

## **SBA STEP Evaluation SBA Grantee Interview Discussion Guide**

Note: These discussions are designed to elicit feedback that can be used to improve STEP program service delivery both from the SBA to STEP awardees and from STEP awarded organizations to small businesses.

### **Introduction**

Thank you for taking the time to talk with us today about the State Trade Expansion Program (STEP). My name is [NAME OF INTERVIEWER], and I'm a researcher at 2M Research, a consulting firm specializing in research, program evaluation, and technical assistance. On the phone with me is my colleague [NAME OF NOTE TAKER], who will be taking notes during the interview.

SBA has contracted 2M to conduct an evaluation of STEP outcomes. As part of our evaluation efforts, we're conducting interviews with SBA leadership, STEP grant managers, and a sample of STEP grantees. This interview will focus on your perspective on the program, the process for implementing STEP grants in your state, your work with small businesses, your perspectives on the impact of the program in your state, and your recommendations for SBA. The information will be used to develop a better understanding of the program, share best practices with SBA, and inform SBA's work moving forward.

### **Confidentiality**

Your personal information will be kept confidential. We will organize responses from the interviews into general themes, and no individuals will be identified by name in reports.

### **Permission to Record**

We'd like to record today's interview so that we can ensure that our notes are accurate. We will not share the recording with anyone outside of the evaluation team. Do we have your permission to record?

[IF YES] Thank you. We'll start the recording now.

[IF NO] That's fine. We'll rely on our notes for this interview.

Do you have any questions before we begin?

### **Background**

I'd like to start our conversation by discussing the process in your state for managing STEP grants, and your role in that process.

1. What office or department within your state manages STEP grants?
2. What does your role entail?
  - a. How long have you been working on STEP?
3. Does your state have any other similar export programs?

## Working with small businesses

Let's talk now about your work with small businesses.

4. What marketing and/or outreach activities do you use to advertise STEP and to encourage small businesses to apply?
5. What is the application process for small businesses that wish to receive STEP funds?
  - a. What guidance is provided to small businesses completing the application process?
  - b. What criteria are used to select small businesses to receive funds?
  - c. What, if any, feedback is provided to declined applicants?
6. What types of activities do small businesses participate in using their STEP funds? (*Interviewer note: These activities should be one or more of the nine funded STEP activities; see end of protocol for list.*)
  - a. Of these, which activities are most common?
7. What do you consider to be best practices for implementing your STEP grant? (E.g., comprehensive screening process, strong partnership network, automation/online tools, export promotion programs are high priority.)

## Impact of the program

And finally, I'd like to ask about your perspective on the impact of the program.

8. From your perspective, what impact have you seen from STEP on small businesses in your state? (E.g., sales, number of small businesses new to exporting, increased number of exports, return on investment.)
  - a. [IF NEEDED]: What do you think is working particularly well in your state?
  - b. [IF NEEDED]: What challenges have you encountered?
9. How does SBA facilitate your work with small businesses (specifically regarding STEP)?
10. Do you have any recommendations for SBA for ways STEP could be improved?
11. Is there anything else about the program you think is important to share with us?

That completes our interview. I appreciate you taking the time to speak with me today. Thank you again!

## Interviewer Notes

STEP activities include (1) foreign trade mission; (2) reverse trade mission; (3) commerce subscription service; (4) website translation, SEO, localization; (5) international marketing media design; (6) trade show exhibition; (7) export training workshops; (8) export consultancy service; and (9) other export initiative.