employee or a volunteer?
- a. Paid
  - b. Volunteer
  - c. Don't know
  - d. Prefer not to answer
- 14) For the last 12 months, has any other staff worked at this VBOC?
- a. Yes → go to 15
  - b. No → go to 58
  - c. Don't know → go to 58
  - d. Prefer not to answer → go to 58

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*Please consider one staff member for the following questions. You will provide information on each additional staff member in later sections.*

- 15) Please list other staff member's role.  
<text box>
- 16) What is this staff member's highest level of education?
- a. High school (grades 9-12, but no degree)
  - b. High school graduate (or equivalent)
  - c. Some college (1-4 years, but no degree)
  - d. Associates degree (for example: including occupational or academic degrees)
  - e. Bachelor's degree (for example: B.A., B.S., A.B., etc.)
  - f. Master's degree (for example: M.A., M.S., M.Eng., M.S.W., etc.)
  - g. Professional school degree (for example: M.D., D.D.C., J.D., etc.)
  - h. Doctoral degree (for example: Ph.D., Ed.D., etc.)
  - i. Other (Please state)
    - i. < Text box here >
  - j. Prefer not to answer

17) Is this staff member a veteran?

- a. Yes
- b. No
- c. Don't know
- d. Prefer not to answer

18) What language(s) is this staff member proficient in? (Select all that apply)

- a. English
- b. Spanish
- c. Other
- d. Don't know
- e. Prefer not to answer

19) Does this staff member have experience working with veterans? (If yes, approximately how many years?)

- a. Yes  
<text box>
- b. No
- c. Don't know
- d. Prefer not to answer

20) Does this staff member have experience providing business counseling? (If yes, approximately how many years?)

- a. Yes  
<text box>
- b. No
- c. Don't know
- d. Prefer not to answer

21) Does this staff member have previous entrepreneurial experience? (If yes, approximately how many years?)

- a. Yes  
<text box>
- b. No
- c. Don't know
- d. Prefer not to answer

22) How many years has this staff member worked at the VBOC?

<text box>

23) For the last 12 months, how many hours has this staff member been working per week?

<text box>

24) For the last 12 months, has this staff member been a paid employee or a volunteer?

- a. Paid

- b. Volunteer
- c. Don't know
- d. Prefer not to answer

25) For the last 12 months, has any other staff worked at this VBOC?

- a. Yes → go to 26
- b. No → go to 58
- c. Don't know → go to 58
- d. Prefer not to answer → go to 58

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*Please consider one staff member for the following questions. You will provide information on each additional staff member in later sections.*

26) Please list other staff member's role.

<text box>

27) What is this staff member's highest level of education?

- a. High school (grades 9-12, but no degree)
- b. High school graduate (or equivalent)
- c. Some college (1-4 years, but no degree)
- d. Associates degree (for example: including occupational or academic degrees)
- e. Bachelor's degree (for example: B.A., B.S., A.B., etc.)
- f. Master's degree (for example: M.A., M.S., M.Eng., M.S.W., etc.)
- g. Professional school degree (for example: M.D., D.D.C., J.D., etc.)
- h. Doctoral degree (for example: Ph.D., Ed.D., etc.)
- i. Other (Please state)
  - i. < Text box here >
- j. Prefer not to answer

28) Is this staff member a veteran?

- a. Yes
- b. No
- c. Don't know
- d. Prefer not to answer

29) What language(s) is this staff member proficient in? (Select all that apply)

- a. English
- b. Spanish
- c. Other
- d. Don't know
- e. Prefer not to answer



30) Does this staff member have experience working with veterans? (If yes, approximately how many years?)

- a. Yes  
<text box>
- b. No
- c. Don't know
- d. Prefer not to answer

31) Does this staff member have experience providing business counseling? (If yes, approximately how many years?)

- a. Yes  
<text box>
- b. No
- c. Don't know
- d. Prefer not to answer

32) Does this staff member have previous entrepreneurial experience? (If yes, approximately how many years?)

- a. Yes  
<text box>
- b. No
- c. Don't know
- d. Prefer not to answer

33) How many years has this staff member worked at the VBOC?

