

## Overview

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Dear EDA grantee,

This [questionnaire](#) is intended for **annual collection** of information on the program outputs (activities) sponsored under an EDA grant (or a cooperative agreement). Please report on all activities **cumulatively since the start of performance under the current grant**, unless stated otherwise.

**If you are a recipient of the [Capital Challenge](#) award, you will be prompted to respond to your program-specific questions.** For all other programs, questions are organized into the following categories:

1. Facilities and equipment\*
2. Events, networking, and referrals
3. Research and development and commercialization support
4. Financing support activities
5. Mentoring, coaching and training
6. Planning and institutional development activities (includes a subsection on CEDS)

***NOT all categories of questions will apply to the activities undertaken as part of your project, so you will be able to bypass any category that is not applicable to your project or skip or enter "N/A" in the case of inapplicable questions.\****

For the purposes of this data collection, unless specified, the word "client" can also mean "beneficiary", "stakeholder", "entrepreneur", "firm", or "borrower" (e.g., for the RLF program). For more information on methodology for this questionnaire, please visit: <https://www.eda.gov/performance/> or e-mail [programevaluation@eda.gov](mailto:programevaluation@eda.gov).

*\*Expansion/leasing of facilities or purchase of equipment for an economic development project.*

*Agency Disclosure Notice: This information collection is authorized by OMB control #0610-0098. Public reporting burden for this collection of information is estimated to average 1.5 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to U.S. Department of Commerce, (Economic Development Administration, 1401 Constitution Ave NW, Washington, DC 20230.). Respondents should be aware that notwithstanding any other provision of law, no person shall be subject to any penalty for failing to comply with a collection of information if it does not display a currently valid OMB control number.*

**General Information**

\* Please enter your EDA grant number:

\* The target beneficiary(ies)/client(s) of this grant is:

- Your organization (to undertake and promote effective economic development programs)
- Revolving Loan Fund borrowers
- Startups
- Small and medium-sized enterprises (SMEs other than startups)
- Firms (excluding startups and SMEs)
- Economic Development Districts (designated by EDA)
- Regional jurisdictions  
(including American Indian reservations-Federal and -State recognized, Alaska Native Regional Corporations , trust lands, and other Native lands)
- N/A (Research)
- Other (please specify)

\* Did your organization receive an [EDA Capital Challenge](#) grant?

- Yes
- No

### Capital Challenge Questions

\* Select activities supported through the EDA Capital Challenge:

- Planning of an early-stage seed fund
- Formation of an early-stage seed fund
- Launch of an early-stage seed fund
- Scale or expansion of the seed fund
- Creation or expansion of an **angel network** or similar efforts to support individual investors

**Capital Challenge**

For the following questions only enter a number (e.g., do not enter "USD" or "\$"). If a question is applicable, but there was no output, enter 0; if not applicable or information is not available, please enter or check "N/A". Unless stated otherwise, **please respond cumulatively since the start of performance under the current grant. All information reported should pertain to the project activities sponsored under an EDA grant.** *Only the questions with asterisks are mandatory.*

\* What is the total target seed fund size?

N/A

Total target seed fund size (USD):

\* What is the total amount raised for your current seed fund?

Not yet known (but expected)

N/A

Total amount (USD):

\* How many fund contributors (either limited partners, donors, grantors, etc.) have committed to the seed fund?

N/A

Number of fund contributors:

\* How many prospective investments were assessed?

N/A

Number of prospective investments assessed:

\* What is the total amount of capital deployed to investment companies?

Not yet known (but expected)

N/A

Amount (USD):

\* How many portfolio companies have you invested in during the span of the Capital Challenge project period?

N/A

Number of companies:

\* What is the average investment size the fund makes in portfolio companies?

N/A

Average investment (USD):

\* What is the time horizon of the fund?

Evergreen/open-ended

N/A

Time horizon (specify):

Is your fund operating in a designated [Opportunity Zone](#)?

