America's SBDC Accreditation Standards and Instructions for Preparing the Self-Study 2017

Overview

The purpose of the combined accreditation standards and self-study is to provide a single guidance document to use for accreditation preparation and completion of the self-study guide. The self-study (1) provides the accreditation review team with needed information about an SBDC's network, (2) provides a description of the network's processes and systems that meet the ASBDC accreditation standards, and (3) identifies tools and "best practices." The accreditation review team will use the self-study guide to make initial assessments about the SBDC's operations and alignment with the accreditation standards, and to design their approach to the accreditation review. During the onsite portion of the accreditation review, the team will clarify and verify the information in the self-study guide through review of information and discussions with SBDC staff and stakeholders.

Accreditation should be a continuous process of incorporating the standards into the SBDC's daily operations rather than a once in a five year procedure. Regularly using the standards will make writing the self-study much easier. Sources of information about the accreditation standards include New State/Regional Directors Training and ASBDC Accreditation Standards work- shops held at the Annual ASBDC Fall Conference and Spring Meeting, the ASBDC Accreditation Mentor Program (see the accreditation page on the ASBDC website at www.asbdc-us.org), the Baldrige Criteria for Performance Excellence (www.quality.nist.gov), and the quality programs many states have that are affiliated with the Baldrige National Quality Program.

Instructions

The self-study is intended to:
    (1) Promote greater understanding of the standards' intentions
    (2) Be a useful self-examination tool for the SBDC
    (3) Create a comprehensive and coherent story about the SBDC for the review team.

SBDCs must provide their self-study and attachments in an electronic format to each member of the assigned accreditation team and the ASBDC national office at least 60 days before the start of the on-site accreditation review. If your SBDC is seeking additional credentials in technology commercialization, clearly identify and address your responses to the standards as they apply to your technology commercialization program in the areas marked with (*).

Each standard is numbered and defined. To prepare the self-study, respond to the directions in italics for each of the sections within the seven Standards. Notes following the standards provide additional explanations to guide preparation of the self-study. A glossary of terms is provided and words in the glossary are hyperlinked within this document.

The standards require narrative responses, documentation of results, as well as narrative interpretations of the performance. When responding to the standards, it is important to show how the processes described in the narratives are linked to results and enable cycles of improvement within four stages:

  - Designing and selecting effective processes, methods, and measures **(Approach)**
  - Executing your approach with consistency **(Deployment)**
  - Assessing your progress and capturing new knowledge, including seeking opportunities for improvement and innovation **(Learning)**
  - Aligning your plans, activities, results, analyses and learning across processes and work units to support organization-wide goals. **(Integration)**

The narrative section of the self-study must not exceed sixty (60) pages or seventy-five (75) for SBDCs that are applying for the Technology Commercialization Accreditation, and it may be considerably fewer pages. Diagrams and other graphic representations can be helpful in showing process and systems. The narrative response may require supporting documentation in the form of exhibits. Key exhibits usually include strategic planning documents, client needs assessments, organizational charts, key measures, graphs depicting trends over time or comparative analysis results, and other similar documents. The accreditation review team leader can provide a list of common exhibits. The Suggested Documentation Form is available on the ASBDC website in the Accreditation folder for additional guidance.

Where key exhibits are necessary, the review team recommends linking the exhibit to the narrative source. For reference purposes, an index of attached exhibits is preferred. Other exhibits that are bulky or do not lend themselves to being stored electronically should be available for review during the on-site visit.

Questions regarding a review or preparation of the self-study should be directed to the review team leader.

PLEASE PROVIDE AN OVERVIEW DESCRIPTION OF YOUR SBDC/SBTDC ADDRESSING THE FOLLOWING TOPICS:

