

Program Report

July 2013

THE NORTH END and
CITY OF MILWAUKEE

BUSINESS CAPACITY BUILDING PROGRAM



Participating BCBP Companies:

JCP Construction
Maures Development Group, LLC
PL Freeman
Ranson Construction Company

Program Website: <http://city.milwaukee.gov/bcbp>



Program Report
Prepared by: Heartland Information Research



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1. Background

The City of Milwaukee's Business Capacity Building Program (BCBP) was developed to increase the growth and sustainability of minority-owned construction companies utilized by developers for projects in Milwaukee. This summary report highlights the activities and results of the first BCBP pilot program offered to contractors working on the North End Development Project (NEDP) headed by the Mandel Group in Milwaukee.

1.1 BCBP History

The concept for the BCBP originated in 2010 when a need was identified to increase the available pool of qualified minority-owned contractors in Milwaukee to support developers working on projects in the city. The BCBP pilot program design began in April 2012 when the City's Office of Small Business Development (OSBD) and the contracted BCBP program manager, WOO Connections, started meeting to develop a program schedule and the outline of topics to be incorporated.

After completing an initial draft of the program outline and a rubric to measure participant completion, OSBD formally launched the pilot BCBP on May 23, 2013 at a kick-off reception held at the NEDP development site. The pilot program culminated in June 2013 with BCBP participants delivering their final presentations at a meeting held inside the newly completed NEDP facility.

The BCBP was funded using a portion of the project's tax incremental financing (TIF) provided by the City of Milwaukee.

1.2 BCBP Participant Recruitment

The identification and recruitment of potential BCBP participants had begun in February 2012 by inviting contractors already working on the NEDP. The participant selection criteria focused on recruiting established companies that would be in better positioned to grow capacity versus targeting startup firms that might lack the infrastructure, access to capital or experience required to increase capacity in the near-term.

After an interviewing process with each potential participant, five companies were selected to participate. One of these companies ultimately opted not to participate and another was unable to fully complete the program due to severe cash flow issues that arose during the program that were unrelated to the NEDP.



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The three remaining companies successfully completed all of the program requirements. The fourth company with financial issues remained committed to the BCBP and completed a substantial portion of the deliverables before having to disengage in order to focus on more immediate business challenges. Based on the pilot BCBP recruitment process, improvements for future BCBP implementations should include the following requirements.

- review of BCBP applicant's company financial condition
- a financial stability letter provided by the applicant's bank
- participant agreement signed by the applicant

On a positive note regarding the one company experiencing extreme financial distress, the involvement in the BCBP allowed them to seamlessly handoff their NEDP contract work to another BCBP participant. As a result, the NEDP development did not experience any scheduling delays that would have reflected negatively on the use of minority-owned contractors on the NEDP.

1.3 BCBP Program Components

There are four components of the BCBP that mark a significant departure from the conventional classroom-based instructional methods often employed in small business capacity building programs.

1. **Forgivable Loan** –

For participants successfully completing the BCBP, they had the opportunity to qualify for up to a \$30,000 forgivable loan. This investment is intended to support these companies in the implementation of their near-term and long-term growth plan developed during the BCBP.

2. **Development Project Centric** –

All of the participants had contracts to perform work on the NEDP. Working together on the same project during the program resulted in frequent job site interactions that further strengthened the business and personal relationships between participants.

3. **Individual Business and Personal Coaching** –

Participants were provided with an individual business coach and a personal coach during the program. The coaches helped develop growth plans, identify key issues and implement action plans for the business as well as personal development.

4. **Peer Group Development** –

The monthly work sessions were guided by Action Learning methodologies that draw upon the experience and knowledge of the participants to help one another work through challenges



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and pursue new opportunities. This approach taught participants that other business owners can provide valuable insights and support when business challenges and opportunities arise.

1.4 BCBP Program Assessment

To assess the BCBP program content delivery, measure the overall program effectiveness, offer recommendations during the course of the program and provide improvements for future implementations, Heartland Information Research (HIR) was invited to assist OSBD with the assessment effort.

Both qualitative and quantitative methods were employed to capture relevant information relates to the BCBP performance. The paragraphs below provide brief descriptions of the selected methodologies.

1. **Monthly Contact** – The reviewing of monthly session participant evaluation forms and maintaining regular dialog with participating companies helped detect program deficiencies and dissatisfaction.
2. **Pre and Post BCBP Assessments** – A pre-BCBP assessment was performed for all participating companies. This assessment consisted of collecting each company's key performance information and financial data, analyzing the data to establish a comparison baseline and comparing the data to similar size companies in the same geographical area to benchmark the company's performance within the industry.

The same assessment was repeated after the conclusion of the BCBP to measure improvements achieved as the result of BCBP participation.

3. **Six, Twelve and Twenty-four Months Follow-up** – Repeat the assessment at six, twelve and twenty-four month intervals after the end of the BCBP to measure the program long-term impact in a company's growth, employment and sustainability.
4. **Mid-Point and End-of-Program Surveys** – Online and paper surveys were conducted during the mid-point and end of program. These surveys included participants, business coaches and business plan development consultants.
5. **Feedback** – Participant interviews were conducted by HIR during the mid-point and at the end of program. Stakeholder feedback was collected at the end of program.
6. **Observations** – Ongoing observation from attending meetings and events often proved to be one of the most effective assessment tools in early problem detection.



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1.5 BCBP Participants

Full contact details are provided at the end of this report for the four participating companies.

| Company | Website | Ownership |
|--------------------------|--|--------------------------|
| JCP Construction | www.jcp-construction.com | African American |
| Maures Development Group | www.mauresllc.com | Woman & African American |
| PL Freeman | www.plfreeman.com | African American |
| Ranson Construction | www.ransonconstruction.com | Native American Indian |



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2. Program Description

The overall objective of the BCBP pilot program was to provide an innovative approach that incentivizes participating companies to increase their business capacity so they can assume larger roles on future projects in Milwaukee. The BCBP targeted the following five areas.

- a. Increasing Business Revenues
- b. Improving Profitability and Sustainability
- c. Creating New Employment Opportunities
- d. Identifying New Customers and Markets
- e. Establishing Relationships with Potential Partners and Resources

Program Components

The BCBP incorporated multiple personal and business development components to help participants identify and address barriers to growth. The program consisted of five key components.

- a. Coaching
- b. Action Learning
- c. Business and Personal Plan Development
- d. Group Learning – Monthly Sessions and Workshops
- e. Relationship Development – Networking and Other Events

The BCBP Component Diagram shown on page 9 illustrates how these components worked together to create a structure for near and long-term business growth.

While none of these components by itself represents a major advancement in business capacity building methodology, the incorporation of these within a single program is unique and to HIR's knowledge unprecedented in Milwaukee.

Because growth barriers often involve a complex combination of financial, operational, market, business, technical, human capital and personal development issues, programs that only focus on one dimension have limited impact by leaving related issues unresolved. The BCBP's innovative approach proved to be effective in addressing a broader range of issues limiting the growth of businesses and their owners.



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2.1 Coaching

Ten hours of individual business coaching sessions and six hours of personal coaching sessions were incorporated in the BCBP. As shown in the BCBP Component Diagram, coaching acted as the cornerstones allowing participants to work one-on-one with a professional to first identify and then develop action plans to address key issues.

The BCBP program manager included this coaching component based on decades of experience facilitating personal and professional development programs. The combination of both business and personal coaching helped participants recognize and begin addressing root causes that over time manifested into complex growth barriers.

A comment made by a BCBP participant during the final interview process illustrates the powerful impact that the business and personal coaching combination had on participating companies.

“Business/Personal Coaching for me previously was a “myth” or a word people just tossed around. But now I am a believer!! Our business coach actually changed the culture of our office by making us understand how to utilize all of our resources. As



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for my personal coach she reaffirmed that I was on the right track in my life. Both coaches identified key elements in our company that has helped us grow in a way no one had thought we would... We are forever in debt.”

Another participant commented:

“For small businesses, coaching becomes an integral component to the sustainability and growth of a firm. It is important for business owners to understand how one’s personal life and mental state impacts the trajectory of the business.”

The business and personal coaching components are further described below along with insights on how these were integrated into the overall program.

Business Coaching

The BCBP business coaching component was designed to allow participants to select their coach from a pre-qualified group of professional business consultants. This approach gave participants an opportunity to ‘speed network’ with a pool of potential coaches at a networking event held on June 27, 2012. During this informal evening event, participants sat down individually with each of the prospective coaches to explore their areas of expertise and coaching style.

The business coaches selected by the participants included Jim Milner of Sector Management Consulting Group LLC, Cuauhtemoc (Temo) Rodriguez from AtVantage Business, Deneine Powell from Lilly & Hampton Consulting Inc. and William Krugler. These coaches met at least monthly with their BCBP businesses to help review issues, develop growth strategies and apply the concepts introduced during the BCBP monthly sessions and quarterly workshops.

Personal Coaching

Personal coaching sessions were provided by Wide Awake, Inc, which is a transformational leadership consulting and executive coaching firm serving clients nationwide from the main office in Vancouver, Washington. Sandye Brown, the founder of Wide Awake, is a Master Certified Coach with 25 years of experience teaching people how to use the art, science and spirit of coaching to reinvent themselves and the organizations they lead. She introduced the concept and benefits of personal coaching at a three hour workshop on February 5, 2013.

Following this personal coaching group session, participants were provided additional hours of private coaching with Sandye during the BCBP program. Personal coaching was a new concept



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for most of the participants who were openly skeptical of any benefits offered by this type of soft skill professional development process.

During final interviews with participants, and also at their final presentations on June 12, 2013 all of the participants were enthusiastic about the experience and the development of leadership and personal goals during their personal coaching experience.

2.2 Action Learning

The Action Learning component helped participants translate their issues into action-orientated business plans and personal growth plans. This activity was introduced at the monthly sessions by Gayle Peay from Innovation Space Training & Development Services.

Action Learning creates a peer-based learning environment using facilitated inquiry-based discussions. This approach is designed to help participants work through complex and evolving issues by having peers ask clarifying questions to identify underlying causes. Further questioning by peers is then used to reveal and explore creative possibilities for action.

The individual bringing the issue to the table is then held accountable by the group for taking the decided action by reporting back to their peers on an agreed upon schedule. During the BCBP, this report-in occurred during the monthly sessions.

2.3 Business and Personal Plans

The written business plans and personal plans developed over the course of the program provided participants with a roadmap to achieve both near-term and long-term objectives. A business plan consultant and a financial forecasting consultant assisted each participating company with completing these program deliverables.

The business plans developed during the BCBP included:

- Business Strategy
- Marketing Plan
- Financial Plan and Forecasted Statements
- Staffing and Sustainability Plan

Personal action plans were also developed as outcomes of the personal coaching sessions and Action Learning topics explored during the monthly BCBP working sessions.



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To provide consistency in the final business plans produced by each of the participating companies, Deneine Powell (one of the business coaches), was engaged to assist the companies with drafting these plans following a common outline. In addition, Brent K. Oglesby from Dewy Rose Capital Ventures worked with participants to generate comprehensive financial projections. The format used allowed flexibility so each company could personalize the plan according to their business culture, vision and strategic directions.

2.4 Group Learning

Monthly Sessions

The middle section of the BCBP Component Diagram shown on page 9 encompasses three types of meeting activities designed into the program. These were a combination of monthly sessions, quarterly workshops and networking events.

There were eleven learning focused monthly sessions featuring guest speakers which covered topics such as business planning, funding, employee management, marketing strategy, understanding financial statements and other key business subjects. During these sessions, participants became familiar with each other's businesses and through Action Learning were able to help one another develop creative approaches to pressing issues.

Quarterly Workshops

Four quarterly learning focused workshops introduced key concepts including:

- 1) Business Model Generation methodology for planning and executing business growth plans
- 2) professional relationship development
- 3) personal coaching
- 4) human capital management and succession planning

These workshop events also provided participants with an opportunity to network with other companies, developers, funders and business resources.

2.5 Relationship Development

Through five business to business networking events, the BCBP participants improved their networking skills and were able to effectively network and build relationships with potential partners, customers and business resources. These events were held in a variety of locations around Milwaukee to attract additional attendees for networking and promote the BCBP participants within the business, construction and property development communities.



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3. BCBP Program Overview and Work Plan

The BCBP program manager developed the program schedule shown on page 14 for the BCBP. This schedule was regularly refined over the course of the program in response to participant feedback, the identification of new topics useful for helping participants build capacity and input from program assessment activities.

The program was divided into four learning modules. These modules were sequenced so each module built upon the previous modules.

