

OED Terms

Definitions and Calculations

TERM	DEFINITION	EDMIS CALCULATION
<p>Client</p>	<p>The client is the business, if it exists. In the case of a prospective business, the client is the individual.</p> <p><u>In-Business</u>: Completed required registration(s), if applicable, with the local, state, and/or Federal government (e.g., DBA registration, get a business license, agency-issued tax identifications, etc.)</p> <p>AND</p> <p>At least one of the following:</p> <ul style="list-style-type: none"> • Has documented a transaction from the sale of a product or professional or personal service for the purpose of gain or profit; • Has contracted for or compensated an employee(s) or independent contractor(s) to perform essential business functions; • Has acquired debt or equity capital to pursue business operations (e.g., to purchase inventory, equipment, building, business, etc.); or • Has incurred business expenses in the operation of a business. <p><u>Nascent (Pre-Venture) Entrepreneur</u>: Those individuals who have taken one or more active steps to form a business, according to the Kauffman Foundation (www.kauffman.org). This includes individuals seeking assistance from the SBA and/or one of its resource partners.</p> <p><u>Start-Up</u>: those individuals who have been in business up to 12 months.</p>	<p>The unique Partner ID and Partner Client ID combination in the uploaded XML file uniquely identifies a client, who is assigned a unique SBA Client Number. The SBA Client Number is created as part of the initial counseling session upload. The number of clients served includes clients reported under all Session Types.</p> <p>NOTE: If an error occurs when uploading the record containing a client's initial session and that error is not fixed prior to the upload of another session, EDMIS will attempt to create the client based on the session submitted in the most recent upload. This may produce an error based on the system's incorrect assumption that it is the client's first session.</p>



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Type of Client	<p>Based on the <u>initial</u> session with the client.</p> <p>Face-to-face is an in-person exchange between counselor(s) and client representatives.</p> <p>Online is a computer- or internet-based exchange between counselor(s) and client representatives.</p> <p>Telephone is a verbal, telephone-based exchange between counselor(s) and client representatives.</p> <p>Training meets the definition of Training found in this document.</p>	<p>The Type of Session value for the initial session must match the Type of Client value. The Type of Client cannot be changed after the Fiscal Year. Subsequent sessions may be of any type.</p> <p>NOTE: If an error occurs when uploading the record containing a client's initial session and that error is not fixed prior to the upload of another session, EDMIS will attempt to create the client based on the session submitted in the most recent upload. This may produce an error based on the system's incorrect assumption it is the client's first session.</p>
Counseling	<p>Services provided to a client that:</p> <ul style="list-style-type: none"> • Are substantive in nature and require assistance from a resource partner or district office personnel in the formation, management, financing, and/or operation of a small business enterprise; <p style="text-align: center;">AND</p> <ul style="list-style-type: none"> • Are specific to the needs of the business or individual; <p style="text-align: center;">AND</p> <ul style="list-style-type: none"> • Require a signed SBA Form 641 or equivalent form that supports the SBA's management information database. 	



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<p>Session</p>	<p>Service provided to a client that meet the definition of Counseling or Training provided within this document.</p>	<p>Based on the unique Partner Client ID and Partner Session ID (unique identifiers from the Network/Center's system included in the XML file).</p> <p>NOTE: Calculations of Impact, such as new business starts, capital infusion, etc., are based on what has been reported to EDMIS via Session data submission.</p>
<p>Type of Session</p>	<p>Face-to-face Counseling is an in-person exchange between counselor(s) and client representatives.</p> <p>Online Counseling is a computer- or internet-based exchange between counselor(s) and client representatives.</p> <p>Telephone Counseling is a verbal, telephone-based exchange between counselor(s) and client representatives.</p> <p>Prepare Only records the amount of time spent preparing and researching information for a client.</p> <p>Update Only updates client data such as capital infusion and business start without contact or prep hours.</p> <p>Training meets the definition of Training found in this document.</p>	<p>The Type of Session for the initial session must match the Type of Client. Subsequent sessions may be of any type.</p>