- BRIEF OVERVIEW OF YOUR STATE/REGIONAL ECONOMY
- IDENTIFY KEY STAKEHOLDERS
- BRIEFLY DESCRIBE THE PROGRAM'S HISTORY INCLUDING START-UP DATE AND FUNDING PARTNERS
- PROVIDE YOUR
    - VISION
    - MISSION
    - VALUES
- SERVICE AREA & OFFICE LOCATIONS STATEWIDE/REGIONWIDE
    - LOCATION OF STATE/REGION HEADQUARTERS
    - LOCATION OF YOUR SBDC/SBTDC CENTERS
- DESCRIBE YOUR WORKFORCE INDICATING IF THEY ARE EMPLOYEES OR CONTRACTORS
    - LEAD OFFICE STAFF
    - CENTER DIRECTORS AND CENTER STAFFING
    - ORGANIZATIONAL CHART
- DESCRIBE ANY SIGNIFICANT CHANGES SINCE THE LAST ACCREDITATION REVIEW INCLUDING:
    - RESULTS/CORRECTIVE ACTIONS
    - ORGANIZATIONAL STRUCTURE OR KEY LEADERS CHANGES
- DESCRIBE ANY COMPETITIVE CHALLENGES INCLUDING:
    - KEY BUSINESS, OPERATIONAL, HUMAN RESOURCES CHALLENGES
    - SUSTAINABILITY CHALLENGE
- PLEASE COMPLETE THE FOLLOWING PROFILE TEMPLATE PROVIDING HIGHLIGHTS OF YOUR SBDC/SBTDC:

Highlights of the (State/Regional) SBDC/SBTDC Network		
Date Program Started		
Key Funding Stakeholders	**Key Funding Sources & Amounts** State SBA Other Match Total Program Income	**FY/CY 201_**
Key Client Segments		
Staff	Consultants: Professional: Leadership: Non-Exempt: Specialty:	

	Support: Total:
Service Centers	
Service Area	
Total Clients Served	CY/FY 201_____Distinct Consulting Clients_____Total Training Participants
Service Hours	CY/FY 201_____Consulting and Preparation (no travel) Hours Delivered. Average Hours per Client _____
Special Programs	
Mission, Vision and Values	
Strategic Challenges	
Strategic Advantages	
State/Region's Economy	
State/Region Population	
State/Region Employment	
State/Region Small Businesses	

ASBDC ACCREDITATION STANDARDS

1.0 Leadership

Objective: The SBDC has a governance system and environment that routinely addresses organizational values, ethical behavior and performance expectations.

1.1 Senior Leader Authority
The SBDC Network director has the authority to make decisions to lead, set strategic direction and sustain the network.

> *Describe how the SBDC network director has authority to:*
> * *Allocate financial and human resources for setting and achieving the SBDC network's vision and strategic priorities*
> * *Determine appropriate organization structure and governance.*
> * *Manage operations in accordance with rules and regulations governing the program, and*
> * *Create and achieve performance expectations.*

1.2 Leadership System

1.2 (a) Sustainable Organization
SBDC leaders routinely guide and sustain the organization, communicate with the workforce, encourage high performance work, advance organizational values, and promote ethical behavior.

> *Describe:*
> * *The leadership system (*)*
>
> *Describe how the SBDC leaders:*
> * *Set vision and values; create a focus on action to accomplish the organization's strategic priorities; improve performance; and attain its vision*
> * *Communicate and deploy performance expectations (*)*
> * *Review performance to understand the health of the organization and to enable translation of performance findings and learning into priorities for improvement and innovation (*)*
> * *Promote ethical behavior including how potential conflicts of interest are managed and*
> * *Analyze performance, learn from this analysis and implement modifications to improve performance (*).*

1.2 (b) Compliance

The SBDC network operates in compliance with the laws and regulations governing the network.

Describe:
- *How leaders demonstrate a commitment and a culture of legal compliance*
- *How the network deploys processes to ensure sound fiscal and contractual management to meet requirements*
- *The results of programmatic and financial reviews performed by governing authorities, including a summary of findings, outcomes and current status, and how this information was used to improve and*
- *Compliance with the operating requirements put forth by the U.S. Small Business Administration in 13 CFR 130.460 and/or Program Announcement including but not limited to salaries of key positions, appropriate reporting level in the organization, an active Advisory Board and addressing findings from SBA Financial and Programmatic Reviews.*

1.2 (c) Support the National SBDC Program

The SBDC leaders support and participate in the common interests of the national SBDC program.

Describe:
- *How the leaders and network members participate in activities, initiatives and share in the advancement of the national SBDC program.*

Notes:

1.1: The SBDC Network director is the senior leader of the State, Region or Territory SBDC program.

1.2: Since the SBDC receives public funds, stewardship of funds, transparency of operations and other governance systems are essential. This includes the system of management and controls exercised in the stewardship of the SBDC.