- Successful Business Models
- Marketing, Promoting and Leveraging Relationships
- Financing and Capital Management
- Human Capital, Process Efficiency and Succession Planning



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BUSINESS CAPACITY BUILDING PROGRAM (North End Development Project)
PROGRAM OVERVIEW – WORK PLAN

| Date | Session | Topic | Activities / Tools / Resources | Speaker(s) / Facilitator / Professional Service Provider |
|-------------------------------|---|--|---|---|
| 05/23/12 | Program Kick-Off Reception- The North End (Business to Business Networking) | | | |
| 1st Quarter | Monthly Session 1 June 15 | Program Kick-Off Retreat <ul style="list-style-type: none"> Program Overview Initial Business Assessment / Readiness Relationship Development Rubric Overview | <ul style="list-style-type: none"> Intro to Initial Assessment Intro to Program Evaluation | <ul style="list-style-type: none"> Program Team Guest Presenter : Rocky Marcoux Opening Remarks Heartland Information Research |
| 06/27/12 | Speed Coaching Event - Coach Matches - BlackThorn (Business to Business Networking Event) | | | |
| MODULE 1 | SUCCESSFUL BUSINESS MODELS | | | |
| | Monthly Session 2 July 11 | <ul style="list-style-type: none"> Intro to Business, Financial, Strategic Plan Development | <ul style="list-style-type: none"> Intro to Key Performance Indicators Intro to Action Learning | <ul style="list-style-type: none"> Program Team Heartland Information Research Guest Presenter : Kamela Goodwyn |
| 08/08/12 | Coach Training with Business Coaches – Manpower | | | |
| | Monthly Session 3 August 8 | <ul style="list-style-type: none"> Meet Your Coach Action Learning #1 | <ul style="list-style-type: none"> Action Learning / Group Coaching Program Agreements | <ul style="list-style-type: none"> Program Team Coaches Heartland Information Research |
| 08/30/12 | Strategies for Small Business Success – Serendipity or Strategy? – Milwaukee Yacht Club Guest Presenters: Margaret Henningson (Women’s Fund) & Bill Beckett (Chryspac) (Business to Business Networking Event) | | | |
| | Monthly Session 4 September 12 | <ul style="list-style-type: none"> Action Learning #2 Intro to Business Model Generation Intro to Business Planning Process | <ul style="list-style-type: none"> Action Learning / Group Coaching Business Model Canvas | <ul style="list-style-type: none"> Program Team Heartland Information Research Guest Presenter : Matt Richardson (SmartWave) Guest Presenter : Deneine Powell |

* Monthly sessions, excluding Program Retreat are 2 hour sessions (2nd Wednesday each/month - 10:30am-12:30pm)

* Quarterly workshops are 3-4 hour sessions

* Participants are expected to meet with mentors/coaches one time per month



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BUSINESS CAPACITY BUILDING PROGRAM (North End Development Project)
PROGRAM OVERVIEW – WORK PLAN

| MODULE 2 MARKETING, PROMOTNG & LEVERAGING RELATIONSHIPS | | | | |
|--|---|---|---|---|
| | Monthly Session 5 October 10 | <ul style="list-style-type: none"> Personal Branding Connecting vs. Networking | <ul style="list-style-type: none"> Action Learning / Group Coaching Personal Leadership Development | <ul style="list-style-type: none"> Program Team Presenter : Genyne Edwards |
| 10/17/12 Workshop | Business Model Generation Workshop – City of Milwaukee Facilitated by Matt Richardson (SmartWave) | | | Resources: Business Model Generation Book & Canvas |
| | Monthly Session 6 November 14 | <ul style="list-style-type: none"> Leveraging Relationships / Business Development / Strategic Alliances On the Job Training Program Trends in Sourcing & Diverse Business Relationships | <ul style="list-style-type: none"> Action Learning / Group Coaching | <ul style="list-style-type: none"> Program Team Heartland Information Research Guest Presenter : MAWIB Guest Presenter : Kimberly Casey |
| 11/29/12 Workshop | Coaching Intensive & Relationship Development - Franklin Square (Maures Development) <i>(Action Learning – Module 1 & 2 Review; 2013 Goal Setting; Rubric Check-In) Commitment Driven Action)</i> | | | <ul style="list-style-type: none"> Program Team Coaches |
| 12/12/12 | Mid-Year Event – Marcus Center for the Performing Arts (Business to Business Networking) | | | |
| MODULE 3 FINANCING & CAPITAL MANAGEMENT | | | | |
| | Monthly Session 7 January 9 | <ul style="list-style-type: none"> Creative Deal Flow with WHEDA | <ul style="list-style-type: none"> Leadership Development | <ul style="list-style-type: none"> Program Team Guest Presenter : Farshad Maltes (WHEDA) |
| 02/05/13 | Personal Coaching Workshop - Milwaukee Yacht Club Facilitator: Sandye Brown (Wide Awake, Inc.) <i>(3-Circle Talk, Commitment, Integrity)</i> | | | |
| | Monthly Session 8 February 13 | <ul style="list-style-type: none"> Reading and understanding financial statements Cash flow analysis Debt Ratios | <ul style="list-style-type: none"> Leadership Development | <ul style="list-style-type: none"> Program Team Guest Presenters : Baker Tilly Andrea Hayes, CPA & Chad Koski |

* Monthly sessions, excluding Program Retreat are 2 hour sessions (2nd Wednesday each/month - 10:30am-12:30pm)

* Quarterly workshops are 3-4 hour sessions

* Participants are expected to meet with mentors/coaches one time per month



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BUSINESS CAPACITY BUILDING PROGRAM (North End Development Project)
PROGRAM OVERVIEW – WORK PLAN

| | | | | |
|----------------------------|--|---|--|---|
| 02/20/13 | BCBP – One-on-One Progress Interviews | | | <ul style="list-style-type: none"> Program Team |
| 02/27/13 Workshop | Wealth Management for Small Business Owners – Hudson Business Lounge Guest Presenters: Julie Murphy Casserly (Business to Business Networking Event) | | | Resources: The Emotion Behind Money Book |
| | Monthly Session 9 March 13 | <ul style="list-style-type: none"> Financial planning for business life stage and business success | <ul style="list-style-type: none"> Action Learning / Group Coaching Leadership Development | <ul style="list-style-type: none"> Program Team Guest Presenter: John Miller (MEDC) |
| MODULE 4 | HUMAN CAPITAL, PROCESS EFFICIENCY & SUCCESSION PLANNING | | | |
| | Monthly Session 10 April 10 | <ul style="list-style-type: none"> Professional Presentation Skills Managing people and processes | <ul style="list-style-type: none"> Action Learning / Group Coaching Leadership Development | <ul style="list-style-type: none"> Program Team Guest Presenters: Genyne Edwards (WOO Connections) |
| | Monthly Session 11 May 8 | <ul style="list-style-type: none"> Staff Planning: Finding & Keeping the Right People | <ul style="list-style-type: none"> Action Learning / Group Coaching Leadership Development | <ul style="list-style-type: none"> Program Team Guest Presenter: Steven Brown, (GE HealthCare) |
| MAY 22 Workshop | SMALL BUSINESS WEEK WORKSHOP (Human Capital) (Business to Business Networking Event) Succession Planning with Dick Shuma – BMO Harris Bank | | | |
| JUNE 12 Final Event | Program Integration Presentation (Panel including Coaches, Program Team and Guests) <ul style="list-style-type: none"> Program Integration & Reflections Completion Ceremony / Closing Event (Business to Business Networking) | | | |

* Monthly sessions, excluding Program Retreat are 2 hour sessions (2nd Wednesday each/month - 10:30am-12:30pm)

* Quarterly workshops are 3-4 hour sessions

* Participants are expected to meet with mentors/coaches one time per month



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4. Program Outcomes

Program outcomes were measured in the following six categories:

- 1) Participant Completion of Program Rubrics
- 2) Participant Program Participation
- 3) Participant Relationship Building with Potential Partners and Resources
- 4) Participant Business Growth Indicators
- 5) Participant Identifying New Opportunities
- 6) Participant Employee Growth

4.1 Completion of the BCBP Rubrics

Four sets of rubrics were developed and used throughout the BCBP to measure and track progress made by each participant.

| | |
|-------------|--|
| Exhibit I | Original Program Requirement Rubric |
| Exhibit II | Rubric / Report Card used to Track Progress during the Program |
| Exhibit III | Rubric for Scoring the Company's Final Presentation to Panel |
| Exhibit IV | Final Overall Rubric Used to Report Completion |

These rubrics were used to:

- 1) communicate program requirements and outcome expectations to participants
- 2) track progress made by each participant
- 3) score program integration presentation
- 4) measure participant completion of program requirements

Each of the rubrics is shown on the following pages with additional descriptions.



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The BCBP program manager developed the rubric shown in Exhibit I. This rubric was used solely to communicate the BCBP requirements and outcome expectations to participants.

Exhibit I

| Business Capacity Building Program - Measuring Success | | | | |
|---|---|---|---|---|
| Name: | | | | |
| Program Attendance: * To earn a certificate of completion, you must participate in at least 80% of program hours (or miss no more than ____ hours out of 108 program hours). | Total Program Hours: | Attendance Rate: | | |
| Participate in monthly business coaching sessions. | Number of coaching sessions utilized: | | | |
| Participate in four individual coaching sessions. | Number of coaching sessions utilized: | | | |
| | No Evidence | Weak Evidence | Adequate Evidence | Strong Evidence |
| Complete initial business assessment . | Not completed. | Self assessment. | Self- assessment and assessment from others. | Self-assessment and assessment from others and debrief mtg. |
| Develop and submit a business plan, financial plan and strategic plan . | No updated plans | Past plans | 1-2 Current plans | All plans complete |
| Develop a business mission and vision statement . | No mission, vision or business goals | Documents included but not aligned | Mission, vision and goals are included | Robust and aligned mission, vision and goals |
| Develop and submit a marketing plan . | No updated plan | Past plan | Current plans | Plan complete |
| Describe the relationships that you have initiated and/or deepened through the program (e.g. participants, presenters, etc.) & the meaning they have for you and your business. | No evidence of relationships initiation or development. | Limited evidence of relationship initiation or development. | Evidence of meaningful relationships with multiple people from one group. | Evidence of meaningful relationships with multiple people from more than one group. |
| Develop and complete a personal action plan . | No evidence or evidence does not support the outcome. | Plan was developed but not completed. | Plan was developed and partially completed. | Plan was developed and completed. |
| Develop and submit a staffing and sustainability plan . | No updated plan | Past plan | Current plans | Plan complete |
| Complete, submit and present program integration documentation . | Not completed or scored ____ - below on the rubric. | Scored a ____ on the rubric. | Scored a ____ on the rubric. | Scored a ____ on the rubric. |

The above rubric was used by the BCBP program manager to communicate all expectations to participants at the beginning of the program.



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HIR developed the rubric shown in Exhibit II. This rubric provided the BCBP program manager, business coaches and business plan consultants a single source to monitor the progress made by each BCBP participant and the program.

Exhibit II

Business Capacity Building - Progress Tracking 2012-13

Program Participant or Company _____

Date of Progress Tracking Snapshot _____

| | | | |
|---|------------------------------|-------------------------|--|
| Program Attendance: <i>* 80% of program hours required</i> | Total Program Hours Offered: | Total Hours Attended: | |
| Participation in individual coaching/mentoring sessions. | # of Sessions Required: | Total Sessions Attended | |

| | # Potential New Customers | # Potential New Partners/Teams | # Potential Funding Sources | # Potential Other Resources | # Actual New Jobs |
|--|---------------------------|--------------------------------|-----------------------------|-----------------------------|-------------------|
| <i>Participant Program Goal</i> | | | | | |
| Establish new relationships or deepen existing ones. | | | | | |
| Program Deliverables | Get Started By | Complete a Draft By | Review w/Coach | Submit By | Approved By |
| <i>Due Dates</i> | <i>Jun-15-12</i> | <i>Jul-10-12</i> | <i>Dec-31-12</i> | <i>May-10-13</i> | <i>May-30-13</i> |
| Complete initial assessment. | | | | | |
| <i>Due Dates</i> | | | | | |
| Develop a business plan and strategic plan. | | | | | |
| Develop a business mission and vision statement. | | | | | |
| Develop a marketing plan. | | | | | |
| Develop a financial plan | | | | | |
| <i>Due Dates</i> | | | | | |
| Develop and complete a personal action plan. | | | | | |
| <i>Due Dates</i> | | | | | |
| Develop a staffing and sustainability plan. | | | | | |
| <i>Due Dates</i> | | | | | |
| Develop a presentation on how you plan to or have already implemented program knowledge in your company. | | | | | |



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The presentation feedback and rating rubric shown in Exhibit III was developed by the BCBP program manager specifically for the review panelists to score and critique BCBP participants final presentations at the June 12th event.

