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**2016 ASBDC  
Accreditation Committee**

February 12, 2016

**Chair:**  
Beth Melnik, GA SBDC

Mark Petrilli  
State Director  
Illinois Small Business Development Center  
Illinois Department of Commerce & Economic Opportunity  
500 East Monroe – Room 505  
Springfield, IL 62701

**Vice Chair:**  
Chris Bouchard, MO SBDC

**Secretary:**  
Duane Fladland, WA SBDC

Dear Mark:

**Members:**

The Illinois Small Business Development Center was reviewed during the week of October 19<sup>th</sup> through 23<sup>rd</sup> of 2014 by Mike Myhre of the Florida SBDC, Janice Washington of the Arizona SBDC, Diane Howerton of the U-Cal Merced SBDC and Mark Langford of the North Texas SBDC. The review encompassed the general accreditation standards developed and deployed in cooperation with our federal funding partner, the U.S. Small Business Administration (SBA).

Michael Brooks, AL SBDC

Lora Brown, MD SBDC

Christian Conroy, PA SBDC

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Katie Sewell, ID - SBDC

Janice Washington, AZ SBDC

Mike Young, TX-Houston SBDC

Attached to this letter is the final report which contains the complete observations and recommendations from the accreditation team. Examples of innovative thinking and actions are detailed within the report, as well as a number of important recommendations for the Illinois SBDC to consider implementing.

Based on the on-site review, final report and presentation by the accreditation team, the Accreditation Committee voted at its January 29, 2016 meeting to accept the recommendation of the team to accredit with one condition the Illinois Small Business Development Center. The one condition was cited in the following standard:

**Standard 3.3 Marketing and Promotional Programs**

OSBDC concurred with the committee's recommendation. The conditions should be met as quickly as possible, but all conditions must be satisfied within 12 months of January 29, 2016. The Illinois SBDC is expected to provide periodic progress reports to the accreditation team which will update the committee.

Accreditation qualifies you to apply for SBA funds administered by the Office of Small Business Development Centers. Your next scheduled review will be in the year 2020, and your accreditation will expire on December 31, 2020. Should you have any questions or require further information prior to 2020, please do not hesitate to contact the chair of the accreditation committee.

Accreditation is important for each SBDC and is essential for the national SBDC program to be recognized as a provider of high quality business education and advising that results in credible economic impact. Congratulations to you and your staff, hosts, and supporters.

Best regards,

Beth Melnik  
Chair, ASBDC Accreditation Committee

Chris Bouchard  
Vice-Chair, ASBDC Accreditation Committee

cc: Randy Kowalski, Deputy Director, Illinois Department of Commerce and Economic Opportunity  
Scott Henry, Acting Associate Administrator, U.S. Small Business Administration  
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C. E. Rowe, President, ASBDC  
Brett Thibodeau, ASBDC  
Mark Langford, ASBDC Accreditation Review Team



# **ILLINOIS SBDC NETWORK ACCREDITATION REPORT**

Accreditation Review Conducted October 19 - 23, 2015  
Michael Myhre, Florida SBDC (Team Lead)  
Janice Washington, Arizona SBDC  
Diane Howerton, UC Merced SBDC  
Mark Langford, North Texas SBDC

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## Accreditation Report

### INTRODUCTION AND OVERVIEW

ORGANIZATIONAL PROFILE OF THE ILLINOIS SBDC NETWORK	
<b>History</b>	The Illinois SBDC was established May 4, 1984. The Illinois SBDC is a state-based program hosted by the Illinois Department of Commerce and Economic Opportunity (Department of Commerce), the lead economic development agency for the state.
<b>Special Programs</b>	In addition to the SBDC program, the network operates five special programs: <ul style="list-style-type: none"> <li>• International Trade Centers (ITCs)</li> <li>• Procurement and Technical Assistance Centers (PTACs)</li> <li>• Technology, Innovation and Entrepreneurship Services (TIES)</li> <li>• First Stop Business Information Center</li> <li>• Small Business Environmental Assistance Program</li> </ul>
<b>Service Area</b>	State of Illinois - All Counties (102)
<b>Service Centers</b>	The Illinois SBDC network is comprised of 35 SBDCs, 12 of which are also SBDC International Trade Centers. The SBDCs are hosted by 8 Universities (7 public, 1 private), 18 Community Colleges and 9 non-profit organizations (2 chambers, 2 EDCs, and 5 other non-profits).
<b>Workforce</b>	The Illinois SBDC is comprised of 125 personnel: <ul style="list-style-type: none"> <li>• 8 State Office <ul style="list-style-type: none"> <li>○ 6 in Springfield, 2 in Chicago</li> <li>○ 8 additional special program staff (non-SBDC)</li> </ul> </li> <li>• 35 Leadership/Advisors</li> <li>• 33 Business Advisors (core)</li> <li>• 15 Specialty (ITC, Technology)</li> <li>• 28 Support</li> </ul>
<b>Mission, Vision and Values</b>	MISSION: <i>To provide professional guidance for business growth.</i> VISION: <i>To be recognized as the leading resource for business growth advancing the Illinois economy.</i> VALUES: <i>Responsiveness to Stakeholders; Accessible Services; Quality Performance; Collaborative Use of Resources; Strategic Engagement</i>
<b>Strategic Challenges</b>	<ul style="list-style-type: none"> <li>• Poor financial condition of State of Illinois and current uncertainty due to state government leadership transition.</li> <li>• Remaining relevant to customers and stakeholders.</li> <li>• Lack of awareness of services and value provided by SBDC in the small business community.</li> <li>• Ability to maximize the use of existing resources.</li> <li>• Need to strengthen existing partnerships and build new ones.</li> </ul>
<b>Strategic Advantages</b>	<ul style="list-style-type: none"> <li>• Dedicated, passionate, experienced and skilled staff in the Network.</li> <li>• Strong, long-term, supportive SBDC host organizations provide Network stability.</li> <li>• Strong ROI and economic impact results attributed to the Illinois SBDC Network by center clients.</li> </ul>



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Review Team: Myhre (TL), Howerton, Langford, Washington  
Approved: January 29, 2016



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Key Funding Stakeholders	Funding Source	2011 (Actual)	2012 (Actual)	2013 (Actual)	2014 (Actual)	2015 (Budget)
	Federal	\$ 4,472,051	\$ 3,794,027	\$ 3,039,254	\$ 4,363,431	\$ 4,417,020
State	\$ 2,961,606	\$ 2,531,529	\$ 2,884,124	\$ 2,412,853	\$ 2,600,000	
Other	\$ 1,716,606	\$ 3,401,718	\$ 3,570,071	\$ 3,979,260	\$ 3,335,125	
<b>TOTAL</b>		<b>\$ 9,150,263</b>	<b>\$ 9,727,274</b>	<b>\$ 9,493,449</b>	<b>\$ 10,755,544</b>	<b>\$ 10,352,145</b>

Key Client Segments	Percentage	Description
	50%	Pre-Venture, Nascent Entrepreneurs
	15%	Start-Up Businesses (in business for less than 1 year)
	35%	Established/Existing Businesses (in business for more than 1 year)
		Innovation/Technology focused with high growth potential (subset of the three segments above)



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<b>Clients (#)</b>	<b>2011 (Actual)</b>	<b>2012 (Actual)</b>	<b>2013 (Actual)</b>	<b>2014 (Actual)</b>	<b>2015 (Goal)</b>
SBDC	9,303	8,574	8,646	8,299	9,200
PTAC	1,617	1,731	1,675	1,435	
ITC	862	1,072	941	906	
TIES	174	352	205	308	
	11,956	11,729	11,467	10,948	9,200
<b>Consulting Hours</b>					
SBDC	65,439	70,553	63,606	58,276	68,750
PTAC	9,157	9,280	9,459	9,219	
ITC	10,214	11,711	9,929	10,492	
TIES	2,285	7,201	4,162	3,680	
	87,095	98,745	87,156	81,667	68,750
<b>LTCs</b>					
SBDC	2,694	2,948	2,895	2,959	2,675
PTAC					
ITC					
TIES					
	2,694	2,948	2,895	2,959	2,675
<b>Capital Infusion</b>					
SBDC	\$191,528,979	\$162,161,450	\$463,199,250	\$366,859,357	\$195,000,000
PTAC					
ITC					
TIES	\$301,200	\$43,738,096	\$11,905,000	\$18,129,540	
	\$191,830,179	\$205,899,546	\$475,104,250	\$384,988,897	\$195,000,000
<b>Business Starts</b>					
SBDC	327	337	473	604	450
PTAC					
ITC					
TIES	2	16	21	29	
	329	353	494	633	450
<b>Contracts (\$)</b>					
SBDC					
PTAC	\$1,622,178,016	\$760,165,095	\$585,829,221	\$590,677,963	\$750,000,000
ITC					
TIES					
	\$1,622,178,016	\$760,165,095	\$585,829,221	\$590,677,963	\$750,000,000
<b>Jobs Created</b>					
SBDC	3,056	3,949	2,828	2,796	3,300
PTAC	1,566	444	624	106	
ITC	228	292	220	243	
TIES	14	295	91	25	
	4,864	4,980	3,763	3,170	3,300
<b>Jobs Retained</b>					
SBDC	6,055	6,183	3,807	3,073	4,400
PTAC	3,582	1,800	2,035	1,269	
ITC	1,339	1,084	557	674	
TIES	102	487	185	14	
	11,078	9,554	6,584	5,030	4,400
<b>ITC Export Sales</b>					
ITC	\$436,560,500	\$757,766,577	\$771,035,481	\$295,805,827	\$500,000,000



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STATE ECONOMY	
<b>Population and Economy</b>	Illinois is the 5th largest state in the country with a population of 12.88 million people, an increase of 3.3% since 2000. Illinois covers 56,400 sq. miles. Population - 15.8% Hispanic; 14.5% Black; 4.6% Asian
<b>Industry</b>	<p>The economy of Illinois includes many industries. The Chicago metropolitan area is home to many of the United States' largest companies, including Boeing, McDonalds, Motorola, and United Airlines. The Chicago area economy headquarters a wide variety of financial institutions, and is home to the largest futures exchange in the world, the Chicago Mercantile Exchange.</p> <p>The 2014 total gross state product for Illinois was \$745 billion, placing it fifth in the nation. The 2013 median household income was \$56,210. The state's industrial outputs include machinery, food processing, electrical equipment, chemical products, publishing, fabricated metal products, transportation equipment, petroleum and coal.</p>
<b>Employment</b>	In August 2015 the state's unemployment rate was 5.6%, compared to the national average of 5.1%. Non-Farm employment in August 2015 was 5,925,400 and total number employed was 6,130,300.
<b>Small Business Environment</b>	<p>1,169,961 # of Small Businesses</p> <p>921,272 # of Non-Employer Firms 78.7% of all small business are self-employed individuals</p> <p>248,689 # of Employer Firms with 1-499 employees 21.3% of all small businesses have at least one employee</p> <p>219,931 # of Employer firms with 1-20 employees 88.4% of all small business employers have fewer than 20 employees</p> <p>2,417,374 Individuals are employed by small business firms 47.0% of all Illinoisans are employed by small businesses</p> <p>3,338,646 Individuals are employed by small businesses, including self-employed individuals</p>

## 1.0 LEADERSHIP AND ORGANIZATIONAL ISSUES

**Objective:** *Create an environment in which the lead center director and other program leaders routinely address organizational values, ethical behavior and performance expectations.*

### 1.1 Senior Leadership Authority

SBDC senior leaders must have authority to make key decisions for:

- Guiding and sustaining the SBDC organization to align it with key stakeholders and support organizations,
- Setting strategic direction,
- Managing operations,
- Allocating resources,
- Managing the SBDC budget,
- Determining the appropriate organizational structure and reporting relationships,
- Determining the optimal location of centers,
- Designing personnel requirements and duties,
- Negotiating and interacting with key stakeholders, and
- Setting and reviewing performance expectations, including performance expectations that are part of the SBA Cooperative Agreement as well as performance expectations of other key funding sources.

