DATE: May 23, 2018

TO: All BusinessSource Center Contractors

FROM: Daysi Hernandez, Chief Grants Administrator
       Economic Development Division

SUBJECT: DIRECTIVE NO. 19-01
         PROGRAM YEAR 2018-2019 NEW PROGRAM FORMS

EFFECTIVE DATE
This bulletin is effective on June 1, 2018.

PURPOSE
The purpose of this Directive is to provide LA BusinessSource Center Program
Subrecipients with new Program Forms to be used for all files in conjunction with
utilization of CDBG funds for Program Year 2018-19. All client files must contain all of
the forms listed in this directive. This Directive and attachments set out the program
requirements and identifies documents that must be utilized and maintained in client
files in order for contract compliance to be maintained.

1. Document Checklist
   Outlines the file structure for maintenance and record-keeping of documentation
   whether electronically stored in Sales Force or maintained in hard-copy form in file
cabinets.

2. Business Objectives Assessment
   Assessment must be completed on all enrolled clients. This assessment has
   suggestions on what type of questions should be asked to lead to an assessment
   with client input. Once the assessment is done, it should be used to develop a plan
   of action and relationship with business, guiding them toward job creation.

3. Individual Business Service Agreement (Application)
   Document is used when clients are ENROLLED in the LABSC program. Application
   must be accompanied by eligibility document(s).

4. Client Service Notes
   This form is expected to be in every file. It will contain information of client
   interactions the BSC conducted to help the client reach their business objectives
   (Job Creation and/or Job retention).
5. **Job Creation/Retention Form**
   This form should be used when a Job has been created or retained. **ONLY HUD JOB CREATIONS UPLOADED TO SALESFORCE will count towards Agency goals.**

   **Job Creation**
   In order to meet this criterion, the job must be created with the direct assistance of the LABSC AND 51% of the jobs created/retained must be available to or held by LMI persons. Jobs created can be part time (PT) however, LABSC Jobs are counted on a full time equivalent (FTE) basis.

   **Job Retention**
   In order to meet these criteria, there must be documentation that jobs would have been lost without the LABSC program services. Documentation required:
   - Documentation of services provided through LABSC directly preventing the loss of jobs - **and**-
   - Letter of explanation of current business environment with income not sufficient to meet payroll and current profit and loss statement(s) evidencing loses in business income - **or**-
   - Bank statements evidencing decreasing balances and challenges meeting credit and payroll responsibilities - **or**-
   - Business Tax Returns for previous two years evidencing a decreasing business income thereby creating challenges meeting credit and payroll responsibilities.

6. **Business Referral Form**
   This form should be used when a client referral is being forwarded to any WorkSource Center location or any other partners.

Attachments:
1. The LA BusinessSource System
2. Document Checklist
3. Business Objectives Assessment
4. Individual Business Services Agreement
5. Client Service Notes
6. Job Creation/Retention Form
7. Business Referral Form