Yes

No

N/A

Is your fund a federally registered Opportunity Fund?

Yes

No

N/A

**Capital Challenge Questions : Angel Network**

For the following questions only enter a number (e.g., do not enter "USD" or "\$"). If a question is applicable, but there was no output, enter 0; if not applicable or information is not available, please enter or check "N/A". **Unless stated otherwise, please respond cumulatively since the start of performance under the current grant. All information reported should pertain to the project activities sponsored under an EDA grant.** *Only the questions with asterisks are mandatory.*

\* How many **1-on-1 meetings** has your organization had with potential investors?

N/A

Number of meetings:

\* How many **outreach events** has your organization hosted to promote and educate potential investors?

N/A

Number of outreach events:

\* For each event type below, please provide the number of events held:  
If not applicable, please enter "1" in the N/A field.

Conference	<input type="text"/>
Networking Event/Meetups	<input type="text"/>
Workshops/Bootcamps	<input type="text"/>
Other	<input type="text"/>
N/A	<input type="text"/>

\* Please enter the total number of **unique participants** for these events:

N/A

Number of participants:

**Facilities & Equipment**

\* Did the EDA grant support expansion or leasing of **facilities** and/or leasing or acquisition of **equipment**?

(Yes/No)

*New facilities and equipment (including software) reflect physical expanding capabilities of EDA grantees. The questions in this section are only about the facilities and equipment existing or obtained in support of the scope of work under the EDA grant/cooperative agreement and do not include other tangential purchases or acquisitions.*

**All information reported should pertain to the project activities sponsored under an EDA grant/cooperative agreement.**

**Facilities and Equipment**

For the following questions only enter a number (e.g., do not enter "USD" or "\$"). If a question is applicable, but there was no output, enter 0; if not applicable or information is not available, please enter or check "N/A". Unless stated otherwise, **please respond cumulatively since the start of performance under the current grant. All information reported should pertain to the project activities sponsored under an EDA grant.** Only the questions with asterisks are mandatory.

How much space (sq. ft.) was available to your organization **prior to the EDA grant**? *If you had already responded to this question before, please leave blank; if the question isn't applicable, please enter "N/A".*

\* How much **new** space (sq. ft.) was developed or leased as a result of the EDA grant?

N/A

New space (sq. ft.):

\* If applicable, please specify the purpose of the facilities:

Incubator

Accelerator

Maker space

Coworking space

Scientific laboratory

N/A

Other (please specify)

\* What was the **total** value of new equipment (that includes software) that was purchased or leased as a result of the EDA grant?

N/A

Total value (USD)

Please specify the type of equipment purchased/leased:



**Events, Networking and Referrals**

\* Did this grant support **events, networking, and/or referral activities**?

(Yes/No)

*The questions in this section refer to activities such as showcases, exhibitions, networking or outreach events conducted under an EDA grant/cooperative agreement. Such events can help generate connections among stakeholders and facilitate the flow of information, ideas and resources within a region.*

**All information reported should pertain to the project activities sponsored under an EDA grant/cooperative agreement.**

**Events, Networking and Referrals**

For the following questions only enter a number (e.g., do not enter "USD" or "\$"). If a question is applicable, but there was no output, enter 0; if not applicable or information is not available, please enter or check "N/A". Unless stated otherwise, **please respond cumulatively since the start of performance under the current grant. All information reported should pertain to the project activities sponsored under an EDA grant.** Only the questions with asterisks are mandatory.

\* What type of events have you held as part of the scope of work under the EDA grant:

- Conference
- Showcase or exhibit
- Networking
- N/A
- Other (please specify)

If applicable, please provide more details on the events held:

How many of these events did you hold?

How many **unique** participants attended these events?

How many participants attended these events (in **total**)?