1.2 (a): Promoting ethical behavior might include policies, workforce training and monitoring systems to identify and manage potential conflicts of interest and foster ethical behavior.

1.2 (b): Findings and recommendations from previous programmatic and financial reviews may provide senior leaders opportunities for improvement and/or reinforce best practices. Responses to previous reviews may show how this information is being used to continually improve the network.

2.0 Strategic Planning

Objective: Develop, implement, modify and measure progress on a strategic plan that drives the SBDC network toward its established mission and vision.

2.1 Strategy Development

2.1 (a) Strategy Development Process

The SBDC has a process to address its strategic challenges and leverage its strategic advantages and opportunities. The process, at a minimum, must include identifying, collecting and analyzing relevant information critical to achieving the program's vision.

Describe the strategic planning process to include:
- *The vision, values and mission of the SBDC*
- *The key steps in the strategic planning process, the participants, and the planning horizons*
- *How data and information is analyzed to identify opportunities(*)*
- *How strategic opportunities are identified that align with the needs of key stakeholders, and how these needs translate into customer services and products or into new market opportunities. (*)*
- *The core competencies, financial and other resources needed to achieve the key strategic priorities (*)*
- *How key success factors are identified (*).*
- *How you have improved the planning process.*

2.1 (b) Strategic Priorities

The strategic planning process identifies key strategic priorities, measures and timetables.

Provide the strategic plan in the attachments and describe:
- *How key strategic priorities address challenges; leverage core competencies, strategic advantages and opportunities; and the needs of key customers*
- *Key strategic priorities (*)*
- *The most important goals for these key strategic priorities and the timetable for achievement (*) and*
- *What changes, if any, are planned in the services provided, client segments, emerging markets and operations (*).*

2.2 Strategy Implementation

The SBDC has a process to deploy the strategic plan throughout the network, which includes identifying necessary resources, measuring progress and modifying priorities.

> *Describe how:*
> - *Strategic priorities are converted into actions (*)*
> - *Actions are deployed throughout the network*
> - *Workforce capabilities and capacities, and other resources are sufficient to support the achievement of the action plans (*)*
> - *Key performance measures and/or indicators for tracking progress are defined and projected into the future (*) and*
> - *Plans are modified if circumstances require a shift and how new plans are executed.*

Notes:

2.0: The strategic planning process may vary based upon the needs, size, challenges and opportunities within the SBDC.

2.1: This item deals with your overall organizational strategy, which might include changes in offerings and client/stakeholder engagement processes. However, you should describe the client engagement and service design processes in Categories 3 and 6 as appropriate.

"Strategy development" refers to your SBDC's approach to preparing for the future. In developing your strategy, you might use various types of forecasts, projections, options, scenarios, knowledge (see Categories 4 and 7 for relevant organizational knowledge), analyses, or other approaches for envisioning the future in order to make decisions and allocate resources.

The term "strategy" should be interpreted broadly. Strategy might be built around or lead to any or all of the following: new products (services); redefinition of key customer (client/stakeholder) groups or market segments; new core competencies; revenue growth via various approaches including grants, endowments, new partnerships and alliances; improvements in operational efficiencies or work processes; and/or new employee or volunteer relationships. Strategy might be directed toward becoming a preferred provider in each of your major markets, a low-cost provider, a market innovator, or a provider of customized products or services. It might also be directed toward meeting a community or public need.

2.1 (a): Strategic opportunities arise from outside-the-box thinking, brainstorming, capitalizing on serendipity, research and innovation processes, extrapolation of current conditions, and other approaches to imagining the future. The generation of ideas that lead to strategic

opportunities benefits from an environment that encourages non-directed, free thought and common sense. Choosing which strategic opportunities to pursue involves considering relative benefit versus risk, whether financial and/or otherwise, and making intelligent choices.

2.1 (a): Additional items described in a strategic planning process may include:
- Development of the vision, values and mission of the SBDC
- The SBDC's strengths, weaknesses, opportunities, and threats
- How analysis of performance is compared to other organizations' performance

2.2: The development and deployment of your strategy are closely linked to other Standards. The following are examples of key linkages:
- Standard 1.2: how senior leaders set and communicate organizational direction
- Standard 3: how you gather customer (client/stakeholder) and market knowledge as input to your strategy and action plans and to use in deploying action plans.
- Standard 4: how you measure and analyze data and manage/use knowledge to support key information needs, provide an effective basis for performance measurements, and track progress on achieving strategic priorities.
- Standard 5: how you meet workforce capability and capacity needs, determine needs and design your workforce learning and development system, and implement workforce related changes.
- Standard 6: how you address changes to your work processes resulting from action plans.

