

# **BACP Deliverable Templates**



# NBDC ECM Deliverables Templates

NBDC grantees are provided Excel-based ECM Deliverables Templates for uploading purposes, which correspond to their contract(s). For example, if an NBDC grantee was awarded the Placed-based Generalist contract, they would be provided with the Placed-based Generalist ECM Deliverables Template to enter their performance data and upload into the Import Portal of ECM. System users can also download the templates from the home page of ECM.

Since there are seven (7) NBDC Program types, there are also seven (7) different templates. Each template contains tabs which relate to their respective program type work program. Below are the tabs contained in each template:

Templates	Tabs									
<b>Business Stage Specialist</b>	Introduction	Business List	Business Consultations	New Business Outreach & Attraction	Referrals	Collaboration	Agency Events	Event Attendee List	Marketing	
<b>Capital Specialist</b>	Introduction	Business List	Business Consultations	Business Advisory	New Business Outreach & Attraction	Referrals	Collaboration	Marketing	Funding Resource Listing	Funding Activities
<b>Cultural Specialist</b>	Introduction	Business List	Business Consultations	New Business Outreach & Attraction	Referrals	Collaboration	Agency Events	Event Attendee List	Marketing	
<b>Industry Specialist</b>	Introduction	Business List	Business Consultations	New Business Outreach & Attraction	Referrals	Collaboration	Agency Events	Event Attendee List	Marketing	
<b>Innovation Specialist</b>	Introduction	Business List	Business Consultations	Business Advisory	New Business Outreach & Attraction	Referrals	Collaboration	Agency Events	Event Attendee List	Marketing
<b>Peer-To-Peer Trainer</b>	Introduction	Business List	Business Consultations	New Business Outreach & Attraction	Referrals	Collaboration	Agency Events	Event Attendee List	Marketing	
<b>Place-Based Generalist</b>	Introduction	Business List	Business Consultations	New Business Outreach & Attraction	Referrals	Collaboration	Agency Events	Event Attendee List	Marketing	

# Snippet/Screenshot



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1		<b>Place-Based Generalist Template   V.05.26.22</b>															
2																	
3		<b>NBDC PROGRAM CATEGORY TYPE</b>															
4		Place-Based Generalist															
5		<b>Do NOT use this Enterprise Case Management (ECM) Neighborhood Business Development Centers (NBDC) Program</b>															
6																	
7		<b>INSTRUCTIONS</b>															
8		SAVE A COPY: Before using this template, save a copy with the proper filename format: ORG															
9		DATA INPUT: Input your program-specific activities data, per your work plan, in the appropriate tabs															
10		REQUIRED FILEDS: When completing a row within each tab, only the columns with header names in red font require															
11		COPY/PASTE TIPS: If inputting data into the template via copy/paste, instead of manual typing, make sure to paste															
12		FILENAME FORMAT: Be sure to save the new document with your corresponding submission date at the end of the															
13		ECM TEMPLATE UPLOAD TIP: When uploading your completed deliverable file into ECM, select the Business BACP File															
14		ECM USER GUIDE PDF: For full instructions on how to properly upload your deliverables into ECM, download and															
15		ECM TECH SUPPORT: If you need assistance, email ECM Technical Support at ECM_SUPPORT@WEGRP.COM or call (844)															
16																	
17																	
18		<b>TAB: Business List</b>															
19		Complete a row per unique business that benefitted and/or participated in a program activity															
20		The businesses listed will automatically be added into the drop-down list within the tabs where "BUSINESS LEGAL															
21																	
22																	
23		<b>TAB: Business Consultations</b>															
24		Complete a row per unique eligible business consultation program activity															
25		Listed program activities will be counted towards the "Planned Output" per your work plan															
26		Cells with drop-downs will not allow manual input or pasting of copied data															
27		The "BUSINESS LEGAL NAME" drop-down will be empty until a business is listed in the "Business List" tab															
28		The "BUSINESS ADDRESS" cell will auto-populate after selecting a business in the "BUSINESS LEGAL NAME" cell															
29		The "INTEREST IN TIF DISTRICT" drop-down refers to whether or not the business owner has expressed an interest in															
30																	
31																	
32		<b>TAB: New Bus(iness) Outreach &amp; Attraction</b>															
33		Complete a row per unique eligible new business outreach and attraction program activity															
34		Listed program activities will be counted towards the "Planned Output" per your work plan															
35		Cells with drop-downs will not allow manual input or pasting of copied data															
36		The "BUSINESS LEGAL NAME" drop-down will be empty until a business is listed in the "Business List" tab															
37		The "BUSINESS ADDRESS" cell will auto-populate after selecting a business in the "BUSINESS LEGAL NAME" cell															

Introduction Business List Business Consultations New Bus Outreach & Attraction Referrals Collaboration Agency Events Event Attendee List Marketing

## Place-Based Generalist Template | V.05.26.22

### NBDC PROGRAM CATEGORY TYPE

Place-Based Generalist

**Do NOT** use this Enterprise Case Management (ECM) Neighborhood Business Development Centers (NBDC) Program reporting template for any other NBDC Program Category Type