\* Focus of the events: (Check all that apply)

- Business development
- Pre-disaster economic planning
- Post-disaster economic recovery
- Regional economic diversification
- Emerging industries
- Global value chains
- Workforce development
- Showcasing of research and/or inventions of your clients
- Data and/or tools for economic development
- N/A
- Other (please specify);

If applicable, please specify industry (ies) these events focused on (Please use [NAICS](#) codes)

\* Since the start of the EDA grant, have you referred your clients to: (Please check all that apply)

- Technical expert
- Local business association
- Local economic development organization (including [EDDs](#))
- Investor
- State or local government
- Another federal agency
- N/A
- Other (please specify)

If yes, please provide more details on the referrals made:

How many referrals were made?

How many clients were referred?

Of the **referrals**, how many were to another federal agency program?

How many **clients** were referred to another federal agency program?

**R&D and Commercialization Support**

\* Did this grant support **research and development (R&D) and/or commercialization activities?**

(Yes/No)

*Key activities in this category include new research initiatives, connecting clients or beneficiaries to university partners, or assistance with technology transfer and commercialization of research (e.g., assistance with licensing, patenting, or other regulatory/government approvals) sponsored under EDA's grant (or a cooperative agreement).*

**All information reported should pertain to the project activities sponsored under an EDA grant/cooperative agreement.**

**R&D and Commercialization Support**

For the following questions only enter a number (e.g., do not enter "USD" or "\$"). If a question is applicable, but there was no output, enter 0; if not applicable or information is not available, please enter or check "N/A". Unless stated otherwise, **please respond cumulatively since the start of performance under the current grant. All information reported should pertain to the project activities sponsored under an EDA grant.** Only the questions with asterisks are mandatory.

\* How many clients did you assist with **technology commercialization or licensing** ?

N/A

Number of clients or beneficiaries assisted:

Which tools did you use to help guide your clients' work?

[Technology Readiness Levels](#) Tool

N/A

Other (please specify)

\* How many clients did you assist with **patenting** activities?

N/A

Number of clients or beneficiaries assisted:

If applicable, how many **patent applications** did you help your clients file?

\* How many clients did you assist with **collaborative agreements**?

*(Collaborative agreements include new, fully executed R&D agreements between at least two organizations where personnel, services, facilities, equipment, intellectual property, or other resources were provided with or without reimbursement toward the conduct of specified research or development efforts.)*

N/A

Number of collaborative agreements:

How many clients did you help with additional intellectual property rights strategies (e.g., [trademarks](#), [copyrights](#))?

N/A

Number of clients

\* Did **your organization or your clients** engage in the following research and development activities?

Proof-Of-Concept

Prototyping

Technology Scale-up

New Product Development

N/A

Other (please specify)

\* For **Trade Adjustment Assistance for Firms (TAAF)** program grantees: how many **firms** served had projects in their business recovery plans that were for the purpose of conducting research and development activities (e.g., new product development)?

N/A

Number of clients/firms with R&D business recovery plans:

\* For **TAAF program grantees**, how many **firms** had projects in their business recovery plans that included technology transfer and commercialization support activities?

N/A

Number of clients with technology transfer and commercialization activities in their business recovery plans:

**Financing Support**

\* Did this grant support **financing activities**?

(Yes/No)

*The questions in this section reflect EDA grant-sponsored activities that grantees undertake to secure new funding in support of their or of their clients' work - from assistance on grant applications to guidance on angel, seed or venture capital competitions.*

**All information reported should pertain to the project activities sponsored under an EDA grant/cooperative agreement.**



**Financing Support**

For the following questions **only enter a number** (e.g., do not enter "USD", "\$", or "sq. ft."). If a question is applicable, but there was no output, enter 0; if not applicable or information is not available, please enter "N/A". Unless stated otherwise, **please respond cumulatively since the start of performance under the current grant. All information reported should pertain to the project activities sponsored under an EDA grant.** *Only the questions with asterisks are mandatory.*

**Please note that the information on the amount of funding secured as a result of the activities reported below will be asked in the annual outcomes questionnaire at the end of the performance year.**

\* How **many clients** did you assist with securing:  
If not applicable, please enter "1" in the "N/A" field.

