

# SUPPLYSTL

an initiative of Greater St. Louis, Inc.

**SMALL BUSINESS SUPPORT COLLABORATIVE 2025**



SMALL BUSINESS SUPPORT TOOLKIT



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## Part 1: Outcomes and Metrics

### Introduction

To grow community wealth, the St. Louis metro must ensure that all small business owners, regardless of race, gender, or any other disadvantaged classification, have ready access to reliable customers, quality capital, experienced advisors, an expanding network of investors, and vibrant Main Streets and commercial corridors. The bold ambition: Put St. Louis among the top metros for Black-, Brown- and/or woman-owned small businesses and startup activity.

Building a world class ecosystem for small businesses and entrepreneurs requires a collaborative approach that includes stakeholders from all 15 counties in the St. Louis MSA. With support from investors and partner organizations, we can achieve measurable progress by 2030. The standard outcomes and recommended metrics set by the collaborative seek to achieve the following:

- Encourage the use of a common set of standards to assess the value of and improve existing small business services.
- Strengthen collaboration and partnerships within the small business ecosystem to improve the collective impact of business services in the metro.
- Increase awareness of the number and types of organizations, resources, tools, and opportunities in the St. Louis Small Business Ecosystem that support small business growth.

**The SupplySTL Standard Outcomes and Recommended Metrics** is a set of common standards with accompanying recommended metrics to help to assess and support regional business/entrepreneur support organizations in promoting inclusive economic growth among disadvantaged business owners and entrepreneurs. SupplySTL was launched to address the calls to action outlined in the 2020 St. Louis Small Business Ecosystem Assessment, the 2021 Justice Action Plan, and the STL 2030 Jobs Plan. Each of those assessments highlighted the robust small business support ecosystem, which recommended the identification of ecosystem champions, centralized case management, formalized partnerships, a continuum of capital, and holistic services.

The proposed standards measure the impact of ESO/BSO services including and not limited to one-on-one coaching, group coaching, accelerator programs, connections, and financial services for clients with a focus on individuals and business owners from underserved areas and disadvantaged populations. The desired outcomes from the recommended metrics are as follows:

1. **An increased number of small, local businesses are accessing supply chain opportunities.**
  - a. **The increase should be aligned with the population proportions of the region.**
  - b. **Increased access to high-growth opportunities in technology, healthcare, advanced manufacturing, and biosciences.**

2. An increased number of business owners with the fundamental business skills, knowledge, and tools to sustain their businesses, including and not limited to business finance, personal credit, business credit, and succession planning.
  3. Measurable increase in job creation.
  4. Improved access to capital for small, local businesses through improved banking relationships.
    - a. Increased ability to secure more attractive funding.
    - b. Access to traditional and alternative funding options including and not limited to small business loans, bank loans, microloans, CDFIs, angel investment, and venture capital.
  5. Data informed, culturally competent, and collaborative ecosystem that measurably advances equity, business growth, and economic resilience for small locally owned businesses.
  6. Access to specialized small business support services.
    - a. Regional small business ecosystem accountability structure and ecosystem hub.
    - b. Cohesive and accessible administrative support networks for small business owners including and not limited to back-office support, mentorship, and business finance skills.
    - c. Culturally competent support services.
- 

These outcomes are expected to have the following effects on the St. Louis MSA small business ecosystem:

- **Financially resilient small businesses.** Strengthening banking relationships between banks and small businesses leads to improved access to capital, better financial advice and services, improved financial stability for small businesses, increased trust and credibility, and stronger community ties.
- Small business service providers and programs that are created to deliver services through an **inclusive framework** that matches resources, services, and opportunities, and supports the individual business owner's needs and capacity. This helps small businesses **improve efficiency, manage risks, achieve growth**, and maintain a competitive edge. By leveraging specialized services, small businesses can thrive and contribute positively to the broader economic environment.
- **Collaboration and coordination** that streamlines business support, best practices and knowledge sharing, and improves access to funding and financial support for businesses and business services organizations.
- **Streamlined procurement processes that improve access to qualified suppliers.** A regional supplier directory is a powerful tool for enhancing the small business ecosystem. By providing centralized access to local suppliers, fostering connections, and supporting various business needs, the directory contributes to economic growth, increased efficiency, and a stronger community identity.