### INSTRUCTIONS

**SAVE A COPY:** Before using this template, save a copy with the proper filename format: ORG Code\_ProgramCategoryType\_Date (e.g., **ABC\_Place-BasedGeneralist\_02\_02\_2022**)

**DATA INPUT:** Input your program-specific activities data, per your work plan, in the appropriate tabs

**REQUIRED FIELDS:** When completing a row within each tab, only the columns with header names in red font require input

**COPY/PASTE TIPS:** If inputting data into the template via copy/paste, instead of manual typing, make sure to paste copied data (1) into the appropriate cells per the column header, (2) without the source formatting of the copied data, and (3) into open cells without drop-down values

**FILENAME FORMAT:** Be sure to save the new document with your corresponding submission date at the end of the filename while keeping the same required format (e.g., **ABC\_Place-BasedGeneralist\_03\_03\_2022**)

**ECM TEMPLATE UPLOAD TIP:** When uploading your completed deliverable file into ECM, select the Business BACP File Type

**ECM USER GUIDE PDF:** For full instructions on how to properly upload your deliverables into ECM, download and review the “ECM for the BACP NBDC Program User Guide” PDF from the BACP Template tab in ECM

**ECM TECH SUPPORT:** If you need assistance, email ECM Technical Support at [ECM\\_SUPPORT@WEGRP.COM](mailto:ECM_SUPPORT@WEGRP.COM) or call (844) 726-2999

### TAB: Business List

Complete a row per unique business that benefitted and/or participated in a program activity

The businesses listed will automatically be added into the drop-down list within the tabs where “BUSINESS LEGAL NAME” is required

## Place-Based Generalist Template | V.05.26.22

### **TAB: Business Consultations**

Complete a row per unique eligible business consultation program activity  
Listed program activities will be counted towards the "Planned Output" per your work plan  
Cells with drop-downs will not allow manual input or pasting of copied data  
The "BUSINESS LEGAL NAME" drop-down will be empty until a business is listed in the "Business List" tab  
The "BUSINESS ADDRESS" cell will auto-populate after selecting a business in the "BUSINESS LEGAL NAME" cell  
The "INTEREST IN TIF DISTRICT" drop-down refers to whether or not the business owner has expressed an interest in opening a business within a specific TIF District

### **TAB: New Bus(iness) Outreach & Attraction**

Complete a row per unique eligible new business outreach and attraction program activity  
Listed program activities will be counted towards the "Planned Output" per your work plan  
Cells with drop-downs will not allow manual input or pasting of copied data  
The "BUSINESS LEGAL NAME" drop-down will be empty until a business is listed in the "Business List" tab  
The "BUSINESS ADDRESS" cell will auto-populate after selecting a business in the "BUSINESS LEGAL NAME" cell

### **TAB: Referrals**

Complete a row per unique eligible referral of a business to a qualified business support partner program activity  
Listed program activities will be counted towards the "Planned Output" per your work plan  
Cells with drop-downs will not allow manual input or pasting of copied data  
The "BUSINESS LEGAL NAME" drop-down will be empty until a business is listed in the "Business List" tab  
The "BUSINESS ADDRESS" cell will auto-populate after selecting a business in the "BUSINESS LEGAL NAME" cell

## Place-Based Generalist Template | V.05.26.22

### **TAB: Collaboration**

Complete a row per unique eligible collaboration effort, both NBDC and Non-NBDC, program activity

Listed program activities will be counted towards the "Planned Output" per your work plan

Cells with drop-downs will not allow manual input or pasting of copied data

The "BUSINESS LEGAL NAME" drop-down will be empty until a business is listed in the "Business List" tab

The "BUSINESS ADDRESS" cell will auto-populate after selecting a business in the "BUSINESS LEGAL NAME" cell

### **TAB: Agency Events**

Complete a row for every unique agency event for the program per your work plan

Listed program activities will be counted towards the "Planned Output" per your work plan

The agency event listed will automatically be added into the drop-down list within the tabs where "AGENCY EVENT NAME" is required

### **TAB: Event Attendee List**

Complete a row for every attendee of event(s) listed in Agency Events

The "AGENCY EVENT NAME" drop-down will be empty until an event is listed in the "Agency Events" tab

### **TAB: Marketing**

Complete a row per unique marketing effort for the program activities per your work plan

Listed program activities will be counted towards the "Planned Output" per your work plan

"ACTIVITY NAME" should match the "ACTIVITY NAME" in the Program Activities Tab

The "RELATED TO TIF PROGRAMMING" drop-down refers to whether or not the marketing effort was for, or encompassed, a specific TIF District

## Place-Based Generalist Template | V.05.26.22

### REMINDERS

Don't forget to upload supporting document files and images into ECM, as proof of your program activities (i.e., New Business Outreach, Agency Events, and Marketing), per your work plan; Full instructions can be found in the "ECM for the BACP NBDC Program User Guide"

