Business Case for Restructuring the SBA
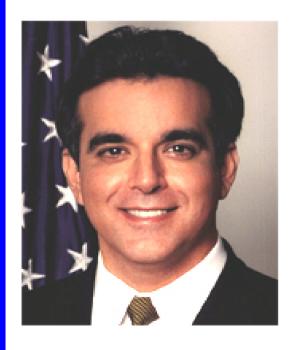
…one of my jobs is to create an environment in which the entrepreneurial spirit flourishes, in which small business owners are able to keep making a living and keep people employed...”

- George W. Bush

U.S. Small Business Administration

The SBA Administrator

When President Bush appointed me to this position, I said that I wanted to change the way government helps small business. It's not good enough to do the same old thing. Our goal is always to do more to respond to the needs of American small businesses. They are our clients, and we will judge our success by theirs." - SBA Administrator, Hector V. Barreto

Why was Transformation Important?

- **President's Management Agenda**

  – Agencies to become more customer-centered, market-based, results-oriented

  – Strategic management of human capital

  – Expanded E-Government

  – Integrate budget and performance

Why was Transformation Important? (continued)

- **GAO reports**
  - Organizational structure
  - Who is the customer?

- **IG reports**
  - Management challenges

Strategic Plan

Define Strategic Initiatives

E-SBA

Transform SBA

Marketing SBA

Sub-initiatives

- **Human Capital Management**

- **Implementing District Pilots**

- **Improving Business Processes**

Human Capital Management

- **Employee Skills Training**
  - Centralized training will provide uniformity
  - Training resources for districts to meet special needs

- **Organizational Realignment**
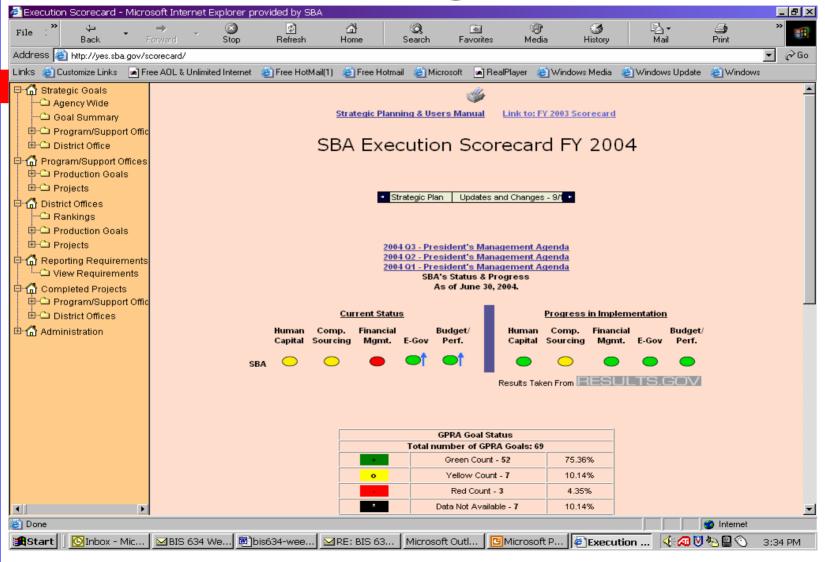 - New assignments, position descriptions

- **Succession Planning**
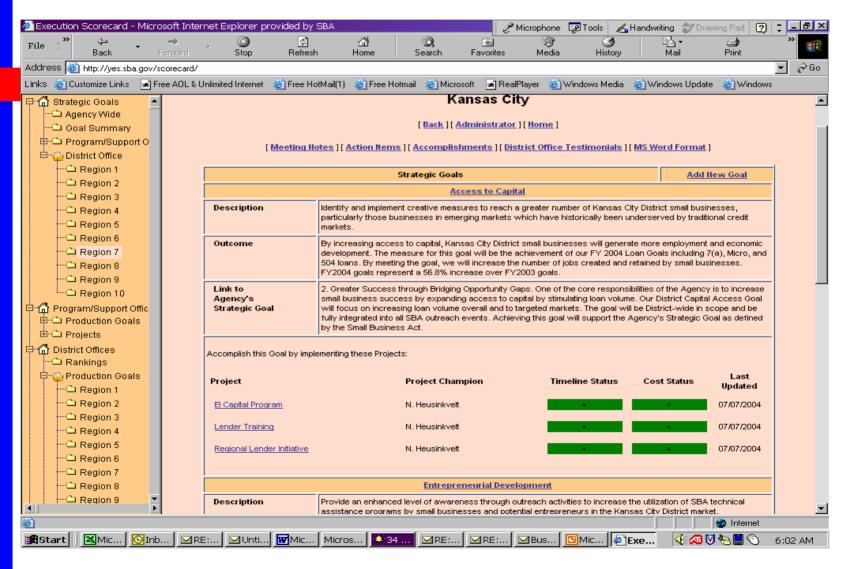 - Informed by analysis on skills, skill gaps, and demographics