## Using the SupplySTL Standard Outcomes and Recommended Metrics

These measures have been designed by local and regional organizations for business support and entrepreneur support organizations with varying levels of resources and staff capacity to adapt to the existing practices, with committed funder and partner support. The SupplySTL Small Business Support Collaborative recognizes that individual organization may have existing recommended metrics, however, these standard outcomes and recommended metrics represent key indicators of inclusive economic growth in the St. Louis Metropolitan Statistical Area. Business support and entrepreneur support organizations, funders, and partners are encouraged to use the SupplySTL Small Business Support Collaborative standards to guide quality service improvement and delivery. Baseline measures of growth may be determined after the first 12 to 18 months of data collection. Benchmarking will support the identification of gaps in service and potential growth targets for the ecosystem.

Most small business and entrepreneur support organizations have small business support intake surveys or forms and follow up processes that allow them to track client success. Many of the recommended metrics in this toolkit are being collected or can be collected through existing intake surveys and forms, client questionnaires, follow up surveys, and one-on-one coaching sessions. We recommend that metrics are aggregated and de-identified. Partner collaborations to support small businesses should be managed through a partnership model in which data is shared and captured to track and report on program success.

Since business support and entrepreneur support organizations provide different services at various levels, it is not expected that every metric will apply to every organization. It is suggested that all organizations in the small business ecosystem consider how they can align their programs using the SupplySTL Small Business Support Collaborative recommended metrics. The recommended metrics are intended to advance the region toward the outcomes defined by the SupplySTL Small Business Support Collaborative. Lastly, the recommended metrics and outcomes will help improve collaboration and coordination, expanding resources, and improving support for business support and entrepreneurs support organizations that serve clients in underserved communities.

To support operationalizing the recommended metrics in this toolkit, reference the section titled *Data Collection*. For the collection of data and timely relevant analysis, it is suggested that organizations consider investing in a data capacity tool and resources, including staff to manage the data assessment, metric collection, and analysis of the business support efforts.

## Outcome 1

**An increased number of small, local businesses accessing supply chain opportunities in alignment with population proportions of the region.** This includes increased access to high-growth opportunities in technology, healthcare, advanced manufacturing, and biosciences.

This outcome is intended for business support and entrepreneur support organizations that offer direct support for supply chain opportunities.

It is recommended that BSO/ESOs collect recommended metrics quarterly and annually to assess short- and long-term impact and gaps in service delivery.

### What to collect and report:

It is recommended that organizations use a client intake survey and follow up survey process when making supply chain connections.



### Recommended Metrics:

It is recommended that organizations track the outcomes of supply chain opportunities they have connected their clients with using these suggested survey questions:

1. Were you able to meet with the supply chain partner you were matched with?
2. What were the outcomes of that connection?
3. Did you receive a contract?
4. Were you able to fulfill the contract?
5. What was the dollar amount of the contract?
6. Did you receive adequate support from our organization or other organizations within the ecosystem to benefit from the connection?

For clients who receive multiple supply chain connections, organizations should attempt to gather information on each connection.

## Outcome 2

**An increased number of business owners with the fundamental business skills, knowledge, and tools to sustain their business** including and not limited to business finance, personal credit, business credit, and succession planning. This outcome is intended for BSO/ESOs that offer regular training and one-on-one consulting and counseling on small business knowledge skills.

It is recommended that BSO/ESOs collect recommended metrics quarterly and annually to assess short- and long-term impact and gaps in service delivery.

**What to collect and report:** It is recommended that organizations use a client intake survey and follow-up survey process for clients participating in fundamentals of business skills training, accelerator programs, one-on-one consulting, or other business knowledge trainings.

### Recommended Metrics:

Organizations should attempt to track whether clients who participated in the organization's trainings have:

1. Improved their knowledge of how to do business and implemented appropriate business strategies to launch, grow, and/or sustain their business.
2. The ability to manage creditworthiness and FICO credit scores to support business finance and capital needs.
3. The confidence to review and interpret current financial reports to guide decision making in response to market conditions (budget, income statement, cashflow statement, and balance sheet).
4. Established a business relationship with trusted professionals and institutions to support them in guiding the use of business financials, such as bookkeeper/accountant, lawyer, and bank.

For clients that receive one-on-one consulting/counseling, participate in an accelerator program, or other training, organizations should attempt to collect client reported information annually to compare year-over-year on the following indications:

5. Improved cash flow management or;
6. Expansion or development of cash reserves or;
7. Increased revenue related to
  - a.) business expansion
  - b.) market expansion
  - c.) hired staff to increase sales.