Seed funding	<input type="text"/>
Angel funding	<input type="text"/>
Venture Capital funding	<input type="text"/>
N/A	<input type="text"/>

\* How many **clients** did you assist with a grant and/or loan application(s)?

N/A

Number of clients (or beneficiaries or borrowers) assisted:

\* How many **clients** did you assist with obtaining other types of financial assistance (e.g., contract, etc.)?

N/A

Number of clients (or beneficiaries or borrowers) assisted:

\* How many grant, loan, or other types of financial assistance did **your organization** apply for in support of the scope of work under an EDA grant?

N/A

Number of applications:

If applicable, please specify the type/source(s) of funding:

\* For **Trade Adjustment Assistance for Firms (TAAF)** program grantees, how many **firms** served had projects in their business recovery plans that included financing activities?

N/A

Number of clients/firms with financing activities in business recovery plans:

**Mentoring, Coaching and Training**

\* Did this grant support **mentoring, coaching, and/or training activities**?

(Yes/No)

*These questions reflect EDA grant/cooperative agreement-sponsored activities that provide grantees and/or their clients with support for human capital, workforce, and business development. Key activities in this category include training, skills, or business assistance such as accelerator programs, market research, or assistance with marketing, sales, product development, exporting, or other operational assistance.*

**All information reported should pertain to the project activities sponsored under an EDA grant/cooperative agreement.**

**Mentoring, Coaching and Training**

For the following questions only enter a number (e.g., do not enter "USD" or "\$"). If a question is applicable, but there was no output, enter 0; if not applicable or information is not available, please enter or check "N/A". Unless stated otherwise, **please respond cumulatively since the start of performance under the current grant. All information reported should pertain to the project activities sponsored under an EDA grant.** Only the questions with asterisks are mandatory.

\* How many training or skill assistance sessions (including workshops and seminars) did your organization hold?

N/A

Number of sessions held:

\* Focus of the training or skill assistance sessions: (Check all that apply)

Data analytics

Leadership/Management

Project management

Marketing/Sales

Finance

Product development

Business development

N/A

Other (please specify); if industry-specific, please provide a NAICS code

\* What was the role (if any) of the **private sector stakeholders** in determining the focus of the training sessions reported above?

Focus and design of training developed in partnership with firms

Demand for skills expressed by the firms in the region (documented)

Training sessions co-sponsored by private firms (including in-kind contributions)

Binding agreement to match clients with jobs in those firms after training completion

N/A

Other (please specify)

\* How many clients (total) participated in the sessions reported above? (If not applicable, please enter "1" next to "N/A")

Number of firms

Number of clients  
(stakeholders)

N/A

\* How many bootcamps or accelerator programs did your organization hold? (If not applicable, please enter "1" next to "N/A")

Number of bootcamps

Number of accelerator  
programs

N/A

How many beneficiaries participated in the sessions reported above?

N/A

Number of beneficiaries:

\* How many mentoring or coaching sessions were held?

N/A

Number of sessions:

\* Did your organization provide any of the following types of business assistance to clients/beneficiaries? (Check all that apply)

Product development

Value chain analysis

E-commerce entry/expansion

Marketing, sales, or market research assistance

Exports assistance or advice

N/A

Other (please specify)

How many firms/stakeholders received the service(s) reported above?

Number of firms

Number of stakeholders  
(other than firms)

\* For **Trade Adjustment Assistance for Firms (TAAF)** grantees, how many **firms** had projects in their business recovery plans that were for the purpose of mentoring, coaching, and/or training activities?

N/A

Number of firms:

**Planning and Institutional Development**

\* Did this grant support **planning and institutional development activities**?

