



2023 Self Study

Orange County Inland Empire SBDC Network

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Mission and Goals:

Serving as the connection between academics and industry, our college's Centers of Excellence support focused mentoring, networking, research and advising for the Southern California professional community and connections and applied experience with subsets of business for the college's students and alumni. Each of the college's centers and institutes rely on the expertise and support of business professionals and corporate/organizational supporters to fulfill their mission. The SBDC serves as a bridge to the community and support one of the main missions of the College of Business, which is to be a leader in economic development and to help to create a vibrant and flourishing local economy. The SBDC plays a vital role in supporting a Women's Business Center in Orange County that supports the creation and expansion of women-owned and led small businesses. One of the core building blocks for CSUF and a leading business development resource for the region is the Orange County/Inland Empire Small Business Development Center (SBDC) Network Lead Center that is hosted by California State University, Fullerton. Based out of the College of Business and Economics at California State University Fullerton, one of the largest accredited business schools in the United States, the SBDC is focused upon improving, supporting and growing the small business sector.

OCIE SBDC Network

Mission: The OCIE SBDC delivers solutions and opportunities for every small business to succeed.

Vision: The OCIE SBDC shall be the sought-after resource for small business success.

Guiding Principles:

- To expand and strengthen our regional impact
- Build an even more collaborative network
- Model effective and efficient practices

Activities:

The OCIE SBDC Network has been hosted by California State University, Fullerton since 2003. Based out of the College of Business and Economics at California State University Fullerton, one of the largest accredited business schools in the United States, the SBDC is focused upon improving, supporting and growing the small business sector. The Orange County Inland Empire SBDC network includes ten service centers spread throughout the region that include California State University, Fullerton, Rancho Santiago Community College District, OCTANe accelerator, California State University, San Bernardino, University of California, Riverside, County of Riverside and the Orange County Hispanic Chamber of Commerce. The service area for the network includes Orange, Riverside and San Bernardino counties – a geographic area of more than 28,000 square miles, all of which are paramount to the success of trade in Southern California. The Network is continually being called upon by the Small Business Administration, Governor's Office of Business and Economic Development and other SBDC networks for the innovate programs, outreach, resources and service techniques being offered to small businesses.

****OCIE SBDC Network Metrics from 2018-2023***

The OCIE SBDC Network assists both start-up businesses and current small business owners

Metric	Results
Clients Counseled	28,688
Total Counseling Hours	205,477
Business Starts	2,186
Capital Infusion - Debt and Equity	\$1,648,753,256
Jobs Supported - Created and Retained	144,558
Total Training Events	2,856
Total Training Attendees	123,483

with one-on-one consulting and training. The core areas of consulting at the OCIE SBDC are business planning, funding and finance, marketing, and management for small businesses. The OCIE SBDC also offers

assistance specifically for high tech, high growth scalable businesses. Over the past 5 years, the OCIE SBDC has consulted with almost 29,000 current and future small businesses in various areas of growth and start-up more than 50% of those clients were immigrants, people of color, women and veterans. Over the past twelve months, the OCIE SBDC has consulted and trained more than 50,000 small business, provided 50,000 hours of one-on-one business consulting, and helped its clients access more than \$350,000,000 in both debt and equity capital.

Organizational Structure and Governance:

The OCIE SBDC Network is hosted at CSU, Fullerton through Auxiliary Services Corporation. The SBDC program is a grant through the federal government by the Small Business Administration. The OCIE SBDC has a State/Regional Director that oversees the program and the deployment of services across the region. The network consists of ten centers that are either part of the CSU Fullerton program or are subcontracted to other partners within the region. Each of the host sites has a Director that reports both to the host and back to the State/Regional Director of the OCIE SBDC Network. Both the Lead Office (CSUF) and the subcontracts (Directors) are the leadership team for the network.

The OCIE SBDC has a voluntary advisory board, per the mandate of the Small Business Administration and the SBDC contract. The advisory board is made up of small businesses and small business and financial lender leaders throughout the region. The advisory board meets four times per year and discusses ways that the OCIE SBDC can 1. Bring more awareness to small business 2. Generate additional cash match opportunities for the program 3. Attract more clients to the program. The board meets every quarter to help the OCIE SBDC Network reach its goals. The board is not compensated and day-to-day management of the program runs through the leadership team, not the advisory board.

5. Resources and Sustainability: List the revenue received by the CCI during its latest three years of operation. What additional resources/sources of support does the CCI receive (e.g., assigned time for leadership, baseline budget amount, hours from community volunteers, unpaid student internships, etc.)? Provide a summary of the number of faculty and staff affiliated with the CCI and approximate time base of each. What assigned space does the CCI occupy and what administrative unit assigns that space? Are there costs related to the space? Comment on the

“degree of sustainability” of the CCI in relation to the resources that the CCI has to draw upon and in relation to plans to maintain, reduce, or grow the work of the CCI.