## Outcome 3

### Measurable increase in job creation.

It is recommended that BSO/ESOs collect recommended metrics quarterly and annually to assess short- and long-term impact and gaps in service delivery.

**What to collect and report:** Data from intake and follow-up surveys on job creation from all clients that receive direct training or one-on-one consulting/counseling from a BSO/ESO.



### Recommended Metrics:

BSO/ESOs should collect information on the number of jobs and the nature of jobs their clients create, as well as whether the client has created a job for themselves.

Owner is asked to report on the following:

1. Does your business provide your main source of income and, if so, what is the approximate range of that income?
2. Number of full-time employees and average wage not including the owner's salary.
3. Number of part-time employees
4. Number of contract workers (1099)
5. Forms of payroll
  - a. Electronic
  - b. Cash
  - c. Check

## Outcome 4

**Improved access to capital for small, local businesses through improved banking relationships.** Increased ability to secure more attractive funding. Access to traditional and alternative funding options including not limited to small business loans, bank loans, microloans, funding through CDFIs, angel investment, and venture capital.

It is recommended that BSO/ESOs collect recommended metrics quarterly and annually to assess short- and long-term impact and gaps in service delivery.

### What to collect and report:

Data from intake and follow-up surveys on access to capital from all clients that receive direct training or one-on-one consulting/counseling from a BSO/ESO.

### Recommended Metrics:

BSO/ESOs should attempt to track progress of clients who participated in trainings and/or one-on-one business financial supportive services. The owner is asked to report on the following:

1. Have you secured responsible debt, credit, non-debt, or equity financing, if sought?
2. If yes, please share the type of financing you have secured.
3. Did the amount secured meet your financing needs?
4. What is the status of that financing?



## Outcome 5

**Data informed, culturally competent, and collaborative ecosystem that measurably advances equity, business growth, and economic resilience for small locally owned businesses.**

Outcome 5 is a metric for BSOs/ESOs, funders and partners to self-assess the impact of their efforts year after year.

### **What to collect and report:**

BSOs/ESOs committed to strengthening ecosystem collaboration and providing accessible, culturally competent services to small business owners and entrepreneurs in the St. Louis MSA should self-assess staff and organizational capacity and efficacy to support small businesses and entrepreneurs.

### **Recommended Metrics:**

1. Does the organization collaborate with other organizations within the ecosystem to create a more equitable and inclusive business environment for small, locally owned businesses?
2. Does the organization collect and analyze data on the revenue growth and financial performance of small, local businesses participating in its programs?
3. Does the organization track and report on its progress in reducing revenue disparities between small local businesses and their larger counterparts?



## Outcome 6

### Access to specialized small business support services.

- Regional small business ecosystem accountability structure and ecosystem hub.
- Cohesive and accessible administrative support networks for small business owners including and not limited to back-office support, mentorship, and finance skills.
- Culturally competent support services.

Outcome 6 features metrics for BSOs/ESOs, funders, and partners in the ecosystem to self-assess annually.

#### What to collect and report:

BSOs/ESOs committed to strengthening ecosystem collaboration and providing accessible, culturally competent services to small local business owners and entrepreneurs in the St. Louis MSA should self-assess staff and organizational capacity and efficacy to support small businesses and entrepreneurs.

#### Recommended Metrics:

1. Does the organization offer culturally specific mentorship, training, and financial assistance to disadvantaged small business owners and entrepreneurs?
2. Does the organization actively seek and incorporate user feedback to enhance its support services?
3. Does the organization track key performance indicators (KPIs) related to user satisfaction, such as Net Promoter Score (NPS) or customer satisfaction (CSAT) scores?
4. Does the organization provide low and/or no cost support services for small business owners and entrepreneurs?
5. Does the organization actively participate in and leverage the regional ecosystem hub's resources, events, and programs to support small businesses and entrepreneurs?
6. Does the organization actively participate in SupplySTL's Partner Network, collaborating with other partners to provide comprehensive support to small businesses?





## Frequently Asked Questions:

### Q1. What is the SupplySTL Small Business Support Collaborative?

The SupplySTL Small Business Support Collaborative is a group of small business support organizations, small business owners, and anchor institutions working together to improve the capacity of the St. Louis small business ecosystem to effectively support small businesses and small business expansion in the region.

