



Mel King Institute  
for community building



ENTREPRENEURSHIP  
ADVANTAGE, INC.  
TRAINING, CONSULTING, EMPOWERMENT & BEYOND

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## **Raising the Standard for Business Technical Assistance**

*An Advanced Training Program for  
Technical Assistance Providers*

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**Technical Assistance Provider  
Advanced Training Program**

**1. PROGRAM DESCRIPTION**

The Mel King Institute, a collaborative enterprise that leverages the resources of many institutions, including MACDC, LISC, Mass Housing, NeighborWorks America, Massachusetts Housing Partnership, Community Economic Development Assistance Corporation, Department of Housing and Community Development and several CDCs, will offer an advanced training program for Business Technical Assistance providers in Massachusetts beginning January 2010. The program is targeted toward seasoned practitioners along with executive directors. The primary objective of this program is to raise the standard of business assistance by providing knowledge, tools and resources that will translate into measurable skills improvements. The following program has been designed based on the input from 15 key stakeholders: TA providers, Executive Directors of CDCs, lenders and government officials. (A summary of the key interviews are attached as an appendix.)

General Flow of the Course

Program Design: 12 month program, dates to be determined

- ✓ 6 full day training modules, conducted every other month
  - Training modules will be conducted from 10am to 4pm at a location to be determined.
- ✓ Participants will be given tasks to complete and new processes to implement. Each participant will report back and give a brief presentation on progress during the next training session.
- ✓ To maximize the effectiveness of the program and to help TA Providers address the particular nuances of their specific clients, this program provides up to 1 hours of one-on-one consulting between each module.
- ✓ An online discussion board will be developed and monitored to encourage ongoing collaboration and support among TA Providers and instructors.
- ✓ An Awards Graduation Program with state and local stakeholders will conclude the event.

### Program Deliverable:

Each TA Provider and or Executive Director will develop and present a TA Program Delivery Guide, that outlines new practices, including intake, assessment, client relationship management and new business development templates, tools and resources. Participants will also document current practices that they will continue as they were affirmed by the course.

## **2. STATEMENT OF GOALS FOR THE COURSE**

Based on the interviews and research, it is clear there has not been enough focus on the level of training and support provided to TA providers to maximize their effectiveness in driving economic development through entrepreneurship. This program will help TA providers leverage their existing knowledge and strengths and compliment their existing skills and resources to deliver a consistent level of technical assistance to the small business community throughout the state. The program will focus, in particular, on how to help businesses in economically distressed areas and entrepreneurs who come from traditionally disadvantaged populations such as immigrants, people of color, low income people, etc. Specifically, the Program will provide training in the following subject areas:

- Success Measures for TA Providers
- Consulting/Client Relationship Management
- Business Plan Fundamentals for Start-ups
- Existing Business Strategic planning and Diagnostic Tools
- Financial Sustainability/Asset Management.
- Executive Management of small business programs

## **3. PARTICIPANT EXPECTATIONS**

This program will not achieve its stated objectives unless key stakeholders are engaged. This is a year long program designed to provide TA Providers with actionable tools and resources to help “make their lives easier” while providing a consistent level of support to their clients. We ask that Executive Directors partner with the TA Provider throughout the process and engage in substantive discussions with the TA Provider during and after the training. We recommend that TA Providers and ED’s collaboratively implement new processes and client relationship management methodologies that meet the needs of their funding sources.

## 4. SYLLABUS

This advanced training program is structured around the TA Provider's current process, beginning with intake and assessment. The program builds, module by module in a logical and progressive manner. It should be understood that the program is structured but will be flexible to meet the specific needs of the TA Providers in the program. We will customize the program in real time, based on the unique needs and interests of the TA Providers.

### **Module #1: - Success Measures for TA Providers**

Instructors: Jason Friedman and Marian Doub, Friedman Associates

#### *Program Introduction:*

We will begin the program with a brief introduction from the Program Sponsors (MACDC and Mel King Institute) regarding the program, the deliverables and the commitment from the State, (if possible). Program Sponsors will introduce the Program Directors (E. Thornton, D. Stoddard). Program Directors will provide an overview of the twelve month program.