Exhibit III

| BCBP Program Integration Presentation Feedback | | | | |
|--|---------------|------|----------|---|
| Date: | June 12, 2013 | | | Total Score: <input style="width: 50px;" type="text"/> |
| Business Name: | | | | |
| Business Leader: | | | | |
| Panel Member: | | | | |
| Presentation Content | | | | |
| | | | | Yes (1) No (0) |
| Presentation was approximately 30 minutes in length. | | | | <input type="checkbox"/> <input type="checkbox"/> |
| Business owner(s) described their overall growth and development in a clear and understandable manner. | | | | <input type="checkbox"/> <input type="checkbox"/> |
| Business owner(s) incorporated and referenced at least three key learnings from BCBP. | | | | <input type="checkbox"/> <input type="checkbox"/> |
| Business owner(s) provided a handout that outlines evidence of completion of program rubric. | | | | <input type="checkbox"/> <input type="checkbox"/> |
| Business owner(s) provided and addressed questions confidently and knowledgeably (during O&A session). | | | | <input type="checkbox"/> <input type="checkbox"/> |
| | | | | Score: <input style="width: 50px;" type="text"/> |
| Presentation Delivery | | | | |
| <i>Indicate to what extent the following was achieved:</i> | | | | |
| | None | Weak | Adequate | Strong |
| Connection with the panel. | 0 | 2 | 3 | 4 |
| Appealed to various learning styles. | 0 | 2 | 3 | 4 |
| Appeared to be prepared and confident. | 0 | 2 | 3 | 4 |
| Body language and movement enhanced the message. | 0 | 2 | 3 | 4 |
| | | | | Score: <input style="width: 50px;" type="text"/> |
| Program Scope & Impact | | | | |
| <i>Indicate to what extent the following was evident:</i> | | | | |
| | None | Weak | Adequate | Strong |
| Growth through Business Coaching | 0 | 2 | 3 | 4 |
| Growth through Personal Coaching | 0 | 2 | 3 | 4 |
| Participation in and Growth through Monthly Sessions | 0 | 2 | 3 | 4 |
| Business Assessment Completed | 0 | 2 | 3 | 4 |
| Business / Strategic Plan completed including mission, vision and marketing plan | 0 | 2 | 3 | 4 |
| Growth through new relationships initiated or deepened through the program | 0 | 2 | 3 | 4 |
| Personal Action Plan Developed | 0 | 2 | 3 | 4 |
| Staffing & Sustainability Plan Developed | 0 | 2 | 3 | 4 |
| Measurable transformation of the business owner and overall business impact. | 0 | 2 | 3 | 4 |
| | | | | Score: <input style="width: 50px;" type="text"/> |
| What I really liked & why I liked it... | | | | |
| | | | | |
| Suggestions for future growth, fine-tuning & the reasons for these suggestions.... | | | | |
| | | | | |
| Other comments: | | | | |
| | | | | |





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HIR developed the rubric shown in Exhibit IV. This rubric captured all assigned scores throughout the program and provided a final score for each participant. The final score would be used to determine the qualified funding level using the OSDB funding scale included in the lower right corner of the chart.

Exhibit IV

| Business Capacity Building - Final Participant Rubric Report 2012-13 | | | | | |
|---|---|------------------------|--|-------------------------|----------------------|
| This final participant rubric report was prepared and verified by the BCBP Program Manager and BCBP Monitoring Firm to report each Participant's completion of program objectives. | | | | | |
| Program Participant or Company | | | | | |
| Participation | | | | Points | |
| 1. Program Attendance: 80% required | Hrs Offered: | 61 | Attended: | 61 | 10.0 |
| 2. Participate in Business Coaching Sessions. | Sessions Offered: | 10 | Attended: | 10 | 10.0 |
| 3. Participate in Personal Coaching Sessions. | Offered: | 6 | Attended: | 6 | 10.0 |
| Total Hours | | 77 | Total Points | | 30.0 |
| Relationships and Job Creation | | | | | |
| These relationships were reported by the participant and reviewed during the final assessment interviews. | Potential New Customers | Potential New Partners | Potential Funding Sources | Potential Resources | Approved (10 points) |
| 4. Establish new relationships or deepen existing ones. | 1 | | | | 10 |
| Job creation was based on both actual and future forecasts | During Program | Next 6 Months | 2014 Forecasted | 2015 Forecasted | Approved (10 points) |
| 5. New jobs created | 1 | | | | 10 |
| | | | | Total Points | 20.0 |
| Deliverables | | | | | |
| Evidence of Completion | | | | | |
| These deliverables were evaluated by the Program Manager and Monitoring Firm. | None | Weak | Adequate | Strong | Approved |
| 5. Complete initial assessment. | 0 | 2 | 3 | 4 | 4 |
| 6. Complete final assessment. | 0 | 2 | 3 | 4 | 4 |
| 7. Complete a Business Plan / Strategic Plan that includes: - Mission and Vision Statement - Marketing Plan - Financial Plan | 0 | 4 | 8 | 10 | 10 |
| 8. Develop a personal action plan. | 0 | 2 | 3 | 4 | 4 |
| 9. Develop a staffing and sustainability plan. | 0 | 2 | 3 | 4 | 4 |
| 10. Develop Action Learning Goals | 0 | 2 | 3 | 4 | 4 |
| | | | | Total Points | 30.0 |
| Final Presentation | | | | | |
| 11. Develop and present program integration | Avg score of reviewers at final presentation out of 61 points | | | | 61 |
| | | This is weighted as | 20% | of total possible score | 20.0 |
| Final BCBP Score Calculation | | | | | |
| | Total Possible | Total Earned | Funding Scale | | |
| Participation | 30 | 30.0 | Points | % | Qualify for |
| Relationships and Job Creation | 20 | 20.0 | 81-100 | 100% | \$ 30,000 |
| Deliverables | 30 | 30.0 | 70-80 | 80% | \$ 24,000 |
| Final Presentation | 20 | 20.0 | 50-70 | 50% | \$ 15,000 |
| Total Possible Points | 100 | 100.0 | | | |
| The above report was prepared and approved by: BCBP Program Manager | | | | | |
| Date: | | | Genyne Edwards WOO Communications | | |
| | | | BCBP Monitoring Firm | | |
| | | | Donald Hill Heartland Information Research, Inc | | |
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Participant Rubric Outcomes

The success of the participants at satisfying the requirements defined by the above rubrics helps indicate the BCBP Program's effectiveness in helping participants learn, understand and apply the concepts introduced during the year-long program.

Final Presentation Scoring Rubric

The June 12th, final presentations were scored by review panels using the Exhibit III rubric on page 20. The score summaries are shown in Table A below. Followed by the scores are highlights of reviewer comments regarding these presentations.

Table A – June 12th Presentation Scores

| | out of maximum possible point score of | | | |
|--|--|------------|---------------|-------------------|
| Avg Score: | 50.8 | 57 | 78.6% | 89.5% |
| | | | 44.85 | 51.15 |
| | | | | 98.9% |
| | | | | 56.4 |
| Presentation Content | Scale | JCP | Maures | PL Freeman |
| Presentation was approximately 30 minutes in length. | | | | |
| Business owner(s) described their overall growth and development in a clear and understandable manner. | | | | |
| Business owner(s) incorporated and referenced at least three key learnings from BCBP. | | | | |
| Business owner(s) provided handout outlining evidence of rubric completion. | | 0.8 | 0.8 | |
| Business owner(s) provided and addressed questions confidently and knowledgeably (during Q&A session). | | | 0.8 | |
| | 5 | 4.8 | 4.6 | 5 |
| Presentation Delivery | | | | |
| Indicate to what extent the following was achieved: | Scale | JCP | Maures | PL Freeman |
| Connection with the panel. | 4 | 3 | 4 | 3.8 |
| Appealed to various learning styles. | 4 | 2.6 | 3.2 | 3.8 |
| Appeared to be prepared and confident. | 4 | 3.4 | 3.8 | 4 |
| Body language and movement enhanced the message. | 4 | 2.8 | 3.4 | 3.8 |
| | 16 | 11.8 | 14.4 | 15.4 |



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| Program Scope & Impact | | | | |
|--|--------------|------------|---------------|-----------------------|
| Indicate to what extent the following was evident: | Scale | JCP | Maures | PL Freeman |
| Growth through Business Coaching | 4 | 3.4 | 3.8 | 4 |
| Growth through Personal Coaching | 4 | 3.25 | 3.8 | 4 |
| Participation in and Growth through Monthly Sessions | 4 | 3.2 | 3.8 | 4 |
| Business Assessment Completed | 4 | 3 | 3.6 | 4 |
| Business / Strategic Plan completed including mission, vision and marketing plan | 4 | 3.4 | 3 | 4 |
| Growth through new relationships initiated or deepened through the program | 4 | 3.2 | 3.4 | 4 |
| Personal Action Plan Developed | 4 | 2.6 | 3.6 | 4 |
| Staffing & Sustainability Plan Developed | 4 | 2.6 | 3.4 | 4 |
| Measurable transformation of the business owner and overall business impact. | 4 | 3.6 | 3.75 | 4 |
| | 36 | 28.25 | 32.15 | 36 |

More revealing of the BCBP success at helping participants apply the concepts introduced during the program were the reviewers' comments regarding the presentations.

"I liked the establishing of a board to continue the business coaching. This will allow them to grow."

"The program clearly made an impact which will transform the company. I liked that the company identified its shortcomings because that is the first step to shoring them up."

"Loved the photos. Innovative approaches - small company with a big company feel. Your branding is obvious even in your personal style. Masterful use of resources & new learning."

Final Program Rubric Scoring

The BCBP program manager and HIR performed a final program review of each participant's outcomes using the Final Program Rubric shown in Exhibit IV on page 21. This confirmed the completion and submission of the deliverables spelled out in the original rubric given to participants at the start of the program.



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Table B – Final Rubric Review Scores

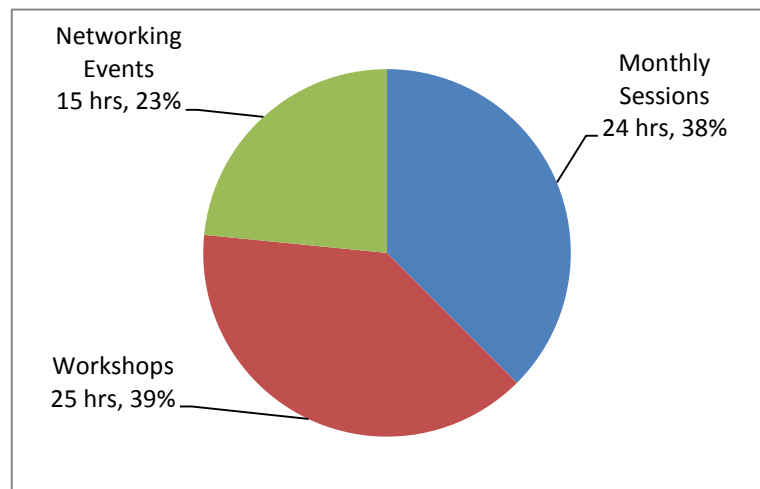
| Final Rubric Review | Total Score | JCP | Maures | PL Freeman | Ranson |
|--|--------------------|-------------|---------------|-----------------------|---------------|
| | | 94.1 | 96.1 | 99.3 | 42 |
| 1. Attendance | | 9.4 | 9.2 | 9.5 | 8 |
| 2. Monthly Coaching | | 10 | 10 | 10 | 7 |
| 3. Individual Coaching | | 10 | 10 | 10 | 0 |
| 4. Relationship Building | | 10 | 10 | 10 | 10 |
| 5. Jobs Created | | 10 | 10 | 10 | 10 |
| 6. Initial Assessment | | 4 | 4 | 4 | 4 |
| 7. Final Assessment | | 4 | 4 | 4 | 3 |
| 8. Business Plan Mission/Vision Marketing Plan Financial Plan | | 10 | 10 | 10 | 0 |
| 9. Personal Action Plan | | 4 | 4 | 4 | 0 |
| 10. Staffing and Sustainability Plan | | 4 | 3 | 4 | 0 |
| 11. Action Learning Goals | | 3 | 4 | 4 | 0 |
| 12. Program Integration Documentation | | 15.7 | 17.9 | 19.8 | 0 |

Based on this final program review and scoring process, three of the companies scored 80 or more points required to qualify for the full loan amount. Ranson Construction, the company that encountered significant financial difficulties (unrelated to the NEDP or the BCBP), scored 42 points out of the total of 100 due to an incomplete business plan and final presentation.

4.2 Program Participation

The BCBP program offered a total of 64 hours of group meetings including the monthly sessions, the quarterly workshops and BCBP networking events held at the beginning, mid-point and end of the program. As shown in Chart 1, workshops and monthly sessions represented the majority of the BCBP attendance hours.

In addition to the BCBP kick-off reception, mid-year check-in and end-

Chart 1 – BCBP Program Hour Allocation

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of-program presentations, the BCBP hosted several other networking events to help participants gain visibility within the contracting, real estate development and financial communities.

All four companies achieved the mandatory 80% attendance rate required to complete the program with three attending over 90% of the program hours offered. The participants were willing to adjust their work schedule to attend program events even when inevitable urgent situations arose in their business that created scheduling conflicts. The BCBP high attendance rates strongly indicate the value of the program to participants.

4.3 Establishing Relationships with Potential Partners and Resources

One challenge of quantifying the impact of small business capacity building programs is that some program benefits may take one or more business cycles to evolve and develop. One example of this type of benefit is the relationships established during the BCBP between participants and potential customers, partners, funders and business assistance resources. Table C displays the number of relationships developed throughout the BCBP program by each participant as revealed during the final interview.

Table C – Relationships Established During the BCBP

| | Total | JCP | Maures | PL Freeman | Ranson |
|-------------------------|-------|-----|--------|------------|--------|
| Potential New Customers | 14 | 7 | 0 | 6 | 1 |
| Potential New Partners | 13 | 5 | 4 | 3 | 1 |
| Potential New Funders | 14 | 5 | 4 | 3 | 2 |
| Potential New Resources | 40 | 11 | 10 | 9 | 10 |

The importance and value of relationships is an intuitive and proven factor to small business growth and sustainability. As an example of how relationships benefit small businesses, a 1996 SBA Office of Advocacy research report found that personal relationships between small business owners and bank staff was found to be statistically significant for small firms (at the 95-percent confidence interval)¹. Specifically, the interest rate paid by these small businesses was reduced by more than three quarters of a percentage point.