The Orange County Inland Empire Small Business Development Center Network (SBDC) provides consulting, training and resources to help small businesses grow and succeed. California’s premier provider of small business technical assistance; the OCIE SBDC Network has more ten SBDC service centers spread throughout the three county region of Orange, San Bernardino and Riverside counties. Since 2003, the OCIE SBDC program has been a leading voice in small business development and has built the largest business development program in the region to foster spirit, support and success of hundreds of thousands of entrepreneurs. The OCIE SBDC Network is funded in part by the U.S. Small Business Administration (SBA), the Governor’s Office of Business and Economic Development (GO-Biz) and other public and private partners. Each year the OCIE SBDC Network Lead Center administers up to \$3.5M in federal funding through the SBDC program, \$3M in state funding through , and an additional \$2M in other grant funding such as agreements with cities, counties, lenders, and private organizations. The network has built capacity and expertise to oversee business development and technical assistance programs that provide opportunity and expertise to the business community of the region and throughout the state of California.

The OCIE SBDC Lead Center operates out of the College of Business and Economics in a suite on the fourth floor. The program also runs a call center with a team of experts that is run out of College Park within the CSUF facility. The CSUF SBDC Service Center has an office in Irvine with eight small offices and a conference room. The other subcontracts of the SBDC program have offices around the region, to support the needs of each of their communities. The SBDC Lead Center and Service Center (CSUF) support more than 30+ full and part-time employees. The Lead Center also uses up to 10 student interns that are paid as ASC part-time employees at any given time.

Highlights and Accomplishments:

In 2022, The Orange County Inland Empire SBDC Network received the SBA District Director award for the COVID-19 Business Champion of the Year for the network’s support of small business during the pandemic. In 2021, the OCIE SBDC Lead Center was recognized by the Orange County Business Council for the small business grant program that the SBDC administered for the city of Huntington Beach. The SBDC was able to administer grants for small businesses within the city for more than \$4,500,000. The OCIE SBDC Lead center went through its five-year accreditation and passed with no conditions. It also received a Technology designation within the accreditation exam. The Lead Center received commendations within the accreditation including; marketing strategy, using data to drive decisions and incorporating the workforce in strategic decision-making.

The OCIE SBDC network was recognized by the city of Tustin as the 2023 Outstanding Economic Development Partner at the city’s annual Business Recognition Luncheon. This award highlights a high-quality collaborative partnership between the CSUF SBDC and the city of Tustin and demonstrates effective work toward reaching the shared goal of supporting Tustin’s small businesses. The OCIE SBDC network has played a pivotal role in facilitating the success of the partnership between the CSUF SBDC and Tustin. Through the network’s all-

encompassing support and resources, they have empowered small businesses within Tustin to achieve their goals and thrive.

The OCIE SBDC Network has had two of its start-up programs recognized as the County program of the year. A start-up Spanish-language program was recognized in 2018 as the SBA program of the year. The award was in recognition of the work the program had achieved in assisting first generation Hispanic business owners with starting and growing their businesses. The award was in partnership with the SBA and the Mexican Consulates of Orange County and San Bernardino. In 2019, OC MADE was highlighted as the program of the year for start-up businesses for assisting more than 75 businesses with generating their first sale. The OC MADE program was in partnership with the County of Orange and the Orange County Marketplace.

Planning and Strategic Outlook

The OCIE SBDC has a process for strategic planning that is broken into four parts:

Assessment – The network conducts analysis of into surveys as well as interviews of all key stakeholders including; clients, staff and consultants, partners, stakeholders and others to gain insight into the needs of the business community. Additionally, the market research team conducts regional assessments which results in a formal report for each county that uses primary and secondary research to create the results. All feedback is recorded and grouped based on priorities and assessed at the strategic planning retreat. The assessment phase allows for all staff and consultants, key stakeholders and partners to have an active role in shaping the direction and priorities for the future strategic plan.

Plan – Once the feedback has been analyzed, the Regional Director along with the Associate Regional Director and Senior leadership at CSUF and SBA create the major strategic priorities for the network heading into the strategic planning retreat. The Leadership Team, along with the Internal Advisory Board and SBA meet for a 2-day strategic planning retreat to develop the strategic plan for the network. The group then spends the next two-days creating the key strategic priorities, goals and action items for the plan. During this retreat each standard has strategic priorities of which each priority has action items to accomplish during the year. For each priority a small group from the Leadership Team and Internal advisory board commit to working on that priority and accomplishing the agreed upon action items.

Execute – Once the plan is developed, the plan is uploaded online so that all members executing the plan have access and track progress. The online platform allows individuals working on each goal to set deadlines, upload working documents, set meetings, etc. The Lead Center sends out a brochure of the strategic plan to all staff of the OCIE SBDC, so that they are aware of the plan and how it ties to the strategic priorities and vision of the network.

Analyze – Timelines are set for each goal and action item and the plan is checked and updated at all leadership meetings and internal advisory board meetings. The Lead Center updates the network with the progress through monthly leadership meetings, quarterly newsletters, e-videos and at each semi-annual, all network meeting.

(Please see attachment for OCIE SBDC Strategic Plan for 2022-2025)