PRIME PROGRAM CLIENT INFORMATION FORM

With funding from the U.S Small Business Administration Program for Investments in Microentrepreneurs (PRIME) Program, The Center for Economic Empowerment & Development has created the **CEED PRIME PROGRAM**.

Program Purpose

The PRIME Program will provide training programs and technical assistance consulting for entrepreneurs with limited English proficiency, specifically in the following areas:

- Credit establishment, credit score improvement, and banking basics
- Technical training in the areas of business-related software (e.g. Microsoft Word, Microsoft Excel, Google applications, social media, etc.)
- Financial record-keeping and cost budgeting
- The regulatory, tax, and certification environments at federal and state levels
- Business plan development (including market research and building accurate projections)
- Access to capital/CEED Microloan and Credit Builder Loan Products ($500-$10,000)

The long-term goal of the PRIME program is to provide practical technical instruction and strategic consulting which will contribute toward the greater growth and long-term success of Hispanic and Latino entrepreneurs in the Sampson, Robeson, and Cumberland counties.

Components of the program:

Orientation- Introduction to the Prime Program:

If the client is new to CEED, they will be required to complete a SBA form 641 Counseling Request form, while if the client is a referral from the WBC Program the WBC consultant will complete a 641 Part III. The client will also be required to complete the basic client agreement for the CEED PRIME Program.

Step 1- Needs Assessment:

In this consultation, the entrepreneur will complete a needs assessment with the PRIME business consultant. The assessment will measure the current knowledge and skills of the program participant in the areas of entrepreneurial literacy, credit worthiness/preparedness, technical proficiency, and funding readiness. This will be used to create a custom technical assistance action plan. Needs assessments will be performed at the enrollment of the participant into the program, halfway through the program, and at the completion of the program period to evaluate progress and adjust future priorities for technical assistance.

Step 2- Technical Assistance Action Plan:

Based on the needs assessment and the PRIME consultant will develop a technical assistance action plan based on the priorities and upcoming training schedule of the program. The TA Plan will be detailed and will outline measurable goals for the business it will estimate the hours needed, methods used such as classroom training, one on one consultations, and materials required, if any.

Step 3- Individualized Consulting and Training Classes:
Based on the technical assistance action plan, the PRIME consultant will meet individually with each PRIME client for personalized consulting and training. Corporate training will take place for clients in some or all of the following classes:

- Credit and Banking Basics
- Microsoft Office Overview and Microsoft Word/Excel for Business
- Google Business Applications
- Regulatory, Tax, and Certifications Training

Step 4-Technical Assistance Progress Log (Ongoing)
As the client attends training sessions and workshops all of the information will be recorded on the clients' progress logs, which will include projected completion dates, follow-up assessments, and summaries of consulting sessions.

Follow- up and Evaluation

Evaluation of the client's progress will occur at mid-program period and at the completion of the program period. This will be used to assess and prepare the client for loan funds that have been earmarked for credit-building efforts, as well as small business startup or expansion (if desired by and qualified for by the client). Continued consulting and access to training classes beyond the program period will be offered as resources continue to be made available.

Note: This project does not guarantee a loan for small businesses but one of the goals of this program is to get applicants ready to acquire funding.   Applicants will need to demonstrate a commitment to engage with consultants to develop and/or implement the capacity to develop or strengthen their small businesses by completing the technical assistance plan.

<u>Contact Information</u>	
Owners Name:	
Business Name:	
Address:	
Email address:	
Telephone:	
Fax Number:	
Website address:	

Business Questionnaire:	**Yes**	**No**
Do you currently have a business banking account?		
Do you use Gmail or other Google business applications?		
Are you familiar with Microsoft Word and Excel?		
Do you have a tax ID for your business?		

Employee Information:	
Paid Full Time Employees (FTE):	
Paid Part-Time Employees:	
Total Number of Paid Staff:	
Approximate Annual Business Revenue/Net Income:	

By signing below, I understand that the CEED's Prime Program requires that I actively participate in technical assistance training and classes for the 2016 program year.

Note: All of your information is privileged and confidential and will not be shared with third-parties.

Client:______________________________________ Date:_________________

TA Consultant:____________________________________ Date:_________________

Please complete this form and return it by email to jsteinman@ncceed.org or fax 910-483-4914