3.0 Stakeholder and Customer Focus

Objective: Identify and segment stakeholders and customers; determine their requirements, expectations and preferences for each; build relationships; and determine satisfaction.

3.1 Stakeholder Engagement (Existing and Potential)

3.1 (a) Stakeholder Requirements and Expectations
The SBDC understands the requirements and expectations of its key stakeholders and any new stakeholders.

Describe key stakeholders and any potential stakeholders the network is pursuing. Show how approaches vary by stakeholder segments as appropriate.

Describe how the SBDC:
- *Determines their key stakeholder (*)*
- *Listens to and interacts with stakeholders to understand how the SBDC aligns with their needs (*)*
- *Listens and responds to feedback from key stakeholders (*)*
- *Communicates the value the SBDC brings to all stakeholders and meets their expectations (*) and*
- *Evaluates the approaches used to understand stakeholder needs and improve them (*).*

3.1 (b) Stakeholder Relationships and Satisfaction
The SBDC obtains information on key stakeholder satisfaction, dissatisfaction and engagement.

Describe how the SBDC:
- *Builds relationships with existing stakeholders and acquires new stakeholders as appropriate (*)*
- *Listens to and obtains feedback from stakeholders*
- *Assesses, analyzes, and responds to stakeholders' satisfaction and/or dissatisfaction*
- *Captures actionable information for use in meeting or exceeding stakeholders' expectations (*) and*
- *Assesses their methods to understand the satisfaction level of their stakeholders to improve them.*

3.2 Customer Engagement (Existing and Potential)

3.2 (a) Customer Requirements and Expectations
The SBDC demonstrates how it defines and analyzes the requirements, expectations, and preferences of customer segments and potential segments.

Describe:
- *The customer segments the SBDC currently serves and any potential segments being pursued(*)*
- *How the requirements and expectations are determined for each customer segment (existing and potential) and how the products and services provided meet their expectations (*) and*
- *Evaluates the approaches used to understand customer needs and improve them (*)*

3.2 (b) Customer Relationships and Satisfaction
The SBDC obtains information on customer satisfaction, dissatisfaction and engagement.

Describe how the SBDC:
- *Builds relationships with existing customers and acquires new customers (*).*
- *Listens to and obtains feedback from customers (*)*
- *Captures actionable information for use in meeting or exceeding customers' expectations (*)*
- *Assesses, analyzes and responds to actionable customer feedback to continuously improve relationships with and satisfaction of customers (*)*
- *Conducts trend analysis and/or comparative analysis of identified segments to evaluate effects of changes in services, service delivery or support services. (*)*
- *Assesses their methods to understand the satisfaction level of their customers to improve them (*).*

3.3 Marketing and Branding
The SBDC has a clear integration of its marketing strategy and image that conveys the SBDC as a cohesive network and is part of the national SBDC program.

Describe:
- *The brand and the strategy for marketing the SBDC.*
- *How a separate and identifiable logo is used consistently throughout the network on all information, materials and signage to convey it is a cohesive SBDC network.*
- *How the SBDC network acknowledges it is a member or an accredited member of the ASBDC through the use of the "America's SBDC" logo or accreditation badge.*

Notes:

3.2(a): Technology Commercialization clients typically have most of the following characteristics
- Innovative concept, product, service or process
- Intellectual property that serves as the foundation for a competitive advantage
- A novel combination of technology
- Technology that drives the business model
- High potential for growth
- Scalable
- Not fundable with traditional financing
- High level of uncertainty or risk

4.0 Measurement, Analysis and Knowledge Management

Objective: The SBDC has a performance management system for driving and managing daily operations and for tracking overall organizational performance. This system includes measurement selection, data collection, data integrity, analysis and alignment with key strategic priorities.

