



EVALUATION OF FIELD OPERATIONS PERFORMANCE

September 2024



PURPOSE: The U.S. Small Business Administration contracted Pacific Research and Evaluation, LLC (PRE) to conduct an evaluation to better understand the Office of Field Operations (OFO) district offices' role within the SBA and the broader entrepreneurial ecosystem.

METHOD: The evaluation utilized a mixed-method approach, collecting both quantitative and qualitative data from SBA staff (e.g., district office leaders/regional administrators, program office leaders) and external stakeholders (e.g., resource partners, community partners, other stakeholders, 8(a) program participants) to answer the research questions below.

RESEARCH QUESTIONS & KEY FINDINGS

1) How do district offices leverage resources to strengthen local small business ecosystems?

District office staff are committed to SBA's core mission of helping small businesses start, grow, and remain resilient. They assume roles as relationship managers, conveners, program experts, ecosystem connectors, and communicators, which are collectively leveraged to strengthen local small business ecosystems (see Figure). While district offices excel at forming and maintaining relationships with resource partners, they cannot equally attend to every relationship.

2) How do district office efforts contribute to the SBA's capital deployment and servicing goals and performance metrics?

District offices support the SBA's capital-related goals by expanding the number of lenders in their communities, increasing the visibility and use of SBA loan programs, supporting the success of lenders, and improving access to capital for small businesses. Adequate lender relations specialist (LRS) staffing is essential to ensure district office capital expertise.

3) How do district office efforts contribute to the SBA's small business contracting goals and performance metrics?

District offices support the SBA's contracting-related goals by recruiting small businesses to the various certification programs, providing education on small business set-asides, managing 8(a) portfolios, and providing business development and program administration support to small businesses. Adequate business opportunity specialist (BOS) staffing is essential to ensure district office contracting expertise.

4) How can district offices' administrative data be used to demonstrate direct and indirect contributions to the SBA's capital access and contracting programs goals and performance metrics?

By refining and expanding metrics collected by district offices, there is an opportunity to better leverage data to more effectively capture district office activities, outcomes, and impact. Current metrics lack strategic alignment between the activities conducted by district offices and relevant strategic objectives.



RECOMMENDATIONS

- 1 Clarify the role of district offices and district office staff positions** to better establish and make clear their role in the entrepreneurial ecosystem and enhance their impact.
- 2 Develop new and improve existing avenues of communication**, both internally and externally, to better align district offices with SBA program offices, ensuring staff and customers have consistent and the most up-to-date information.
- 3 Increase efficiency within district offices** by standardizing processes and procedures and reducing redundant efforts so that staff can create additional bandwidth to focus on critical, strategic efforts to strengthen the entrepreneurial ecosystem.
- 4 Develop a strategic ecosystem building plan** at the district office level so staff are equipped to support entrepreneurship in their communities, facilitating equitable access to capital and contracting-related opportunities for all members.
- 5 Revise and implement strategic metrics** that are aligned to district office roles and relevant strategic objectives so that data can better demonstrate the impact of district offices and how their efforts contribute to SBA goals and objectives.