<text box>

34) For the last 12 months, how many hours has this staff member been working per week?

<text box>

35) For the last 12 months, has this staff member been a paid employee or a volunteer?

- a. Paid
- b. Volunteer
- c. Don't know
- d. Prefer not to answer

36) For the last 12 months, has any other staff worked at this VBOC?

- a. Yes → go to 37
- b. No → go to 58
- c. Don't know → go to 58
- d. Prefer not to answer → go to 58

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*Please consider one staff member for the following questions. You will provide information on each additional staff member in later sections.*

37) Please list other staff member's role.

<text box>

38) What is this staff member's highest level of education?

- a. High school (grades 9-12, but no degree)
- b. High school graduate (or equivalent)
- c. Some college (1-4 years, but no degree)
- d. Associates degree (for example: including occupational or academic degrees)
- e. Bachelor's degree (for example: B.A., B.S., A.B., etc.)
- f. Master's degree (for example: M.A., M.S., M.Eng., M.S.W., etc.)
- g. Professional school degree (for example: M.D., D.D.C., J.D., etc.)
- h. Doctoral degree (for example: Ph.D., Ed.D., etc.)
- i. Other (Please state)
  - i. < Text box here >
- j. Prefer not to answer

39) Is this staff member a veteran?

- a. Yes
- b. No
- c. Don't know
- d. Prefer not to answer

40) What language(s) is this staff member proficient in? (Select all that apply)

- a. English
- b. Spanish
- c. Other
- d. Don't know
- e. Prefer not to answer

41) Does this staff member have experience working with veterans? (If yes, approximately how many years?)

- a. Yes
  - <text box>
- b. No
- c. Don't know
- d. Prefer not to answer

42) Does this staff member have experience providing business counseling? (If yes, approximately how many years?)

- a. Yes
  - <text box>
- b. No
- c. Don't know
- d. Prefer not to answer

- 43) Does this staff member have previous entrepreneurial experience? (If yes, approximately how many years?)
- a. Yes  
<text box>
  - b. No
  - c. Don't know
  - d. Prefer not to answer
- 44) How many years has this staff member worked at the VBOC?  
<text box>
- 45) For the last 12 months, how many hours has this staff member been working per week?  
<text box>
- 46) For the last 12 months, has this i staff member been a paid employee or a volunteer?
- a. Paid
  - b. Volunteer
  - c. Don't know
  - d. Prefer not to answer
- 47) For the last 12 months, has any other staff worked at this VBOC?
- a. Yes → go to 48
  - b. No → go to 58
  - c. Don't know → go to 58
  - d. Prefer not to answer → go to 58

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*Please consider one staff member for the following questions. You will provide information on each additional staff member in later sections.*

- 48) Please list other staff member's role.  
<text box>
- 49) What is this staff member's highest level of education?
- a. High school (grades 9-12, but no degree)
  - b. High school graduate (or equivalent)
  - c. Some college (1-4 years, but no degree)
  - d. Associates degree (for example: including occupational or academic degrees)
  - e. Bachelor's degree (for example: B.A., B.S., A.B., etc.)
  - f. Master's degree (for example: M.A., M.S., M.Eng., M.S.W., etc.)
  - g. Professional school degree (for example: M.D., D.D.C., J.D., etc.)
  - h. Doctoral degree (for example: Ph.D., Ed.D., etc.)
  - i. Other (Please state)
    - i. < Text box here >

- j. Prefer not to answer
- 50) Is this staff member a veteran?
- a. Yes
  - b. No
  - c. Don't know
  - d. Prefer not to answer
- 51) What language(s) is this staff member proficient in? (Select all that apply)
- a. English
  - b. Spanish
  - c. Other
  - d. Don't know
  - e. Prefer not to answer
- 52) Does this staff member have experience working with veterans? (If yes, approximately how many years?)
- a. Yes  
<text box>
  - b. No
  - c. Don't know
  - d. Prefer not to answer
- 53) Does this staff member have experience providing business counseling? (If yes, approximately how many years?)
- a. Yes  
<text box>
  - b. No
  - c. Don't know
  - d. Prefer not to answer
- 54) Does this staff member have previous entrepreneurial experience? (If yes, approximately how many years?)
- a. Yes  
<text box>
  - b. No
  - c. Don't know
  - d. Prefer not to answer
- 55) How many years has this staff member worked at the VBOC?  
<text box>
- 56) For the last 12 months, how many hours has this staff member been working per week?  
<text box>
- 57) For the last 12 months, has this staff member been a paid employee or a volunteer?

