

INCLUSIVITY CHALLENGE

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Implementation Guide

The Inclusivity Challenge is a voluntary SBDC initiative to empower entrepreneurs and small businesses to improve their communities through building companies that provide jobs, local services and benefits, and create wealth. As a business succeeds, it enables a certain lifestyle for the owner and employees, for their families, and for opportunities to invest in the future. This initiative builds upon [existing SBDC efforts](#) to help underserved and minority entrepreneurs establish a clear path to empowerment and continued economic and community prosperity.

The Inclusivity Challenge features resources including customized, culturally relevant business and financial advising, business education events, and access to partners to help underserved entrepreneurs navigate the path of small business success. This attracts not just aspiring entrepreneurs but also established businesses to be part of The Inclusivity Challenge.

All SBDCs are invited to join The Inclusivity Challenge. Participation is completely voluntary.

To participate in The Inclusivity Challenge, SBDCs will take a critical look at the communities they serve to identify those that face barriers and limitations, and where expanded/enhanced SBDC services can make an impact. The SBDC will then make an explicit commitment to outreach and services in the community(s) it identifies.

The Inclusivity Challenge helps assure entrepreneurs in the target markets are aware of the SBDC and feel welcomed and comfortable in engaging with the SBDC. Building trust with target markets is the objective of The Inclusivity Challenge.

Implementation Steps

1. Identify Target Market

Each SBDC participating in The Inclusivity Challenge begins by critically examining communities within the SBDC service region that are underserved, or face barriers or limitations to building sustainable businesses. The Inclusivity Challenge is not just about targeting demographic groups. It's about helping entrepreneurs overcome impediments to their success. Those could include language, culture, geography, disability, past life experiences (drug addiction, prison records), etc. SBDCs do not necessarily need to start something new to participate in The Inclusivity Challenge. The Inclusivity Challenge is a framework to strengthen current activities and to expand into other markets.

Analysis should include:

- understanding the needs of businesses in the community and their barriers and limitations to success
- evaluation of the SBDC's past performance in the community
- availability of other resources to meet the needs and address the challenges of businesses in the community
- relationships with relevant community partners
- availability and access to resources the SBDC can leverage to effectively serve the community
- opportunities where the SBDC can best deliver services to enable business success

SBDCs should also consider SBDC host institution strategic priorities for outreach to underserved communities. This could include procurement initiatives and student recruitment.

As part of this analysis process, the SBDC should engage with members of the community directly and through partners to learn firsthand of needs and limitations; get recommendations on strategies for the SBDC to use to address those issues; and obtain feedback on the proposed SBDC services.

To provide guidance to staff and spark interest in client participation, SBDCs should establish goals on number of clients served, amount of capital acquired, and businesses started. It is recommended that there not be an identified deadline for accomplishing these goals. Rather, it is the commitment to accomplishing these goals over whatever period is necessary that is the driver of The Inclusivity Challenge.

2. Establish Partnerships

Partners are vital to building connections to businesses within the community targeted and help to endorse the creditability of the SBDC and build confidence of businesses to seek SBDC services. Partners could include:

- Chambers of commerce
- Business districts

- Merchant associations
- Religious institutions
- Main Street programs
- Financial literacy assistance organizations
- Navigator entities
- Local elected officials

Past SBDC clients can be tapped as community ambassadors and to help establish connections to the most relevant partners.

Financial partners are vital to help address the capital needs of businesses and are important to achieving the capital access objective of The Inclusivity Challenge. Financial partners could include:

- Community banks
- Credit unions
- Community Development Corporations
- CDFIs
- Micro-finance organizations (e.g. Kiva)
- Local government

Diversity, Equity and Inclusion (DEI) offices of SBDC host organizations can also be a source for guidance on appropriate partnerships.

A Community Outreach Advisory Board could be established to bring together key partners and form an ecosystem to serve the community.

3. Build the Team

Having a staff member who can be the lead for The Inclusivity Challenge – a person who can relate to, welcome, communicate with, and champion the target market’s success - is critical to success.

Assess the capacity of current staff to be viewed as trusted advisors within the targeted community.

Identify training to educate staff on the key unique aspects of the community and techniques to establish trust. America’s SBDC will provide some professional development training resources to support the objectives of The Inclusivity Challenge. Community partners can provide insights on effectively interacting with the community. SBDC Affinity Groups (see Step 7 below) will be asked to help in identifying staff training resources.

DEI offices of SBDC host organizations might be a resource in building a team that will be accessible to and trusted by community members.

4. Develop Services

SBDCs can work together (in-state or between states/regions) collaboratively to deliver services to businesses in a community, sharing responsibility for intake and delivering services.