As shown in Table C, the participating companies reported establishing some level of contact with 14 new potential sources of funding for their businesses and/or projects. These range from programs offered by the Milwaukee Economic Development Corporation (MEDC), Wisconsin Housing and Economic Development Agency (WHEDA) and traditional bank financing.

¹ The Role of Social Relationships in Financial Intermediation: Empirical Evidence from the United States Small Business Credit Market by Margaret Jane Miller 1996. Margaret Jane Miller, University of California, Berkeley CA. contract no. SBA-8027-OA-93



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The number of potential new partners identified during the BCBP is beneficial because these relationships enable companies to form teams and pursue larger projects together that would be impossible doing it alone. Directly attributable to the BCBP are the close relationships between BCBP participants that developed during the year long program while working together on the NEDP. As mentioned earlier, the level of trust and knowledge between the participants allowed the one company experiencing severe financial issues to transfer work to another BCBP participant and avoid scheduling delays on the NEDP.

Through the BCBP program, particularly the Action Learning component where participants help one another work through complex business issues, the participants continue to benefit from relationships with each other as teaming opportunities present themselves in the future.

The number of new contracts directly resulting from the BCBP would be difficult to quantify. However the potential benefit to participants on having attended BCBP networking events and meeting 14 potential customers or referral sources should be measureable in six months, a year and two years during follow-up assessments.

The final rubric item regarded the number of new relationships with business assistance or resources that were established during the BCBP. The number reported by each participant was around ten which is significant given that these are established businesses and all have completed business development or capacity building programs offered by other organizations.

The participants all cited as new resources their business coach, personal coach, the BCBP program manager and the other professionals involved with BCBP meetings and events. The participants also stated having a better understanding and relationship with Milwaukee's OSBD staff through the program. BCBP guest speakers that attended program events were also cited as new opportunities to access business assistance and resources.

4.4 Business Growth Indicators

The measurements used to track the BCBP's overall impact on participating companies were:

1. Combined Revenue Growth
2. Combined Net Profit Growth
3. Total Number of New Opportunities Identified by Participants
4. Combined Employment Growth

The aggregate or combined values from all of the companies is presented in this report for two reasons. First, this is to preserve the financial privacy of each individual company that provided



| | | |
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|--|---|---|

confidential company financial and operating data for the BCBP report. Second, the aggregate values reflect the overall impact of the BCBP to increase business capacity in Milwaukee.

Table D below summarizes these four growth indicators measured during the program. This table will be updated with actual values during follow-up assessments with each company in six months, a year and in two years.

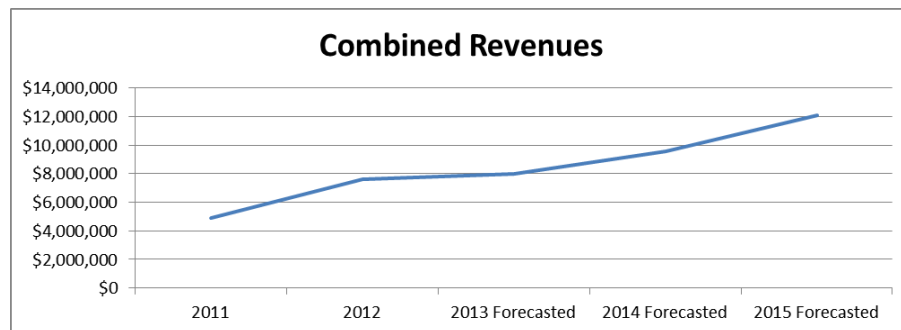
Table D - Combined Impact of BCBP on Participating Companies

| | 2011 | 2012 | 2013 Forecasted | 2014 Forecasted | 2015 Forecasted |
|-------------------|-------------|-------------|--------------------|--------------------|--------------------|
| Revenues | \$4,918,068 | \$7,624,290 | \$8,002,000 | \$9,539,000 | \$12,060,000 |
| Net Profits | -\$23,385 | -\$35,379 | \$571,541 | \$741,698 | \$1,033,428 |
| New Opportunities | | | 14 | | |
| Employees | 29 | 36 | 36 | 52 | 71 |

Combined Revenue and Profit Growth of Participating Companies

Growth in total revenues from 2011 to 2012 and continued forecasted growth for 2013 indicates that participating companies are able to find new opportunities. The degree to which the BCBP is directly responsible for this continued growth will be assessed in six months, a year and in two years during follow-up interviews. This will reveal how the contracting opportunities revealed during BCBP networking events that developers and other resources attended translated into increased revenues.

Chart 2



Specifically, follow-up interviews with participants will explore if sharing knowledge of upcoming projects between each other and exploring the possibility of partnering to secure larger projects resulted in new opportunities.

While all of the revenue growth shown in Chart 2 may not be a direct outgrowth of the BCBP, interviews with participants at the conclusion of the program attributed a significant portion of



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their forecasted growth to the BCBP's business planning process, Action Learning sessions, relationship building and BCBP coaching activities.

One BCBP participant commented:

"Just want to point out that this BCBP was a key factor for this year and our company's growth"

In addition, participants felt more confident in their future growth because of improvements resulting from their participation in the BCBP. This was summed up in the following participant's comments:

"Personally, with all the "tools" the BCBP has put in front of us, I feel much more confident with the idea on succeeding in Milwaukee. I feel that my networking circle has doubled, confidence in my abilities and I think permanently, I have won the trust of my business partners"

The BCBP business planning process also created marketing plans to target new customers and find additional opportunities. One participant highlighted the benefit of this process.

"It has helped me realize the importance of business development. It has helped me to take a step back and look at my business and to chart a course for the future. We developed a business and marketing plan as well as a business and personal action plan."

The experience of working on the NEDP, along with having opportunities to build relationships with potential teaming partners, provided opportunities for companies to consider larger roles in future development projects which will result in increased revenues.

Combined Net Profit of Participating Companies

The benefit associated with growth in net profits is obvious. The net profit growth reflected in actual BCBP participants performance and forecasted future performance indicates that the companies are applying the business concepts introduced by the BCBP in being more efficient and profitable.

Because net profits can be reinvested in new equipment, hiring additional employees or improving business processes, this is a key factor for supporting future growth and capacity building efforts. The full extent that the BCBP helped participants increase net profitability will be determined during the six month, one year and two year follow-up interviews. However, one participant's statement below indicates the BCBP did contribute to improved sustainability of the business.



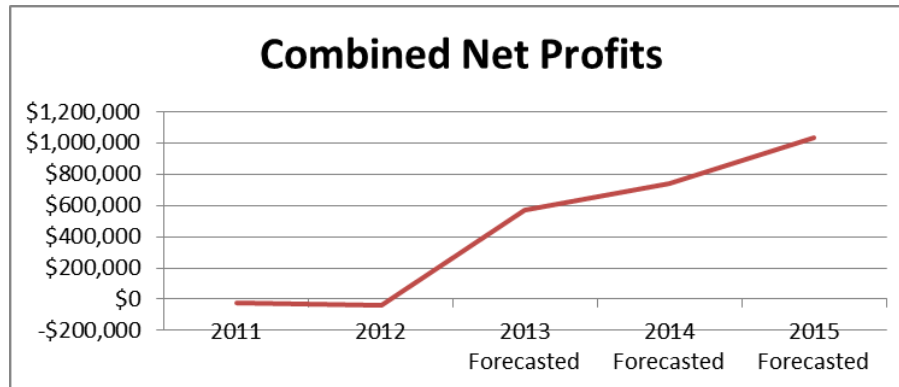
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“It is an instrumental program in terms of giving you the necessary tools and helping you sharpen your current business tools in order to increase your business capacity and sustainability.”

Chart 3



The decline of 2012 net profits shown in Chart 3 reflects the financial difficulties encountered by one of the participating companies. This was unrelated to the BCBP or NEDP. The forecasted growth of 2013 through 2015 demonstrates the positive impact of the BCBP should have on all participating companies.

4.5 New Opportunities Identified through the BCBP

The number of new opportunities identified was measured through interviews with each participating company. New opportunities included new relationships developed during the BCBP with developers, large prime contractors and potential teaming partners. These new opportunities were directly attributed to participating in the BCBP and were only measured during the BCBP program period between June 2012 and June 2013.

The conversion of these opportunities into revenue generating projects for the BCBP participants will be explored during the six month, one year and two year follow-up interview process. It is expected that these opportunities should represent revenue increases for the companies participating in the BCBP. Ideally, a new contract resulting from these opportunities would be similar to the work performed on the NEDP.

To estimate the impact on the BCBP participant revenues growth, it was assumed that only 1 out of 4 (25%) of the opportunities will result in contracts with an average value of \$500,000. Based on this, the estimated additional revenue generated from the 14 opportunities identified in 2013 could generate an additional \$1.75 million in revenues for the participating companies.



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How the BCBP participant's involvement in the program supports future revenue growth will be explored during the follow-up interviews in six months, a year and two years.

4.6 Combined Employment Growth

Based on interviews with BCBP participants, all participants stated that jobs were retained as part of working on the NEDP. The City of Milwaukee's Residential Preference Program (RPP) was part of the NEDP project with Cross Management Services monitoring the RPP and other project compliance requirements. The Cross Management Services' North End report would be the most accurate source for the BCBP companies' participation and job metrics.

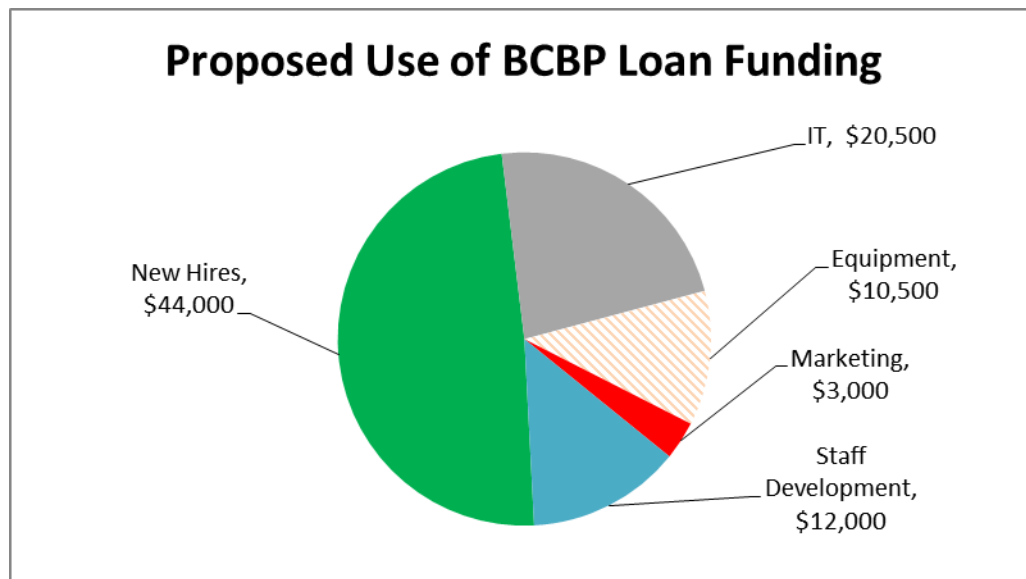
However, based on the participants' feedback at the conclusion of the BCBP, they expect to increase permanent employment over the next several years as they implement the growth plans developed during the BCBP. This is shown in Table E below.

Table E – Forecasted Combined Employment of Participating Companies

| | 2011 | 2012 | 2013 Forecasted | 2014 Forecasted | 2015 Forecasted |
|------------------------|------|------|--------------------|--------------------|--------------------|
| Total Employees | 29 | 35.5 | 35.5 | 52 | 71 |

4.6 Planned Investment of BCBP Forgivable Loan Funds

Based on preliminary proposals submitted by participants that qualified for funding, interviews with BCBP participants, all participants stated that jobs were retained as part of working on the NEDP



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5. Feedback

Program feedback was gathered from participants, coaches and key stakeholders during and after the program. Nearly all expressed that the program was a positive contribution to the BCBP participants' growth with one negative stakeholder comment related to seeing fewer than expected minorities workers on the NEDP job site during the construction phase.

The appendices included in the back of this report provide summaries of the participants' monthly meeting feedback forms along with results from surveys of BCBP business coaches.

5.1 Participant Feedback

Participants were surveyed at the mid-term and at the conclusion of the BCBP on the usefulness of the various components offered. These results are shown in Table F below.

Table F – Usefulness of BCBP Components

| BCBP Component | Not utilized | Not Useful | Somewhat Useful | Useful | Very Useful |
|----------------------------|--------------|------------|-----------------|--------|-------------|
| Action Learning | | | 1 | 2 | 1 |
| Business Coaching Sessions | | | | | 4 |
| Personal Coaching Sessions | 1 | | | | 3 |
| Monthly Meetings | | | | 2 | 2 |
| Business Plan Development | 1 | | | | 3 |
| Business Generation Model | | | 2 | 1 | 1 |
| Guest Speakers (overall) | | | | 2 | 2 |
| Business Assessments | | | 2 | | 2 |
| Networking Events | | | 1 | 2 | 1 |
| Final Presentation | 1 | | | | 3 |

Both the business coaching and personal coaching were found to be “very useful” for those that utilized these components. Likewise both the business plan and final presentation were found “very useful” by participants. None of the components were found to be “not useful” by participants and for future BCBP implementations the current set of components should be retained.