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Clients Counseled	The count of clients receiving services meeting the criteria for Counseling.	<p>Count of unique SBA Client IDs with a reported counseling session in the time period indicated.</p> <p>Client Counseled includes clients reported under Face-to-face, Online, Telephone, Prepare Only, and Update Only.</p>
Contact Hours	The amount of time spent directly with a business or individual client that meets the criteria for a Counseling Session.	N/A
Prep Hours	The amount of time spent preparing and researching information for a client's Counseling Session.	N/A
Travel Hours	The amount of time spent traveling to/from a location (separate from assigned post-of-duty) to meet with a client(s). If the meeting(s) is with more than one client, the total travel time should only be reported once; the total reported travel time should not exceed the actual travel time.	N/A
Long-term Counseling Clients	A client that has 5 or more hours or contact and prep time during the selected fiscal year.	Count of unique SBA Client IDs with a sum of 5 or more contact and prep hours for all sessions reported as occurring during the fiscal year indicated.



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<p>Training Event</p>	<p>An activity or event presented or co-sponsored by a resource partner, district office or other SBA office which delivers a structured program of knowledge, information, or experience on an entrepreneurial or business-related subject.</p> <p>Training is designed to facilitate the participant’s acquisition of knowledge, skills, and competencies that relates to specific useful skills.</p> <p>Co-Hosted/Collaborative Trainings are training events hosted by multiple organizations where each host organization actively participates and contributes substantially to the training. Each host can report the event as training provided.</p> <p>Training with Multiple Sessions are training events with multiple training sessions. Each session or component requiring separate registration is counted as an individual course.</p>	<p>Number of Training Sessions is based on the number of sessions reported under each Training Event.</p> <p>An event with multiple sessions can be recorded as one event indicating the total number of sessions or as individual events each with one session. Sessions reported as individual events and indicating the total number of sessions for the event each time will cause double counting in the Number of Training Sessions.</p>



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Training – Program Format	<p>Seminar is short-term training on an entrepreneurial or business-related subject(s) that is conducted as a single, standalone program</p> <p>Course is more formal, structured training on an entrepreneurial or business-related subject(s) that may be conducted over multiple sessions.</p> <p>Online is a structured program of knowledge, information, or experience on an entrepreneurial or business-related subject(s) that is delivered through a computer and/or over the internet.</p> <p>Online training must be of a quality and substantive nature and include a registration process. A course evaluation must be made available. It must include one or more participating clients.</p> <p>e.g. if a resource partner provides a registration and link to an online training it can be counted as an online training, as long as it meets the other criteria listed above.</p> <p>Teleconference is any training delivered via electronic communications that does not meet the criteria for Online.</p>	<p>N/A</p>
Training Attendees	<p>The number of clients registered for and attending an event meeting the criteria for Training.</p>	<p>Count of clients reported on the SBA Form 888 as registering and attending a training session.</p>



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Clients Trained	The unique number of clients registered and attending an event meeting the criteria for Training.	<p>Count of the unique clients reported as attending a training session via the “Service Provided” (similar to the SBA 641) format during the time period indicated.</p> <p>Clients Trained includes clients reported with a Session Type of Training.</p>
Total Hours of Training	The number of hours that the trainer spends teaching the training session.	Based on the number of training hours reported on the SBA Form 888.
Clients Served	The number of unique clients counseled and/or trained.	<p>Count of unique SBA Client IDs with a reported counseling or training session in the time period indicated.</p> <p>Clients served includes client reported under all Session Types.</p>
New Business Starts	Clients that were able to start a business (indicated that they are in business) as a result of services received.	<p>Based on any counseling or training session within the specified time frame, that indicates the client is in business (the <i>In Business</i> flag is marked Yes) and where all prior sessions, including sessions outside the time frame, indicates the client was not in business (the <i>In Business</i> flag is marked No).</p> <p>The business start is counted in the Quarter in which the session first indicating the client as being in business (the <i>In Business</i> flag is marked Yes) occurred, i.e., is based on the session date.</p>