#### Team Observations:

The Illinois Small Business Development Center (SBDC) Network is comprised of highly capable and professional personnel committed to quality performance in service delivery that addresses the assessed needs of their customers and funding stakeholders. The network expends considerable effort to engage and align itself with its key (funding) partners and stakeholders, including the U.S. Small Business Administration (SBA), Defense Logistics Agency (DLA), Illinois Department of Commerce and Economic Opportunity (Department of Commerce) and its diverse network of centers, including universities, community colleges, and non-profit community and economic development host organizations. This alignment is demonstrated through setting performance standards (measures) that contribute to achievement of desired outcomes, e.g. business starts and expansions, capital infusion, and job creation and retention, among others which stakeholders expect of network services.

The senior leadership team of the Illinois SBDC Network includes the State Director, Mark Petrilli, and Associate State Director, Rod Hollenstine. With a combined 47 years of service to the Illinois SBDC, these senior leaders possess the qualifications and abilities to foster and lead organizational growth. The State Director is recognized as the network's senior executive leader with the authority within the state office and throughout the network to allocate resources (financial and human); to guide strategic development and partnerships; to set organizational structure and reporting relationships; to determine center locations and hosts; and to set performance expectations for the network and individual centers.



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In addition to its federal funding, the SBDC receives financial support from the State of Illinois, appropriated annually by the Illinois Legislature. Centers are appropriated either federal, state or a combination of both. Center host partners are required to provide 75% cash match for each award (federal and state) dollar. All centers are required to waive all indirect. Senior leaders allocate federal and state resources through an annual solicitation and contract process where they set minimum performance standards within a scope of work. An individual agreement is needed for each source of funds appropriated, i.e. one center receiving mixed (federal and state) funding executes two contractual agreements. This is a result of the state's accounting and fiscal policy system.

The State Director reports to Ms. Esther Joy King, DCEO Deputy Director, who reports to Mr. Jim Schultz, Department of Commerce Executive Director. The Accreditation Review Team met with Mr. Schultz and Ms. King. The team also met with Mr. Robert "Bo" Steiner, SBA District Director, and Mr. Ricardo (Rick) Garcia, SBA Deputy District Director and Project Officer. In the team's opinion, state office's host and SBA partners articulated extensive experience with knowledge of and support for the SBDC, as well as strong support and confidence in the network's senior executive leader, leadership team and staff.

The Illinois SBDC Advisory Board provides advice and advocacy for the Illinois SBDC and works cooperatively with the SBDC State Director and leadership to advance and improve the statewide SBDC network. The latest meeting of the Advisory Board was September 24, 2015. The review team met with Mr. Jerry Furby, PNC Bank Executive Vice President and Illinois SBDC State Advisory Board Chairman by conference call. While Mr. Furby indicated a high level of satisfaction and passion for the network, he expressed that the advisory board could do more to strategically leverage individual member relationships to advocate on behalf of the network.

### Evaluation:

	Commendation / Best Practice
✓	Standard Met / Recommendation
	Standard Not Met / Condition

### Recommendation:

The Illinois SBDC is in a unique and fortunate position to have such significant host and key stakeholder support, including an active and passionate state advisory board. The Accreditation Review Team recommends that network senior leadership develop strategies to elevate and leverage its state advisory board to help support and forward its mission. This may assist the network to secure the expansion funding it will need to support the achievement of the network's vision and future endeavors for long-term continuity and growth.

### 1.2 Senior Leadership Responsibilities

The SBDC leadership system creates an environment in which the Lead Center Director and other program leaders routinely guide and sustain the SBDC organization, communicate with the workforce, encourage high performance, advance organizational values, and promote ethical behavior.



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**SBDC leaders must systematically:**

- **Set direction,**
- **Address current and future opportunities,**
- **Set standards for organizational values and promote ethical behavior,**
- **Have processes in place that ensure sound fiscal and contractual management of the SBDC program,**
- **Communicate and deploy performance expectations, and**
- **Review performance to understand the health of the organization and to enable translation of performance findings and learning into priorities for improvement and innovation.**

**SBDC senior leaders must ensure that the SBDC operates in compliance with:**

- **Federal laws and regulations, and**
- **The Notice of Award and Program Announcement.**

**SBDC senior leaders must support and participate in the common interests of the Association of Small Business Development Centers including political objectives, national initiatives and financial obligations.**

### **Team Observations:**

The Illinois SBDC senior leadership team is commended for its commitment for inclusiveness, openness and communication throughout all levels within the organization. Illinois SBDC Network senior leaders, through regular online engagements, weekly connection emails, monthly conference calls, quarterly (or as needed) strategic planning group meetings, and bi-annual network coordinator reviews are effectively communicating and reinforcing organizational values, ethical behaviors and network performance expectations. The frequency, depth and quality of communication was identified as "welcomed," "greatly appreciated," "highly valued," "informative" and "sufficient" by network personnel.

Senior leadership have created and maintained an environment which allows for innovation in accomplishing network objectives and opportunities for enhancing service and performance. Senior leadership reviews identified strategic activities and objectives for progress toward identified goals continuously through monthly compilation and review of performance statistics and strategic actions; engages in regular communications with host partner leadership through email, and shifts strategies when appropriate opportunities are identified.

The Illinois SBDC is a state-based program, i.e. the state office is hosted at the State of Illinois Department of Commerce, and all service centers (35 SBDCs) are located at select partner institutions hosted at universities (8), community colleges (18), and non-profit community and economic development organizations (9) through contractual agreements. The network has a framework and processes for reviews in place to monitor compliance with program guidelines, regulations and laws, and ensure sound fiscal, operational and contractual management of the program and budget. The Accreditation Review Team found well-organized fiscal management and budget control functions managed by a team of experienced network coordinator professionals. Center programmatic and financial reviews are conducted bi-annually and designed and performed to conform to federal program compliance guidelines.



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An SBA Fiscal Examination was completed in June 2015, dated November 24, 2015. The report concluded that , "Overall, Illinois-SBDC is in compliance with the financial objectives of the SBDC Program. Based on the review of the limited data examined, there was one finding requiring attention." The finding was for an immaterial unallowable promotional expense and required no further action. The SBA Project Of- ficer completed a programmatic review in June 2013. No findings or recommendations were identified.

### Evaluation:

✓	<b>Commendation / Best Practice</b>
	<b>Standard Met / Recommendation</b>
	<b>Standard Not Met / Condition</b>

### Commendation:

The Illinois SBDC senior leadership team is commended for its openness and encouragement of innovative thinking and communication from all levels of the organization. The vast majority of personnel inter- viewed indicated an open environment that encouraged all staff, from all levels, to bring forward new ideas and concepts directly to senior leaders. This environment was largely contributed to the culture established by the network's senior leaders.

## 2.0 STRATEGIC PLANNING

**Objective:** *Develop systematic, well defined and well understood decision making processes which focus on long-term sustainability and results in the development of mid to long term strategies and action plans, and aligns the organization in pursuit of its long-term strategies. The strategic planning process may vary based upon the needs, size, challenges and opportunities within the SBDC lead center.*

### 2.1 Strategy Development

#### 2.1 (a) Strategy Development Process

**Strategic planning must demonstrate a systematic (regular and continual) approach to collecting and analyzing relevant data and information to identify key success factors for SBDC sustainability and development of key strategic objectives.**

### Team Observations:

The **2015-2017 Illinois SBDC Strategic Plan** was developed through collaborative effort among SBDC leadership, network members and key funding stakeholders and advisory board members. During the strategic planning process, senior leaders created a framework that identified and prioritized key objectives to ensure the network's long-term success. The network's strategic planning process identifies timelines, responsible persons, and measurable outcomes. The process deployed to develop the plan can best be summarized as bottom up and inclusive.

While the review team received input from across the network from all levels that the planning process had significant input from network personnel and select key stakeholders (i.e. SBA, host and advisory board members), the review team observed, as evidenced by conversations with network personnel, a lack of



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some degree of 'big picture' understanding of how the principal goals of the plan are inter-related and how center agreements and individual actions impact the ability of the network to achieve its vision.

**Evaluation:**

	Commendation / Best Practice
✓	Standard Met / Recommendation
	Standard Not Met / Condition

**Recommendation:**

While the Accreditation Review Team is satisfied that the senior leadership team and many network team members understand the network’s strategic planning process and goals and that feedback from all personnel and key stakeholders were included in the strategy development process, the Review Team recommends that senior leadership create opportunities to enhance workforce understanding of how center and individual actions directly contribute to planned goals and overall success.

**2.1 (b) Strategic Objectives**

The SBDC’s strategic planning process must identify key strategic objectives, measures, timetables for accomplishment, and the most important goals for the strategic objectives.

**Team Observations:**

The Illinois SBDC Strategic Plan for 2015-2017 embodies four (4) key strategic goals, each goal with three (3) specific objectives and multiple action items. The following outline identifies the goals and objectives as defined in the 3-year plan:

**STRATEGIC GOAL 1 - INCREASE RELEVANCE**  
*Maximize the network's effectiveness and relevancy to advance business growth*  
 Objective 1.1 - Continuously identify and assess emerging needs and trends.  
 Objective 1.2 - Deliver effective and relevant services which address client needs and contribute to business growth and job creation.  
 Objective 1.3 - Ensure the delivery of relevant and effective services throughout the Network.

**STRATEGIC GOAL 2 - PROMOTE VALUE**  
*Position the network as the principal source of valued guidance for entrepreneurs and businesses with growth potential*  
 Objective 2.1 - Target and attract businesses and entrepreneurs with the potential to create economic impact.  
 Objective 2.2 - Develop long-term relationships with clients that have significant opportunities to grow and create jobs in Illinois.  
 Objective 2.3 - Deliver a consistent message to cultivate a highly recognized SBDC Network brand.

**STRATEGIC GOAL 3 - MAXIMIZE RESOURCES**  
*Effectively utilize resources, tools and technology to maximize client success*  
 Objective 3.1 - Fully deploy a rapid onboarding process for Network personnel.  
 Objective 3.2 - Empower Network personnel with the most appropriate tools and technologies.  
 Objective 3.3 - Effectively integrate specialized expertise throughout the Network.



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### STRATEGIC GOAL 4 - STRENGTHEN PARTNERSHIPS

*Grow collaborative relationships with key stakeholders for network sustainability*

Objective 4.1 - Build stronger relationships with existing Network funding stakeholders.

Objective 4.2 - Broaden stakeholder support by attracting new collaborative partners.

Objective 4.3 - Utilize partnerships to advocate for small businesses and promote an entrepreneurial culture.

In addition to identifying its strategic goals, the network's plan includes timelines, identifies responsible parties for completing each action item, and measurable outcomes.

#### Evaluation:

	Commendation / Best Practice
✓	Standard Met / Recommendation
	Standard Not Met / Condition

#### Recommendation:

None.

### 2.2 Strategy Deployment

A systematic (regular and continual) and well understood process must be in place to:

- Convert strategic objectives into actions,
- Modify actions if circumstances require a shift,
- Define innovations in products and services which are driven by client and stakeholder needs,
- Define key performance measures and indicators for tracking progress, and
- Define requirements in financial, technological and key human resource planning.

#### Team Observations:

The Accreditation Review Team observed a comprehensive plan that is specific, measurable, attainable and time bound. Based on the team's observations, the network's annual planning process is being implemented and tracked in such a way as to provide network senior leadership confidence that resulting actions and goals will be achieved. Each network center is required to address their individual contribution to applicable actions as a component of the network's annual proposal/plan process. Individual action plans break network actions into self-defined activities and performance measures that will be achieved at the individual center level.

The Accreditation Review Team found that individual center deployment, however, occurred at varying degrees dependent on individual capabilities and communities served. Activity is continuously reported and reviewed and openly discussed during weekly and monthly communications to ensure continued progress. However, the team observed that while the network was provided updates on the strategic plan at various intervals throughout the year, network personnel were unsure how to access the strategic plan progress status report.