- a. Paid
- b. Volunteer
- c. Don't know
- d. Prefer not to answer

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**VBOC SERVICES AND ACTIVITIES**

**VBOC Website**

*The questions below pertain to the last 12 months.*

- 58) What did you use your VBOC website for? Please select all that apply.
- a. Listing your VBOC hours
  - b. Listing your VBOC location
  - c. Listing your VBOC staff
  - d. Listing the services offered at your VBOC
  - e. Client registration for VBOC services (counseling, training, etc.)
  - f. Hosting training webinars
  - g. Advertising for center events
  - h. Listing business assistance resources (e.g. guidebooks, worksheets, etc.)
  - i. Contact information for other SBA resource partners
  - j. Contact information for other federal agencies (e.g. VA, DOD, etc.)
  - k. Contact information for private/ non-profit business-assistance providers
  - l. Collecting client feedback
  - m. Client spotlights
  - n. Posting your newsletter
  - o. Other (Please explain)  
< Text box here >
  - p. Don't know
  - q. Prefer not to answer

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**VBOC Outreach Activities**

*The questions below pertain to the last 12 months.*

- 59) What organizations or marketing venues have you used for your outreach activities to generate new clients? Please select all that apply.
- a. SBA district office
  - b. Lender
  - c. Small Business Administration (SBA) website
  - d. Boots to Business
  - e. U.S. Export Assistance Center (USEAC)

- f. Small Business Development Center (SBDC)
- g. SCORE Association
- h. Women's Business Centers (WBC)
- i. Local economic development official
- j. Chamber of Commerce
- k. Advertising (i.e., magazines, newspaper, television, radio)
- l. Internet
- m. Other federal agencies (e.g. VA, DOD, etc.)
- n. Military or veteran organizations (e.g., American Legion, Veterans of Foreign Wars)
- o. University resources
- p. Other client or word of mouth
- q. Other (Please specify)  
< Text box here >
- r. Don't know
- s. Prefer not to answer

60) From the sources selected above, please rank the top 5. A rank of 1 indicates the source that was most frequently used for your outreach activities.

If you specified "Other" in the previous question, please rank "Other" along with other sources. Do not re-write the specification. If you selected "Don't know" or "Prefer not to answer", type 1 next to the appropriate answer..

- a. SBA district office
- b. Lender
- c. Small Business Administration (SBA) website
- d. Boots to Business
- e. U.S. Export Assistance Center (USEAC)
- f. Small Business Development Center (SBDC)
- g. SCORE Association
- h. Women's Business Centers (WBC)
- i. Local economic development official
- j. Chamber of Commerce
- k. Advertising (i.e., magazines, newspaper, television, radio)
- l. Internet
- m. Other federal agencies (e.g. VA, DOD, etc.)
- n. Military or veteran organizations (e.g., American Legion, Veterans of Foreign Wars)
- o. University resources
- p. Other client or word of mouth
- q. Other (Please specify)  
< Text box here >
- r. Don't know
- s. Prefer not to answer

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- 61) Does your VBOC focus its outreach efforts on particular geographic areas within your region? If yes, please explain those areas.
- Yes <text box>
  - No
  - Not Applicable
  - Don't know
  - Prefer not to answer
- 62) Did your outreach efforts focus specifically on particular types of people, such as active duty military, retirees, veteran families, service-disabled veterans, or other? Please select all that apply.
- Active duty military
  - Retirees
  - Veteran families
  - Service-disabled veterans
  - Racial or ethnic minority veterans
  - Veterans living in poverty
  - Other (Please specify)  
< Text box here >
  - No, outreach did not focus on particular groups
  - Don't know
  - Prefer not to answer