A. Intake – “The Warm Welcome”

Community members need to feel comfortable reaching out to the SBDC. The intake process should be adapted to be personalized to members of the community – this is the concept of the “Warm Welcome”. The “Warm Welcome” should use language and communications approaches that resonate with community members so that they feel comfortable when they initially interact with the SBDC. This may require using different language and terms, revising processes and forms, and spending more time interacting with the client to establish trust. It may be helpful to collect intake data verbally and for the SBDC to complete intake forms and then send it to the client for signature. This can also help assure the appropriate demographic data is collected.

B. Customized Engagement Plan

As part of the intake process, a culturally sensitive consultant welcomes the client through a personalized conversation to help the client identify their goals and needs; highlight how their business and its success can provide opportunities for themselves, their family and their community; and to outline a customized support plan. The message to the client is that they are signing up to be part of a cause—building their community, not just working to better their own business. Ask clients to commit to sharing data on their business results and promote that they are part of the Inclusivity Challenge.

C. Key Services and Tools

Two primary outcomes for The Inclusivity Challenge are capital access and business starts. SBDC core competencies and services in these topics need to be adjusted to be relevant to the targeted community. This could mean translating materials; revising materials to explain concepts in different ways to be relatable and understandable; using examples that feature community members; engaging community members in delivering services (e.g. having a community member facilitate events); delivering services in non-traditional community locations (e.g. religious institutions, schools, community centers, libraries, etc.); and engaging non-traditional support organizations (e.g. daycare or eldercare providers).

Working with partners and past clients, evaluate tools and resources and adjust to meet the unique needs of the target market. This could include providing information in different languages, translating information, and using different examples to explain concepts.

Work with partners to develop customer follow-up surveys that will collect actionable data that can be used to improve services and best meet community member needs.

5. Outline Key Data Points

Identify leading indicators that can be used to determine if the SBDC Inclusivity Challenge initiative will meet the objectives of helping community members acquire capital, start businesses, and operate sustainably. These could include metrics such as outreach events, workshop attendees, marketing impressions, referrals received, etc.

Establish protocols to collect data on:

- Output of services as appropriate (e.g. training events, training attendees, advising clients, advising hours)
- Client Demographics
- Capital Acquired, with client attribution
- Business Starts, with client attribution
- Jobs Created, with client attribution
- Referrals Received – track by total number and by source
- Referrals Made – track by total number and by source
- Customer Satisfaction

If possible, establish baseline figures for these metrics based on the average for each for a period prior to 2020 (typically 3-5 years).

Client success stories, testimonials, and partner feedback should be collected to provide additional perspective on the impact of the SBDC's Inclusivity Challenge initiative.

Metrics can be reported to SBA to support core program goals if core funds are used to support the activities. This *does not* result in double reporting of metrics to SBA.

6. Develop Marketing Materials

America's SBDC will develop some general branding, marketing and messaging for SBDCs to use to note how their initiative fits within The Inclusivity Challenge. These materials are available in the America's SBDC [Toolkit](#). Each participating SBDC is asked to use the Inclusivity Challenge logo and is encouraged to use the messaging that will be developed. The America's SBDC Marketing and Communications Committee will provide suggestions and resources to support marketing The Inclusivity Challenge.

Each participating SBDC should develop marketing materials appropriate for the target community. Partners can provide assistance to assure messaging, materials and mediums are appropriate for the targeted community and will resonate. This may require translating materials into different languages, using different language and examples, and using images reflective of the target community.

To help build credibility, materials should prominently promote partners.

7. Engage with Other SBDCs

Inform America's SBDC of the target market being served by completing this simple form: <https://americassbdc.org/members/inclusivity-challenge-participation-form/>. The **password** is *SBDC-Inclusivity*

Affinity Groups will be established for the most common target market communities. Each Affinity Group will self-define and self-direct its activities, which could include: delivering staff training, determining baseline metrics and success factors, creating tools and resources, establishing

partnerships, providing mutual services to businesses, developing marketing materials, and sharing best practices.

8. Launch the SBDC Inclusivity Challenge Initiative

Announce the launch of the SBDC's Inclusivity Challenge with a press release, social media announcements and communications to clients, partners and stakeholders. America's SBDC and the Marketing and Communications Committee will develop an announcement template.

9. Report and Promote Results

Share data semi-annually with America's SBDC in January and July on:

- Total Inclusivity Challenge participants
- Total Output metrics (e.g. training events, training attendees, advising clients, advising hours)
- Total Capital Acquired
- Total Business Starts
- Total Jobs Created

Share data and success stories on results with community partners, the SBDC host institution, and stakeholders (elected officials, grantors).

10. Refine and Celebrate Success

SBDC leaders should assess their Inclusivity Challenge initiative on a regular basis (quarterly, semi-annually and/or annually) to note successes and identify opportunities for enhancements. Client success and staff efforts should be celebrated and promoted.