4.1 Performance Measurement

SBDC has a systematic process which identifies how it selects, measures, verifies and analyzes performance data. The SBDC analyzes trends in key performance measures and other operational data, and benchmarks against other organizations to support continuous improvement.

Describe how:
- *Key performance measures are selected and aligned with strategic priorities (*)*
- *Data is collected, verified and used in tracking short and long term operations; as well as overall performance levels. Provide trend data for KPI results, efficiency ratios, return on investment and other data as appropriate (*)*
- *Key performance measures are used to support decision making, learning, continuous improvement and innovation (*) and*
    - *Key comparative data are selected and used to support decision making and innovation. Provide comparison data, trends and discuss learning.*

4.2 Data Integrity

The SBDC has a systematic process to ensure data and information is accurate and impact is attributed by the client.

Describe how the SBDC:
- *Collects client attribution of economic impact.*
- *Verifies and validates the accuracy of data.*

4.3 Security and Confidentiality of Data

The SBDC has a systematic process in place to maximize security and confidentiality of all customer information and other data.

Describe how customer data and other sensitive information is kept confidential and secure through all access points.

4.4 Economic Impact Participation

The SBDC network participates in the impact studies of the America's SBDC and/or SBA and develops a process which strives to attain a statistically significant number of useable responses while adhering to survey protocol and maintaining survey integrity.

Describe:
- *The SBDC's participation in ASBDC and/or SBA impact studies*

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- *The response rate(s)*
- *Any actions to attain a statistically significant response rate*

Notes:

4.2: Accuracy includes all data and information captured to include but not limited to session notes, client information, survey results, etc.

4.2: Common economic impact measures collected include, but are not limited to, change in sales, change in jobs, capital infusion and business starts.

4.2: Data integrity includes processes that check for impact verification, validity and attribution. Verification assures that data and data entry are correct. Verification includes accurate documentation of impact such as an email, a survey response or signed form confirming the impact event. Validation assures that the impact achieved is reasonable and fair based on services rendered. Attribution is the client's word that SBDC assistance was beneficial. Verification and attribution are often collected at the same time.

4.3: The security of data must address data stored in any form and from any access point whether electronic or physical. Policies encompass all aspects of security and confidentiality to include where customer information can be discussed and the limits on who has access to the information.

5.0 Workforce Focus

Objective: Create work systems and an environment that engages, manages, and develops the workforce to maximize its potential in alignment with the SBDC's strategic plan. The SBDC analyzes trends in human resource results to support continuous improvement and high performance.

5.1 Workforce Capability and Capacity

The SBDC has work systems, an organizational structure and staffing patterns based on analysis of key needs and strategies of the SBDC. This structure must align with the SBDC's strategic priorities and be designed to enable the workforce to achieve desired results and effectiveness while providing an opportunity to develop its full potential and achieve high performance.

Describe how the SBDC:
- *Assesses staffing needs to include the skills, capabilities, and capacity (*).*
- *Recruits, hires, and retains workforce members.*
- *Organizes and manages the workforce to accomplish the mission of the SBDC (*).*
- *Capitalizes on core competencies, reinforces a customer/stakeholder focus, and meets or exceeds performance expectations.*
- *Uses its structure and alignment to enable the workforce to achieve the desired results and high performance. Include contributions of other individuals beyond the core workforce, if applicable (for example: interns, students, faculty, and volunteers)(*)*

5.2 Workforce Learning and Growth

The SBDC aligns its staff education and training to support achievement of the SBDC's strategic priorities, including the enhancement of workforce knowledge, skills, and leadership capabilities that contribute to organizational effectiveness, performance improvement, and succession planning for key personnel.

Describe how the SBDC:
- *Identifies core competencies throughout the network necessary to achieve desired results including identified specialties important to the network (*) Technology accredited SBDCs identify access to the following core competencies: technology transfer/commercialization; research and development funding; intellectual property issues; technology commercialization networking and resource identification; and alternative financing (equity). It is expected that a majority of these competencies would be within the SBDC, and any remaining competencies may be delivered through leveraging other resources.*

- *Determines the professional development needs of the workforce;*
- *Develops a workforce education and professional development strategy that meets or demonstrates progress toward achieving identified competencies for both the network and individuals (*).*
- *Uses a systematic training/orientation program for new members of the workforce;*
- *Assesses the effectiveness of the professional development offerings including what information is used to make changes to prepare the workforce to the changing needs of the marketplace.*
- *Develops leadership skills and plans for succession of key positions throughout the network.*

5.3 Workforce Engagement
The SBDC maintains a work environment and a supportive climate that contributes to the well-being, satisfaction, and engagement of all personnel.

