

## Appendix B-1 Intake Survey Introduction

OMB Approval No: \_\_\_\_\_

Expiration Date: \_\_\_\_\_

Email script containing survey link:

Hello [first name],

Congratulations on being selected into the SBA Emerging Leaders Program! The following assessment is your first piece of homework for the program and will be used to help your instructor personalize the class. Please click the following URL to complete the survey by [DATE]:

[Survey link]

How will you and your instructor use this assessment?

1. You are taking it at the beginning of the curriculum in order to help you identify specific areas of improvement for your business. The assessment is a baseline for your own learning and growth.
2. The assessment helps your instructor know more about you, your fellow participants, and your business. She/he will use the results to identify the overall strengths and areas for development of the whole class.

This assessment is an important first step of the Emerging Leaders initiative. This baseline survey will collect data about you and your business. Three annual follow-up surveys after graduation will collect data on the progress you have made toward achieving your business-related goals and the value of services you received from Emerging Leaders. The data helps SBA evaluate the initiative. The results of this assessment will also be used by you and your instructor throughout the curriculum.

If you have any questions or concerns, feel free to reach out to us at [feedback@interise.org](mailto:feedback@interise.org). We look forward to receiving your assessment and value your honest and candid feedback.

Welcome to the program,  
The Interise Team

The estimated burden for completing this survey is 17 minutes. You may need your past year's financial information--including tax returns, payroll records, and Profit and Loss statement--available in order to complete the assessment. You are not required to respond to any collection information unless it displays a currently valid OMB approval number. The OMB approval number for this survey is 3245-[xxxx]. Comments on the burden should be sent to: U.S. Small Business Administration, 409 3rd Street, SW, Washington, DC 20416, and to: Desk Officer

SBA, Office of Management and Budget, New Executive Office Building, Room 10202, Washington, D.C., 20503. PLEASE DO NOT SEND COMPLETED SURVEYS TO OMB.

Survey start page script:

Please Read Before You Get Started:

This assessment is an important first step of the Emerging Leaders initiative. **This baseline survey will** collect data about you and your business. The results of this assessment will also be used by you and your instructor throughout the curriculum.

How will you and your instructor use this assessment?

1. You are taking it at the beginning of the curriculum in order to help you identify specific areas of improvement for your business. The assessment is a baseline for your own learning and growth.
2. The assessment helps your instructor know more about you, your fellow participants, and your business. She/he will use the results to identify the overall strengths and areas for development of the whole class.

If you need to save your responses, and return later to complete the assessment, press "SAVE" at the top of the page. A link will be emailed to the address you provide so you can access your partially completed assessment at the point where you left off.

Next Steps:

Once you press the submit button, an email with a copy of your responses will be automatically sent to you and your instructor. Your responses will be kept confidential as detailed in the consent form preceding the survey [see Appendix B-2]. Be sure to print a copy and bring it to your next session. Please feel free to contact [feedback@interise.org](mailto:feedback@interise.org) or 617.350.6300 if you need any assistance regarding your business assessment.

Enjoy the start of the program!