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- 63) What sources have referred clients to your center? Select all that apply.
- SBA district office
  - Lender
  - SBA website
  - Boots to Business
  - U.S. Export Assistance Center (USEAC)
  - Small Business Development Center (SBDC)
  - SCORE Association
  - Women's Business Centers (WBC)
  - Local economic development official
  - Chamber of Commerce
  - Advertising (i.e., magazines, newspaper, television, radio)
  - Internet
  - Other federal agencies (e.g. VA, DOD, etc.)
  - Military or veteran organizations (e.g., American Legion, Veterans of Foreign Wars)
  - University resources
  - Other client or word of mouth

- q. Other (Please specify)  
< Text box here >
- r. Don't know
- s. Prefer not to answer

64) From the sources selected above, please rank the top 5. A rank of 1 indicates the source that most frequently referred clients.

If you specified "Other" in the previous question, please rank "Other" along with other sources. Do not re-write the specification. If you selected "Don't know" or "Prefer not to answer", type 1 next to the appropriate answer..

- a. SBA district office
- b. Lender
- c. SBA website
- d. Boots to Business
- e. U.S. Export Assistance Center (USEAC)
- f. Small Business Development Center (SBDC)
- g. SCORE Association
- h. Women's Business Centers (WBC)
- i. Local economic development official
- j. Chamber of Commerce
- k. Advertising (i.e., magazines, newspaper, television, radio)
- l. Internet
- m. Other federal agencies (e.g. VA, DOD, etc.)
- n. Military or veteran organizations (e.g., American Legion, Veterans of Foreign Wars)
- o. University resources
- p. Other client or word of mouth
- q. Other (Please specify)  
< Text box here >
- r. Don't know
- s. Prefer not to answer

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**Client Intake**

***The questions below pertain to the last 12 months.***

- 65) The most common form of initial contact by clients was
- a. By phone
  - b. By e-mail
  - c. In-person
  - d. Instant chat
  - e. Website portal registration



- f. Other (Please explain)  
< Text box here >
- g. Don't know
- h. Prefer not to answer

66) Please describe the formal or informal screening process used by your VBOC for providing client service.  
< Text box here >

67) Please explain the current process (e.g., questions asked of the client, forms used, etc.) for assessing a client's needs and determining the type of assistance that the client should receive.  
< Text box here >

68) Does your VBOC use a documented protocol (e.g., a document that lists the questions posed to the client, etc.) for assessing each client's need?

- a. Yes
- b. No
- c. Don't know
- d. Prefer not to answer

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**VBOC Services**

***The questions below pertain to the last 12 months.***

69) Please explain your definition of a VBOC "client"? Specifically, is there minimum amount of interaction that must take place for an individual to be classified as a client?  
< Text box here >

70) Where are your services (e.g. training, counseling, etc.) offered? Please rank the applicable locations. A rank of 1 indicates the location that was most frequently used.

*Leave unused locations blank. If you "Don't know" or "Prefer not to answer", type 1 next to the appropriate answer.*

- a. At your VBOC
- b. SBA or OVBD headquarters
- c. At other resource partners (i.e., SBDC, SCORE, WBC, etc.)
- d. Business site
- e. Community college or other educational institution
- f. Other (Please explain)  
< Text box here >
- g. Don't know
- h. Prefer not to answer

71) Please specify if you chose "Other" in the previous questions.  
<text box>

**This is the mid-way point of the survey. Feel free to continue the survey or to come back to it at a later time.**

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**Client Business Stages**

72) Approximately what percentage of clients have completed the following activities:

	Percent of clients
Developed a scalable product, service, or target market	
Opened a bank account for the start-up	
Established a phone book or internet listing	
Devoted full-time to the start-up	
Hired an employee	
Purchased materials, supplies, inventory, or components	
Purchased or leased a capital asset	
Began to promote a good or service	
Received income from sales of goods or services	
Established supplier credit	
Initial positive monthly cash flow	
Initiated a business plan	
Developed financial projections	
Sought external funding for the start-up	
Invested own money in the start-up	
Defining market for product or service	
Development of model or prototype of service or product	
Initiated patent, copyright, or trademark protection	
Filed initial federal tax return	
Paid initial federal Social Security payment	
Paid initial state unemployment insurance payment	

**Client Business Development**

73) Approximately what percentage of clients served just had an interest in starting a business, but did not have a business idea?  
< Text box here >

74) Approximately what percentage of clients served just have an idea about a product or service and who to sell it to (have identified a market for your product/service)?  
< Text box here >

75) Approximately what percentage of clients served have a business plan or tried to repair their credit?