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**Evaluation:**

	Commendation / Best Practice
✓	Standard Met / Recommendation
	Standard Not Met / Condition

**Recommendation:**

While the Accreditation Review Team is confident that senior leadership is informing network personnel on the progress of accomplishments contributing to defined strategic objectives, the Review Team recommends that senior leaders provide access to the network strategic plan progress dashboard.

### 3.0 CUSTOMER AND STAKEHOLDER FOCUS

**Objective:** Identify and segment clients, markets and key stakeholders; determine needs, requirements, expectations and preferences for each; build relationships; and determine satisfaction.

#### 3.1 Knowledge of Client, Stakeholder, and Market Needs, Requirements, Preferences, and Expectations

SBDC should demonstrate it has a systematic process or processes to determine needs, requirements, expectations, and preferences of clients, stakeholders and markets to ensure the continuing relevance of SBDC products and services and the development of new SBDC business opportunities.

##### 3.1 (a) Client Requirements, Needs, and Expectations (Preferences)

SBDCs should have a regular and continual process in place to gather and analyze relevant information regarding key needs and requirements, as well as product and service expectations (preferences) of client segments and key clients.

**Team Observations:**

The Illinois SBDC has several mechanisms, formal and informal, to identify and assess the needs and expectations of existing and potential customers, including client surveys, training evaluations, specialized surveys designed and implemented by partners or targeted groups, direct interaction with small business owners and entrepreneurs, frequent interactions with key referral organizations (e.g. banks, EDCs) and other resource partners, as well as from the professional experiences of staff. Several centers also had local advisory boards comprised of small business owners and held regular meetings as opportunities to engage and assess business issues and needs. In addition, network leadership and staff actively participate in national, state and local economic and business development community organizations that provide feedback on issues and needs of importance. The network demonstrated it has a systematic process to determine needs of its overall market and using data to ensure the continuing relevance of SBDC products and services.

**Evaluation:**

	Commendation / Best Practice
✓	Standard Met / Recommendation
	Standard Not Met / Condition



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### Recommendation:

None.

### 3.1 (b) Stakeholder Needs, Requirements and Expectations (Preferences)

**SBDCs should have a regular and continual process in place to gather and analyze relevant information regarding key needs, requirements, and expectations (preferences) of key stakeholders and resource partners.**

### Team Observations:

The Accreditation Team observed evidence that Illinois SBDCs deploy an informal stakeholder needs and expectations assessment process. The SBDC senior and center leadership actively engage the economic and business development communities they operate on a continual basis. In addition, network senior and center leadership frequently engage with their respective host partner leadership and key funding partner organizations. This was evidenced by the support the host and partner leaders expressed throughout the on-site review and their continuation of center program funding in the absence of a state budget and access to state funding. The network depends on its informal key stakeholder assessment process and personal engagements (listening posts) as their assessment to verify if current services and products are meeting key stakeholder expectations and desired outcomes (ROI).

### Evaluation:

	Commendation / Best Practice
✓	Standard Met / Recommendation
	Standard Not Met / Condition

### Recommendation:

None.

### 3.1 (c) Market Needs and Expectations (Preferences)

**SBDCs should have a regular and continual process in place to gather and analyze relevant information regarding key needs and expectations (preferences) of the broader small business market in order to identify potential new markets, market segments, or other new business opportunities.**

### Team Observations:

As described in 3.1(a) above, the Illinois SBDC deploys several mechanisms, formal and informal, to identify and assess the needs and expectations of customers. The network and centers use this data to identify business trends and needs. One example includes how the Illinois SBDC at Governors State University discovered a growing interest and need for women in business peer support. The center responded by developing expertise and offering a women CEO roundtable program titled "Heels of Business Peer to Peer," a monthly forum that addresses women owned business personal and professional challenges.

**Evaluation:**

	Commendation / Best Practice
✓	Standard Met / Recommendation
	Standard Not Met / Condition

**Recommendation:**

None.
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**3.2 Management of Client and Key Stakeholder Relationships and Satisfaction**

**3.2 (a) Stakeholder Relationships**

SBDCs must have a systematic (regular and continual) process for:

- Building relationships with existing stakeholders and acquiring new stakeholders,
- Enhancing the SBDC's value to key stakeholders,
- Listening to and obtaining feedback from key stakeholders, and
- Assessing, analyzing, and responding to stakeholder satisfaction and/or dissatisfaction. Methodology should capture actionable information for use in meeting or exceeding stakeholders' expectations. Processes should be in place to integrate feedback as part of a continuous improvement system.

**Team Observations:**

<p>The Illinois SBDC has an effective stakeholder communication system and considers the development and maintenance of its strategic partnerships that provide mutual benefit as a key value and goal. During the review, the Accreditation Review Team met with several key stakeholder organization representatives and leaders important to the network, including the SBA, Department of Commerce, and center host partners. Each stakeholder highlighted the frequent and regular communication; the opportunity to be included in the network meetings, and to provide feedback as a strength of network leadership. While senior leadership maintain key relationships, several personnel interviewed indicated that in light of state budget issues, enhanced communication between network senior leaders and host partner organization senior leaders would be appreciated.</p> <p>The Illinois SBDC is an essential partner of the Illinois Department of Commerce. The Department of Commerce Office of Entrepreneurship, Innovation and Technology includes the SBDC, PTAC, ITC and TIES (all operated under the auspices of the Illinois SBDC Network). The Illinois SBDC Network, including its collective units, are the Department of Commerce's primary business resource for business creation, expansion and retention - cornerstones of the Illinois economic development plan.</p>
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**Evaluation:**

	Commendation / Best Practice
✓	Standard Met / Recommendation
	Standard Not Met / Condition



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### Recommendation:

Though the team observed that senior leaders have positive relationships with hosts, the Accreditation Review Team recommends that senior leadership establish a regular and continual personal visit engagement plan with center host partner senior leaders (center director supervisor and higher) to ensure interpersonal relationships exists between network and host partner leaders. This will ensure that network senior leaders have meaningful relationships necessary to address both challenges and opportunities within its partnerships.

### 3.2 (b) Client Relationships

SBDCs must have a systematic (regular and continual) process for:

- Building relationships with existing clients and acquiring new clients,
- Enhancing the SBDC's value to clients,
- Listening to and obtaining feedback from clients, and
- Assessing, analyzing, and responding to client satisfaction and/or dissatisfaction. Methodology should capture actionable information for use in meeting or exceeding clients' expectations. Processes should be in place to integrate feedback as part of a continuous improvement system.

### Team Observations:

The Illinois SBDC has an effective client communication system. The network relies on its websites, referrals from stakeholders and past clients, training event attendees, and public presentations to attract new customers. In some cases, network members highlighted the need to "get out of the office" as approaches needed to serve the needs of target clients.

The Illinois SBDC executes customer surveys and utilizes client follow-up to measure and assess customer satisfaction and impact. When made aware of a dissatisfied client, the appropriate center leadership conduct due diligence and takes corrective action where needed. Centers reported that while they were made aware of the network wide customer satisfaction results, they did not have knowledge of their individual center level of satisfaction from the state conducted surveys.

### Evaluation:

	Commendation / Best Practice
✓	Standard Met / Recommendation
	Standard Not Met / Condition

### Recommendation:

The Accreditation Review Team recommends that network senior leadership consider establishing indicators to identify potential issues with respect to quality of service.

For example, SBDCs may measure the quality of services delivered in several ways, including:

- Qualifications, experience and credentials of professionals,
- High rate of referrals (or willingness to refer) from past clients, especially target market clients,
- High rate of referrals (or willingness to refer) from key (funding) stakeholders and partners,



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- Low rate of one-time client sessions, and
- Depth of advising delivered in customer engagement session narratives.

This may assist the network and centers to track quality and appropriately respond to potential issues of quality quickly.

The Accreditation Review Team also recommends that network leadership compile, segment and distribute state conducted annual survey results in order to assist centers when assessing, analyzing, and responding to client satisfaction and/or dissatisfaction.

### 3.3 Marketing and Promotional Programs

The requirements for designing, managing, and improving the marketing and promotional programs must include:

- A separate and identifiable logo or brand used consistently throughout the network including the SBDC or SBTDC name.
- A clear integration of strategy and image for the SBDC that conveys the SBDC image and identity as a cohesive SBDC network.
- Use of the brand or logo to convey the identity of a cohesive SBDC network on all information, materials, and signage.
- Acknowledgement of being an accredited member of the ASBDC where appropriate, and preferably having the approved ASBDC logo on the website of the lead center. (Note: If an SBDC is not accredited, the standard ASBDC logo is to be used instead.)

#### Team Observations:

The Accreditation Review Team observed inconsistent deployment and compliance with network branding standards. This standard requires that all SBDCs must have a consistently used brand that conveys that it is part a cohesive network and a distinguishable sub-unit of its host partner. Evidenced by materials reviewed and language personnel used, the Review Team observed varying degrees and inconsistent usage of the network's brand standards and does not create the perception of a unified, cohesive organization.

#### Evaluation:

	Commendation / Best Practice
	Standard Met / Recommendation
✓	Standard Not Met / Condition

#### CONDITION:

This condition will be met when the Illinois SBDC provides evidence of systematic utilization of common branding and messaging that distinguishes the network as a cohesive and distinguishable organization. This involves strict adherence to the network's established branding standards, including the proper utilization of branding elements on all materials (e.g. stationery, business cards, websites, documents and promotional materials), and consistency in language and messaging used by the network members.



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### 4.0 MEASUREMENT, ANALYSIS AND KNOWLEDGE MANAGEMENT

**Objective:** Create a performance management system for driving and managing daily operations and for tracking overall organizational performance. This system includes measurement selection, data collection, analysis, and alignment with key strategic objectives.

#### 4.1 Development and Implementation of a Performance System

**SBDCs must have processes which identify how the organization selects measures, gathers and analyzes data, aligns, reviews, and utilizes its performance data and information at all levels of the SBDC program to enable learning and continuous improvement.**

#### Team Observations:

The Illinois SBDC deploys a "Scope of Work" as the basis of its performance measurement system. The network has established 15 key performance indicators for the SBDC program:

- 8 economic impact goals
- 4 business consultation goals
- 1 business training goal
- 1 professional development goal
- 1 success story goal

#### 2015 ILLINOIS SBDC – ITC - TIES SCOPE OF WORK PERFORMANCE INDICATORS/MEASURE FORM

HOST INSTITUTION:		TYPE OF AGREEMENT: GRF <input type="checkbox"/> OR FEDERAL <input type="checkbox"/>		
PERFORMANCE INDICATOR(S):	SBDC	ITC	TIES	
<b>A. ECONOMIC IMPACT</b>				
1. Number of jobs created. (annual minimum 75 SBDC; 16 ITC)				
2. Number of jobs retained. (annual minimum 115 SBDC; 18 ITC)				XXXX
3. Number of business starts. (annual minimum 15)		XXXX		
4. Number of business expansions. (annual minimum 5)		XXXX		XXXX
5. Number of client loans secured		XXXX		
6. Dollars in debt financing secured. (annual minimum \$2.2 million)		XXXX		
7. Number of projects with non-debt financing secured		XXXX		
8. Dollars in non-debt financing secured. (annual minimum \$1.1 million)		XXXX		
9. Dollar value of export sales secured (by country/annual minimum \$17 million)	XXXX			XXXX
10. Number of intellectual property filings	XXXX	XXXX		
11. Number of federal funding applications submitted	XXXX	XXXX		
12. Dollar value of federal applications successfully funded	XXXX	XXXX		
13. Number of formal client pitches/presentations to potential investors	XXXX	XXXX		
<b>B. BUSINESS CONSULTATION</b>				
1. Total number of clients				
2. Percentage of in business clients compared to all clients		XXXX		XXXX
3. Total number of center advising hours (minimum 1,100 hours per \$80,000)				
4. Average hours per client				
<b>C. BUSINESS TRAINING</b>				
1. Number of sponsored/co-sponsored events				
<b>D. PROFESSIONAL DEVELOPMENT/TRAINING</b>				
1. Number of hours of Professional Development/ Training (50 per PFTE staff)				
<b>E. MARKET INTERACTION AND ASSESSMENT</b>				
1. Number of Success Stories submitted through the Neoserra information tracking system. (minimum 6)				
<b>XXXX – Indicator is tracked but an annual goal is not required.</b>				

Network leadership established specific minimum measures (goals) by center based on the level of funding (federal and state) awarded which are included in every center's annual cooperative agreement (contract).