#### *Module Content:*

TA Providers are facing increasing scrutiny from funders to provide clear evidence they are producing tangible outcomes. The focus of this module is to learn how to:

- ✓ Develop a dynamic outcomes management system to demonstrate tangible long-term client outcomes;
- ✓ Develop a logic model/theory of change based on your mission;
- ✓ Determine program data collection needs;
- ✓ Determine the measures to demonstrate program performance and client outcomes;
- ✓ Utilize emerging industry standards in data collection and program and client outcome reporting;
- ✓ Review current Management Information Systems (MIS) software utilized by TA providers and their benefits and features and strengths and weaknesses; and
- ✓ Utilize performance data for advocacy and fundraising.

#### *Key Learning Objective:*

TA Providers will learn a process to better internally define and manage their client outcomes management processes for maximum client and funder benefit.

*Homework:* Develop a program logic model or theory of change and report back progress, obstacles or new ideas, at the beginning of the next session.

*Consulting:* Support will be provided via e-mail or phone by Friedman Associates

*On line Discussion:* Participants are encouraged to share their experience with developing their program logic model or theory of change.

## **Module#2 -- Successful Practices in Client Assessment, Consulting and Retention**

Instructors: Jason Friedman, Friedman Associates

*This module we begin with a review and report back of the homework assignment. The goal will be to build consensus regarding key tactical approaches for effective client intake and assessment prior to services, as well as successful practices in services for client retention and growth.*

### **Module Content**

- ✓ Introduction to "No Wrong Door Approach" - how community based non-profit organizations are creating multiple access points for entrepreneurs to access services (beyond just the training program) and meeting clients "where they are."
- ✓ Different models/approaches for client assessment and screening (for training and technical assistance), with a focus on underserved populations
- ✓ Successful practices in addressing client confidentiality, referral procedures to human service agencies and staff-client boundary issues. Special attention will be placed on a framework for working with very low-income clients.
- ✓ Innovations and tools in post-training and post-loan technical assistance/coaching programs
- ✓ Emerging practices in creating a membership program for client retention and growth

### **Key Learning Objective:**

TA providers will be able to effectively assess their program model for assessing personal and business readiness needs; supporting client business start-up and sustainability; and how to more effectively manage their relationship with clients.

*Homework:* Develop a draft program plan for post-training and/or post-TA coaching services using staff and/or volunteers and contractors.

*Consulting:* Support will be provided via e-mail or phone by Friedman and Associates

*On line Discussion:* Participants are encouraged to share their experience with client relationship management

### **Module#3 -- Business Plan Fundamentals –For Start-up**

Instructors: Elizabeth Thornton, Donna Stoddard, Entrepreneurship Advantage, Inc.

The module will begin with a review of the tactical processes that were developed and implemented in module 1 and module 2. TA Providers will share their experiences with using new processes and intake techniques.

#### **Module Content**

- ✓ Overview of new logic: Entrepreneurial Thought and Action
- ✓ Managing the client process from pre-concept to business plan development
- ✓ Review of new theory and practice related to:
  - Finding opportunity
  - Evaluating opportunity
  - Shaping opportunity
  - Concept development and business planning
  - Marketing, selling and pitching
  - Operations, using technology for maximum efficiency and environment sustainability

The pedagogies that will be used in this module include break-out sessions, video, group presentations and some lecture. There will be strong emphasis on acquiring knowledge about the primary and secondary topic areas of entrepreneurship and developing strong skills in guiding the entrepreneurial process for aspiring entrepreneurs. The Babson philosophy emphasizes both content and process areas of entrepreneurship education.

#### **Key Learning Objective:**

There is new evolving logic regarding the entrepreneurial process. TA Providers will be armed with new ways of framing and guiding the client in the opportunity shaping and business development process.

*Homework:* Review your existing business plan templates and look at ways to simplify or otherwise revise tools based on new approaches. In preparation for the next module, bring in three years of financial statements: balance sheet and income statements for one of your clients and read the pre-reading that will be mailed to each participant in advance. Laptops are required if available.

*Consulting:* Support will be provided via e-mail or phone by E. Thornton, D. Stoddard

*On line Discussion:* Participants are encouraged to share their experience with managing the business planning process.