< Text box here >

76) Approximately what percentage of clients served have implemented their business plan?

< Text box here >

77) Approximately what percentage of clients served have received funds from a financial institution or sold at least one good/ service to a non-family member?

< Text box here >

78) Approximately what percentage of clients served have generated revenue from the sale of goods or services for less than 3 years?

< Text box here >

79) Approximately what percentage of clients served have had at least a 20% growth in sales of a good or service in 2 years?

< Text box here >

80) Approximately what percentage of clients served have generated revenue from the sale of a good or service for more than 3 years?

< Text box here >

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81) What types of training courses were offered at your VBOC? Please rank the applicable types of courses. A rank of 1 indicates the type of course that was most frequently used.

Leave unused locations blank. If you “Don’t know” or “Prefer not to answer”, type 1 next to the appropriate answer.

- a. Workshops and seminars
- b. Stand-alone courses
- c. Online course
- d. Teleconference
- e. Multi-session course
- f. Boots to Business (B2B) events
- g. Webinars
- h. Other
- i. Don’t know
- j. Prefer not to answer

82) Please specify if you chose “Other” in the previous question.

<text box>

83) What training topics are offered by your VBOC? Select all that apply.

- a. Business start-up pre-planning
- b. Business plan
- c. Business financing or capital sources
- d. Managing a business
- e. Human resources and managing employees
- f. Customer relations
- g. Social media
- h. Business accounting and budget
- i. Cash flow management
- j. Tax planning
- k. Marketing and sales
- l. Government contracting
- m. Franchising
- n. Buy or sell business
- o. Technology and computers
- p. eCommerce
- q. Legal issues
- r. Importing
- s. Exporting
- t. Risk management
- u. Disaster planning
- v. Disaster recovery
- w. Other (Please specify)  
< Text box here >
- x. Don't know
- y. Prefer not to answer

84) From the topics selected above, please rank the top 5 topics. A rank of 1 indicates the topic that was most frequently offered.

*If you specified "Other" in the previous question, please rank "Other" along with the other sources. Do not re-write the specification. If you selected "Don't know" or "Prefer not to answer", type 1 next to the appropriate answer..*

- a. Business start-up pre-planning
- b. Business plan
- c. Business financing or capital sources
- d. Managing a business
- e. Human resources and managing employees
- f. Customer relations
- g. Social media
- h. Business accounting and budget
- i. Cash flow management
- j. Tax planning
- k. Marketing and sales
- l. Government contracting

- m. Franchising
- n. Buy or sell business
- o. Technology and computers
- p. eCommerce
- q. Legal issues
- r. Importing
- s. Exporting
- t. Risk management
- u. Disaster planning
- v. Disaster recovery
- w. Other (Please specify)  
< Text box here >
- x. Don't know
- y. Prefer not to answer

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- 85) What was the most common method of providing counseling clients at your VBOC? Please rank the methods. A rank of 1 indicates the method that was most frequently offered.

Leave unused methods blank. If you "Don't know" or "Prefer not to answer", type 1 next to the appropriate answer.