### Q2. Why should an organization join the Collaborative?

Organizations should join the Collaborative to more effectively collaborate and connect with other small business ecosystem stakeholders, reduce administrative cost, and increase capacity.

### Q3. What are the benefits of the Collaborative?

Near seamless collaboration between partners, more support for small business clients, access to centralized resources, tools, and regional impact data.

### Q4. How can an organization join the Collaborative?

Joining the Collaborative is free for all small business ecosystem stakeholders.

### Q5. What are the Standard Outcomes and Recommended Metrics?

The Standard Outcomes and Recommended Metrics is a set of common standards with accompanying metrics to help assess and support regional business and entrepreneur support organizations in promoting inclusive economic resilience for small local businesses.

### Q6. How can an organization use the Standard Outcomes and Recommended Metrics?

To support operationalizing the recommended metrics in this toolkit, reference the section titled Data Collection. For the collection of data and timely relevant analysis, it is suggested that organizations consider investing in a data capacity tool and resources, including staff to manage the data assessment, metric collection, and analysis of the business support efforts.

### Q7. What tools and resources does the Collaborative provide to support partners?

The Collaborative provides its partners with access to an online regional small business case management system, communities of practice, and access to capital for capacity building and support of small businesses.





## Part 2: Data Collection

### Business Support Organizational Readiness Checklist

For organizations considering becoming a SupplySTL Small Business Support Collaborative Partner or interested in adopting the Standard Outcomes and Recommended Metrics shared in this toolkit, it is recommended that organizations complete a self-assessment to determine the organization's readiness and capacity to measure impact.

#### The organization has:

- ☐ Staff time dedicated to data collection and follow-up processes for your clients.
- ☐ A data system for collecting client information at intake.
- ☐ A data system to collect and track follow-up information post-counseling and post-training.
- ☐ Evaluation processes and forms to assess your services immediately post-counseling and post-training.
- ☐ Evaluation processes to assess the impact of your services annually with all clients who received one-on-one staff counseling and/or training.



## Intake Form: Initial Small Business Assessment

**Instructions:** Please complete this form prior to your one-on-one counseling or training. Your personal information is not shared with outside organizations. This intake form will ask some questions about you and your business. No public or commercial use of your name, address, or business identity will be made without your prior approval and will be kept confidential. Our services are open to all, even if you are unable to answer certain questions at this time. If you are unsure about an answer, please answer to the best of your ability or skip the question. If you have a phone or virtual appointment with a counselor, you **MUST** complete this form prior to your appointment, otherwise your appointment may be rescheduled.

You may be asked to complete an additional assessment form in person. Please arrive 10 minutes before your scheduled appointment to do so. If you are coming in with a business partner, only one person per business entity needs to enter the business information.

Your responses will be used to identify and match you with the best fit resources for your business stage and goals.

### Owner Information

1. First Name\_\_\_\_\_

2. Last Name\_\_\_\_\_

3. Gender

☐ Male

☐ Female

☐ Non-Binary

☐ Prefer not to say

4. Preferred Pronouns

☐ She/Her/Hers

☐ He/Him/His

☐ They/Them/Their

☐ Other

5. Race

☐ Black or African American ☐ American Indian or Alaska Native ☐ Hispanic or Latino

☐ Asian ☐ Native Hawaiian ☐ Other Pacific Islander ☐ White ☐ Other ☐ Prefer not to say

## Intake Form: Initial Small Business Assessment - Continued

6. Have you ever served in the United States Military?

☐ Currently serving

☐ Veteran

☐ Neither

7. Do you have a disability you wish to disclose?

☐ Yes

☐ No

☐ Prefer not to answer

8. What is your preferred language?

☐ English

☐ Spanish

☐ Other

### Business Information

9. What is your company's name? \_\_\_\_\_

10. Street Address \_\_\_\_\_

11. City \_\_\_\_\_

12. State \_\_\_\_\_

13. Zip code \_\_\_\_\_

14. Provide your company's web URL \_\_\_\_\_

15. Business Email \_\_\_\_\_

16. Business Phone \_\_\_\_\_

17. What is your preferred communication method?

☐ Phone

☐ Email

☐ Other

18. Business Start Date \_\_\_\_\_

19. Please provide a brief description of your business. Include products or services offered.

## Intake Form: Initial Small Business Assessment - Continued

### 20. Industry

- ☐ Agriculture
- ☐ Forestry and Fishing
- ☐ Oil and Gas
- ☐ Utilities
- ☐ Construction
- ☐ Manufacturing
- ☐ Wholesale
- ☐ Retail
- ☐ Transportation and Warehousing
- ☐ Accommodation and Food Services
- ☐ Information Technology
- ☐ Finance and Insurance
- ☐ Professional, Scientific, Technical Services
- ☐ Administrative and Support Services
- ☐ Arts, Entertainment, and Recreation
- ☐ Educational Services
- ☐ Healthcare and Social Assistance
- ☐ Other