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While the Accreditation Team observed systematic understanding of the Scope of Work, the Team observed varying degrees of network personnel understanding of what were the most important goals for their center and advisors and reasoning why certain indicators existed or were important at all.

The network utilizes Neoserra as its principle CRM system. Activities and milestones included on the Scope of Work are entered into Neoserra which aggregate results that are reviewed by the Illinois SBDC leadership on a weekly basis and then shared and discussed with each service center.

### Evaluation:

	Commendation / Best Practice
✓	Standard Met / Recommendation
	Standard Not Met / Condition

### Recommendation:

The Accreditation Review Team recommends that senior leadership assess its key performance indicators included in its Scope of Work to 1) determine if measures selected are the most appropriate and/or inclusive of the key measures which align with current strategic objectives, and 2) enhance network personnel's focus by identifying and clearly defining the most important key performance indicator(s) that centers should allocate resources (financial and human).

## 4.2 Security and Confidentiality of Data

**SBDCs must have a system in place to ensure security and confidentiality of electronic and hard copy data.**

### Team Observations:

The Illinois SBDC deploys a process to monitor and assure the security and confidentiality of client data that meets this standard and the requirements of federal law. The network has a dedicated network coordinator that monitors system access and assigns and removes account access and permissions. All personnel that have access to client data are required to sign the network's code of conduct and receive appropriate system training prior to gaining access to any network system. The network also has data backup systems in place to protect customer data.

### Evaluation:

	Commendation / Best Practice
✓	Standard Met / Recommendation
	Standard Not Met / Condition

### Recommendation:

None.

#### 4.3 Validation and Verification of Key Performance Results

**SBDCs must have systems in place to validate and/or verify the accuracy of key performance measures and results.**

**Team Observations:**

The Illinois SBDC uses multiple methods to collect, verify and report economic impact, including the collection of an Economic Impact Verification/Attribution Form executed continuously by clients during the consulting engagement or periodically through emailed surveys. The team observed that the process for verifying and validating impact was present but the application and methodology, timing and population surveyed were inconsistent from center to center.

Network personnel summarized the process of collecting impact as "extremely difficult" due to the high standards required by the SBDC's state host, the Illinois Department of Commerce. The State requires SBDCs to collect business employment data (positions, salaries, identifiers) well above national standard of practice and what could be considered proprietary and intrusive to client businesses.

**Evaluation:**

	<b>Commendation / Best Practice</b>
✓	<b>Standard Met / Recommendation</b>
	<b>Standard Not Met / Condition</b>

**Recommendation:**

The Accreditation Review Team strongly recommends senior leaders work with state officials to address the high standard of data collection being required for the SBDC program. While appropriate for state business finance programs and tax incentives, the well-intended need to verify jobs impact to assess the effectiveness of a technical assistance program, like the SBDC, may 1) adversely affect the ability of SBDCs to collect any level of impact data from client businesses leading to overall lower reported results across all impact categories required by other funding partners (e.g. SBA - new business starts, capital infusion, etc.), and 2) threaten the critical component of trust between the SBDC advisor and client businesses leading to an unwillingness to take advantage of SBDCs professional expertise desperately needed by client businesses. The Accreditation Review Team recommends that the network align its impact collection practices with national network impact collection processes that ensures verification and attribution of impact from program services.

#### 4.4 Measurement of Economic Impact

**Each SBDC program must participate in the impact studies of the ASBDC and SBA, and should develop a strategy which works towards a statistically significant number of responses.**

**Team Observations:**

The Illinois SBDC participates in the ASBDC National Impact Study. The return rate for the past three studies has improved dramatically from 4.1% in 2013, 5.7% in 2014 to 16.7% in 2015. The Illinois SBDC has a targeted response rate of 30% by 2018.

**Evaluation:**

	Commendation / Best Practice
✓	Standard Met / Recommendation
	Standard Not Met / Condition

**Recommendation:**

None.

**5.0 WORKFORCE FOCUS**

**Objective:** *Design work systems that encourage workforce learning and motivation and enable the workforce to develop and utilize their full potential in alignment with the SBDC's overall objectives and action plans. The SBDC's efforts must build and maintain a work environment and workforce support climate conducive to innovation, performance excellence, and to personal and organizational growth. Create and manage human resource systems to achieve high performance. Establish key workforce practices and a support climate that enables personal growth, organizational growth and performance excellence.*

**5.1 Work Systems**

**The SBDC must have 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 objectives 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.**

**Team Observations:**

The Illinois SBDC is staffed by an experienced team of professionals, including experienced senior leaders, Network Coordinators, and center leadership. The network's structure and workforce allows it to achieve its strategic objectives and adequately serve a large diverse state to the best of its abilities with existing financial resources. The SBDC team is very well positioned to adapt to new business opportunities.

The Illinois SBDC is constantly looking for new trends, evaluating opportunities, developing skills and deploying work systems that facilitate their organizational objectives and goals. As the leadership team progresses to evolve its strategic plan, the review team is confident that the Illinois SBDC will be able to adapt their work systems to meet new business opportunities. The team observed very responsive reactions to both challenges and opportunities in deployment of new services and training. Advisor training is a high priority for the Illinois SBDC, which utilizes a combination of methods for professional development for its team members.

**Evaluation:**

	Commendation / Best Practice
✓	Standard Met / Recommendation
	Condition Needs Attention

**Recommendation:**

None.



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### 5.2 Key Positions

**Objective:** *Key positions demonstrate appropriate business or administrative experience, knowledge and abilities to direct, coordinate and manage a multifaceted and multi-location organization. Key positions must have ability and skills to coordinate and manage a human resource system, establish and maintain collaborative relationships and understand business practices and management methods. Key positions and responsibilities, capacity, and salaries must be consistent with 13 CFR 130.460(f) (1).*

#### Lead Center Director and Associate/Assistant Director

The lead center director and associate/assistant director(s) should have at a minimum a master's degree in business or other directly related field, or a bachelor's degree with sufficient and progressively responsible experience, or have appropriate business or administrative experience that demonstrates the knowledge and abilities required to:

- Direct, coordinate and manage a multi-faceted, multi-location organization;
- Direct, coordinate and manage human and administrative resources;
- Understand the full range of business practices and business management methods; and
- Demonstrate skills in establishing and maintaining effective support and working relationships with a variety of public and private stakeholder partners that are needed for alignment with strategic objectives.

The salary of the SBDC lead center director and associate/assistant director(s) should at a minimum be equivalent to the annualized average salary of a full professor or associate professor, respectively, in the institution hosting the SBDC or parallel positions in the agency/organization hosting the SBDC. When the university host is not affiliated with a college, the salaries of the director and associate/assistant director(s) should be comparable to the college of business, college of engineering or equivalent.

The SBDC Network should have a plan or strategy focused on developing leadership skills and succession for key positions throughout the network.

#### Team Observations:

State Director, Mark Petrilli, and Associate State Director, Rod Hollenstine have a combined 47 years of service and possess extensive experience and qualifications to lead a multifaceted SBDC network. Other key network positions include five (5) Network Coordinators. Network Coordinators provide direct oversight and support to service centers. All have the knowledge and experience to effectively manage network operations within their areas of responsibility and specialization.

The Accreditation Review Team observed that the Illinois SBDC State Office has strong support from the entire network. The State Director and Associate State Director are clearly able to direct the efforts of all major programs of the network - SBDC, PTAC, ITC and TIES.

The review team heard from stakeholders that the state leadership team is clearly in charge of the network and has a strong command of how to establish and maintain effective support and working relations with key stakeholders.



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The Accreditation Review team observed that senior staff salaries are less than national standards for equivalently sized networks and that the state director has not received a raise in several years.

When the network experiences turnover, the network handles transition and hiring of team members utilizing host policies and procedures and utilizes a model of mentorship matching new employees with other experienced personnel.

### Evaluation:

	Commendation / Best Practice
✓	Standard Met / Recommendation
	Standard Not Met / Condition

### Recommendation:

The Accreditation Review Team strongly recommends senior leaders work with direct reports to inform them regarding the discrepancies of salaries of key leadership positions with respect to national standards for equivalent positions and responsibility. This will ensure the retention and recruitment of high quality leadership.

The Accreditation Review Team recommends that senior leadership consider developing a succession strategy for key positions, including senior leadership positions to ensure institutional continuity.

### 5.3 Workforce Learning and Growth

**Objectives:** Provide a method for determining the professional development needs of the workforce that supports the achievement of the SBDC's strategic objectives and contributes to the organization's performance. Provide on-going professional development and training for the workforce that builds its knowledge, skills and capabilities; contributes to achievement of action plans, organizational effectiveness, and career progression; supports key organizational needs related to the orientation of new members of the workforce, ethical business practices, management, and leadership; and addresses key needs associated with organizational performance and improvement and the changing business and technology environment. Provide an assessment and evaluation process that seeks input and feedback from the entire workforce regarding training needs and evaluation of professional development offerings.

Workforce education and training must align with and support the achievement of the SBDC's strategic objectives, including the enhancement of workforce knowledge, skills, and leadership capabilities that contribute to organizational effectiveness and performance improvement.

The SBDC must have a systematic professional development program tied to its strategic objectives and provide evidence of its implementation throughout the network. The program must include:

- Identification of network core competencies for all staff necessary to achieve desired results including specialties such as international trade, technology, and procurement;
- A method of determining the professional development needs of the workforce;



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- An on-going workforce education and professional development strategy that meets or demonstrates progress toward achieving identified competencies for both network and individual;
- A structured training/orientation program for new members of the workforce; and
- An assessment system, including opportunities for feedback, to determine effectiveness of the professional development offerings and make changes when warranted.

### Team Observations:

The Accreditation Review Team observed a network of team members that are well trained and capable of delivering current core services and training.

The Illinois SBDC has a strong commitment to workforce learning and continuing education. The network has established the Illinois Entrepreneurship and Small Business Growth Association (IESBGA), a 501(c)(3) to execute the network's annual professional development program and Certified Business Development Advisor (CBDA) program. IESBGA is staffed by network volunteers. All center directors, business advisors and professional staff are required to complete a minimum of 50 hours of professional development/continuing education each year.

The Illinois SBDC has an established and structured new employee orientation, including a one-day orientation with network leadership and observation and mentorship with other network personnel. New advisors are required to complete CBDA certification, including ten individual modules. The network also encourages an environment and culture of peer mentoring and knowledge exchange between centers for the benefit of the client regardless of location.

### Evaluation:

	Commendation / Best Practice
✓	Standard Met / Recommendation
	Standard Not Met / Condition

### Recommendation:

None.

## 5.4 Workforce Environment and Motivation

**Objectives:** *Provide facilities that offer a professional environment for confidential client counseling. Assess and develop ways to improve workplace health, safety, security and ergonomics. Create workplace preparedness for disasters or emergencies. Determine specific factors that affect the workforces' well-being, satisfaction and motivation by developing formal or informal assessment methods to determine workforce satisfaction, well-being, and needs.*

**Maintain a work environment and a workforce support climate that contributes to the well-being, satisfaction, and motivation of all personnel and:**

- Ensures and improves workplace health, safety, security, and ergonomics,
- Ensures workplace preparedness for disaster or emergencies,



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- Provides staff an opportunity to periodically give feedback to determine the key factors that affect workforce well-being, satisfaction and motivation,
- Supports the workforce via benefits and policies including items such as compensation, career progression and related practices that enables the well-being of the workforce. and
- Provides facilities that are professional in appearance, adequate for the delivery of services and allows for confidentiality for counseling.