- **Performance Management**
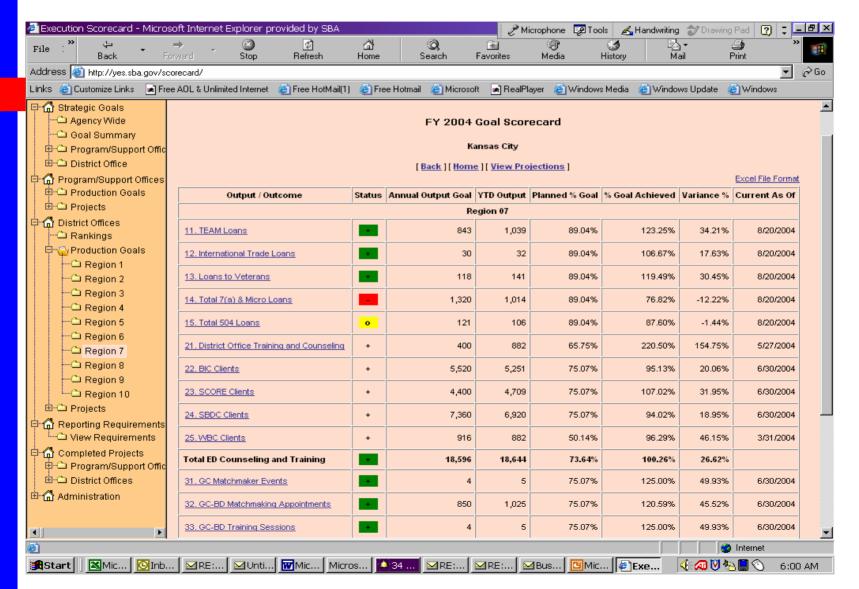 - Regular use of Execution Scorecard

Performance Management

Strategic Goals and Projects

Performance Goals

FY 2004 Goal Scorecard

Kansas City

[Back] [Home] [View Projections]

Excel File Format

Output / Outcome	Status	Annual Output Goal	YTD Output	Planned % Goal	% Goal Achieved	Variance %	Current As Of
Region 07							
11. TEAM Loans	+	843	1,039	89.04%	123.25%	34.21%	8/20/2004
12. International Trade Loans	+	30	32	89.04%	106.67%	17.63%	8/20/2004
13. Loans to Veterans	+	118	141	89.04%	119.49%	30.45%	8/20/2004
14. Total 7(a) & Micro Loans	-	1,320	1,014	89.04%	76.82%	-12.22%	8/20/2004
15. Total 504 Loans	o	121	106	89.04%	87.60%	-1.44%	8/20/2004
21. District Office Training and Counseling	+	400	882	65.75%	220.50%	154.75%	5/27/2004
22. BIC Clients	+	5,520	5,251	75.07%	95.13%	20.06%	6/30/2004
23. SCORE Clients	+	4,400	4,709	75.07%	107.02%	31.95%	6/30/2004
24. SBDC Clients	+	7,360	6,920	75.07%	94.02%	18.95%	6/30/2004
25. WBC Clients	+	916	882	50.14%	96.29%	46.15%	3/31/2004
Total ED Counseling and Training	+	18,596	18,644	73.64%	100.26%	26.62%	
31. GC Matchmaker Events	+	4	5	75.07%	125.00%	49.93%	6/30/2004
32. GC-BD Matchmaking Appointments	+	850	1,025	75.07%	120.59%	45.52%	6/30/2004
33. GC-BD Training Sessions	+	4	5	75.07%	125.00%	49.93%	6/30/2004

Ranking Results Screen

Implementing District Pilots

- **Consolidate back room activities**
  - Centralize 7(a) guaranty loan purchasing/liquidation
  - Centralize disaster commercial loan liquidation
  - Centralize 504 loan processing
  - Centralize 8(a) annual reviews

- **Deploy staff closer to customers**
  - Re-deploying district staff to focus on marketing/outreach
  - Use of Alternate Work Sites (AWS)

Improving Business Processes

- **E-Tran**

- **Guaranty Purchase Tracking System (GPTS)**

- **Commercial Loan Chron System (CLCS)**

- **8(a) Eligibility Application & Annual Review**

Improving Business Processes
(continued)

- **Alternate Work Sites (AWS)**

- **District Office Tracking System (DOTS)**

- **National Lender Guide & PowerPoint**

Questions & Comments