### 21. Is your business registered in the state of Missouri?

- ☐ Yes
- ☐ No

### 22. What is your business' legal structure?

- ☐ Sole Proprietorship
- ☐ Partnership
- ☐ LLC
- ☐ Corporation
- ☐ I don't have a legal business structure.
- ☐ Other



## Intake Form: Initial Small Business Assessment - Continued

23. Do you have any of the following?
- ☐ EIN
  - ☐ State Tax ID
  - ☐ Business Licenses
  - ☐ Business Permits
  - ☐ None of the above
24. Does your business hold any of the following certifications?
- ☐ Minority Business Enterprise (MBE)
  - ☐ Woman Business Enterprise (WBE)
  - ☐ Veteran Business Organization (VBO)
  - ☐ 8a
  - ☐ Hubzone
  - ☐ Other
25. Please share your workforce
- ☐ Number of Full Time Employees\_\_\_\_\_
  - ☐ Number of Part Time Employees\_\_\_\_\_
  - ☐ Number of PRN Employees\_\_\_\_\_
  - ☐ Number of Contracted Employees\_\_\_\_\_
26. Do you currently have business insurance?
- ☐ Yes
  - ☐ No
27. Do you have a brick-and-mortar location?
- ☐ Yes
  - ☐ No

### Banking and Finance

28. What is the annual revenue range for your business?
- ☐ < \$100,000
  - ☐ \$100,000 - \$250,000
  - ☐ \$250,001 - \$500,000
  - ☐ \$500,001 - \$1 Million
  - ☐ > \$1 Million
29. Do you currently have a business bank account?
- ☐ Yes
  - ☐ No

## Intake Form: Initial Small Business Assessment - Continued

30. Do you use any of the following? Check all that apply

- ☐ Account Services
- ☐ Accounting Software
- ☐ Payroll System

31. Are you seeking access to capital?

- ☐ Yes
- ☐ No

32. Did you file taxes last year?

- ☐ Yes
- ☐ No

33. Have you received any of the following funding types? Select all that apply.

- ☐ Grants
- ☐ Angel Investment
- ☐ Crowdfunding
- ☐ Venture Capital
- ☐ Loan
- ☐ Other \_\_\_\_\_
- ☐ None

### Business Operation Strategy

34. Do you have a physical business plan that can be shared?

- ☐ Yes
- ☐ No

### Supplier Readiness

35. Have you ever submitted a bid for a vendor contract?

- ☐ Yes
- ☐ No

### Consent for Referrals and Information Sharing

Do you consent to SupplySTL sharing your business information with partners for business support referrals?

- ☐ Yes
- ☐ No

## Intake Form: In-Person Small Business Assessment

**Instructions:** This form is to be completed in person with a small business navigator. Your personal information is not shared with outside organizations without your prior consent. This intake form will ask additional questions about you and your business. No public or commercial use of your name, address, or business identity will be made without your prior approval and will be kept confidential.

Our services are open to all, even if you are unable to answer certain questions at this time. If you are unsure about an answer, please answer to the best of your ability or skip the question. If you have a phone or virtual appointment with a counselor, you **MUST** complete this form prior to your appointment, otherwise your appointment may be rescheduled.

Your responses will be used to identify and match you with the best fit resources for your business stage and goals.

### Owner Information

1) Race/Ethnic Designation (This information is used to determine eligibility for culturally relevant services.)

- ☐ Black/African American
- ☐ Hispanic
- ☐ Asian/Pacific Islander
- ☐ Native American/Alaskan Native
- ☐ Middle Eastern
- ☐ Multiracial/Biracial
- ☐ White
- ☐ Prefer Not to Say
- ☐ Other \_\_\_\_\_

2) If the client responded “yes” to having a disability, please collect more insight below.