### Team Observations:

Senior leadership is recognized for creating an environment of openness and collaboration amongst network personnel. Convinced by staff testimonials, the Accreditation Review Team observed a team of professionals committed and focused to the delivery of quality services and organizational success and growth. However, the Accreditation Review Team observed a high level of anxiety among network personnel and partners concerning the fiscal impasse that exists within state government, i.e. Illinois has not enacted a FY2015-2016 budget, now four months into the fiscal year. Committed center host partners funded by state resources are unable to access state appropriations resulting in their need to cover the full costs of center operations. Unsure when a budget will pass, there is an underlying concern by an otherwise highly motivated and enthusiastic workforce, that their employment is threatened. Unless resolved, or another funding solution implemented, the consequence could result in the loss of highly talented and experienced people and/or loss of otherwise committed local host development partner organizations.

All Illinois SBDC locations visited by the team were accessible, professional, well-equipped business friendly environments that provide confidential space for one on one business advising sessions. The team did not observe any issues with workplace health, safety, security or ergonomics.

The Illinois SBDC has a Business Continuity/Disaster Recovery Plan that follows the overall guidelines of the State of Illinois and Department of Commerce and Economic Opportunity, the State Office host. Each Illinois SBDC Service Center also has a plan that has been developed in conjunction with their local host partner organization.

The Illinois SBDC previously participated in a Disaster Assistance and Recovery Initiative receiving supplemental disaster assistance funds from the SBA. Several tools, documents, reports and other information related to this past initiative can be found on the CenterConnect portal.

### Evaluation:

	Commendation / Best Practice
✓	Standard Met / Recommendation
	Standard Not Met / Condition

### Recommendation:

None.



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## 6.0 PROGRAM DELIVERY AND MANAGEMENT

**Objective:** *To design key service delivery processes that maximize client value and satisfaction and drive organizational success and sustainability.*

### 6.1 Key SBDC Services

**Key services must be consistent with the national SBDC mission and align with the SBDC lead center strategy and cooperative agreement. Regular and continual processes for the design, delivery and management of key services must be in place.**

**For each key service, systematic processes must be in place to:**

- **Ensure efficient & effective delivery**
- **Identify client expectations & preferences**
- **Link to the strategic plan**
- **Measure effectiveness**
- **Assess staff performance**
- **Obtain client feedback & measure client satisfaction:**
- **Gather & analyze performance data**
- **Use data for continuous improvement**
- **Improve performance & increase value to clients**
- **Maintain client confidentiality & avoid conflicts of interest**

#### **Team Observations:**

The Illinois SBDCs are focused on providing accurate, highly valued information, business advice and training to help launch, develop and grow pre-venture, start-ups and existing business clients. The specific advising and training services offered by the Illinois SBDC align with the ASBDC core or "basic" competencies and federal Program Announcement service requirements.

Early stage pre-venture inquirers are directed to standardized "Starting Your Business in Illinois" workshops, hosted by the Illinois SBDCs, or referred to the First Stop Business Information Center for a customer customized "Starting Your Business In Illinois" information kit. Numerous online publications and the eLearning website are also recommended for pre-venture clients to secure needed information. This process allows for the business advisors at the SBDCs to target more of their advising hours toward more advanced pre-venture clients, start-ups and existing businesses that are impact-ready; a network strategic objective.

The Illinois SBDC focuses on providing confidential advising with clients as soon as he or she completes the Request for Consultation form. In the initial engagement, the SBDC advisor reviews the Clients Rights and Responsibilities. Through this process the Illinois SBDC sets the parameters of the client relationship and reinforces the need and expectation for economic impact generated as a result of the engagement.

The Illinois SBDC education/training programs are used to supplement business advising and a forum for advising client recruitment. The Illinois SBDC requires that all centers conduct the "Starting Your Business in Illinois" workshop.



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The Illinois SBDC aligns key services and tools with key client segments:

Key Client Segments	Key Services	Tools/Resources (see Exhibits for details)
<i>Pre-Venture or Nascent:</i> Individuals interested in starting a business that are seeking information, business advice and training assistance necessary for their start-up.	<ul style="list-style-type: none"> <li>- Business Information Center - Start-up kit</li> <li>- "Starting Your Business in Illinois Workshop"</li> <li>- Business Training/Education</li> <li>- Referral to other source or resource partner.</li> <li>- Business Plan and Strategy Development</li> </ul>	<ul style="list-style-type: none"> <li>- "Starting Your Business in Illinois" Handbook.</li> <li>- First Stop FAQ and Knowledgebase.</li> <li>- Online Publications</li> <li>- eLearning Center</li> <li>- Center Locator</li> <li>- eCenter Direct</li> <li>- GrowthWheel</li> </ul>
<i>Start-up:</i> Clients seeking assistance and skills to overcome the obstacles faced during the establishment and operation of their business and have been in operation for up to one year.	<ul style="list-style-type: none"> <li>- Business Management Assistance</li> <li>- Business Plan and Strategy Development</li> <li>- Business Financing</li> <li>- Market Research</li> <li>- Marketing Plans</li> <li>- Business Training/Education</li> <li>- Regulatory Compliance</li> </ul>	<ul style="list-style-type: none"> <li>- eCenter Direct</li> <li>- GrowthWheel</li> <li>- Profit Mastery</li> <li>- IBISWorld</li> <li>- Global Classroom eLearning Center</li> <li>- Reference USA</li> </ul>
<i>Established:</i> Clients that are beyond their first year of operation. These are small businesses that need assistance with specific issues or problems.	<ul style="list-style-type: none"> <li>- Business Financing</li> <li>- Business Management Assistance</li> <li>- Market Research</li> <li>- Marketing Plans</li> <li>- International Trade</li> <li>- Government Contracting</li> <li>- Regulatory Compliance</li> <li>- Business Training/Education</li> </ul>	<ul style="list-style-type: none"> <li>- eCenter Direct</li> <li>- Client Assessment Tool</li> <li>- GrowthWheel</li> <li>- ProfitCents</li> <li>- Profit Mastery</li> <li>- IBISWorld</li> <li>- Datamyne, Kompass, Euromonitor</li> <li>- Reference USA</li> <li>- Bid Match, Fedmine, Proximity</li> <li>- Global Classroom eLearning Center</li> </ul>

Every staff member signs the networks conflict of interest that outlines prohibited acts and confidentiality standards.

### Evaluation:

✓	<b>Commendation / Best Practice</b>
✓	<b>Standard Met / Recommendation</b>
✓	<b>Standard Not Met / Condition</b>

### Recommendation:

None.



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## 6.2 Accreditation of Technology Programs

If the SBDC is applying or re-applying for accreditation of a technology program, it must develop its technology program to meet the Guidelines for SBDCs seeking or renewing Technology Accreditation and/or Designation as a Small Business and Technology Development Center (see Appendix A of this document).

### Team Observations:

While the Illinois SBDC Network operates its Technology, Innovation Entrepreneurship Services (TIES), the network did not request a Technology Accreditation Review.

### Evaluation: N/A

	Commendation / Best Practice
	Standard Met / Recommendation
	Standard Not Met / Condition

## 7.0 RESULTS

**Objective:** *To develop a routine and continual process to examine trends of SBDC's organizational performance over time (3-5 years) including stakeholder and customer focused outcomes, process effectiveness outcomes, financial and market outcomes, workforce focused outcomes and leadership outcomes.*

**For the SBDC to improve quality and performance, the SBDC must utilize a system to document its work performance and outcomes in order to drive continuous quality improvement. This should include an ability to report on the performance measurement elements set forth in Standards 1 through 6. It must also include an ability to report on common data and results. ("Common data" refers here to data collected and utilized by more than one and often all SBDCs.)**

**Each of the standards below should be evidenced by tables, charts, graphs or other data with narrative analysis describing how the SBDC uses the data to improve performance and the results of its efforts.**

### 7.1 SBDC Service Results and Outcomes

- Define key performance metrics (as identified in Standard 4.1) including those mandated from funding sources.
- Provide trend data for a minimum of three years in either graphic forms or charts depicting the SBDC's current level and trends in key measures or indicators of service performance for the overall organization.
- Describe how this trend data is regularly used to manage performance and explain positive or negative trends. Provide examples of how the analysis of these trends drives improvement or has led to organizational changes that resulted in improved performance.



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### Team Observations:

The Illinois SBDC identifies its key performance indicators to include number of clients advised; number of hours of consultation; average hours per client; value of business financing with assistance; number of new business launches with assistance, and number of jobs created and retained.

Illinois SBDC Network	CY10	CY11	CY12	CY13	CY 14	Year Avg.
Total Clients	10,264	9,086	8,640	8,655	8,293	8,988
Total Hours	66,412	65,619	71,137	63,704	58,315	65,037
Avg. Hours Per Client	6.47	7.22	8.23	7.36	7.03	7.262
Jobs Created	3,377	2,567	3,263	2,956	2,792	2,991
Jobs Retained	6,077	6,052	6,246	3,811	2,987	5,035
Business Start Ups	446	428	503	562	600	507
Business Expansions	214	208	244	185	142	199
Total Loans	385	374	407	372	377	383
Total Loan \$'s	\$79,188,673	\$92,218,190	\$85,468,272	\$409,707,987	\$316,525,966	\$196,621,818
Total Equity Units	735	780	687	562	514	655
Total Equity \$'s	\$63,350,080	\$99,723,049	\$77,115,863	\$54,091,626	\$50,302,391	\$68,916,602
Total Capital \$'s	\$142,538,753	\$191,941,239	\$162,584,135	\$463,799,613	\$365,828,357	\$265,538,420

The outputs (clients, total hours, and hours per client) over the past three years show a slight downward trend. However, the outcomes (start-ups, \$\$ in financing) the past two years have been strong. The reported jobs over the past couple of years have dropped due to an added state requirement to secure additional details (including employee identifier; salary; position classification) for each job reported. Clients have been hesitant to provide this additional level of detail to the local SBDCs leading to an underreporting of the number of jobs created and number of jobs retained as the result of Illinois SBDC assistance. The Illinois SBDC is pursuing the relaxation of these current requirements through discussions with the Department of Commerce and the Illinois Governor's Office.

The downward trend in the overall outputs of the Illinois SBDC may be attributed to the delay of receiving funding confirmations and the funding uncertainty at the federal and state levels. For the past few years there have been delays in receiving funding confirmations from both the SBA and also the Illinois Department of Commerce which have caused delays in getting the annual Illinois SBDC agreements in place with the local SBDC host organizations. Although the SBDCs have continued to operate without agreements in place, it is apparent the centers have been cautious during these times and have not aggressively promoted the centers services during these transition periods. January and February client numbers had fallen off considerably during the 2012-2014 period.

After the trend was identified and discussed with the SBDC Network in early 2015 client numbers and total consultation hours increased month by month over the first four months of this year. The Illinois SBDC continues to focus on maintaining and increasing its level of output for key performance indicators to leverage continued economic impact results and successes for SBDC clients.

**Evaluation:**

	Commendation / Best Practice
✓	Standard Met / Recommendation
	Standard Not Met / Condition

**Recommendation:**

The Accreditation Review Team recommends that the network continually analyze and refine its customer centric performance activities (KPIs) which it considers to be appropriate productivity measures for tracking performance.