Describe how the SBDC:
- *Supports a work environment that contributes to the well-being, satisfaction, and motivation of the entire workforce*
- *Ensures and improves workplace health, safety and security*
- *Ensures workplace preparedness for disaster or emergencies*
- *Obtains workforce feedback to determine the key factors that affect workforce well-being, satisfaction and motivation; analyzes this feedback and uses this information to implement modifications that support continuous improvement*
- *Supports the workforce via benefits and policies including items such as compensation, career progression and related practices that improve the work place environment.*
- *Provides facilities that are professional in appearance, adequate for the delivery of services and allow for confidential counseling.*

Notes:

5.0: The SBDC assesses its workforce capability and capacity needs and builds an environment conducive to high performance work. The SBDC creates work systems that engage, manage, and develop the workforce to maximize its potential in alignment with the organizational mission, strategies and action plans.

The SBDC creates a supportive climate that enables personal growth, satisfaction, and well-being. Facilities offer a professional environment for confidential client counseling. Demonstrate how the organization develops ways to improve workplace health, safety and security to include preparedness for disasters or emergencies.

5.2: Core competencies should include such things as the basic business disciplines of

management, marketing and finance, and other skills appropriate to the network.

6.0 Operations Focus

Objective: The SBDC designs, delivers, manages and improves key services and supportive or critical work processes that maximize customer and stakeholder value; improves operational effectiveness and achieves organizational success and sustainability.

6.1 Service and Process Design
The SBDC has processes to select, design, deliver and manage key services to support customer needs, the SBDC mission and the SBA Cooperative Agreement, and other stakeholder needs.

Describe the key services.

For the key services, describe how:
- *The customer services are designed, managed and align with key customer needs (*)*
- *Performance is analyzed for quality, efficiency and effectiveness (*)*
- *Data is used for continuous improvement of processes (*) and*
- *Specialty programs are leveraged with and integrated into the SBDC network (*).*

Notes:

6.1: Key work processes include customer related processes and other internal support processes considered important to the success and growth of the SBDC. Customer support processes frequently relate to your core competencies, strategic priorities and critical success factors. Examples might include processes built around customer services provided in financial analysis, market research, social media, management assessments, business start-up, international trade, managing intellectual property and others that meet the unique needs of your network.

6.1: Specialty programs include technology commercialization programs, but may also include other programs such as international trade, environmental assistance or other niche services important to key stakeholders.

Glossary of terms

Customers

An SBDC customer is the person receiving the services of the SBDC, which includes individuals receiving counseling and training attendees. It includes current clients and training participants as well as potential clients or training participants. It is the most inclusive term used to describe those whom we serve.

Governance

The system of management and controls exercised in the stewardship of the SBDC to include the responsibilities of senior leaders. Policies describe the responsibilities of parties and how they direct and control the SBDC network to ensure (1) accountability to stakeholders, (2) transparency of operations, and (3) fair treatment of all stakeholders, customers and staff. Governance processes may include the approval of strategic direction, the evaluation of the senior leader's performance, succession planning, financial auditing, risk management, disclosure and stakeholder reporting. Ensuring effective governance is important to the public and stakeholders' trust and organizational effectiveness.

High Performance Work

Work processes that systematically pursue ever-higher levels of overall organizational and individual performance including quality, productivity, and innovation. High performance work results in satisfied customers and other stakeholders.

Approaches to high-performance work vary in their form, their function, and incentive systems used. High performance work stems from and enhances workforce engagement. It involves cooperation between management and the workforce, which may involve cooperation among work units, often involving teams; empowerment of people including personal accountability, and workforce input into planning. It may involve learning and building individual and organizational skills; learning from other organizations; creating flexible job design and work assignments; maintaining a flattened organizational structure where decision making is decentralized and made closest to the frontline; and effectively using performance measures including comparisons. Many organizations encourage high performance work with monetary and nonmonetary incentives based on factors such as organizational performance, team and individual contributions, and skill building. Approaches to high performance work usually seek to align the organization's structure, core competencies, work, jobs, workforce development and incentives.