## **Module#4--Strategic Planning and Diagnostic Tools for Existing/Emerging Businesses**

*We will begin the module by reviewing components of a strategic plan. This is a full day program with on-going consulting support.*

### Module Content

- Overview of financial analysis
- Review of financial statements
- Review of ratio tree
- Identification of historical trends and key ratios upon which to focus further financial analysis

*One-on-one coaching will be available to support analysis of financials and identification of problem ratios.*

- Identify links between identified ratios to specific functional areas of the business
- Identify internal problem areas within each function using the “operational tree”
- Develop a take-away plan to investigate and develop potential solutions for the identified areas for concern and/or improvement
- Operational significance of specific ratios
- Tactics for improving financial performance
- Deconstruct the problem
- Identify a range of solutions to the problems
- Fine tune and validate potential strategies
- Identify impact of potential strategies
- Choose high potential strategic alternatives
- Quantify the impact of proposed strategies
- Develop tactical plan

This will be a highly interactive hands-on experiential learning module.

### Key Learning Objective:

TA Providers will be provided a tool to diagnose the condition of their existing, emerging businesses. TA providers will be able to assist clients in diagnosing the current condition of the business and guide them through the development of an action plan to improve performance.

*Consulting:* Support will be provided via e-mail or phone by E. Thornton, D. Stoddard

*Homework:* Bring in a case/client profile outlining the lending process that you supported within the past 12 months. Who was the lender, who was the entrepreneur, what type of business, loan amount, terms, process etc.

## **Module#5-- Financial Sustainability/ Asset Management**

Instructor: Donna Stoddard

### Module Content:

- ✓ What's changed in lending?
- ✓ Who are the lenders, public, non-profit and private lenders and what are the differences?  
How to determine which lender to approach
- ✓ What deliverables does the lender expect from the client prior to loan approval?
- ✓ What documentation does the lender need from the client "post approval?"
- ✓ How can the TA provider assist the client when working with a lender?
- ✓ What is the role of the TA provider, post loan, i.e. what should they do to manage the loan portfolio?

### Key Learning Objectives:

TA Providers play a key role when clients who seek loan financing by helping clients assemble the documentation required by lenders for loan approval. With the downturn in the economy and the tightening of credit, underwriting lender expectations and requirements have changed. Lenders have also introduced new product offerings.

In this module, TA providers will meet with lenders to understand the emerging landscape of small business lending. TA providers will also learn how they can help their clients, post loan, to ensure that the client fulfills lender reporting requirements.

*Consulting:* Support will be provided via e-mail or phone by E. Thornton, D. Stoddard

*Homework:* none.

## **Module#6-- Building Institutional Capacity for Sustainability and Growth**

Instructor: Jason Friedman, Friedman Associates

Module Content:

- ✓ The Challenges and Opportunities Facing Small Business Development Programs Operating Within Multi-Purpose Organizations
- ✓ Developing A Strategy for Increasing the Sustainability of Your Small Business Development Program in a Recessionary Economy.
  - Assessing Current Capacity for Growth and Sustainability
  - Simple Steps to Increase Internal Capacity for Fund Development
  - Simple Steps to Increase Internal Capacity for External Communications for increased visibility and support
  - Strategies to Engage Your Board of Directors to Increase Sustainability and Growth

Learning Objectives: Despite the fact that small business is critical to the economic recovery, small business development organizations and programs continue to face challenges in funding for operations, capital and technical support for entrepreneurs. This module is designed to be a “roll up our sleeves” working session between the consultant and Executive Directors and senior staff to facilitate a dialogue and address the internal and external challenges facing the sustainability of their small business development programs. The key learning objective is to help them develop a process to assess the current state of their program and develop an action plan to increase programmatic and/or institutional sustainability. A core focus will be on practical strategies programs can take now, with current resources, to better position themselves to be seen as part of the solution to the economic recovery and attract more support. In advance of the training, participants will complete an assessment tool that diagnoses organizational capacity in key areas and share their results with colleagues. The results will be used to guide the training and discussion on building capacity in fund development, strategic communications and marketing, and governance (the role of the Board of Directors).

### **Graduation Celebration – Award Ceremony – 10 am – 2pm**

*We will invite Secretary Bialecki and other key stakeholders to a closing Award Ceremony.*

### **Technical Assistance Providers and Executive Director Presentations**

- Each TA/ED team, delivers 10 minute presentation
- Peer-to-peer plan reviews
- Award Luncheon