## Intake Form: In-Person Small Business Assessment - Continued

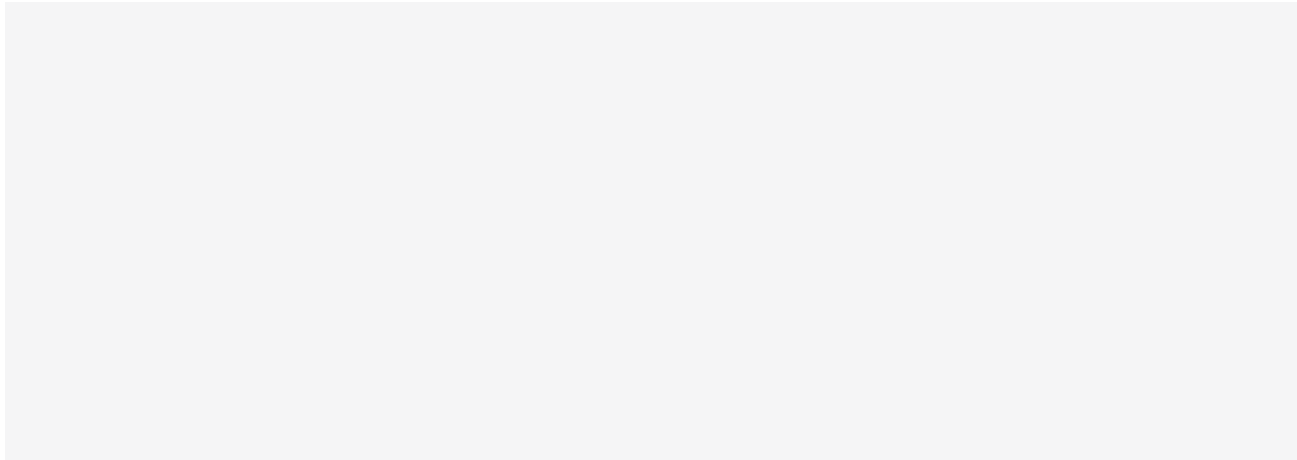
### Business Information

3) Are you interested in brick and mortar or expanding to another location?

☐ Yes

☐ No

4) What resources or organizations have you previously utilized?



### Banking & Finance

5) If you have loans, what is the status of your loans?

☐ Active

☐ Paid in full

☐ Default

☐ Prefer not to say

☐ Other

6) If you have loans, what is the total amount of the loan(s)?

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## Intake Form: In-Person Small Business Assessment - Continued

7) Provide the name of the financial institution(s) that provided the loan(s).

a) \_\_\_\_\_

b) \_\_\_\_\_

c) \_\_\_\_\_

8) Select the accounting software your company uses?

☐ Quickbooks

☐ Xero

☐ Freshbooks

☐ Sage

☐ Netsuite

☐ Wave

☐ ZarMoney

☐ Kashoo

☐ Other \_\_\_\_\_

*If the client is seeking capital complete questions 9 and 10.*

9) How much capital are you seeking?

10) Is the company seeking capital for an ongoing or upcoming project?

☐ No

☐ Yes, please explain.

### Business Operations & Strategy

11) What is the size of your customer base?

\_\_\_\_\_



## Intake Form: In-Person Small Business Assessment - Continued

12) How have you grown your business?

- ☐ Market Expansion
- ☐ New Customers
- ☐ Merger and Acquisition
- ☐ New product/service
- ☐ Other

13) What is your biggest barrier to growth?

14) What are your primary business goals for the next 12 months?

- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

15) What are your primary business goals for the next 18 months?

- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

### Supplier Readiness

16) Is your business registered on any procurement portals?

- ☐ Yes
- ☐ No

17) List the procurement portals you are registered on.

- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

18) Please share any relevant details about your most recent procurement contracts, including the client's name.  
(Enter N/A if not applicable)

### Consent for Referrals and Information Sharing

Do you consent to SupplySTL sharing your business information with partners for business support referrals?

- ☐ Yes
- ☐ No

## Questions for Client Data Collection

**Instructions:** Questions for outcomes 1-4 listed below can be used to gather and report data on the business support services provided by business support and entrepreneur support organizations.

Questions for outcomes 5 and 6 should be used to gather and report data on eco system collaboration and support capacity for organizations that provide support to small businesses.

### Outcome 1: Questions to Collect Data on Access to Opportunity

1) What is your industry?

\_\_\_\_\_

2) What is the size of your company?

