



**U.S. Small Business Administration**

**Project Charter  
For  
Entrepreneurial Development's Management  
Information System Workgroup**

**Version 1.3  
January 5, 2012**



## Document Details

Business Owner	Audience	Creation Date
Holly Schick		12/13/11

Template: OCIO-ITPMO-PMMG-TP10, v1.0

## Revision History

Date	Version	Description	Author
12/13	1.0	Initial Draft	OED
01/05/12	1.2	Final	OED

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## 1. General Information

Project Title: Entrepreneurial Development's Management Information System Workgroup

Project Start Date: December 8, 2011

Project Finish Date: March 1, 2012

### 1.1 Background

The Office of Entrepreneurial Development (OED) is Small Business Administration's (SBA) primary channel to support the nation's entrepreneurial community. OED is able to respond to emergent market needs through cooperative agreements to colleges, universities, non-profit organizations and economic development groups via premier management and technical assistance programs including: Small Business Development Centers (SBDC), Women's Business Centers (WBC), SCORE, and Regional Innovation Clusters.

These programs deliver business management expertise and guidance to aspiring entrepreneurs and small businesses to help businesses start, grow and compete in global markets. While the programs' goals and niche audience vary, a common mission is shared: to provide business management expertise and guidance to American small businesses and would-be entrepreneurs so that all have the opportunity to flourish.

For the program to continue to grow and be effective, OED must continue to demonstrate its impact. Whether the SBA is working in conjunction with agencies or resource partners to conduct training, match-making and marketing events to expand outreach to small businesses or strengthen SBA's entrepreneurial education, counseling and training resources to help create new and grow existing businesses, OED will need effective tools and processes in place to accurately measure the activity and success of its program.

### 1.2 Entrepreneurial Development Management Information Workgroup Needs Analysis

For years OED has collected data from numerous partners via the Entrepreneurial Development Management Information System (EDMIS). OED seeks to improve this Management & Technical Assistance (M&TA) capability to accurately track these impacts across all partners, respond to the Small Business Jobs Act requirements and better align itself with the Agency's strategic goals by undertaking an initiative to replace EDMIS.

By building an EDMIS-like tool on modular and open components, we will increase the reusability of the technical infrastructure that underlay's this important capability within SBA. In turn, we will be able to effectively meet the M&TA program requirements for OED and other offices by leveraging the existing services and capabilities.

To that end, the SBA OED is seeking to develop a new system to replace EDMIS. Although the new system will replace EDMIS, SBA plans to leverage much of the existing functionality used to collect counseling, training and economic impact information from each of our SBA resource partners. SBA also intends to use this time to address many known issues with the EDMIS while incorporating new communication and reporting functionality along with new data requirements into the new system.

### **1.3 Purpose**

The purpose of the Entrepreneurial Development's Management Information System Workgroup is to review SBA Entrepreneurial Development system issues and data needs; and collaborate with resource partners on potential system enhancements and solutions. The input and recommendations regarding requirements made during Workgroup meetings will lead toward the design, development and implementation of SBA's new system.

### **1.4 Project Objectives**

The main objective of the Workgroup is to gather input on SBA's program needs and the new system requirements and their priority for accomplishment in view of limited resources.

### **1.5 Scope**

The scope of this Workgroup is to conduct bi-weekly workgroup sessions and discuss requirements that will be used to design, develop and implement SBA's new MIS. Workgroup discussion areas will include:

- Workgroup kick-off, review of EDMIS Workgroup Charter and administrative items.
- M&TA Summary of Findings and Workgroup agenda topics.
- SBA/External vendor system communication and error reports.
- MIS reporting system and resource partner reporting needs.
- Collection of individual training/client data.
- Collection of new client and program data fields.
- Impact calculation revisions.
- Collaboration between SBA and Resource Partners.

### **1.6 Assumptions**

- Clear understanding of current EDMIS functionality and program requirements.
- Each Workgroup member, regardless of the organization they represent, has equal opportunity to contribute.
- All Workgroup meetings will be recorded for accurate note keeping and minutes/workgroup documents will be posted on workgroup webpage for all participants.

### **1.7 Workgroup Governance**

- The Workgroup is consultative in nature. Individual representatives are providing their professional expertise and do not represent the positions of their collective organizations. Workgroup meetings will be led by an independent facilitator. The outcome(s) of the Workgroup, including unresolved issues, will be forwarded to SBA leadership for discussion with resource partner groups.



- Workgroup meetings will be held bi-weekly on Tuesday's at 3:00 PM Starting on January 10, 2012.

## 2. Key Stakeholders

Name	Role	Organization
Steve Smith	Workgroup Facilitator	SBA ODP
Kevin Keeton	Program Advisor	SBA OED (Contractor)
Holly Schick	Workgroup Administrator	SBA OED
Bruce Purdy	Workgroup Member	SBA OED/OWBO
Jack Bienko	Workgroup Member	SBA OED/OEE
Ann Bradbury	Workgroup Member	SBA OED/OSBDC
Scott Henry	Workgroup Member	SBA OED/Clusters
Catherine Connors	Workgroup Member	Houston SBDC
Diane Sandstrom	Workgroup Member	Pennsylvania SBDC
Brian Goldstein	Workgroup Member	New York SBDC
Linda Jadwin	Workgroup Member	Tacoma WBC
Kathy Bolesworth	Workgroup Member	Jacksonville WBC
Julie Bilodeau	Workgroup Member	Providence WBC
Ken Yancey	Workgroup Member	SCORE
Jim Gephart	Workgroup Member	SCORE
Steve Records	Workgroup Member	SCORE
Rick Garcia	Program Advisor	SBA OED
Barbara Jones	Program Advisor	SBA OED
Kim McClellan	Program Advisor	SBA/OVBD
Jody Raskind	Program Advisor	SBA/ Microloan
Bryson Patterson	Program Advisor	SBA /OIT
Monica Johnson	Workgroup – Staff Assistant	SBA OED

### 2.1 EDMIS Workgroup Responsibilities

- Provide strategic focus and advocacy
- Represent resource partners within the constraints of the project's charter
- Identify business impacts
- Provide recommendations and requirements as appropriate

## 3. Deliverables

The following table shows the document deliverables.

Deliverables
Bi-Weekly Workgroup Meeting Minutes
Requirements Document



## 4. Project Authority

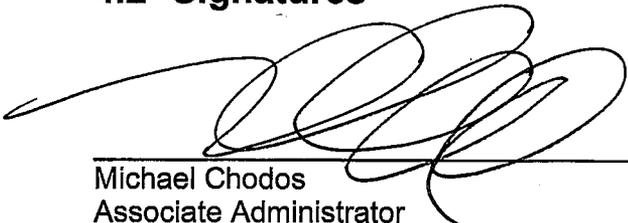
The signatures of the persons below relay an understanding in the purpose and content of this document.

Position/Title	Name	Date	Phone Number
Executive Sponsor	Michael Chodos	12/15/2011	(202) 205-6844
Workgroup Administrator	Holly Schick	12/15/2011	(202) 205-7755

### 4.1 Project Sponsor

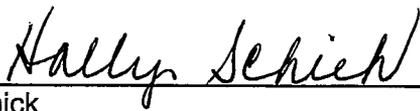
Michael Chodos, Associate Administrator of the Office of Entrepreneurial Development is the Project Sponsor.

### 4.2 Signatures



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Michael Chodos  
Associate Administrator  
Office of Entrepreneurial Development



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Holly Schick  
Deputy Associate Administrator  
Office of Entrepreneurial Development