As mentioned earlier, the coaching components were mentioned in all of the participant final feedback surveys as being “very useful” and a key component to the program. Another example of the type of comment that the coaching component earned is:

“BCBP provided both personal and business coaching. The coaches were an integral part of the program as they acted as an unbiased perspective. The insights and at times hand holding offered pushed me toward greatness is priceless.”



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All the participants indicated that the BCBP contributed to their personal and professional growth.

Table G – BCBP Contribution to Participant’s Personal/Professional Growth

| | No Contribution | Minimal Contribution | Some Contribution | Major Contribution |
|--|-----------------|----------------------|-------------------|--------------------|
| Personal Goal Setting | | | | 4 |
| Business Goal Setting | | | | 4 |
| Overcoming Barriers to Personal Growth | | | 1 | 3 |
| Overcoming Barriers to Business Growth | | | 3 | 1 |
| Business and Strategic Planning | | | 1 | 3 |
| Managing Employees | | | 3 | 1 |
| Managing Cash Flow and Finances | | | 2 | 2 |
| Developing New Relationships | | | 1 | 3 |

The one area that could use improvement in future BCBP implementations is additional employee management skill development. While the participant feedback shows that all felt the BCBP contributed to some degree in helping them manage employees, this is a critical area for business growth. Additional time, subject matter experts and tools should be included in the BCBP to further enhance this area.

5.2 Coaches Feedback

Feedback from coaches was gathered via a mid-process ‘Reflections Form’ developed by the BCBP program manager. This format was designed to provide coaches with an opportunity to share how they were approaching the BCBP tasks and working with their company.

On April 25, 2013, individual meetings with the four business coaches were conducted to gather feedback and obtain an update on each company’s status in completing the BCBP rubric. Their feedback and suggestions on the program were also solicited and captured.

Below are some of the key items identified as being positives of the BCBP as well as areas for improving future BCBP implementations.



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BCBP Strengths

- Coach matchmaking process that allowed participants and coaches to meet in a networking setting was a positive. This allowed better matching of personalities and styles versus an external assignment process without coach and participant input.
- Participants were very receptive and engaged with the coaching process.
- The trust and confidentiality level between coaches and participants grew significantly during the program. Some coaches suggested finding ways to accelerate this important process.
- Combination of input and feedback to participants from multiple BCBP sources (coaches, business plan consultant, other participants and presenters) provided wide perspective of potential issues and range of solutions.

BCBP Improvement Suggestions

- During participant selection, need to verify applicant's financial stability to avoid situation where company becomes financially distressed and is unable to complete the program. This could be accomplished by reviewing participant current ratio, aging receivables reports and other key indicators of potential cash flow issues.
- Involve business coaches in business planning discussions and process. During the program, business planning work was intentionally assigned to one professional to ensure the final plans of all the participants would have similar contents and format. This approach was chosen to make comparisons between participant outcomes easier during final review. However, the written plan development process inherently involved topics being discussed between participants and their business coaches.
- Involve business coaches in the initial company assessment process to avoid duplication of effort and provide additional insights into the participating company's strengths and weaknesses. For this time, it was impossible since coaches were not selected until the third month of the program which was several months after the completion of the initial assessment. However, in future BCBP implementations it should be possible and beneficial to adjust the schedule so business coaches could be involved in this important process.



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- Develop a ‘resource round table’ of qualified professionals that the coaches could refer to as needed to help participants address specific business problems such as IT, website design, employee management, process improvements and other key business aspects.
- Add a personality type test early in the program to help coaches and participants understand the most effective approach for communication and problem solving.
- Communicate clearly to participants the amount of time required outside of the program monthly sessions and events to complete all of the deliverables. Specifically, the amount of time required to complete Action Learning plans, business plans and personal action plans.
- Add regular check-ins on business plan progress with Program Manager and OSBD staff to identify potential issues and participants nonresponsive to information requests.
- If forgivable loans remain a part of the program, provide an opportunity for participants to access a portion of these funds during the program to invest in improvements while the program is underway. Agreement would be that if they fail to complete the BCBP satisfactorily, the loan would become due. This approach would allow participants to address key issues immediately during the program rather than wait until completion to access funds for improvement investments.
- Investigate if other funding sources can be leveraged using the BCBP forgivable loan funds. This coordination could allow participants to access larger amounts to support their growth.
- Provide opportunities for coaches to meet one another and compare approaches and experiences. Also provide additional guidance on expectations, topics to cover and outcomes of the BCBP coaching engagement.

5.3 Stakeholder Feedback

Stakeholder input was gathered from individuals involved in the NEDP or interested in the BCBP outcomes. This included Phil Aiello, the Senior Development Manager for the Mandel Group, Rocky Marcoux, the Commissioner of the City of Milwaukee’s Department of City Development and Nik Kovac, Milwaukee’s 3rd District Alderman.

Both Mr. Aiello and Mr. Marcoux mentioned that the BCBP avoided taking a ‘cookie cutter’ or ‘one-size-fits-all’ approach to providing a capacity building program. As a result, they saw the BCBP as being able to accommodate a wider range of different issues facing the various companies participating in the program. The use of business and personal coaching was also



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seen as a positive to and resulted in visible growth in participant confidence comparing the presentations at the beginning of the BCBP and the final presentations in June. They also saw an increase in the clarity of the future growth plans for the companies.

Feedback comments indicated that the BCBP was seen as providing long-term benefits to participants and the City versus expectations of immediate and significant increases in contractor capacity.

As such, the BCBP was seen as an effective tool in the City's toolbox to increase the capacity of small contractors and help some become competitive in the prime contractor arena over the long haul. This increase in the subcontractor and prime contractor pool can generate healthy competition beneficial to developers planning development projects in Milwaukee.

One observation regarded the diversity of the overall workforce on the NEDP. While Alderman Kovac was impressed with the scope and quality of the work performed by the BCBP participating companies, he noted that the workforce report to the City Council showed that over 80% of the workers were non-minorities. He stated that he would like to see much better diversity on future projects at the worker level and not just the subcontractor business level.

This worker diversity concern could be partly addressed by expanding the topics related to managing employees which could include more tools for recruiting, training and managing minority workers. Also, benefits or requirements of utilizing the RPP and similar programs could be explained and promoted during these sessions.



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6. Observations and Recommendations

The following observations are provided to help the OSBD and program manager discuss potential improvements to the program.

Components to Retain

- **Business and Personal Coaches –**
 Small business owners have difficulty breaking out of the day-to-day operation of their company to develop and implement meaningful changes to generate sustainable growth. This is partly due to most small business owners not having peers or experienced confidants to help identify barriers and work through alternatives to overcome them. The BCBP's inclusion of individual coaching was identified by participants and stakeholders as an important element making the program effective.
- **Coach Match-Making –**
 The networking event approach that allowed participants to select their coaches from a pool of pre-qualified consultants helped improve the successes in those working relationships. This event should be moved up in the program schedule so coaches could be involved with the business from the very beginning of the program.
- **Action Learning –**
 The introduction and use of the peer-based learning and accountability methods of Action Learning was embraced by all participants. This format helps participants recognize they can tap the expertise of other business owners to overcome complex issues facing their own companies. Long-term, this should help build a stronger network of business owners able to address larger issues facing the business community as a whole.
- **Monthly Work Sessions –**
 By design, the monthly work sessions were kept to only two hours. Compared to other business development programs, this is a relatively short time period but one appreciated by the participants for not keeping them away from their businesses for a half or full day. Because the BCBP also includes individual coaching hours as well as business planning consulting hours, this short monthly meeting time should remain adequate to introduce new topics, feature guest speakers and provide time to check-in on progress being made.



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Potential BCBP Improvements

The program manager has already implemented a few improvements throughout the program. The improvements already implemented by the program manager included:

- **Communication** – Increase email communication and reminders on BCBP events, deliverables and deadlines.
- **Program Documentation** – Enhance program materials to clearly present expected outcomes, program deliverables and time commitment on the part of participants.
- **Refining BCBP Topics** – Revising the BCBP monthly session topics in response to participant interests/requests.

Additional improvements that could be considered include:

- **Applicant Recruitment and Selection** – Including a more rigorous financial review of program applicants to identify potential issues that could impact their ability to remain engaged in the program. Likewise, checking for back taxes, liens and current licensing is recommended.
- **Involve Coaches in the Initial Assessment Process** – Include coaches in the initial and final assessment processes.
- **Increase Detail on Expected Program Outcomes** – Based on the pilot program experience, documents are needed to clearly explain the expectation of coaching services and desired program outcomes for both the participants and coaches.
- **Earlier Access to BCBP Funding** – Allow participants to access BCBP funding during the program to invest in immediate improvements rather than waiting until the end of the program to implement changes.
- **Leverage BCBP funding with other Programs** – Collaborate with other funding sources of small business lending to leverage the funds provided by the BCBP.
- **Coaching Best Practices** – Provide opportunities for coaches to meet as a group to share best practices and discuss approaches to address challenges with their individual companies.
- **Expand Pool of Business Writing Consultants** – Provide more than one qualified business writing consultant and financial projection expert to reduce backlog on finished products. However, establishing a standard format for both the written narrative and the financial forecast statements is a must to allow final reviews to be



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consistent between companies.

- **Online BCBP Status System** – Develop an online tool or other simple to use ‘check-in’ reporting system to track participant progress towards deliverables. This will help the program manager identify and address any potential issues proactively.
- **BCBP Information Sharing** – Dropbox was set up for the program in an attempt to provide a shared repository of BCBP information, program materials and deliverables for participants, coaches, program manager and OSBD staff. This tool was met with minimal success. An alternative should be explored and implemented for future BCBP implementation to simplify program manager access to participant progress, coaching activities and other important program information.



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7. BCBP Program Team, Coaches, Partners and Participant Information

Below is the contact information of all who were involved with the first BCBP.

| Role | Name and Contact |
|---------------------------------------|---|
| Program | <p>Ossie Kendrick, Manager <i>(left position shortly after BCBP ended in June 2013)</i> Office of Small Business Development City of Milwaukee, 200 E. Wells Street, Room 606, Milwaukee, WI 53202</p> <p>Rayna Andrews, Senior Business Analyst Office of Small Business Development City of Milwaukee, 200 E. Wells Street, Room 606, Milwaukee, WI 53202 (414) 286-8781 randre@milwaukee.gov http://city.milwaukee.gov/osbd</p> |
| Program Manager | <p>Geynene Edwards, JD, Principal Consultant WOO Connections (414) 801-6167 genyne@wooconnections.com http://www.wooconnections.com</p> |
| Action Learning | <p>Gayle Peay Innovation Space Training & Development Services Educationspace@gmail.com</p> |
| Personal Coach | <p>Sandye Brown Personal Coach, Master Certified and Board Certified Coach Wide Awake, Inc. 2917 Washington Street, Suite 103, Vancouver, WA 98660 (800) 457-8126 Cell: (360) 798-3457 sandye@wideawakeinc.com www.wideawakeinc.com</p> |
| Business Coach Ranson Construction | <p>James Milner, MBA Sector Management Consulting Group LLC 600 East Mason Street, Suite 101, Milwaukee, WI 53202 (414) 221-9500 jmilner@urbanstrategies.biz www.urbanstrategies.biz</p> |
| Business Coach PL Freeman | <p>Cuauhtemoc "Temo" Rodriguez Business Consultant & Planner AtVantage Business Consultants (ABC) (414) 736-9263 atvantagebusiness@yahoo.com www.abcbusinessplans.com</p> |
| Business Coach Maures Development | <p>William Krugler wkrugler@gmail.com</p> |
| Business Coach JCP Construction | <p>Deneine Powell Lilly & Hampton Consulting Inc. deneine@gmail.com (414) 455-4747</p> |



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| Role | Name and Contact |
|---------------------------------|--|
| Business Plan Consultant | Deneine Powell Lilly & Hampton Consulting Inc. deneine@gmail.com (414) 455-4747 |
| Business Plan Financial Analyst | Brent K. Oglesby Dewy Rose Capital Ventures (262) 770-5405 bkoglesby@drosecapital.com www.dewyrose.com |
| Program Assessment | Don Hill Heartland Information Research, Inc 6434 W. North Avenue, Wauwatosa WI 53213 (414) 727-2095 info@hirservices.com |



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8. Conclusion

In conclusion, the BCBP is an entirely new program designed specifically for established small construction and development related companies. During the first pilot of the BCBP from May 2012 to June 2013, participant feedback indicates that the program did assist them with developing plans and implementing changes to support their future growth. The extent of this growth will be reviewed in six months, a year and in two years to measure BCBP benefits.

The feedback from participants was extremely favorable and was corroborated by high participant attendance rates at BCBP sessions. All of the BCBP participants expected that the BCBP planning, coaching and information would contribute to their future growth. That expectation included the one company that experienced severe cash flow issues due to uncollected payments on a prior project unrelated to the NEDP.

The stakeholders interviewed see the BCBP as a useful tool in the City's toolbox to help increase the pool of qualified contractors to work on new development projects in Milwaukee, and to increase employment opportunities within the City.

Compared to other business development and capacity building programs, the BCBP's inclusion of both individual business and personal coaching combined with Action Learning techniques is innovative and BCBP participants were highly receptive and positive to these components.