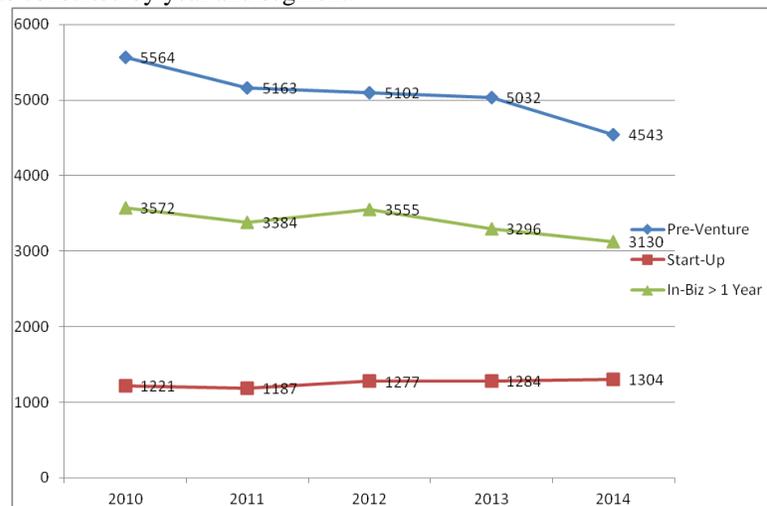
**7.2 Customer-Focused Results and Outcomes**

- Based on the strategy for segmenting your client market as described in Standard 3.1(a), provide trend data for a minimum of three years in either graphic forms or charts depicting the SBDC’s current level and trends in key measures or indicators of service performance for product offerings, client groups or market segments as appropriate.
- Describe how this trend data is regularly used to manage performance and explain positive or negative trends. Provide examples of how the analysis of these trends drives improvement or has led to organizational changes that resulted in improved performance.

**Team Observations:**

The Accreditation Review Team observed a network that measures and uses its customer-focused trends to learn and grow. Shown below are graphs providing trend information on the primary client segments identified and served by the Illinois SBDC. The segments include; Pre-Ventures; Start-Ups (< 1 year) and Established/Existing (> 1 year).

Number of clients consulted by year and segment:

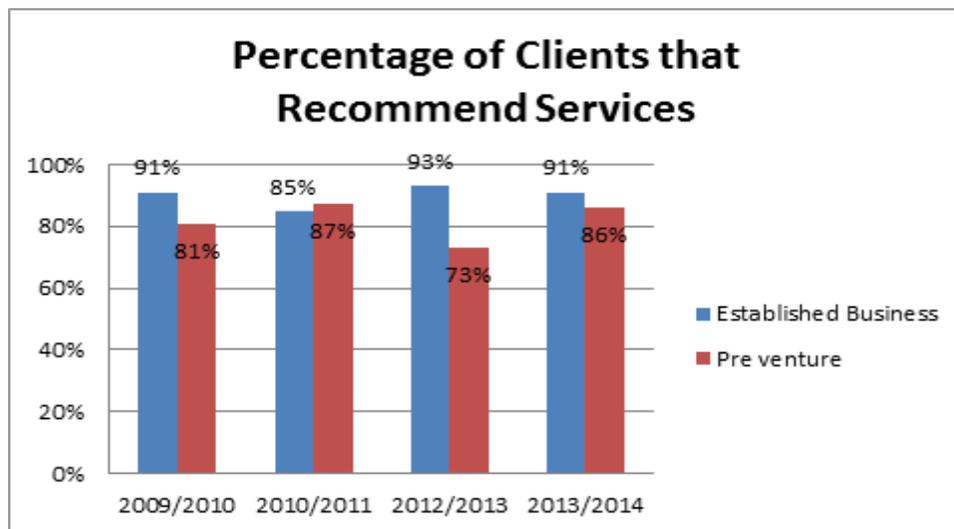
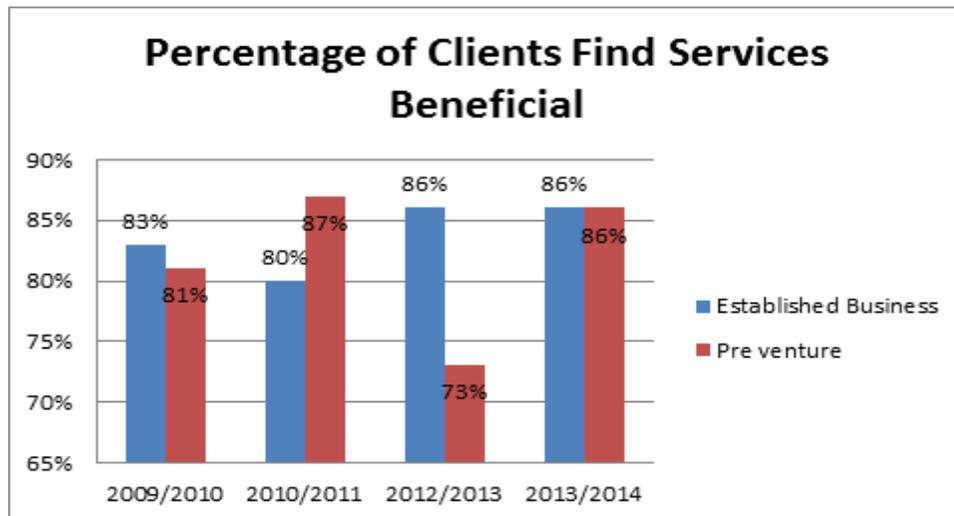


As indicated in 7.1 above, the Illinois SBDC Network has experienced a downward trend in the total number of clients receiving one on one business consultation. However, one very positive trend has been the

slow but steady upward trend in the number of existing/established businesses being served by the SBDC. Increasing the percentage of in-business (start-ups and in-business) clients served by the SBDC has been a focus of the SBDC for the past several years. This slight increase in the number of existing businesses has also attributed to strong performance in the amount of capital that clients have reported and attributed to the services of the Illinois SBDC.

The Illinois SBDC tracks customer satisfaction of client segments in several ways. One of the methods used to gage an overall level of client satisfaction on an annual basis is through the SBDC Economic Impact Study. Below are comparisons from the past four studies for both Established and Pre-venture clients.

Illinois SBDC Client Satisfaction by Pre-Venture and Established Business:





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These results demonstrate a strong level of client satisfaction for the existing business clients served by the Illinois SBDC. For established businesses, the report has shown strong increases during the past two studies in the percentage of clients that found the services beneficial and even stronger increases for the percentage of established businesses that would recommend SBDC services to other small businesses.

Although the overall results are strong, the Illinois SBDC is striving to increase its value and service to network clients. The effort to secure economic impact reporting through a State Office online survey demonstrates the importance of the business advisor – client engagement and relationship. The SBDC has learned that constant attention must be given to improving the level of overall satisfaction for center clients and ongoing communication and contact continues to be extremely important.

### Evaluation:

	Commendation / Best Practice
✓	Standard Met / Recommendation
	Standard Not Met / Condition

### Recommendation:

None.

### 7.3 Market Results and Outcomes

- Describe peer or aspirant organizations (such as similarly funded or structured SBDCs or other local organizations). Define comparable metrics and data collection sources.
- Benchmark trend data for a minimum of three years in either graphic forms or charts depicting the SBDC’s current level and trends in key measures or indicators of service performance to comparable SBDCs or national averages.
- Describe how this trend data is regularly used to manage performance and explain positive or negative trends. Provide examples of how the analysis of these trends drives improvement or has led to organizational changes that resulted in improved performance.

### Team Observations:

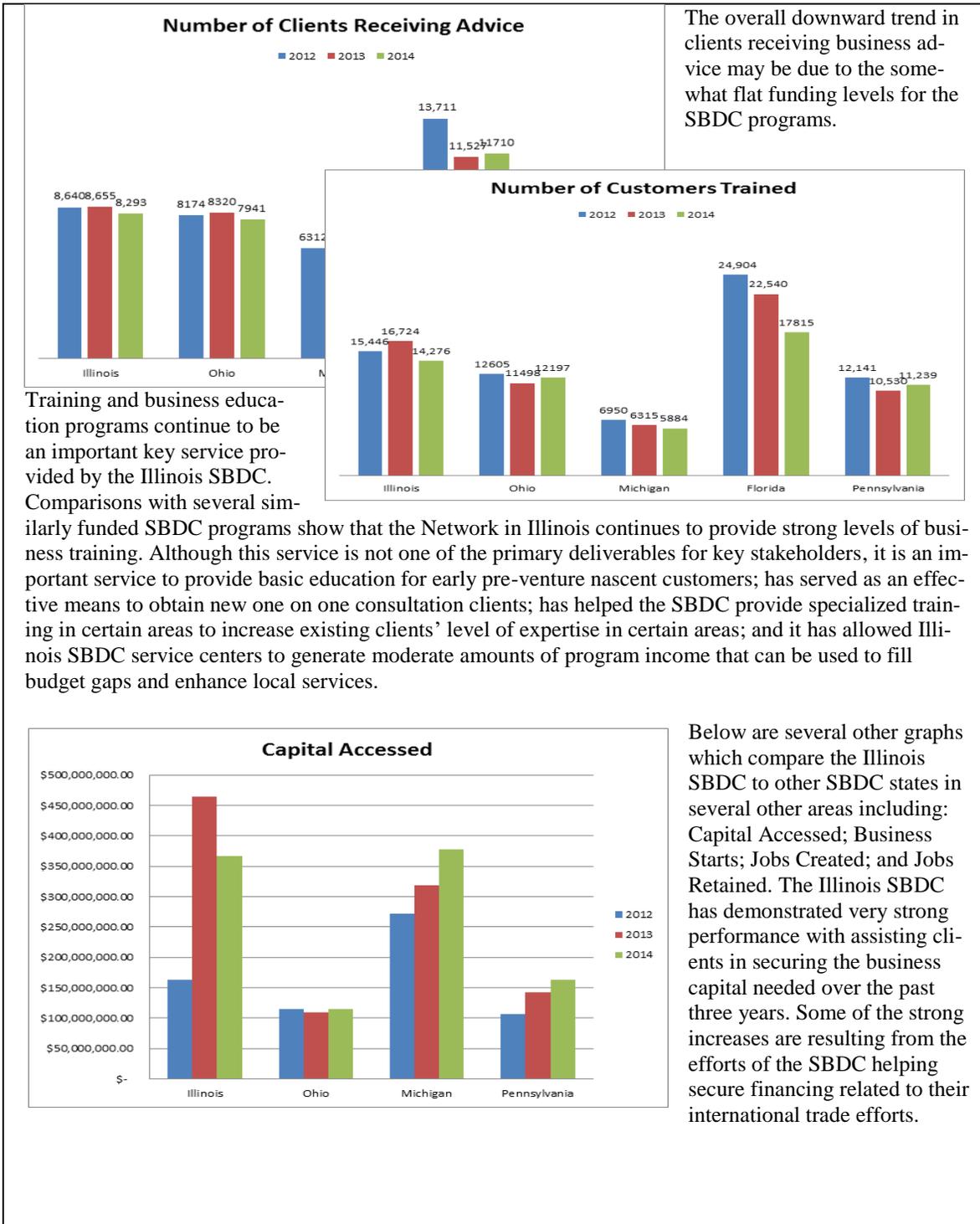
The Illinois SBDC has included historical information below on several key performance indicators and has provided comparison data for several similar sized states and one larger state SBDC program. The information below includes data from the SBDCs in Illinois, Ohio, Michigan and Pennsylvania and also some comparisons with a larger, better funded program, the Florida SBDC, on a few key indicators.

The total number of clients receiving one on one business advice has been trending slightly downward for all of the state SBDC programs compared above. The Illinois SBDC is working in 2015 to reverse the trend and begin to grow its client base, with an added emphasis on its exporting assistance efforts.