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Employees/Jobs	<p>Employee is defined as all persons on the payroll who worked during, or received pay for, the pay period that includes the 12th of the month.</p> <p>INCLUDES:</p> <ul style="list-style-type: none"> • Full-time and part-time employees • Permanent, short-term, and seasonal employees • Salaried and hourly workers • Employees on paid vacation or other paid leave • Independent consultants on a 1099 who cannot be counted by any other establishment/business <p>DOES NOT INCLUDE:</p> <ul style="list-style-type: none"> • Proprietors and partners of unincorporated businesses • Unpaid family workers • Employees on strike for the entire pay period • Employees on leave without pay for the entire pay period • Employees of temporary help agencies, employee leasing companies, outside contractors, or consultants. Employees of these types of firms are counted by establishments employing them, not at the site where the work is performed. 	<p>N/A</p>



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Jobs Created	Employee positions a business created as a result of services provided.	<p>The positive difference between the number of employees (FT and PT) reported in the last session of the requested FY and the number of employees reported in the last session prior to the start of the requested FY. If the difference is negative (total number of employees reported in the last session of the requested FY is less than that reported in the last session prior to the start of the requested FY), then the number of Jobs Created is zero (0).</p> <p>For new clients (those not existing in any prior FY), the total number of employees reported in their first session of the requested FY will be used in place of the last session prior to the start of the requested FY.</p> <p>NOTE: The sessions used in this calculation are the sessions with a non-null value in Total Number of Employees; zero (0) is considered a valid value.</p>



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Jobs Retained	Employee positions a business would have otherwise eliminated due to closing or downsizing.	<p>The lower of the total number of employees (FT and PT) reported in the last session of the requested FY and the last session of prior to the start of the requested FY.</p> <p>For new clients (those not existing in any prior FY), the total number of employees reported in the first session of the requested FY will be used in place of the last session prior to the start of the requested FY.</p> <p>NOTE: The sessions used in this calculation are the sessions with a non-null value in Total Number of Employees; zero (0) is considered a valid value.</p>
Jobs Supported	Total number of employee positions resulting from services provided.	<p>The total number of employees (FT and PT) reported in the last session of the requested FY for clients having more than one session.</p> <p>NOTE: The last session used in this calculation is the last session with a non-null value in Total Number of Employees; zero (0) is considered a valid value.</p>



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Capital Infusion	Includes all forms of capital debt and investments from all sources (i.e., lines of credit, consumer debt products used specifically for the business, angel investors, owner’s capital contributions, etc.). Credit lines and other revolving debt facilities/instruments are to be recognized for the full amount of the line of credit when established and not to be based on individual draw-downs.	Sum of the values reported for the following: <ul style="list-style-type: none"> • Dollar amount of SBA loans • Dollar amount of non-SBA loans • Dollar amount of equity capital (including private investment)
Capital Infusion Transactions	See definition of Capital Infusion, above. Capital Infusion is reported as a total dollar amount, while Capital Infusion Transactions is reported as a total number of capital infusion vehicles making up the dollar amount reported.	Sum of the reported number of the following: <ul style="list-style-type: none"> • SBA loans • Non-SBA loans • Equity capital (including private investments)
Gross Revenue / Sales	For clients in business, the revenue from the beginning to the end of their last 12-month financial reporting year.	
Revenue Growth	For clients in business, the increase in revenue from the beginning to the end of a their last 12-month financial reporting year.	The positive difference between the Gross Revenue/Sales value reported in the last session of the requested FY and value reported in the last session of the previous FY. Negative values are reported as zero (0). Clients must have received service in both the requested and the previous FY to be included in the Revenue Growth calculation.



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Percentage of Businesses Realizing Revenue Growth	For clients in business, the percentage of those clients/businesses indicating revenue growth from the beginning to the end of their last 12-month financial reporting year.	Based on the last session of the requested time period, the number in business clients indicating revenue growth (via the Revenue Growth Indicator) divided by the total number of in business clients with at least one session in the same time period.

