

VR Business Development System: Tier 1 & Tier 2 Processes

Descriptive Overview of Steps and Forms

The VR Business Development System (BDS) has been created to provide a systematic process for supporting VR customers in developing successful part-time and full-time Self-Employment / Venture Development (SE/VD) outcomes. A Handbook is available to provide guidance in progressing through the BDS in a methodical manner. BDS Overview:

1. Determine how much the customer needs to earn each month, how much they can earn without affecting their support payments, and their physical or mental capacity to perform required tasks for the proposed venture – Review with benefits counselor
 - a. Form 1 of 3: Customer Profile Assessment – Determine Tier 1 or Tier 2
 - b. Action: Counselor completes Form – Submits for VR Regional Leader approval
2. Introduce SE/VD as an option. Provide customer with copy of either 5 Steps to Successful Self-Employment or 10 Steps to Venture Success Workbook and discuss proposal requirements
 - a. Form: Tier 1 Business Proposal Requirements or Tier 2 Business Plan Required Elements
 - b. Action: Review with Customer
3. Discuss importance of customer participation and willingness to collaborate – this is your “contract” to document the customer’s commitment to the process
 - a. Form: Tracking Agreement – either Tier 1 Business Proposal Development or Tier 2 Business Plan Development
 - b. Action: Customer and Counselor both sign Agreement; continue to review and sign throughout business development project
4. Determine customer suitability for operating their own business (Either 5 or 10 Steps, Steps 1 & 2 – complete online or in Workbook) and whether they have the skills, knowledge and aptitude for the specific SE/VD proposed – Utilize consultant help as needed
 - a. Form 2 of 3: Business Concept Assessment
 - b. Action: Review with Customer – Submit for VR Regional Leader Approval
5. Proceed with development of remaining Steps – Utilize consultant help as needed
 - a. Utilize 5 or 10 Steps Workbook and / or work online
 - b. Action: Document results of each step, archive for final summary
6. Prepare Business Proposal / Plan – Utilize consultant help as needed
 - a. Utilize Sample Plan as example
 - b. Action: Counselor and Customer sign off on each step in Tracking Agreement
7. Complete Business Readiness Checklist and Bookkeeping Agreement
 - a. Utilize: Business Readiness Checklist, Bookkeeping Agreement & Tracking Form
 - b. Action: Counselor and Customer review and complete Checklist
8. Review Tier 2 Business Proposal / Plan for completeness – ready for submission
 - a. Form 3 of 3: Business Proposal / Plan Assessment
 - b. Action: Submit to Knowledge Institute (KI) for Plan Evaluation
9. Final Adjustments
 - a. Form 3 of 3: Business Proposal / Plan Assessment

Action: KI returns plan and review form to Counselor for further action or submission to VR Regional Leader for review and approval – Tier 2 plans submitted to Central Office for final approval and funding authorization