

Client name: \_\_\_\_\_



Administered by  The Abilities Fund

## Progress Checklist

### Standard Outline of Self Employment Services

**\*(Forms to be completed by VR Staff)**

#### **Pre-Application Phase \*(SE Discussion Questionnaire, ESE Workshop Referral, Easter Seals Benefits Analysis Referral Form)**

- \_\_\_\_\_ Client expresses interest in self employment and discusses ideas with VR staff. At this time, client completes VR Self Employment Discussion Questionnaire form and discusses with VR staff as means to clarify and document the business idea
- \_\_\_\_\_ **IF APPROPRIATE**, VR staff suggests client attend Exploring Self Employment Workshop
- \_\_\_\_\_ VR staff completes “Exploring Self Employment (ESE) Workshop Referral Form found on The Abilities Fund website ([www.abilitiesfund.org](http://www.abilitiesfund.org)) or VRIS and forwards completed form to NSES
- \_\_\_\_\_ Client participates in ESE Workshop, decides whether or not self employment is right for them and notifies VR staff of decision
- \_\_\_\_\_ VR staff refers client for Easter Seals Benefits Analysis
- \_\_\_\_\_ If client decides to pursue self employment, VR staff continues with Application Phase activities
- \_\_\_\_\_ *Client status*—Eligible and Planning

#### **Application Phase \*(SE Assessment & Referral)**

- \_\_\_\_\_ **IF APPROPRIATE**, VR staff submits “Self Employment Assessment and Referral Form” to NSES along with a copy of the completed VR Self Employment Pre-Assessment form
- \_\_\_\_\_ NSES sends email link Informed Choices© application to client or hard copy in mail if client does not have email access
- \_\_\_\_\_ Client completes application within 30 days
- \_\_\_\_\_ Application interview is scheduled with client, VR staff and NSES
- \_\_\_\_\_ Copy of completed application is provided to VR staff and client
- \_\_\_\_\_ Application summary/recommendation is provided by NSES to VR staff and client
- \_\_\_\_\_ *Client status*—Eligible and Planning

**Phase I – Feasibility (Estimated 60 days to completion)**

- \_\_\_\_\_ NSES recommends Feasibility Assessment services (Easter Seals Benefits Analysis must be completed before Feasibility begins)
- \_\_\_\_\_ Feasibility Assessment begins upon agreement of VR staff and client
- \_\_\_\_\_ Target net income goal is set by the client
- \_\_\_\_\_ NSES forwards a copy of the Feasibility Assessment to VR staff and client
- \_\_\_\_\_ Feasibility meeting conducted
- \_\_\_\_\_ NSES provides a summary/recommendation based upon the Feasibility Assessment
- \_\_\_\_\_ *Client status*—Eligible and Planning

**Phase II – Business Plan (BP) Development (Estimated 80 days to completion)**

- \_\_\_\_\_ NSES recommends business planning services
- \_\_\_\_\_ VR staff agrees with NSES recommendation
- \_\_\_\_\_ Business planning services begin
- \_\_\_\_\_ NSES assists the client prepare to present their BP and provide client with details regarding what documentation is required—including written estimates
- \_\_\_\_\_ NSES forwards a copy of the business plan to VR staff prior to BP Presentation & Review meeting
- \_\_\_\_\_ *Client status*—Eligible and Planning

**Phase III – BP Presentation and Review \*(IPE is signed)**

- \_\_\_\_\_ NSES contacts the counselor to schedule a BP Review meeting and confirms via email
- \_\_\_\_\_ BP Presentation and Review meeting is held
- \_\_\_\_\_ Remaining business plan and/or financial assistance issues are resolved
- \_\_\_\_\_ NSES sends a “recommendation for funding” email to VR staff and client that includes final copy of BP, financials and all estimates
- \_\_\_\_\_ VR staff completes authorization for financial assistance
- \_\_\_\_\_ Client receives financial assistance and makes purchases as appropriate
- \_\_\_\_\_ Client provides copies of all receipts for purchases to VR staff
- \_\_\_\_\_ Business start up (all purchases complete) within 6 months of funding
- \_\_\_\_\_ *Client Status*—Employment Follow Up (after all purchases made and business start)

**Phase IV – Business Support Services (BSS)**

- \_\_\_\_\_ Monthly business support services commence
- \_\_\_\_\_ Monthly BSS reports are provided to VR staff and client
- \_\_\_\_\_ Clients submit monthly financial statements to NSES, they are forwarded to VR staff
- \_\_\_\_\_ Business support services is available to client by NSES immediately after funds are authorized and continues up to a year after client meets their target net income goal
- \_\_\_\_\_ Clients may participate in additional BSS services including “Build a Better Business” Workshops and “Main Street” events
- \_\_\_\_\_ Self employment files remain in “employment follow-up” milestone until target income goal is met or income has stabilized for a minimum of 3 months
- \_\_\_\_\_ *Client status*—Successful Closure (once either target net income is reached or income is stabilized for a minimum of 3 months)