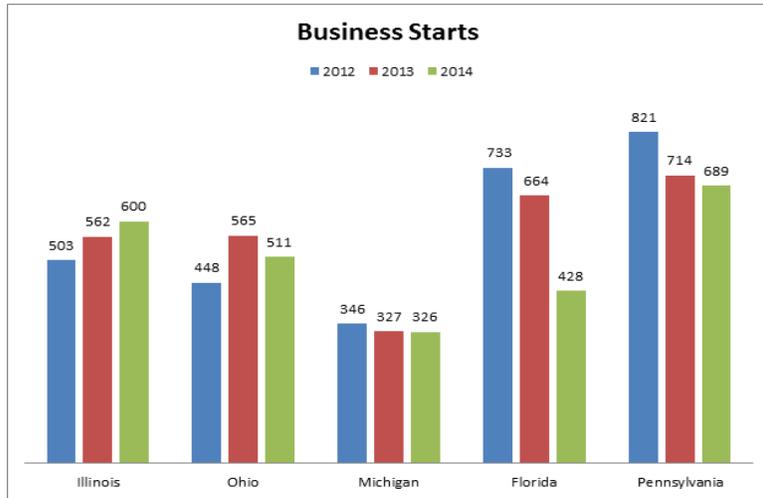


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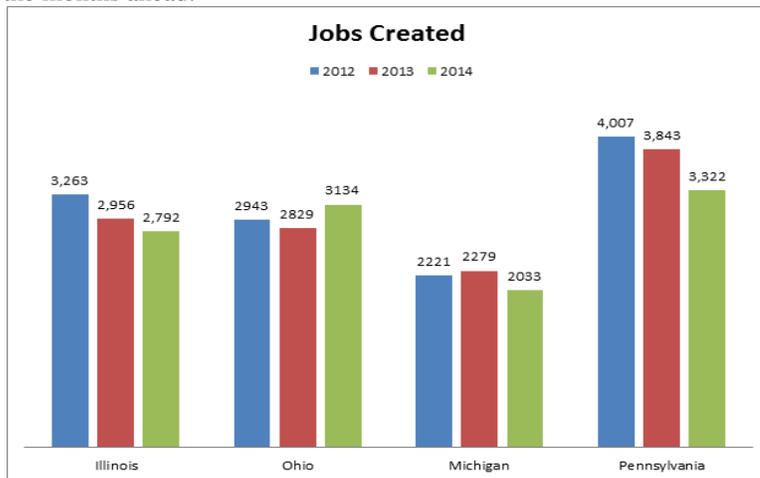


Business starts have trended upward for the Illinois SBDC primarily because of efforts to ensure the local centers are properly recording start up information in the SBDC Neoserra system. The results for Illinois are comparable to the other state programs analyzed.

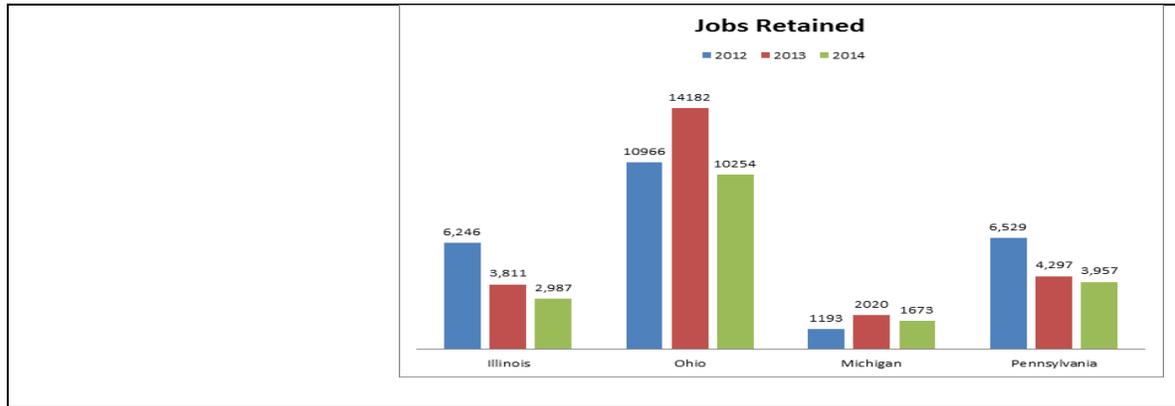


As indicated earlier, the reported number of jobs created and retained as the result of assistance from the Illinois SBDCs has been trending down over the past three years due primarily to the additional reporting burden implemented by the state of Illinois for each job reported.

Although comparable to some of the states compared above, the Illinois SBDC is working diligently to improve these impact numbers in the months ahead.



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### Evaluation:

	Commendation / Best Practice
✓	Standard Met / Recommendation
	Standard Not Met / Condition

### Recommendation:

None.

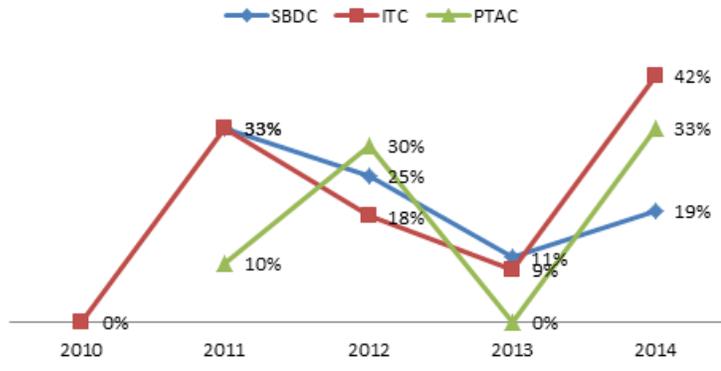
### 7.4 Human Resource Results and Outcomes

- Describe your key performance measures or outcomes for employee learning, workforce environment and general staff satisfaction (as identified in Standards 5.3 and 5.4).
- Provide trend data for a minimum of three years in either graphic forms or charts depicting the SBDC's current level and trends in key measures or indicators of human resource performance.
- Describe how this trend data is regularly used to manage performance and explain positive or negative trends. Provide examples of how the analysis of these trends drives improvement or has led to organizational changes that resulted in improved performance.

### Team Observations:

The Illinois SBDC tracks the turnover rate of center directors for the SBDC, SBDC International Trade Center and PTAC programs. The chart below shows turnover trended downward from 2011 to 2013 and then jumped up for all three program areas this past year. The centers within the Illinois SBDC Network have not seen any real overall funding increases over the past 4 years. With funding flat and local match becoming tighter at the host level, several directors have left the SBDC Network for better paying positions.

### Director Turnover Rate 2010-2014

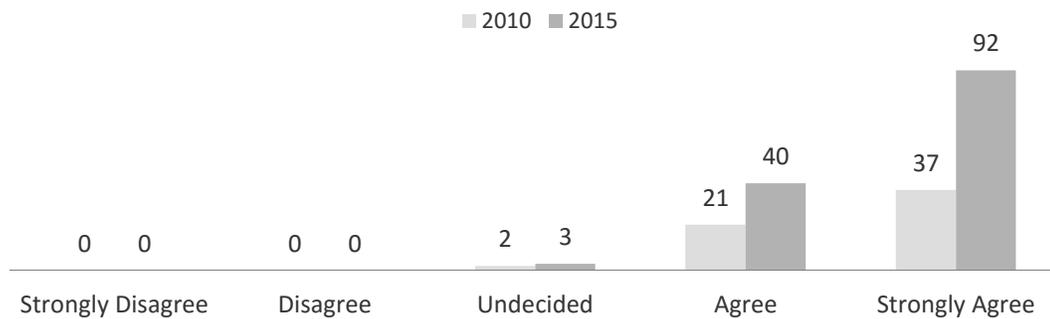


The jump in the turnover rate has raised some concern within the SBDC's leadership. Unfortunately, with the high level of budget uncertainty currently within the state of Illinois, the turnover rate may not decline drastically in the near future.

The Illinois SBDC also utilizes the Baldrige "Are we making progress" survey to solicit feedback from both the Illinois State Office and Illinois SBDC Service Center Staff. The overall results for both surveys were

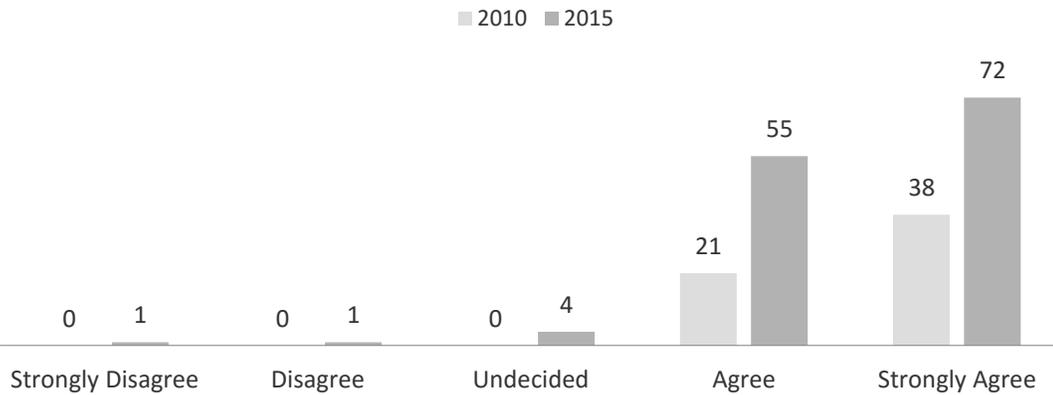
positive, but also provide the leadership with areas that can be improved. The results for both surveys are included in the exhibits. Below are examples of a few of the charts comparing survey results from 2010 and 2015.

### I know my organization's mission (what it is trying to accomplish).

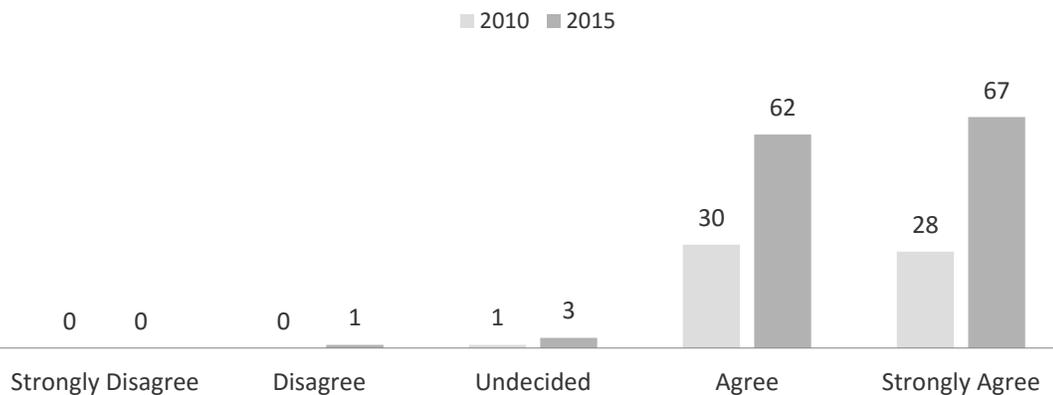


Both surveys indicated a strong level of communication within the network and a strong understanding of the priorities and expectations.

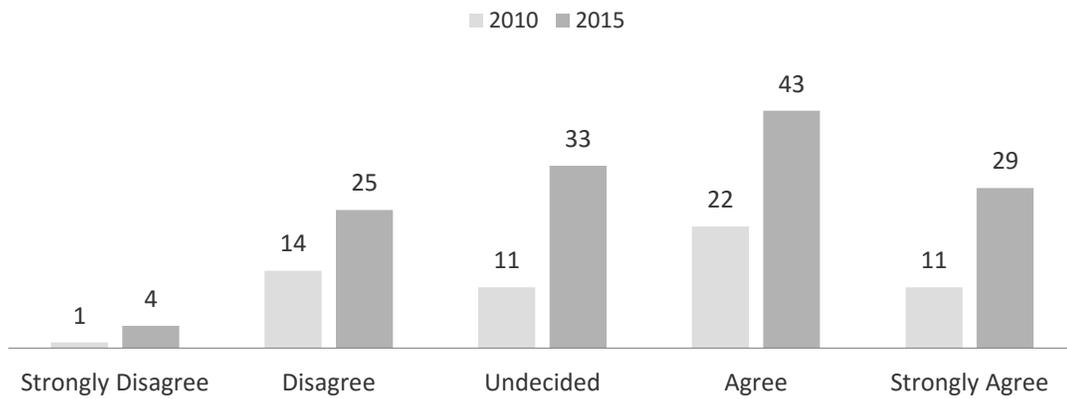
## I know who my most important customers are.