☐ Micro

☐ Small

☐ Mid-Size

☐ I don't know

3) How many supply chain partners were you matched with in the last 12 months?

☐ 1

☐ 2

☐ 3

☐ Other:\_\_\_\_\_

4) What were the outcomes of those connections?

☐ Got a contract to become their supplier.

☐ Learned about the requirements that are needed to be awarded a contract.

☐ Got access to additional resources provided by the supply chain partner/ecosystem support organization.

☐ Got additional referrals to other supply chain teams.

☐ Other:\_\_\_\_\_

5) How many bids have you submitted in the last 12 months?

☐ 0

☐ 1

☐ 2

☐ 3

☐ 4

☐ Other:\_\_\_\_\_

## Questions for Client Data Collection - Continued

6) How many of those turned into contracts?

☐ 0

☐ 1

☐ 2

☐ 3

☐ 4

☐ Other:\_\_\_\_\_

7) For each contract awarded, specify type of contract (government or private) and recurrence of contract (first or recurring).

8) Were you able to complete the job?

☐ Yes

☐ No

☐ If no: what was needed for you to successfully complete the job?

\_\_\_\_\_

9) Level of contracting:

☐ Tier I

☐ Tier II

☐ Joint Venture

10) If the contract was a Tier II opportunity, are you interested in moving to Tier 1 opportunities?

☐ Yes

☐ No

☐ N/A

11) Please share information regarding any challenges you experienced during the contract(s):

## Outcome 2: Questions to Collect Data on Business Sustainability

These questions are recommended for BSOs/ESOs that provide business finance education for clients.

- 1) Following the financial training class(es) you received, or any one-on-one counseling by staff, please select what you have established:
  - ☐ Electronic financial recordkeeping processes
  - ☐ A trusted relationship with an accountant/bookkeeper
  - ☐ A trusted relationship with an attorney or law firm
  - ☐ A trusted relationship with banker/lender (at bank, non-profit lender, credit union).
  
- 2) I regularly create current and projected financial reports to review sales, fixed and variable costs, and cash flow for decision making.
  - ☐ 5-Strongly agree
  - ☐ 4-Agree
  - ☐ 3-Neutral
  - ☐ 2-Somewhat disagree
  - ☐ 1-Disagree
  
- 3) I feel confident in my ability to interpret current and projected financial reports to review sales, fixed and variable costs, and cash flow, especially to guide decisions during changes in market conditions or during severe economic disruptions.
  - ☐ 5-Strongly agree
  - ☐ 4-Agree
  - ☐ 3-Neutral
  - ☐ 2-Somewhat disagree
  - ☐ 1-Disagree
  
- 4) I am confident that I can manage my personal credit score to help support my business financial and capital needs.
  - ☐ 5-Strongly agree
  - ☐ 4-Agree
  - ☐ 3-Neutral
  - ☐ 2-Somewhat disagree
  - ☐ 1-Disagree

## Outcome 2: Questions to Collect Data on Business Sustainability - Continued

- 5) Do you have existing business debt from start-up or current operations (either personal or commercial debt)?:
- ☐ Yes
  - ☐ No
- 5a) If yes, debt range (select one):
- ☐ <\$5k
  - ☐ \$5k - \$15k
  - ☐ \$16-25k
  - ☐ >\$25k
- 6) How confident are you with your skills and understanding of small business finance?
- ☐ Extremely confident
  - ☐ Confident
  - ☐ Neutral - I may need a refresh training.
  - ☐ A little confident - I likely need either a refresh training or to re-take a full training.
  - ☐ Not confident - I'd like to take another training.
- 7) Following any training or one-on-one counsel you may have received from our staff, has your business experienced any of the following in the last 12 months? *Check all that apply:*
- ☐ Improved cash flow management
  - ☐ Expansion of cash reserves
  - ☐ Increased revenue
- 8) How have you grown your operations in the last 12 months by (check all that apply):
- ☐ Physical expansion
  - ☐ Online expansion
  - ☐ Market expansion
  - ☐ Hired workers to increase sales
  - ☐ I haven't grown my operations.
- 9) Following any training or one-on-one counseling you received from our staff, what was the outcome?
- ☐ I decided to grow my business.
  - ☐ I closed my business.
  - ☐ I put my business on hold or paused operations.
  - ☐ I've decided not to pursue creating a small business at this time.