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Appendix I - Monthly Session Feedback Forms

The Program Manager developed and collected session feedback forms for each monthly meeting. These were compiled and the result shown below.

| BCBP Kick-Off Retreat | |
|--|------------------|
| Monthly Session 1 Friday June 15, 2012 | |
| Guest Presenter : Rocky Marcoux - Opening Remarks | |
| <u>Topics / Activities</u> | |
| · Program Overview | |
| · Initial Business Assessment / Readiness | |
| · Relationship Development | |
| · Rubric Overview | |
| · Intro to Initial Assessment | |
| · Intro to Program Evaluation | |
| | 4 Strongly Agree |
| Indicate to what extent the following statements are true for you: | Avg |
| I have an understanding of the overall Business Capacity Building Program. | 3.3 |
| I have an understanding of the program expectations. | 3.5 |
| I had the opportunity to meet and get to know fellow program participants. | 3.0 |
| I had the opportunity to meet and interact with program team. | 3.8 |
| | 5 Strong |
| Please rate yourself on the following scale: | Avg |
| How do you rate your knowledge of the BCBP as a RESULT of the retreat? | 3.5 |
| How do you rate your knowledge of BCBP PRIOR to the retreat? | 1.3 |
| How do you rate your commitment to business growth as a RESULT of the retreat? | 3.5 |
| How do you rate your commitment to business growth as a PRIOR to the retreat? | 2.3 |
| How do you rate your connection to other BCBP participants as a RESULT of the retreat? | 2.5 |
| How do you rate your connection to other BCBP participants PRIOR to the retreat? | 1.5 |
| | 3 Great Degree |
| Indicate to what extent the following has contributed to your learning: | Avg |
| Team presentations/facilitation (Ossie, Genyne, Don, Kate) | 2.3 |
| Rocky Marcoux (Opening Intro) | 2.0 |
| "4 Corners" exercise | 1.8 |
| "Inside and Outside" exercise | 1.8 |
| Pair Discussion | 1.0 |
| Large Group Discussion | 2.5 |
| | 2 Strongly Agree |
| Please let us know about the materials/logistics of the retreat: | Avg |
| The materials I received (binders, handouts, etc.) were good quality. | 1.5 |
| The retreat space was clean and comfortable. | 1.8 |
| Meals and snacks met my needs | 0.3 |



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| BCBP Monthly Session 2 Wednesday July 11, 2012 | |
|---|----------------------------|
| Guest Presenter : Kamela Goodwyn | |
| <u>Topics / Activities</u> | |
| · Intro to Business, Financial, Strategic Plan Development | |
| · Intro to Key Performance Indicators | |
| · Intro to Action Learning | |
| | 4 Strongly Agree |
| I. Overall Learning Value: | Avg |
| 1.1 Overall, this was an effective learning experience for me. | 3.8 |
| 1.2 This session was relevant to me or my business development. | 3.8 |
| | 4 Strongly Agree |
| II. Application: | Avg |
| 2.1 I can apply today's learning to my business practice. | 3.5 |
| | 4 Strong |
| III. Learning Outcomes - Rate your current <u>and</u> prior understanding:: | Avg |
| 3.1 How do you rate your CURRENT business planning? | 1.5 |
| 3.2 How do you rate your understanding of business planning, PRIOR to the session today? | 2.0 |
| | 4 High |
| IV. Indicate to what extent the following has contributed to your learning | Avg |
| 4.1a Kamela Goodwyn's presentation | 3.5 |
| 4.1b HIR's presentation (KIP) | 3.8 |
| 4.1c Gayle Peay's presentation (Action Learning) | 3.8 |
| V. Disposition | 4 Curiosity 1 Indifference |
| How did you show up today? | Avg |
| With a sense of... | 3.8 |
| Comments: | |
| Eager to learn. I really enjoyed today's sessions, looking forward to next months's session. Thanks again for all or your efforts. | |



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| BCBP Monthly Session 3 Wednesday August 8, 2012 | |
|---|----------------------------|
| Coach Training with Business Coaches | |
| <u>Topics / Activities</u> | |
| · Meet Your Coach | |
| · Action Learning #1 | |
| · Action Learning / Group Coaching | |
| · Program Agreements | |
| | 4 Strongly Agree |
| I. Overall Learning Value: | Avg |
| 1.1 Overall, this was an effective learning experience for me. | 3.8 |
| 1.2 This session was relevant to me or my business development. | 3.6 |
| | 4 Strongly Agree |
| II. Application: | Avg |
| 2.1 I can apply today's learning to my business practice. | 3.8 |
| | 4 Strong |
| III. Learning Outcomes - Rate your current <u>and</u> prior understanding: | Avg |
| 3.1 How do you rate your CURRENT business inquiry process? | 3.0 |
| 3.2 How do you rate your understanding of the business inquiry process, PRIOR to the session today? | 2.4 |
| | 4 High |
| IV. Indicate to what extent the following has contributed to your learning | Avg |
| 4.1a Coach Engagemen t | 3.4 |
| 4.1b Gayle Peay's facilitation (Action Learning) | 3.5 |
| V. Disposition | 4 Curiosity 1 Indifference |
| How did you show up today? | Avg |
| With a sense of... | 3.3 |
| Comments: | |
| I came in happy with a smile. Good. | |



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| BCBP Monthly Session 4 Wednesday September 12, 2012 | |
|---|----------------------------|
| Guest Presenter : Matt Richardson (SmartWave) | |
| Guest Presenter : Deneine Powell | |
| <u>Topics / Activities</u> | |
| · Action Learning #2 | |
| · Intro to Business Model Generation | |
| · Intro to Business Planning Process | |
| · Action Learning / Group Coaching | |
| · Business Model Canvas | |
| | 4 Strongly Agree |
| I. Overall Learning Value: | Avg |
| 1.1 Overall, this was an effective learning experience for me. | 3.3 |
| 1.2 This session was relevant to me or my business development. | 3.8 |
| | 4 Strongly Agree |
| II. Application: | Avg |
| 2.1 I can apply today's learning to my business practice. | 3.3 |
| | 4 Strong |
| III. Learning Outcomes - Rate your current <u>and</u> prior understanding: | Avg |
| 3.1 How do you rate your CURRENT business modeling process? | 1.8 |
| 3.2 How do you rate your understanding of the business inquiry process, PRIOR to the session today? | 1.5 |
| | 4 High |
| IV. Indicate to what extent the following has contributed to your learning | Avg |
| 4.1a Gayle Peay's facilitation (Action Learning) | 3.5 |
| 4.1b Matt Richardson presentation | 3.8 |
| 4.1c Deneine Powell presentation | 4.0 |
| V. Disposition | 4 Curiosity 1 Indifference |
| How did you show up today? | Avg |
| With a sense of... | 3.8 |



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| BCBP Monthly Session 5 Wednesday October 10, 2012 | |
|---|----------------------------|
| Presenter : Genyne Edwards | |
| Topics / Activities | |
| · Personal Branding | |
| · Connecting vs. Networking | |
| · Action Learning / Group Coaching | |
| · Personal Leadership Development | |
| | 4 Strongly Agree |
| I. Overall Learning Value: | Avg |
| 1.1 Overall, this was an effective learning experience for me. | 4.0 |
| 1.2 This session was relevant to me or my business development. | 3.7 |
| | 4 Strongly Agree |
| II. Application: | Avg |
| 2.1 I can apply today's learning to my business practice. | 3.7 |
| | 4 Strong |
| III. Learning Outcomes - Rate your current <u>and</u> prior understanding: | Avg |
| 3.1 How do you rate your CURRENT marketing and branding process? | 2.3 |
| 3.2 How do you rate your understanding of marketing and branding process, PRIOR to the session today? | 1.8 |
| | 4 High |
| IV. Indicate to what extent the following has contributed to your learning | Avg |
| 4.1a Gayle Peay's facilitation (Action Learning) | 3.3 |
| 4.1b Genyne Edward's presentation | 4.0 |
| V. Disposition | 4 Curiosity 1 Indifference |
| How did you show up today? | Avg |
| With a sense of... | 4.0 |



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| BCBP Monthly Session 6 Wednesday November 14, 2012 | |
|--|----------------------------|
| Guest Presenter : MAWIB | |
| Guest Presenter : Kimberly Casey | |
| Topics / Activities | |
| · Leveraging Relationships / Business Development / Strategic Alliances | |
| · On the Job Training Program | |
| · Trends in Sourcing & Diverse Business Relationships | |
| · Action Learning / Group Coaching | |
| | |
| | 4 Strongly Agree |
| I. Overall Learning Value: | Avg |
| 1.1 Overall, this was an effective learning experience for me. | 3.8 |
| 1.2 This session was relevant to me or my business development. | 4.0 |
| | 4 Strongly Agree |
| II. Application: | Avg |
| 2.1 I can apply today's learning to my business practice. | 4.0 |
| | 4 Strong |
| III. Learning Outcomes - Rate your current <u>and</u> prior understanding: | Avg |
| 3.1 How do you rate your CURRENT of the importance of leveraging relationships | 3.3 |
| 3.2 How do you rate your understanding of levergaing relationships , PRIOR to the session today? | 2.0 |
| | 4 High |
| IV. Indicate to what extent the following has contributed to your learning | Avg |
| 4.1a MAWIBS Presentation | 3.8 |
| 4.1a Gayle Peay's facilitation (Action Learning) | 3.8 |
| 4.1b Kimberly Caseys Presentation | 4.0 |
| V. Disposition | 4 Curiosity 1 Indifference |
| How did you show up today? | Avg |
| With a sense of... | 3.5 |



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| <u>BCBP Quarterly Session Thursday November 29, 2012</u> | |
|--|----------------------------|
| <i>Coaching Intensive & Relationship Development</i> | |
| <u>Topics / Activities</u> | |
| Action Learning – Module 1 & 2 Review | |
| 2013 Goal Setting Rubric Check-In Commitment Driven Action | |
| Rubric Check-In | |
| Commitment Driven Action | |
| | 4 Strongly Agree |
| I. Overall Learning Value: | Avg |
| 1.1 Overall, this was an effective learning experience for me. | 3.5 |
| 1.2 This session was relevant to me or my business development. | 3.5 |
| | 4 Strongly Agree |
| II. Application: | Avg |
| 2.1 I can apply today's learning to my business practice. | 3.5 |
| | 4 Strong |
| III. Learning Outcomes - Rate your current <u>and</u> prior understanding: | Avg |
| 3.1 How do you rate your CURRENT program engagement? | 3.3 |
| 3.2 How do you rate your program engagement PRIOR to the session today? | 2.8 |
| | 4 High |
| IV. Indicate to what extent the following has contributed to your learning | Avg |
| 4.1a Gayle Peay's facilitation (Action Learning) | 3.7 |
| V. Disposition | 4 Curiosity 1 Indifference |
| How did you show up today? | Avg |
| With a sense of... | 3.5 |
| Comments: | |
| Engaged and ready to refocus | |
| Refreshed | |



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| BCBP Monthly Session 7 Wednesday January 9, 2013 | |
|--|----------------------------|
| Guest Presenter : Farshad Maltes (WHEDA) | |
| <u>Topics / Activities</u> | |
| · Creative Deal Flow with WHEDA | |
| · Leadership Development | |
| | 4 Strongly Agree |
| I. Overall Learning Value: | Avg |
| 1.1 Overall, this was an effective learning experience for me. | 4.0 |
| 1.2 This session was relevant to me or my business development. | 3.5 |
| | 4 Strongly Agree |
| II. Application: | Avg |
| 2.1 I can apply today's learning to my business practice. | 4.0 |
| | 4 Strong |
| III. Learning Outcomes - Rate your current <u>and</u> prior understanding: | Avg |
| 3.1 How do you rate your CURRENT deal flow understanding of deal flow (financ | 3.5 |
| 3.2 How do you rate your understanding of deal flow financing and deal development with WHEDA, PRIOR to the session today? | 2.5 |
| | 4 High |
| IV. Indicate to what extent the following has contributed to your learning | Avg |
| 4.1a Farshad Maltes presentation on WHEDA's financing options and deal development | 3.8 |
| V. Disposition | 4 Curiosity 1 Indifference |
| How did you show up today? | Avg |
| With a sense of... | 3.3 |
| Comments: | |



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| BCBP Personal Coaching Session Tuesday February 5, 2013 | |
|--|----------------------------|
| Facilitator: Sandye Brown (Wide Awake, Inc.) | |
| <u>Topics / Activities</u> | |
| 3-Circle Talk, Commitment, Integrity | |
| | 4 Strongly Agree |
| I. Overall Learning Value: | Avg |
| 1.1 Overall, this was an effective learning experience for me. | 4.0 |
| 1.2 This session was relevant to me or my business development. | 4.0 |
| | 4 Strongly Agree |
| II. Application: | Avg |
| 2.1 I can apply today's learning to my business practice. | 4.0 |
| | 4 Strong |
| III. Learning Outcomes - Rate your current <u>and</u> prior understanding: | Avg |
| 3.1 How do you rate your CURRENT process and understanding of personal coaching? | 3.2 |
| 3.2 How do you rate your process and understanding of personal coaching, PRIOR to the session today? | 2.5 |
| | 4 High |
| IV. Indicate to what extent the following has contributed to your learning | Avg |
| 4.1a Sandye Brown's presentation on personal coaching | 4.0 |
| V. Disposition | 4 Curiosity 1 Indifference |
| How did you show up today? | Avg |
| With a sense of... | 4.0 |
| Comments: | |
| Intrigued | |
| Great job Sandye! | |