- a. In-person
  - b. On the phone
  - c. Through the Internet
  - d. Other
  - e. Don't know
  - f. Prefer not to answer
- 86) Please specify the "Other" chosen in the previous question.  
<text box>
- 87) What counseling topics were offered by your VBOC? Select all that apply.
- a. Business start-up pre-planning
  - b. Business plan
  - c. Business financing or capital sources
  - d. Managing a business
  - e. Human resources and managing employees
  - f. Customer relations
  - g. Social media
  - h. Business accounting and budget
  - i. Cash flow management
  - j. Tax planning
  - k. Marketing and sales
  - l. Government contracting

- m. Franchising
- n. Buy or sell business
- o. Technology and computers
- p. eCommerce
- q. Legal issues
- r. Importing
- s. Exporting
- t. Risk management
- u. Disaster planning
- v. Disaster recovery
- w. Other (Please specify)  
< Text box here >
- x. Don't know
- y. Prefer not to answer

88) From the sources selected above, please rank the top 5. A rank of 1 indicates the source that was most frequently used for your outreach activities.

If you specified "Other" in the previous question, please rank "Other" along with other sources. Do not re-write the specification. If you selected "Don't know" or "Prefer not to answer", type 1 next to the appropriate answer.

- a. Business start-up pre-planning
- b. Business plan
- c. Business financing or capital sources
- d. Managing a business
- e. Human resources and managing employees
- f. Customer relations
- g. Social media
- h. Business accounting and budget
- i. Cash flow management
- j. Tax planning
- k. Marketing and sales
- l. Government contracting
- m. Franchising
- n. Buy or sell business
- o. Technology and computers
- p. eCommerce
- q. Legal issues
- r. Importing
- s. Exporting
- t. Risk management
- u. Disaster planning
- v. Disaster recovery
- w. Other (please specify)  
< Text box here >

- x. Don't know
- y. Prefer not to answer

89) What specialized initiatives have been established by your VBOC based on the expressed needs of clients? Please list.

< Text box here >

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**Client Outcomes**

*The questions below pertain to the last 12 months*

90) At what interval or point in time did your VBOC systematically (i.e., using the same procedure for all clients) collect outcome data (e.g., revenue, employees, loans, contracts awarded) from past clients to determine the impact of services?

- a. No systematic method was used for collecting data
- a. Less than 1 month after service receipt
- b. 1-2 months after service receipt
- c. 3-6 months after service receipt
- d. 7-9 months after service receipt
- e. 9-11 months after service receipt
- f. 1-2 years after service receipt
- g. 2-4 years after service receipt
- h. Quarterly
- i. Semi-annually
- j. Annually
- k. Other regular interval (Please specify)  
< Text box here >
- l. Outcome data were not collected
- m. Don't know
- n. Prefer not to answer

91) Before it was entered into WebCATS/Neoserra, how did your VBOC systematically (i.e., using the same procedure for all clients) gather client outcome data? Please select all that apply.

- a. No systematic method was used for collecting client information.
- b. Telephone
- c. Electronic (i.e., e-mail)
- d. Web-based (e.g., Survey Monkey)
- e. Paper
- f. Other (Please specify)  
< Text box here >
- g. Outcome data were not collected

- h. Don't know
  - i. Prefer not to answer
- 92) What kinds of client outcome data were collected by your VBOC? Please select all that apply.
- a. Firm birth
  - b. Firm death
  - c. Revenue
  - d. Number of full-time employees
  - e. Number of part-time employees
  - f. Number of contractor employees
  - g. Change in business strategy
  - h. Loans received
  - i. Contracts received
  - j. Patents created
  - k. Attribution of business changes to VBOC services received
  - l. Specific start-up related activities
  - m. Other (Please specify)  
< Text box here >
  - n. Outcome data were not collected
  - o. Don't know
  - p. Prefer not to answer
- 93) Approximately, what percentage of your clients were you able to collect outcome data on?  
Please provide a percentage.  
<text box>

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**VBOC Reporting**

***The questions below pertain to the last 12 months***

- 94) How often did your VBOC report its data into WebCATS/Neoserra?
- a. Immediately following counseling and training sessions
  - b. Weekly
  - c. Monthly
  - d. Quarterly
  - e. Semi-annually
  - f. Annually
  - g. Other (Please specify)  
< Text box here >
  - h. Not applicable
  - i. Don't know
  - j. Prefer not to answer



- 95) Did SBA provide reporting guidelines for your VBOC?
- a. Yes
  - b. No
  - c. Don't know
  - d. Prefer not to answer

