

MARICOPA SBDC COUNSELOR EVALUATION PROCESS

Updated 8-10-10

1. Traditional performance appraisal process is not employed for special status employees
2. Employment subject to need and subject to continuation of grant funding
3. SBDC is performance based, using State Network criteria for counselor performance, adherence to standards, and percentage of Center goals set by State Office and U.S. Small Business Administration
4. Specific Criteria shown as follows:
 - a. Key Performance Indicators (see Chart)
 - b. Goals (see Chart)
 - c. Other criteria:
 - i. Advocacy activities
 - ii. Team behavior & Cooperation (See Below)

Be Authentic & Respectful

- Value individual contributions and differences and empathise with others' situations
- Do what we say we will do and deliver on our promises
- Speak up and have open, honest and constructive conversations
- Encourage others to share their ideas and actively listen to and respect their ideas

Work Together

- Work collaboratively and support others to achieve the right outcome for our customers and organization
- Share ideas, knowledge and experience across the organization
- Do what is right for the customer, community or organization, putting aside own agenda
- Connect employees, customers and the community to help them achieve their outcomes

Create Value Through Excellence

- Be passionate about creating value through high standards of performance
- Be action oriented and innovate to find better ways of doing things to exceed our customers expectations
- Use quality data and facts to support outcomes and provide sustainable performance for our organization
- Reward, recognize and celebrate high levels of achievement and success
- Act like owners of the business and take accountability for issues, decisions and actions that matter for our customers and community

AZSBDC PERFORMANCE METRICS

Dashboard:

- | | |
|--|--------|
| 1. Counseling - % pre-venture counseling clients | <= 35% |
| 2. Training - Conversion % attendee to AB client | 5% |
| 3. Startup Success - % of pre-venture to startup | 50% |
| 4. Segmentation - % clients w/ AB Matrix Score | >= 50% |
| 5. Staff Utilization - Staff hours available after dilutions | >=50% |
| 6. Client Satisfaction - Surveys Very good to Excellent | >=90% |

Reportcard:

- | | |
|------------------------------------|------|
| 7. Jobs | |
| New Jobs | Goal |
| Retained Jobs | Goal |
| 8. Sales Increases | |
| Increased revenues | Goal |
| Saved revenues | Goal |
| 9. New Capital | |
| Loans, investment, etc. | Goal |
| 10. Client Hours | |
| Long Term Clients (5+ hrs. 1 year) | Goal |
| Extended Clients (5+ hrs 3+ years) | Goal |
| 11. Startups | Goal |

Scorecard:

- | | |
|--|--|
| 12. Counseling | |
| 1. New Clients | |
| 2. Total Clients | |
| 3. PreVent Clients | |
| 4. Total Contact | |
| 5. Average Contact | |
| 6. Total Contact and Prep | |
| 13. Training | |
| 1. # of attendees/hours | |
| 2. # of workshops | |
| 14. Impact | |
| 1. ROI's | |
| 1. Capital | |
| 2. Revenues | |
| 15. Satisfaction | |
| 1. Counseling – 90% rating good to excellent | |
| 2. Training - 90% rating good to excellent | |