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| BCBP Monthly Session 8 Wednesday February 13, 2013 | |
|---|----------------------------|
| Guest Presenters : Baker Tilly - Andrea Hayes, CPA & Chad Koski | |
| <u>Topics / Activities</u> | |
| · Reading and understanding financial statements | |
| · Cash flow analysis | |
| · Debt Ratios | |
| · Leadership Development | |
| | 4 Strongly Agree |
| I. Overall Learning Value: | Avg |
| 1.1 Overall, this was an effective learning experience for me. | 3.8 |
| 1.2 This session was relevant to me or my business development. | 4.0 |
| | 4 Strongly Agree |
| II. Application: | Avg |
| 2.1 I can apply today's learning to my business practice. | 4.0 |
| | 4 Strong |
| III. Learning Outcomes - Rate your current <u>and</u> prior understanding: | Avg |
| 3.1 How do you rate your CURRENT process and understanding of financial statements? | 2.3 |
| 3.2 How do you rate your process and understanding of financial statements, PRIOR to the session today? | 2.3 |
| | 4 High |
| IV. Indicate to what extent the following has contributed to your learning | Avg |
| 4.1a Andrea Hayes presentation on understanding financial statements | 3.8 |
| 4.1b Chad Koski presentation on understanding financial statements | 3.8 |
| V. Disposition | 4 Curiosity 1 Indifference |
| How did you show up today? | Avg |
| With a sense of... | 3.3 |
| Comments: | |
| One of the best presentations | |
| Great presentation | |



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| BCBP Monthly Session 9 Wednesday March 13, 2013 | |
|--|----------------------------|
| Guest Presenter: John Miller (MEDC) | |
| <u>Topics / Activities</u> | |
| · Financial planning for business life stage and business success | |
| · Action Learning / Group Coaching | |
| · Leadership Development | |
| | 4 Strongly Agree |
| I. Overall Learning Value: | Avg |
| 1.1 Overall, this was an effective learning experience for me. | 3.8 |
| 1.2 This session was relevant to me or my business development. | 3.8 |
| | 4 Strongly Agree |
| II. Application: | Avg |
| 2.1 I can apply today's learning to my business practice. | 4.0 |
| | 4 Strong |
| III. Learning Outcomes - Rate your current <u>and</u> prior understanding: | Avg |
| 3.1 How do you rate your CURRENT process and understanding of business life cycles? | 3.3 |
| 3.2 How do you rate your process and understanding of business life cycles , PRIOR to the session today? | 3.0 |
| | 4 High |
| IV. Indicate to what extent the following has contributed to your learning | Avg |
| 4.1a John Miller's presentation on the business life cycle | 3.5 |
| V. Disposition | 4 Curiosity 1 Indifference |
| How did you show up today? | Avg |
| With a sense of... | 3.5 |
| Comments: | |
| I plan on reaching out to John | |
| Always have reasons to do other duties but always glad I chose the class | |



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| BCBP Monthly Session 10 Wednesday April 10, 2013 | |
|--|----------------------------|
| Guest Presenters: Genyne Edwards (WOO Connections) | |
| <u>Topics / Activities</u> | |
| · Professional Presentation Skills | |
| · Managing people and processes | |
| · Action Learning / Group Coaching | |
| · Leadership Development | |
| | 4 Strongly Agree |
| I. Overall Learning Value: | Avg |
| 1.1 Overall, this was an effective learning experience for me. | 3.0 |
| 1.2 This session was relevant to me or my business development. | 4.0 |
| | 4 Strongly Agree |
| II. Application: | Avg |
| 2.1 I can apply today's learning to my business practice. | 3.5 |
| | 4 Strong |
| III. Learning Outcomes - Rate your current <u>and</u> prior understanding: | Avg |
| 3.1 How do you rate your CURRENT process and understanding of program integration and presentation skills? | 3.0 |
| 3.2 How do you rate your process and understanding of program integration and presentation skills, PRIOR to the session today? | 2.5 |
| | 4 High |
| IV. Indicate to what extent the following has contributed to your learning | Avg |
| 4.1a Genyne Edwards presentation on presentation skills | 3.5 |
| V. Disposition | 4 Curiosity 1 Indifference |
| How did you show up today? | Avg |
| With a sense of... | 3.0 |
| Comments: | |
| Enjoyed the session | |



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| BCBP Monthyl Session 11 Wednesday May 8, 2013 | |
|---|----------------------------|
| Guest Presenter: Steven Brown, (GE HealthCare) | |
| <u>Topics / Activities</u> | |
| · Staff Planning: Finding & Keeping the Right People | |
| · Action Learning / Group Coaching | |
| · Leadership Development | |
| | 4 Strongly Agree |
| I. Overall Learning Value: | Avg |
| 1.1 Overall, this was an effective learning experience for me. | 3.5 |
| 1.2 This session was relevant to me or my business development. | 4.0 |
| | 4 Strongly Agree |
| II. Application: | Avg |
| 2.1 I can apply today's learning to my business practice. | 3.7 |
| | 4 Strong |
| III. Learning Outcomes - Rate your current <u>and</u> prior understanding: | Avg |
| 3.1 How do you rate your CURRENT process and understanding of human capital planning | 2.8 |
| 3.2 How do you rate your process and understanding of human capital planning, PRIOR to the session today? | 2.3 |
| | 4 High |
| IV. Indicate to what extent the following has contributed to your learning | Avg |
| 4.1a Steven Brown's presentation on human capital planning | 3.5 |
| V. Disposition | 4 Curiosity 1 Indifference |
| How did you show up today? | Avg |
| With a sense of... | 3.0 |
| Comments: | |
| Focused | |



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Appendix II - Monthly Coach Reflection Report



This form collects your reflections from your coaching experiences during the Business Capacity Building Program.

Name: _____

1. Create a safe and challenging environment.

Have you created a trusting environment with your coachee?

How are you adding to your own passion and enthusiasm for quality outcomes, and adding cultivating curiosity as you go?

2. Work with the coachee's agenda

How do you offer suggestions that help the business owner to organize hir/her business plan in ways that utilize their own life and business experiences?

3. Help business owners discover their leadership potential capacity.

How do you help the business owner to see his/her own strengths, unique value proposition and influence?

4. Current Concerns/Challenges



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Appendix III - BCBP Mid-Year Participant Survey



Constant Contact Survey Results

Survey Name: BCBP Mid-Year Participant Survey Jan 15 2013

Response Status: Partial & Completed

Filter: None

1/23/2013 3:17 PM CST

TextBlock:

This survey is collecting feedback on the program and suggestions for future improvements.
For businesses with multiple owners, each owner should complete the survey individually.
Thanks for your input!

*1 Participant Please enter the information indicated below.

| Answers | Number of Response(s) |
|--------------|-----------------------|
| First Name | 4 |
| Last Name | 4 |
| Company Name | 4 |

2. Overall Program Impact

How do you expect the program to contribute towards your company's growth in the following areas?

1 = No Contribution, 2 = Minimal Contribution, 3 = Some Contribution, 4 = Major Contribution, 5 = Primary Contributor to Growth in 2013

| Answer | 1 | 2 | 3 | 4 | 5 | Number of Response(s) | Rating Score* |
|---|---|---|---|---|---|-----------------------|---------------|
| Gross Revenue Growth | | | 3 | | | 4 | 3.0 |
| Increasing Net Profitability | | | 3 | | | 4 | 2.8 |
| Identifying New Contracting Opportunities | | | 3 | | | 4 | 3.2 |
| Developing New Relationships | | | 4 | | | 4 | 3.8 |
| Hiring Additional Employees | | 2 | | | | 4 | 2.2 |
| Using More Subcontractors | | 2 | | | | 4 | 2.2 |

*The Rating Score is the weighted average calculated by dividing the sum of all weighted ratings by the number of total responses.

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3. Usefulness of Program Components

How useful has each program component been in helping you understand, plan and grow your business?

1 = Not used yet, 2 = Not at all Useful, 3 = Somewhat Useful, 4 = Useful, 5 = Very Useful

| Answer | 1 | 2 | 3 | 4 | 5 | Number of Response(s) | Rating Score* |
|--|---|---|---|---|---|-----------------------|---------------|
| Initial Business Assessment | | | | | | 4 | 3.8 |
| Kickoff Retreat (June 15th 2012) | | | | | | 4 | 3.2 |
| Monthly Meetings | | | | | | 4 | 4.2 |
| Business Coaching | | | | | | 4 | 4.8 |
| Business Planning | | | | | | 4 | 2.2 |
| Networking Events (Kick-off, mid-year) | | | | | | 4 | 3.5 |
| Action Learning | | | | | | 4 | 3.8 |
| Guest Speakers | | | | | | 4 | 4.2 |
| Business Generation Model | | | | | | 4 | 3.2 |

*The Rating Score is the weighted average calculated by dividing the sum of all weighted ratings by the number of total responses.

4. Rubric Status

A rubric is being used to measure program completion. Indicate the status that best describes your progress in each area.

1 = Unsure what is required, 2 = Not started, 3 = Need more help, 4 = Confident will meet goal, 5 = Completed

| Answer | 1 | 2 | 3 | 4 | 5 | Number of Response(s) | Rating Score* |
|--|---|---|---|---|---|-----------------------|---------------|
| Initial Business Assessment | | | | | | 4 | 4.2 |
| Business Plan, Financial Plan, Marketing Plan and Strategic Document | | | | | | 4 | 3.5 |
| Develop New Relationships and Contacts | | | | | | 4 | 3.8 |

*The Rating Score is the weighted average calculated by dividing the sum of all weighted ratings by the number of total responses.



5. Reason for Participating in the BCBP

Rank the importance of the following program benefits.

<< Must rank all benefits listed and ranking multiple benefits the same not possible >>

Use the comment field for any benefits not listed.

1 = MOST important

| Answer | 1 | 2 | 3 | 4 | 5 | 6 | 7 | Number of Response(s) | Ranking Score* |
|--|---|---|---|---|---|---|---|-----------------------|----------------|
| Professional and Personal Growth | ■ | | | | | | | 4 | 2.2 |
| Learn New Business Concepts | ■ | | | | | | | 4 | 3.5 |
| Obtain Business Coaching Assistance | ■ | | | | | | | 4 | 2.0 |
| Obtain Business Assessment | ■ | | | | | | | 4 | 4.8 |
| Forgivable Loan | ■ | | | | | | | 4 | 5.2 |
| Action Learning Topics and Application | ■ | | | | | | | 4 | 6.0 |
| Building New Relationships | ■ | | | | | | | 4 | 4.2 |

*The Ranking Score is the weighted average calculated by dividing the sum of all weighted rankings by the number of total responses.

6. Program Format

Indicate your feedback on the format of the program. Provide comments if desired.

1 = Strongly Disagree, 2 = Disagree, 3 = Agree, 4 = Strongly Agree

| Answer | 1 | 2 | 3 | 4 | Number of Response(s) | Rating Score* |
|---|---|---|---|---|-----------------------|---------------|
| The time and day of the monthly meetings are a good fit for my business schedule. | | | ■ | | 4 | 3.2 |
| Meeting locations have been conducive for effective learning and discussions. | | | ■ | | 4 | 3.5 |
| The time investment expected for me to participate in the program rubric is reasonable. | | | ■ | | 4 | 3.5 |
| Meeting notifications are sufficient to help me prepare and follow-up with post-meeting tasks | | | ■ | | 4 | 3.2 |
| I have a clear understanding of the rubric requirements and my current status of completion. | | | ■ | | 4 | 3.2 |

*The Rating Score is the weighted average calculated by dividing the sum of all weighted ratings by the number of total responses.

7. Professional and Personal Growth Comments

Use the comment field below to share how the BCBP program has assisted with your professional and personal growth thus far.

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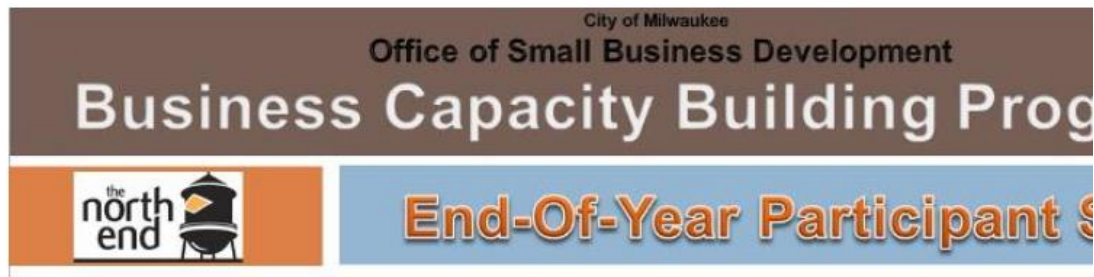


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Appendix IV - BCBP End-of-Year Participant Survey Summary



Constant Contact Survey Results

Survey Name: BCBP End-of-Year Participant Survey June 2013

Response Status: Partial & Completed

Filter: None

7/29/2013 5:42 PM CDT

TextBlock:

Please provide feedback to help improve the program.

Thanks for your input!

