

Standard	ASBDC 2018 Accreditation Suggested Documentation
1.1 Senior Leadership Authority	<ul style="list-style-type: none"> Budgets including sources and uses of funds, for the whole network and each individual center
	<ul style="list-style-type: none"> Policies and Procedures Manual
	<ul style="list-style-type: none"> Subcontracts with centers, employees, contract employees
	<ul style="list-style-type: none"> Organizational Chart
	<ul style="list-style-type: none"> Illustration or explanation on the allocation of financial resources
1.2 (a) Sustainable Organization	<ul style="list-style-type: none"> Performance reports
	<ul style="list-style-type: none"> Conflict of interest agreements & code of ethics documents Calendar/schedule of organizational activity Document on the organization's strategic priorities Example of center performance review Agendas from the past 3 network leadership/directors' meetings
1.2(b) Compliance	<ul style="list-style-type: none"> Most recent SBA Financial and Programmatic Review
	<ul style="list-style-type: none"> If any findings, the reply from the SBDC outlining corrective actions taken should also be included.
	<ul style="list-style-type: none"> Examples of compliance with 13 CFR 130.460 including salaries for key positions, reporting level of SBDC network in the organization, and advisory board
	<ul style="list-style-type: none"> List of Advisory Board members
	<ul style="list-style-type: none"> Notes or minutes from most recent Board meeting
	<ul style="list-style-type: none"> Any reviews conducted by host organization and review documents
	<ul style="list-style-type: none"> Agendas of the past 3 network leadership/directors meetings
	<ul style="list-style-type: none"> Copy of the most recent SBA semi-annual report
1.2 (c) Support the National SBDC Program	<ul style="list-style-type: none"> State/Regional Director and Associate Director salary
	<ul style="list-style-type: none"> Examples recognizing ASBDC membership, support and engagement
2.1 (a) Strategy Development Process	<ul style="list-style-type: none"> Agenda from strategic planning retreat or notes from strategy development sessions, including list and/or description of key people involved
	<ul style="list-style-type: none"> Strategy maps or flowcharts or timeline
	<ul style="list-style-type: none"> Mission, vision, values
	<ul style="list-style-type: none"> Strategic Plan

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	<ul style="list-style-type: none"> Tech strategic plan, if applicable
2.1(b) Strategic Priorities	<ul style="list-style-type: none"> List of strategic objectives with metrics, timelines, and desired accomplishments
	<ul style="list-style-type: none"> Supporting plans from local offices and/or functional plans (i.e., marketing plans)
	<ul style="list-style-type: none"> Tech strategic priorities, if applicable
2.2 Strategy Implementation	<ul style="list-style-type: none"> Action Matrix or other tracking device/system
	<ul style="list-style-type: none"> Diagram on the tech ecosystem and/or triage system, if applicable
3.1(a) Stakeholder Engagement (Existing and Potential)	<ul style="list-style-type: none"> Samples of data gathering instruments or exercises
	<ul style="list-style-type: none"> Examples of needs/expectations being met with key stakeholders
	<ul style="list-style-type: none"> Copies of communication documents with key stakeholders
3.1(b) Stakeholder Relationships and Satisfaction	<ul style="list-style-type: none"> Samples of data gathering instruments or exercises
	<ul style="list-style-type: none"> Examples of needs/expectations being met
	<ul style="list-style-type: none"> Inter agency agreements
	<ul style="list-style-type: none"> Stakeholder performance and expectation documents/letters
3.2(a) Customer Requirements and Expectations	<ul style="list-style-type: none"> Samples of data gathering instruments or exercises
	<ul style="list-style-type: none"> Consolidation and analysis of data with peer organizations during, minimum a 3-yr timeline.
	<ul style="list-style-type: none"> Actions that occurred as a result of findings
	<ul style="list-style-type: none"> Follow-up feedback