## I regularly ask my customers what they need and want.



## My organization is flexible and can make changes quickly when needed.



The statement receiving the most “mixed responses” was “My organization is flexible and can make changes quickly when needed.” Although the majority of the respondents either agreed or strongly agreed, there were still a significant number who were either undecided or disagreed. This is an area the SBDC has identified that needs to be improved. With the state host being a state government agency and the majority of the local hosts being either universities or community colleges, making massive improvements with organization flexibility may be challenging. However, the leadership strongly believes improvement can be made to some of the guidelines and procedures in place to increase flexibility.

The Illinois SBDC has been working to strengthen the SBDC Center Director position. The average annual salary for the Illinois SBDC Service Center Director was \$66,500 in 2014 which is slightly higher than the mean salary of a Center/Region Director's salary in Region V of \$64,747. Unfortunately, due to the tough budget environment for the State of Illinois and also for many of the state supported colleges and non-profit organizations, salaries have not increased significantly in the past four years.

### Illinois SBDC Service Center Director Salary

2010	2014
\$63,117	\$66,500

The Illinois SBDC is committed to providing outstanding professional development opportunities for Service Center and Lead Center Staff. Over the past several years, Service Center Directors have been strongly encouraged to participate in the ASBDC Annual Conference. The Illinois SBDC has also continued to support IESBGA, the SBDC non-profit organization which delivers professional development and resources for the SBDC Network. High quality professional development training is provided to members of the Illinois SBDC Network at the IESBGA Annual Professional Development Conference each spring.

The charts below show the increasingly strong participation levels at both the America’s SBDCs Annual Conference and the IESBGA Annual Conference



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Number of Illinois SBDC Participants in ASBDC Annual Conference	
Year	Attendees
2015	45
2014	58
2013	50
2012	45
2011	44

Illinois SBDC Participants at the SBDC-IESBGA Training Conference	
2015	123
2014	126
2013	106
2012	104
2011	99

### Evaluation:

	Commendation / Best Practice
✓	Standard Met / Recommendation
	Standard Not Met / Condition

### Recommendation:

None.
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### 7.5 Organizational Effectiveness Results and Outcomes

- Describe key performance measures or outcomes for measuring indicating the return on investment of the SBDC either from the annual impact study or other sources and include any other metrics (i.e., cost per job created or amount of new sales for every dollar invested in the SBDC) which would help evaluate organizational effectiveness.
- Provide trend data for a minimum of three years in either graphic forms or charts depicting the SBDC's current level and trends in key measures or indicators of organizational effectiveness.
- Describe how this trend data is regularly used to manage performance and explain positive or negative trends. Provide examples of how the analysis of these trends drives improvement or has led to organizational changes that resulted in improved performance.

### Team Observations:

<p>The primary performance indicators used for calculating the return on investment for the Illinois SBDC are metrics tracked from the Illinois results from the SBDC National Impact Study. The key measures include: cost per job; overall benefit to cost ratio; benefit to cost ratio for long term consultation and the financing leverage ratio.</p> <p>Illinois SBDC ROI Results:</p>
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<u>All Firms</u>	<u>2009/2010</u>	<u>2010/2011</u>	<u>2012/2013</u>	<u>2013/2014</u>
Cost per Job	\$5,169	\$4,486	\$3,786	\$3,689
Cost of all consulting	\$4,589,922	\$4,691,896	\$5,186,967	\$5,101,992
Benefit to cost ratio	4.08/1.00	2.97/1.00	3.06/1.00	3.10/1.00
Cost of long term consulting	\$3,052,922	\$3,326,554	\$3,952,469	\$4,020,369
Benefit to cost ratio	6.13/1.00	4.19/1.00	4.02/1.00	3.93/1.00
Value added to cost				
Financing "Leverage"	13.74/1.00	12.82/1.00	3.26/1.00	5.09/1.00

<u>All Firms</u>	<u>2008/2009</u>	<u>2009/2010</u>	<u>2010/2011</u>	<u>2012/2013</u>	<u>2013/2014</u>
Aggregate sales Impact	\$87,334,600	\$269,054,860	\$148,377,350	\$147,237,800	\$145,109,000
Aggregate employment Impact	2847	1776	2092	2740	2766
State tax revenues generated	\$5,280,568	\$13,396,925	\$7,825,127	\$8,572,469	\$8,443,894
Federal tax revenues generated	\$8,854,387	\$5,326,915	\$6,129,185	\$7,296,956	\$7,366,433
Cost of entire SBDC operation	\$9,773,827	\$9,179,843	\$9,383,792	\$10,373,934	\$10,203,984
Benefit to Cost Ratio	1.45/1.00	2.04/1.00	1.49/1.00	1.53/1.00	1.55/1.00
Cost per Job	\$3,433	\$5,169	\$4,486	\$3,786	\$3,689
Cost of all consulting	\$4,886,914	\$4,589,922	\$4,691,896	\$5,186,967	\$5,101,992
Benefit to cost ratio	2.89/1.00	4.08/1.00	2.97/1.00	3.06/1.00	3.10/1.00
Cost of long term consulting	\$3,655,412	\$3,052,922	\$3,326,554	\$3,952,469	\$4,020,369
Benefit to cost ratio	3.87/1.00	6.13/1.00	4.19/1.00	4.02/1.00	3.93/1.00
Value added to cost					
Financing "Leverage"	3.68/1.00	13.74/1.00	12.82/1.00	3.26/1.00	5.09/1.00

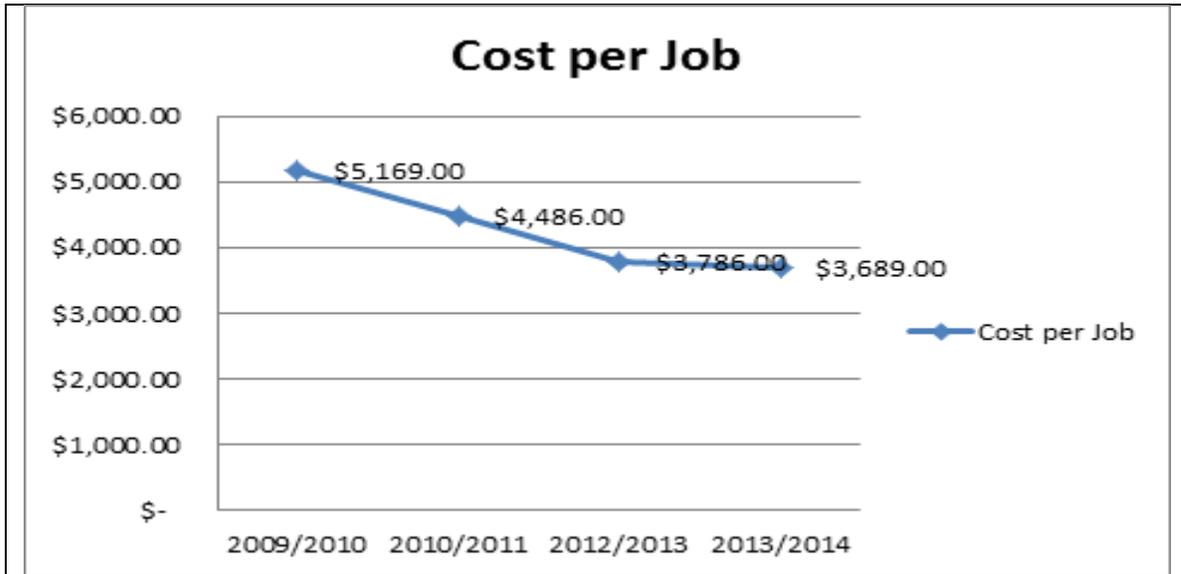
### Benefit to Cost Ratio per \$1 Spent - All Consulting



### Benefit to Cost Ratio per \$1 Spent - Long Term Consulting



Although there has been a reduction since 2010, the benefit to cost ratio per \$1 dollar spent has continued to be steady over the past two years. As indicated in Section 4.4, the Illinois SBDC is focused on continuing to increase the returns of the Annual SBDC Economic Impact survey.



The cost per job ratio in the Annual Impact Study has trended downward over the past four years. Although higher than the national average, this measure for the Illinois SBDC demonstrates a strong indicator of increased effectiveness for the SBDC Network over the past four years.

**Evaluation:**

	Commendation / Best Practice
✓	Standard Met / Recommendation
	Standard Not Met / Condition

**Recommendation:**

None.

**Illinois SBDC Personnel Interviewed (by interview location)**

<b>Team 1</b>		
Jim Foley	Bradley University	Peoria
Ross Miller	Bradley University	
Jim Ryan	Bradley university	
Beatrice Poloney	Bradley University	
Elizabeth Binning	Illinois State University	
Kristi Patterson	McHenry County College	
Martha Carney	College of DuPage	Lisle
Zach Person	College of DuPage	
Rita Haake	College of DuPage	
Frank Brisbois	College of Lake County	
Nicole Massey Pratt	College of Lake County	
Sybil Ege	Elgin Community College	
Harriet Parker	Waubensee Community College	
Nisha Floyd	NORBIC	Chicago
Pam McDonough	NORBIC	
Tom Cassell	William Rainey Harper College	
Melissa Brown	Joseph Center	
Denise Ching	University of Illinois Chicago	
Steve Bob	University of Illinois Chicago	
Karen Goldner	WBDC	
Silvia Bonila	Illinois Hispanic Chamber	
Jim Schultz	Commerce	Chicago
Esther King	Commerce	
Robert "Bo" Steiner	SBA DD	
Richard Garcia	SBA Deputy DD	
Emily Lo	Industrial Council of Nearwest	Chicago
Lori Spingola	Industrial Council of Nearwest	
Steve DeBretto	Industrial Council of Nearwest	
Curt Roeschley	Bethel New Life	
Ed Coleman	Bethel New Life	
Rodney Brown	New Covenant	
Angelique Orr	New Covenant	
Florence Hardy	Chicagoland Chamber	
Priscilla Cordero	Governors State University	University Park
Mary Ma	Governors State University	
Ken Crite	Kankakee Community College	
Amy Murphy	Joliet Junior College	
Scott Upshaw	Chicago State University	



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Marie Dumas	Commerce/Illinois SBDC	
<b>Team 2</b>		
Joel Youngs	Black Hawk College	Moline
Michelle Lewis	Black Hawk College	
Beverly Malooley	Illinois Valley Community College	
Gina Czubachowski	Illinois Valley Community College	
Brain McIntyre	Rock Valley College	
Terrance Hall	RAEDC	
Patrick McKeehan	SIUE	East St Louis
Giovanna Dimaggio	SIUE	
Silvia Torres	SIUE	
Robyn Russell	SIUC	Carbondale
Greg Bouhl	SIUC	
Ken Stoner	SIUC	
Michelle Breslin	SIUC	
Amie Wigfall	SIUC	
Candy Eastwood	Shawnee Community College	
Lori Cox	Southeastern Illinois College	
Steve Groner	Kaskaskia College	Centralia
Curt Mower	Rend Lake College	
Nick Lemay	Rend Lake College	
Don Elmore	Champaign County EDC	Champaign
Craig Rost	Champaign County EDC	
Kathie Cravens	Champaign County EDC	
Carol Nichols	Danville Area Community College	
Greg Garrett	Western Illinois University	Macomb
Jim Boyd	Western Illinois University	
Dana Vanbebber	Western Illinois University	
Chris Merritt	Western Illinois University	
Kevin Lust	Lincoln Land Community College	Springfield
Linda Dillon	Lincoln Land Community College	
Tom Becker	Commerce/ Illinois SBDC	
Becky Blankenship	Commerce/ Illinois SBDC	
Beth Livingston	Commerce/ Illinois SBDC	
Kirsti Carter	Commerce/ Illinois SBDC	



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