*Participant

| Answers | Number of Response(s) |
|------------|-----------------------|
| First Name | 4 |
| Last Name | 4 |

*Overall Program Impact - Business Growth

How did the program contribute towards your company's growth?

1 = No Contribution, 2 = Minimal Contribution, 3 = Some Contribution, 4 = Major Contribution, 5 = Primary Contributor

| Answer | 1 | 2 | 3 | 4 | 5 | Number of Response(s) | Rating Score* |
|--|---|---|---|---|---|-----------------------|---------------|
| Increase Revenue | | | | | | 4 | 3.5 |
| Increase Net Profitability | | | | | | 4 | 3.5 |
| Identify New Contracting Opportunities | | | | | | 4 | 3.5 |
| Develop New Relationships | | | | | | 4 | 4.0 |
| Hire Additional Employees | | | | | | 4 | 4.0 |
| Use More Subcontractors | | | | | | 4 | 3.2 |

*The Rating Score is the weighted average calculated by dividing the sum of all weighted ratings by the number of total responses.

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*Overall Program Impact - Personal Growth

How did the program contribute towards your personal/professional growth?

1 = No Contribution, 2 = Minimal Contribution, 3 = Some Contribution, 4 = Major Contribution, 5 = Primary Contributor to Growth in 2013

| Answer | 1 | 2 | 3 | 4 | 5 | Number of Response(s) | Rating Score* |
|--|---|---|---|---|---|-----------------------|---------------|
| Personal Goal Setting | | | | | | 4 | 3.8 |
| Business Goal Setting | | | | | | 4 | 3.8 |
| Overcoming Barriers to Personal Growth | | | | | | 4 | 3.5 |
| Overcoming Barriers to Business Growth | | | | | | 4 | 3.2 |
| Business and Strategic Planning | | | | | | 4 | 3.5 |
| Managing Employees | | | | | | 4 | 3.5 |
| Managing Cash Flow and Finances | | | | | | 4 | 3.2 |
| Developing New Relationships | | | | | | 4 | 3.8 |

*The Rating Score is the weighted average calculated by dividing the sum of all weighted ratings by the number of total responses.

Program Benefits Describe one or more business growth challenges or barriers you feel the BCBP program helped you overcome.

4 Response(s)

*Program Benefits How did the program help you grow professionally and personally?

4 Response(s)



Program Component Feedback

*Overall, how useful was each program component?(Note - we have your meeting feedback forms, this is overall usefulness of these to you)

1 = Not utilized, 2 = Not Useful, 3 = Somewhat Useful, 4 = Useful, 5 = Very Useful

| Answer | 1 | 2 | 3 | 4 | 5 | Number of Response(s) | Rating Score* |
|----------------------------|---|---|---|---|---|-----------------------|---------------|
| Action Learning | | | | | | 4 | 4.5 |
| Business Coaching Sessions | | | | | | 4 | 5.0 |
| Personal Coaching Sessions | | | | | | 4 | 4.0 |
| Monthly Meetings | | | | | | 4 | 4.5 |
| Business Plan Development | | | | | | 4 | 4.5 |
| Business Generation Model | | | | | | 4 | 3.8 |
| Guest Speakers (overall) | | | | | | 4 | 4.5 |
| Business Assessments | | | | | | 4 | 4.2 |
| Networking Events | | | | | | 4 | 4.0 |
| Final Presentation | | | | | | 4 | 4.0 |

*The Rating Score is the weighted average calculated by dividing the sum of all weighted ratings by the number of total responses.

*Program ValueWhat was your original motivation to participate in this program?Did your reasons to stay active in the program change over the course of the program?

4 Response(s)

Describe the BCBP ProgramBriefly explain ho you would describe the BCBP to other contractors considering participating in future BCBP programs n other developments.

3 Response(s)

Other Feedback and Suggestions

Please share any other feedback on the program or suggestions to improvement future sessions.

3 Response(s)

TextBlock:

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Appendix V – BCBP End-of-Year Participant Survey

1. Participant - Responses

First Name: Clifton
Last Name: Phelps

First Name: Prentice L.
Last Name: Freeman Jr

First Name: Melissa
Last Name: Goins

First Name: John
Last Name: Ranson

2. Overall Program Impact - Business Growth How did the program contribute towards your company's growth?

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.

| | No Contribution | Minimal Contribution | Some Contribution | Major Contribution | Primary Contributor |
|--|-----------------|----------------------|-------------------|--------------------|---------------------|
| Increase Revenue | 0 0% | 0 0% | 2 50% | 2 50% | 0 0% |
| Increase Net Profitability | 0 0% | 0 0% | 2 50% | 2 50% | 0 0% |
| Identify New Contracting Opportunities | 0 0% | 0 0% | 2 50% | 2 50% | 0 0% |
| Develop New Relationships | 0 0% | 0 0% | 1 25% | 2 50% | 1 25% |
| Hire Additional Employees | 0 0% | 0 0% | 1 25% | 2 50% | 1 25% |
| Use More Subcontractors | 0 0% | 1 25% | 1 25% | 2 50% | 0 0% |

2 Comment(s)

Just want to point out that this BCBP was a key factor for this year and our companies growth

Would have been a net plus if had been in different situation.

Were shutdown before class was over but believe potential is certainly there long-term. Did develop valuable relationships helpful for addressing current situation.



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3. Overall Program Impact - Personal Growth How did the program contribute towards your personal/professional growth?

| Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option. | No Contribution | Minimal Contribution | Some Contribution | Major Contribution | Primary Contributor to Growth in 2013 |
|---|-----------------|----------------------|-------------------|--------------------|---------------------------------------|
| Personal Goal Setting | 0 0% | 0 0% | 1 25% | 3 75% | 0 0% |
| Business Goal Setting | 0 0% | 0 0% | 1 25% | 3 75% | 0 0% |
| Overcoming Barriers to Personal Growth | 0 0% | 0 0% | 2 50% | 2 50% | 0 0% |
| Overcoming Barriers to Business Growth | 0 0% | 0 0% | 3 75% | 1 25% | 0 0% |
| Business and Strategic Planning | 0 0% | 0 0% | 2 50% | 2 50% | 0 0% |
| Managing E employees | 0 0% | 0 0% | 2 50% | 2 50% | 0 0% |
| Managing Cash Flow and Finances | 0 0% | 0 0% | 3 75% | 1 25% | 0 0% |
| Developing New Relationships | 0 0% | 0 0% | 1 25% | 3 75% | 0 0% |

1 Comment(s)

Not enough time elapsed to manifest positives, but expect it would have made significant difference.

4. Program Benefits Describe one or more business growth challenges or barriers you feel the BCBP program helped you overcome.

Answer

Accountability in the office/field: previous to the BCBP program we had a difficult time tracking production and keeping internal deadlines. Because of this program, we were able to make business goals for ourselves, and actually use and put them in place. As a company, we are more clear about who is accountable for what and penalties for not fulfilling.

It has helped me realize the importance of business development. It has helped me to take a step back and look at my business and to chart a course for the future,

We developed a business and marketing plan as well as a a business and personal action plan.

BCBP played an important role in my willingness to be more responsive to people. I had (and at times have) the tendency to push off returning telephone calls and emails. The "do it now" was emphasized on a regular basis. While it is far from perfection, I understand and appreciate more fully how this impacts business and my sanity.

Organizational skills were pointed out that would have been corrected.



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5. Program Benefits How did the program help you grow professionally and personally?

Answer

Personal/Business Coaching for me previously was a "myth" or a word people just tossed around. But now i am a believer!! Our business coach actually changed the culture of our office by making us understand how to utilize all of our resources. As for my personal coach she reaffirmed that I was on the right track in my life. Both coaches identified key elements in JCP Construction that has helped us grow in a way no one had thought we would... We are forever in debt.

As i mentioned we benefited from the personal coaching sessions we received, it helped me develop my core values. It also helped me to establish and improve my personal leadership qualities.

BCBP provided both personal and business coaching. The coaches were an intrgral part of the program as they acted as an unbiased perspective. The insights and at times hand holding offered by those who loving pushed me toward greatness is priceless.

Again, definitely feel that there was a strong probability that had time permitted would have contributed very positively to direction forward.

6. Program Component Feedback Overall, how useful was each program component? (Note - we have your meeting feedback forms, this is overall usefulness of these to you)

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.

| | Not utilized | Not Useful | Somewhat Useful | Useful | Very Useful |
|----------------------------|--------------|------------|-----------------|----------|-------------|
| Action Learning | 0 0% | 0 0% | 0 0% | 2 50% | 2 50% |
| Business Coaching Sessions | 0 0% | 0 0% | 0 0% | 0 0% | 4 100% |
| Personal Coaching Sessions | 1 25% | 0 0% | 0 0% | 0 0% | 3 75% |
| Monthly Meetings | 0 0% | 0 0% | 0 0% | 2 50% | 2 50% |
| Business Plan Development | 0 0% | 0 0% | 1 25% | 0 0% | 3 75% |
| Business Generation Model | 0 0% | 0 0% | 2 50% | 1 25% | 1 25% |
| Guest Speakers (overall) | 0 0% | 0 0% | 0 0% | 2 50% | 2 50% |
| Business Assessments | 0 0% | 0 0% | 1 25% | 1 25% | 2 50% |
| Networking Events | 0 0% | 0 0% | 1 25% | 2 50% | 1 25% |
| Final Presentation | 1 25% | 0 0% | 0 0% | 0 0% | 3 75% |

1 Comment(s)



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Coaching was excellent. Of all the components presented, Jim Milner was one of the strongest parts to take away from the BCBP.

Monthly meetings started slowly then as program continued built momentum. As a pilot program am sure that program will improve.

Business planning, met twice but distracted working through situation. Business generation model useful for seeing how perspectives help shape business. Guest speakers all had some good info. Business assessment provided good starting point.

7. Program Value - What was your original motivation to participate in this program? Did your reasons to stay active in the program change over the course of the program?

Answer

It actually did. At first, I really didn't think that participating in the program would make a difference. I just knew that if we kept coming, there was possible compensation. But by the 2nd month, I was fully engaged and actually couldn't wait until the next event/speaker/networking event. It was a great experience.

I wanted not only to work on the project from the contracting standpoint but also for the opportunity to benefit from the Business Capacity Building Program. The idea of getting a business plan was one of the motivating factors.

My original motivation to participate in the Northend Business Capacity Building Program (BCBP) was based on its stated goals. BCBP has been a useful tool for me to pause and assess, both personally and professionally. BCBP has a stated goal to prepare small businesses for sustainable growth that can be measured by increased business revenue, new employment opportunities, and job creation. For small businesses, coaching becomes an integral component to the sustainability and growth of a firm. It is important for ownership to understand how one's personal life and mental state impacts the trajectory of the business.

My original and ongoing participation in the program remained the same throughout.

Originally became involved because offered, not publicly offered. Bob called and invited. The only reason did not continue was because of the business situation.



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8. Describe the BCBP Program - Briefly explain how you would describe the BCBP to other contractors considering participating in future BCBP programs and other developments.

Answer

Personally, with all the "tools" the BCBP has put in front of us, I feel much more confident with the idea on succeeding in Milwaukee. I feel that my networking circle has doubled, confidence in my abilities and I think permanently, I have won the trust of my business partners.

It is an instrumental program in terms of giving you the necessary tools and helping you sharpen your current business tools in in order to increase your business capacity and sustainability.

BCBP is useful for businesses at a trajectory point or those who are ready to mature. The time spent in the monthly sessions and working on the business/strategic plan was very necessary. It is important to pause and assess to ensure everything is moving in the right direction or if they're not, to chart a new direction.

I recommend the program, not only for the business support, it is a tool to help your company assess it self which includes ownership. Being a business owner does not make you superhuman. Understanding how you contribute to and/or detract from business is critical. You'll have the opportunity to look in the mirror and make some changes or reaffirm your path.

Was very useful tool that if you got involved in it and stayed involved through the duration would end up with a lot more tools in the tool chest to avoid the pitfalls that us contractors so often fall into.

The long and short of it, Rayna and Genyne knew I was desperate to stay on, but there are some things that unable to stay on academic track. Not sure they understood severity of the situation once union issues raised and money not being released a stopper.

9. Other Feedback and Suggestions - Please share any other feedback on the program or suggestions to improve future sessions.

Answer

My only feedback it that this program needs to continue. It is very instrumental that the City has something in place that promotes Business Capacity in Milwaukee to Minority firms.

I really can't think of any major improvements other than possibly having several business plan writers.

Again my feedback on what they could do, they did a very good job at putting a pilot program. Am sure they will change some things, but ultimately good program for contractors to take advantage of.



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Appendix VI – Pre BCBP Assessments



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Appendix VII – Post BCBP Assessments



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About Heartland Information Research, Inc

HIR's assessment of the BCBP pilot is based on over fifteen years of experience with small business development programs in Wisconsin. HIR assisted with the launch of the Wisconsin Entrepreneurial Network (WEN) and the Milwaukee's BizStarts program, and has performed small business research for the Small Business Administration (SBA) and Aspen Institute. In addition, HIR has developed and instructed programs for the SBA Small Business Development Centers (SBDC) in Milwaukee and Whitewater, the SBA's E200 Emerging Business Program, the Wisconsin Women's Business Initiative Corporation (WWBIC), various Wisconsin minority chambers of commerce and the Wisconsin Technical College's Small Business Center.



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