(Yes/No)

*The activities in this section are often led by **organizations that might not directly serve clients** but seek to improve institutional capabilities or pursue planning and research activities that will help grow regional economies as part of the scope of work under the EDA grant/cooperative agreement.*

*Please note that this section begins with a question that will let you proceed directly to the subsection on the development, update, and implementation of a Comprehensive Economic Development Strategy (CEDs).*

**All information reported should pertain to the project activities sponsored under an EDA grant/cooperative agreement.**

**Planning and Institutional Development**

\* Since the start of the grant or over the past six months, did you work on the development, update, and/or implementation of a [Comprehensive Economic Development Strategy \(CEDS\)](#) as a result of support from this grant?

- Development
- Update
- Implementation
- Did not work on CEDS
- Worked on CEDS and other institutional development activities



**Planning and Institutional Development**

For the following questions only enter a number (e.g., do not enter "USD" or "\$"). If a question is applicable, but there was no output, enter 0; if not applicable or information is not available, please enter or check "N/A". Unless stated otherwise, **please respond cumulatively since the start of performance under the current grant.** *Only the questions with asterisks are mandatory.*

\* Did your organization conduct any of the following activities? Please check all that apply.

- Research
- Feasibility study
- Disaster recovery, resilience or mitigation plan
- Economic impact analysis (including IMPLAN ©, REMI ©, or regression analyses)
- Non-CEDS economic development plan
- Development of a report/tool
- Workforce development study
- Cluster development study
- Market study
- Productivity improvement study
- N/A
- Other (please specify)

How many of the activities reported above **were completed**?

How many clients did you assist with the activity (ies) reported above?

- N/A
- Number of clients/beneficiaries/borrowers:

\* Did you host outreach events to increase visibility of the findings stemming from the activities reported above?

 (Yes/No/N/A)

\* If yes, how many participants (total) attended these events?

N/A

Number of participants:

Were you or your clients provided with **outside expertise or professional services**, such as consulting, relevant to the scope of work under this grant?

(Yes/No/N/A)

**Comprehensive Economic Development Strategy (CEDS)**

\* My organization worked on [CEDS](#)-related activities since the start of the grant (or over the past six months):

(Yes/No)

**Planning and Institutional Development (CEDS)**

For the following questions only enter a number (e.g., do not enter "USD" or "\$"). If a question is applicable, but there was no output, enter 0; if not applicable or information is not available, please enter or check "N/A". **All information reported should pertain to the project activities sponsored under an EDA grant.** Only the questions with asterisks are mandatory.

\* Over the past six months, how many times has the CEDS Strategy Committee met?

\* How many participating jurisdictions (e.g., the Economic Development District members and/or sub-jurisdictions) engaged in the development, update, and/or implementation of a CEDS?

Over the past six months, has the CEDS been actively used by a participating jurisdiction (or sub-jurisdiction) to inform a decision around economic development?

(Yes/No/N/A)

\* Have you proactively attempted to align or integrate the CEDS with another federally-funded planning document (e.g., HUD Consolidated Plan, FEMA Hazard Mitigation Plan)?

(Yes/No/N/A)

If yes, please enter the name of the other planning document:

\* Has the integrated plan been completed and submitted to EDA and/or another federal partner?

- Yes
- No
- N/A

Has the CEDS been used to support federal, state or local disaster recovery and/or resilience planning or projects?

(Yes/No/N/A)

**Narrative Section**

\* Is information on the reported outputs available at the county, census tract, or tribal area level? If possible, please provide the [census tract numbers](#), [FIPS codes](#), or Native American reservations/ trust lands/area names.

- No
- N/A
- Yes, list geographic information:

Did you use any of the tools listed below to plan or assess the progress of project?

- [StatsAmerica Regional Innovation Index](#)
- [Stats America: CEDS Resource Library](#)
- [Stats America: the Regionizer](#)
- [StatsAmerica: Measuring Distress](#)
- [StatsAmerica: Opportunity Zones](#)
- [StatsAmerica: Cluster Mapping](#)
- N/A
- Other (please specify)

Please use this section for additional comments (e.g., use this space to report on progress or success story resulting from the EDA grant, etc.):

As of the date of this report, how have the sponsored activities benefited the distressed communities or underserved populations?