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	<ul style="list-style-type: none"> Trend & comparison data on KPI's (identified in Standard 4.1, market segments, customer groups) that includes an analysis of results/lessons learned
3.2(b) Customer Relationships and Satisfaction	<ul style="list-style-type: none"> Samples of data gathering instruments or exercises
	<ul style="list-style-type: none"> Consolidation and analysis of data with peer organizations
	<ul style="list-style-type: none"> Actions that occurred as a result of findings
	<ul style="list-style-type: none"> Follow-up feedback
	<ul style="list-style-type: none"> Trend & comparison data on client satisfaction (identified in Standard 4.1) that includes an analysis of results/lessons learned
3.3 Marketing and Branding	<ul style="list-style-type: none"> Samples of program-specific marketing pieces via traditional and new media
	<ul style="list-style-type: none"> Statewide marketing pieces via traditional and new media
	<ul style="list-style-type: none"> Samples of branding efforts such as signage, name badges, shirts, trinkets (on site)
	<ul style="list-style-type: none"> Branding guidelines
4.1 Performance Measurement	<ul style="list-style-type: none"> Sample center review report or format including center level metrics
	<ul style="list-style-type: none"> Sample individual performance review or format including individual level metrics
	<ul style="list-style-type: none"> Sample collection form, survey, or report for key performance indicators
	<ul style="list-style-type: none"> Sample management reports for consulting, training and other key activities including organizational level metrics
	<ul style="list-style-type: none"> Trend data and comparison data reports on KPI/s that includes an analysis of results and lessons learned/strategies implemented
	<ul style="list-style-type: none"> ROI trend data analysis with peer organizations, minimum 3-yr. timeline
4.2 Data Integrity	<ul style="list-style-type: none">
	<ul style="list-style-type: none"> Examples of data verification, validation and attribution
	<ul style="list-style-type: none"> Attribution Policy
	<ul style="list-style-type: none">
4.3 Security and Confidentiality of Data	<ul style="list-style-type: none"> Copies of all executed conflict of interest/code of professional conduct agreements
	<ul style="list-style-type: none"> Data security plans
	<ul style="list-style-type: none">
4.4 Economic Impact Participant	<ul style="list-style-type: none"> ASBDC Economic Impact Study page which lists participating SBDC programs
	<ul style="list-style-type: none">

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5.1 Workforce Capability and Capacity	<ul style="list-style-type: none"> Organizational Chart
	<ul style="list-style-type: none"> Workflow processes
	<ul style="list-style-type: none"> Map of centers and their region of responsibility, map of the state Timeline charts Examples of assessing staff needs Document on recruiting, hiring, firing Trend data analysis with peer organizations, minimum 3-yr. timeline
5.2 Workforce Learning and Growth	<ul style="list-style-type: none"> Job Descriptions
	<ul style="list-style-type: none"> Resumes or abbreviated vitas & salary report
	<ul style="list-style-type: none"> Succession Plans
	<ul style="list-style-type: none"> Sample Professional Development Agenda as provided by lead center
	<ul style="list-style-type: none"> Evaluation of Professional Development program/activities
	<ul style="list-style-type: none"> Summary of Evaluations and explanation of how results were used to make improvements/changes
	<ul style="list-style-type: none"> Sample professional development undertaken by counselors and explanation of how they applied what they learned to (a) improve clients' situations and/or (b) improve internal processes
	<ul style="list-style-type: none"> Sample materials from new employee orientation process, i.e., agenda, handouts, assignments. Network core competencies Show trends over time on workforce learning & growth along with an analysis and any changes that occurred as a result of the data. Include trend analysis with peer organizations.
5.3 Workforce Engagement	<ul style="list-style-type: none"> Employee satisfaction survey or facilitated discussion questions
	<ul style="list-style-type: none"> Consolidated findings and explanation of how information was used to improve programs and/or processes
	<ul style="list-style-type: none"> Awards or recognition programs
	<ul style="list-style-type: none"> Photos of offices that will not be visited by review team (available on site)
	<ul style="list-style-type: none"> Show trends over time on workforce learning & growth along with an analysis and any changes that occurred as a result of the data. Include trend analysis with peer organizations
6.1 Service and Process Design	<ul style="list-style-type: none"> Business Continuity Plans
	<ul style="list-style-type: none"> Listing of services for each market segment
	<ul style="list-style-type: none"> Summary of results of services
	<ul style="list-style-type: none"> Speciality program services
	<ul style="list-style-type: none"> Listing of research resources
	<ul style="list-style-type: none"> Listing of referral sources and partners Process map on key services to support customer needs