SUCCESS STORIES: "Success Stories" are a required deliverable per your work plan, however, it is NOT inputted in this template; Either input directly into ECM, or upload a document file into the Document tab of the Data Import page of ECM; Full instructions can be found in the "ECM for the BACP NBDC Program User Guide"

COMMERCIAL LISTING: "Commercial Listing" is a required deliverable per your work plan, however, it is NOT inputted in this template; Upload proof of your current list of available commercial space in your service area into the Document tab of the Data Import page of ECM; Full instructions can be found in the "ECM for the BACP NBDC Program User Guide"

BACP EVENTS: "BACP Events" are required BACP NBDC-related events which requires attendance by a representative from your organization as per your work plan, however, proof of attendance is NOT inputted in this template; BACP Small Business Advocacy team will send event invitations via ECM and attendance will be taken upon check-in

# Deliverable tabs



## Business List Tab

<b>BUSINESS LEGAL NAME</b>	<b>DOING BUSINESS AS NAME</b>	<b>BUSINESS ADDRESS</b>	<b>BUSINESS ADDRESS UNIT TYPE</b>	<b>BUSINESS ADDRESS UNIT NUMBER</b>
	<b>BUSINESS CITY</b>	<b>BUSINESS STATE</b>	<b>BUSINESS ZIP CODE</b>	<b>BUSINESS INDUSTRY</b>

## Business Consultation Tab

<b>CONSULTATION DATE</b>	<b>BUSINESS LEGAL NAME</b>	<b>BUSINESS ADDRESS</b>	<b>NEEDS</b>	<b>SOLUTION PROVIDED</b>	<b>OUTCOME DETAILS</b>
<b>INTERESTED IN TIF DISTRICT</b>	<b>CONTACT NAME</b>	<b>CONTACT POSITION / TITLE</b>	<b>CONTACT EMAIL</b>	<b>CONTACT PHONE</b>	
	<b>GENDER</b>	<b>ETHNICITY</b>	<b>RACE</b>		

## New Bus Outreach & Attraction Tab

<b>OUTREACH DATE</b>	<b>BUSINESS LEGAL NAME</b>	<b>BUSINESS ADDRESS</b>	<b>OUTCOME DETAILS</b>
<b>CONTACT NAME</b>	<b>CONTACT POSITION / TITLE</b>	<b>CONTACT EMAIL</b>	<b>CONTACT PHONE</b>



# Deliverable tabs



## Referrals Tab

REFERRAL DATE	BUSINESS LEGAL NAME	BUSINESS ADDRESS	NEEDS	REFERRAL TO
OUTCOME DETAILS	CONTACT NAME	CONTACT POSITION / TITLE	CONTACT EMAIL	CONTACT PHONE

## Business Advisory Tab

ADVISORY DATE	BUSINESS LEGAL NAME	BUSINESS ADDRESS	NEEDS	SOLUTION PROVIDED	
INTERESTED IN TIF DISTRICT	OUTCOME DETAILS	CONTACT NAME	CONTACT POSITION / TITLE	CONTACT EMAIL	CONTACT PHONE

## Collaboration Tab

COLLABORATION DATE	COLLABORATION NAME	DESCRIPTION OF COLLABORATION STRATEGY / INITIATIVE	NUMBER OF BUSINESSES
NUMBER OF ATTENDEES	COLLABORATING AGENCY NAME	COLLABORATING AGENCY 2 NAME	COLLABORATING AGENCY 3 NAME

# Deliverable tabs



## Agency Events Tab

AGENCY EVENT DATE	AGENCY EVENT NAME	AGENCY EVENT TYPE	NEEDS / PURPOSE
NUMBER OF BUSINESSES THAT PARTICIPATED IN EVENT	TOTAL NUMBER OF EVENT ATTENDEES	OUTCOME DETAILS	

## Event Attendee List Tab

AGENCY EVENT NAME	AGENCY EVENT DATE	ATTENDEE NAME
ATTENDEE POSITION / TITLE	ATTENDEE EMAIL	ATTENDEE PHONE

## Marketing Tab

AGENCY MARKETING START DATE	AGENCY MARKETING TYPE	RELATED TO TIF PROGRAMMING	DESCRIPTION OR ARTICLE LINK TO MARKETING EFFORT
NEEDS	SOLUTIONS	OUTCOME DETAILS	

# Deliverable tabs



## Funding Resource Listing Tab

LENDER / CAPITAL PROVIDER	ADDRESS OF LENDER / PROVIDER	CITY	STATE
ZIP	CONTACT NAME	CONTACT EMAIL	CONTACT PHONE

## Funding Activities Tab

BUSINESS LEGAL NAME OF FUNDING RECIPIENT	BUSINESS ADDRESS	FUNDING SOURCE TYPE	LISTED FUNDING SOURCE NAME	
UNLISTED FUNDING RESOURCE NAME	FUNDING TYPE	FUNDING AMOUNT	NUMBER OF JOBS CREATED	NUMBER OF JOBS RETAINED























