

**On-Site Review Guidelines**

**SCORE Chapter**

# Purpose

# The purpose of the on-site review is to promote communication, collaboration, and understanding of operations between SBA District Offices and SCORE Chapters.

# Overall Process

# Prior to communicating with any individual SCORE Chapter regarding the SBA review process, the SBA District Office will schedule a meeting with the SCORE District Director in the second quarter (Jan. – Mar.) of the current fiscal year. During that meeting, the SBA District Office and the SCORE District Director will discuss the challenges, opportunities, and performance of the SCORE Chapters in that district. The SCORE District Director will share and review the SCORE on-site review form (Form 16) for the chapters as a foundation of the discussion. The SBA District Office will identify the SCORE Chapters that will be visited and coordinate the communications and logistics with the chapters.

# Frequency

# On-site reviews for SCORE Chapters will take place once per chapter each fiscal year (on-site reviews may be delegated to other SBA field staff).

# Preparation

# As you prepare to conduct an on-site review, be sure to review the following documents:

* The Current Year Program Announcement; and
* The SCORE Notice of Award.

**Review and Submission**

When conducting the review, indicate whether the SCORE Chapter follows each requirement on the on-site review and provide notes to support your assessment. If the chapter’s response (or lack thereof) requires follow-up, make a note in your summary section and establish a due date for the chapter to submit this information. Your on-site review must be submitted to the Office of Entrepreneurship Education (OEE) SCORE Program Manager within 10 days of your site visit. After the OEE Program Manager concurs with the report, forward a final PDF version to the Chapter Chair, copying the Program Manager.

# Additional context

# SCORE is a national organization and SCORE’s goals and performance are managed between SBA-HQ and SCORE-HQ. Local SBA District Offices should discuss what the chapters’ priorities are but should not direct or evaluate a chapter’s ‘performance’ against any given priority. During the on-site review, the SBA District Office will review that a given SCORE Chapter’s activities are responsive to SBA national and local priorities and conform to the requirements of the law, the Federal Regulations, Program Announcement, and the Notice of Award.

# Where more than ten SCORE Chapters exist within the SBA District Office, and on-site reviews are prohibitive for all locations to be visited within a 12-month timeframe, the SBA District Director or Deputy District Director may propose alternative site visits schedules/options with OEE.

# SCORE ON-SITE REVIEW REPORT

# Current Program Year (FY): XXXX SCORE Chapter Name: XXXX

# Chapter Chair Name: XXXX

**Chapter Chair E-Mail: XXXX**

**Chapter Chair Phone Number: XXXX**

**GENERAL REQUIREMENTS**

1. Is SBA’s partnership with SCORE featured prominently so that logo placement, all promotional and marketing materials, the website, etc. have the appropriate acknowledgement of the chapter’s affiliation with the SBA?

Yes  
 No  
  
Notes: XXXX

1. Is the SCORE Chapter located in an SBA space?

Yes  
 No  
  
Notes: XXXX

1. Is security clearance required for SCORE mentors to access the SBA space?  
     
    Yes  
    No  
     
   Notes: XXXX

**SERVICE DELIVERY AND COLLABORATION**

1. Does the SCORE Chapter collaborate with other federal, state, or local small business assistance programs (e.g. MEP, PTAC, USEAC, Chambers, etc.) to serve small businesses?

Yes  
 No

Notes: XXXX

1. Does the SCORE Chapter collaborate with the District Office or with other SBA Resource Partners (e.g. WBC, SBDC, VBOCs)?

Yes  
 No

Notes: XXXX

1. Does the scope and quality of the SCORE Chapter’s mentoring and training meet the needs of the local economy?

Yes  
No

Notes: XXXX

# SUMMARY

1. What are best practices of this SCORE Chapter?   
     
   XXXX
2. What are the challenges of this SCORE Chapter?  
     
   XXXX
3. How can SBA and SCORE better collaborate?  
     
   XXXX
4. Provide any additional comments or recommendations.

XXXX

**SBA SCORE Liaison:** XXXX  
**Date:** XXXX