

## Community Navigator Grantee Performance Reporting

As outlined in the Notice of Funding Opportunity, in addition to financial reports using SF 425 – Federal Financial Report (OMB Control Number 4040-0014), all grantees are also expected to submit quarterly performance reports to SBA. The reported information will help SBA to assess grantees’ program activity and the extent to which grantees are achieving desired program results and appropriately utilizing grant funds in support of the Community Navigator Program. Submission of these reports is necessary for grantee’s compliance with the terms of its grant.

According To the paperwork Reduction Act, you are not required to respond to a collection of information unless a valid OMB control number is displayed. The number for this collection of information is 3245-XXXX. The estimated burden for preparing and submitting each quarterly performance report is 2 hours If you have any questions or comments concerning this estimate or other aspects of this collection of information, please contact the U.S. Small Business Administration, Director, Records Management Division, 409 3rd Street, S.W., Washington, DC 20416, and/or SBA Desk Officer, Office of Management and Budget, New Executive Office Building, Room 10202, Washington, DC 20503.

Pages 28-30 of Notice of Funding Opportunity

### 5.5.2 *Performance Reports*

The Recipient will be required to submit quarterly narrative performance reports to SBA within thirty (30) days of the completion of each three (3) month period.

**To track progress toward achieving our goals and assess success of the program, SBA will monitor a set of performance metrics that include, but are not limited to:**

#### **Outputs and Evaluation:**

1. Number of unique clients who **receive assistance** in the development of their
  - a. **Loan application** (PPP, EIDL, 7(a), 504, Microloan, Exporting, Other Loan)
  - b. **Grant application** (Federal, State, Local, or Private Sector Grants)
  - c. **Other application** (Contracting certifications or other business assistance program)
2. Dollar (millions) **amount request** of completed
  - a. **Loan application** (PPP, EIDL, 7(a), 504, Microloans, Exporting, Other Loan)
  - b. **Grant application** (Federal, State, Local, or Private Sector Grants)
3. Dollar (millions) **amount of approved**
  - a. **Loans** (PPP, EIDL, 7(a), 504, Microloans, Exporting, Local Loans)
  - b. **Grants** (Federal, State, Local or Private Sector Grants)
4. Number of **counseling hours** to develop and submit
  - a. **Loan application** (PPP, EIDL, 7(a), 504, Microloan, Exporting, Local Loan)
  - b. **Grant application** (Federal, State, Local, or Private Sector Grants)
  - c. **Other application** (Contracting certifications or other business assistance program)
5. Number of **counseling hours** provided for:

- a. Disaster preparedness/recovery
  - b. Credit counseling, financial literacy
  - c. Business technical assistance (operation, marketing, sales, management, etc.)
  - d. Contracting and procurement
  - e. Other business development technical assistance (exporting, industry specific technical assistance)
6. Number of training hours
  7. Number of clients trained
  8. Number of clients receiving approved loan or grant funding **starting a business**
  9. Number of clients receiving approved loan or grant funding with their business **in operation (business survival)**
  10. Number of **jobs created or retained**
  11. Percent **increase of revenue (gross sale dollars)**

**Metric Crosscuts.** The SBA seeks to measure the outputs and outcomes through the following crosscuts:

- Gender
- Race
- Ethnicity
- Veteran Status
- Disability Status
- LGBTQ
- Business Status - Years in Business
- Business Industry
- Geography
- State
- Assistance from other Federal, State or local programs supported by American Rescue Plan or other Federal aid program related to COVID-19