Innovation

Innovation is making meaningful change to improve services, processes, or

organizational effectiveness and create new value for stakeholders and customers. Innovation involves adopting an idea, process, technology, product or business model that is either new or new to its proposed application. Innovation benefits from a supportive environment, a process for identifying strategic opportunities, and a willingness to pursue intelligent risks. Innovation is applicable to all processes that can benefit from change, whether breakthrough improvement or a change in approach or outputs.

Key
Major or most important; critical to achieving the intended outcome. The Standards references key services, stakeholders, work processes, measures, etc., which are those that are most important to success. They are the essential elements for pursuing or monitoring a desired outcome.

Leadership System
The way leadership is exercised, formally and informally, throughout the SBDC network; the basis for key decisions and the way they are made, communicated and carried out. A leadership system includes structures and mechanisms for making decisions; ensuring two-way communication; selecting and developing leaders and managers; and reinforcing values, ethical behavior, directions, and performance expectations. It encourages and supports initiative, innovation, and appropriate risk taking, and avoids chains of command that require long decision paths. An effective leadership system includes mechanisms for leaders to conduct self-examination, receive feedback and improve.

Segments
Segments typically have common characteristics that allow logical groupings and aggregating data in a way that allows for meaningful analysis of the SBDC's performance. It is up to each SBDC to determine the factors used to segment its customers, stakeholders, markets, services and workforce. Understanding segments is critical in identifying the distinct needs and expectations of different customer, stakeholder, market, and workforce groups and to tailor offerings to meet their needs and expectations.

Success Factors
Elements that are vital for the achievement of a strategic priority or organizational purpose. Often referenced as Critical Success Factors (CSF) which would indicate a set of 3-8 Success Factors.

Stakeholder
A funder, potential funder, or an organization important to the success of the SBDC.

Stakeholder Engagement
Stakeholder engagement is the commitment your funders have to the SBDC. Building

relationships and ensuring their satisfaction is an important component to this. Characteristics of an engaged stakeholder include loyalty, willingness to advocate for the SBDC and recommend your services.

Strategic Priorities
What your SBDC must achieve to remain or become effective and ensure its long-term sustainability. Strategic priorities set longer-term directions and guide resource allocation and redistribution.

Sustainability
The SBDC's ability to address current needs and have the ability and strategic management to prepare successfully for the future. The organization needs to consider both external and internal factors.

Factors in sustainability might include workforce capability and capacity, reputation in the marketplace, resource availability, technology, knowledge, core competencies, work systems, facilities and equipment. Sustainability might be affected by changes in marketplace and customer preferences, the financial markets and the legal and regulatory environment. Sustainability includes emergency preparedness.

Systematic
Well-ordered, repeatable, and exhibiting the use of data and information so that learning is possible. Approaches are systematic if they build in the opportunity for evaluation, improvement, and sharing.

Technology Commercialization
Technology commercialization is the process by which an innovative product or service, which is based on intellectual property, provides a foundation for a competitive advantage and moves from concept to introduction into the market.

Work Processes
The SBDC's most important internal value-creation processes. They might include product/service design, production and delivery, customer and stakeholder support. Key work processes frequently relate to core competencies, the factors that determine success, and the factors senior leaders consider important for business growth.

Work Systems
How the network's work is accomplished. Work systems involve the workforce, partners, other collaborators, and other resources needed to produce and deliver services and carry out business and support processes. Work systems comprise the internal work processes and external resources needed to develop and produce products and services, deliver them and succeed in the marketplace.

Decisions about work systems are strategic. These decisions involve protecting and capitalizing on core competencies and deciding what should be procured or produced outside your network in order to be efficient and sustainable in your marketplace.

Workforce Engagement
The extent of workforce members' emotional and intellectual commitment to accomplishing the mission and vision. High levels of workforce engagement are characterized by environments in which people are motivated to do their utmost for their customers' benefit and the organization's success.

In general, members feel engaged when they find personal meaning and motivation in their work and receive interpersonal and workplace support. An engaged workforce benefits from trusting relationships, a safe and cooperative environment, good communication and information flow, empowerment, and accountability for performance. Key factors include training and career development, effective recognition, equal opportunity and fair treatment.

Modified: November, 2016