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**VBOC Collaboration and Referral Network**

*The questions below pertain to the last 12 months*

- 96) What other VBOC directors did you collaborate with (i.e., exchanged best practices, lessons learned, training resources, etc.)? Select all that apply.
- a. Guam
  - b. Hampton Roads-Old Dominion University
  - c. Louisiana
  - d. New Jersey-Rutgers Business School
  - e. New Mexico
  - f. Northeast
  - g. New York State-Research Foundation of SUNY at Farmingdale SBDC
  - h. Rocky Boys Veteran's Association
  - i. Seattle Business Assistance Center
  - j. University of Texas-Pan American
  - k. University of West Florida in Pensacola
  - l. VetBiz Central, Inc.
  - m. Veterans Advocacy Foundation, Inc.
  - n. Fayetteville State University Region
  - o. Veterans Business Outreach Center IX
  - p. None
  - q. Don't know
  - r. Prefer not to answer

- 97) If you collaborated with other organizations (i.e., non-VBOCs), please list who you collaborated with.
- < Text box here >
- Not applicable
  - Don't know
  - Prefer not to answer

- 98) Approximately how many organizations (e.g., lenders, educational institutions, SBA resource partners, workforce development organizations) did you refer clients to for other services?
- a. 1-5 organizations
  - b. 6-10 organizations
  - c. 11-15 organizations

- d. 16 or more organizations
- e. Don't know
- f. Prefer not to answer

99) What types of organizations did you refer clients to for other services? Please rank the applicable organizations.

Leave unused organizations blank. If you "Don't know" or "Prefer not to answer", type 1 next to the appropriate answer.

- a. DoD programs
- b. VA programs
- c. Community-based military programs (e.g., VFW)
- d. Other SBA programs (e.g., SCORE, WBC)
- e. Business assistance programs (not SBA-funded)
- f. Economic development programs
- g. Lenders
- h. Educational institutions
- i. Other (Please specify)  
< Text box here >
- j. Don't know
- k. Prefer not to answer

100) Please specify the "Other" chosen in the previous question.  
<text box>

101) What were the five most common reasons for referring a client to another service provider? Please list.

- < Text box here >
- Don't know
  - Prefer not to answer

102) Approximately what percentage of clients have you referred to another service provider? Please provide a percentage.

103) Was your list of referral organizations available to staff?

- a. Yes
- b. No
- c. Other (Please specify)  
< Text box here >
- d. Not applicable
- e. Don't know
- f. Prefer not to answer

104) How often did you update your list of referral organizations?

- a. Not updated on a regular basis, or updated as resources appear

- b. Monthly
- c. Quarterly
- d. Annually
- e. Biennially
- f. Other (Please specify)  
< Text box here >
- g. Not applicable
- h. Don't know
- i. Prefer not to answer

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**SATISFACTION WITH VBOC RESOURCES**

*The questions below pertain to the last 12 months*

- 105) To what extent do you agree that your VBOC had sufficient resources to provide services to clients? For example, do you have adequate staff? Or if your VBOC is located in a predominantly Spanish-speaking area, were there enough Spanish speakers on staff?
- a. Strongly Agree → go to 107
  - b. Agree → go to 107
  - c. Undecided → go to 106
  - d. Disagree → go to 106
  - e. Strongly Disagree → go to 106
  - f. Prefer not to answer → go to 106

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- 106) Please explain how your VBOC did not have sufficient and appropriate resources to serve clients. < Text box here >

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- 107) With regard to the incoming workflow, this VBOC was
- a. Under-staffed
  - b. Adequately staffed
  - c. Over-staffed
  - d. Don't know
  - e. Prefer not to answer

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**VBOC CHALLENGES, LESSONS LEARNED, AND BEST PRACTICES**

*The questions below pertain to the last 12 months*

108)What has been the greatest challenge that your VBOC has faced? Please explain.  
< Text box here >

109)Please explain your VBOC's best practices for client case management?  
< Text box here >

110)Please explain your VBOC's lessons learned for client case management?  
< Text box here >

111)What could SBA do to improve the VBOC program? Please explain.  
< Text box here >