## Outcome 3: Questions to Collect Data on Job Creation

- 1) Is this business a full-time job or a part-time job for you, the owner? Check one:
  - ☐ Full-time
  - ☐ Part-time
- 2) Does your business provide your sole source of income? Check one.
  - ☐ Yes
  - ☐ No.
- 3) What was the range of your personal income from your business profits? Select one:
  - ☐ < \$20k
  - ☐ \$20-42k
  - ☐ \$42k-\$75k
  - ☐ \$75k-plus
- 4) Are you the only legal owner of this business? Check one:
  - ☐ Yes
  - ☐ No

**Questions 5-12 are intended for BSOs that provide direct capital support for clients (e.g. provide grants, originate or service loans and/or lines of credit) and provide training and one-on-one counseling.**

These metrics will provide BSOs that provide funding with baseline measures to compare year-over-year on jobs, pay, and nature of jobs.

- 5) Not including yourself, how many people does your business employ?
  - ☐ Number of full-time employees 30 hours or more: \_\_\_\_\_
  - ☐ Number of part-time employees under 30 hours: \_\_\_\_\_
  - ☐ Number of 1099/contractors: \_\_\_\_\_
- 6) Average wage of workers:
  - ☐ Less than \$45,000 annually
  - ☐ \$45,501 - \$59,999 annually
  - ☐ \$60,000- 74,999 annually
  - ☐ More than \$75,000 annually

### Outcome 3: Questions to Collect Data on Job Creation - Continued

7) Average wage of full-time workers:

- ☐ Less than \$45,000 annually
- ☐ \$45,501 - \$59,999 annually
- ☐ \$60,000- 74,999 annually
- ☐ More than \$75,000 annually

8) Average wage of part-time workers:

- ☐ Less than \$45,000 annually
- ☐ \$45,501 - \$59,999 annually
- ☐ \$60,000- 74,999 annually
- ☐ More than \$75,000 annually

9) Average annual salary of salaried workers, if any:

- ☐ Less than \$75,000 annually
- ☐ \$75,001 - \$90,000 annually
- ☐ \$90,001- \$110,000 annually
- ☐ More than \$110,000 annually

10) Did your business decrease or increase payroll expenses in the last 12 months? Select one:

- ☐ Increased payroll expenses for workers
- ☐ Decreased payroll expenses for workers
- ☐ Not applicable – I am a sole proprietor with no employees and payroll is only for me.

11) In the last 12 months, how many contract/1099 workers, seasonal, and temporary workers did you pay?

- ☐ Write-in (if zero put "0"): \_\_\_\_\_
- ☐ Not applicable. I had no 1099/contract, seasonal or temporary workers in the last 12 months.

12) How does your business pay its workers? Check all that apply:

- ☐ Electronic
- ☐ Paper check
- ☐ Cash
- ☐ Other: \_\_\_\_\_



## Outcome 4: Questions to Collect Data on Funding

1) Have you secured funding in the last 6 months?

☐ Yes

☐ No

2) Was this your first time securing funding?

☐ Yes

☐ No

3) If this is not the first time, how many times have you secured funding?

☐ 1 -3

☐ 4-5

☐ Other\_\_\_\_\_

4) If this is not the first time, did you get financing from the same funder as prior opportunities?

☐ Yes

☐ No

5) Was your funding application rejected before?

☐ Yes

☐ No

6) If your application was rejected, please briefly describe the reason provided by the funder.

7) Please select the type of financial support you secured:

☐ Bank loan

☐ Microloan

☐ CDFI

☐ Crowdfunding

☐ Angel Investment

☐ Venture capital

☐ Grant

☐ Other\_\_\_\_\_

☐ Line of credit

#### Outcome 4: Questions to Collect Data on Funding - Continued

8) Please provide the amount of financing you have received.

- ☐ < \$10,000
- ☐ \$10,001 - \$19,999
- ☐ \$20,000 - \$29,999
- ☐ \$30,000 - \$39,000
- ☐ \$40,000 - \$49,999
- ☐ > \$50,000

9) Did the amount secured meet your needs?

- ☐ Yes
- ☐ No

10) If no, are you planning to apply for more funding?

- ☐ Yes
- ☐ No



## Outcome 5: Questions to Collect Data about Ecosystem Collaboration

These questions are for BSOs/ESOs to measure their ecosystem partnership collaboration capacity.

- 1) Does the organization collaborate with other organizations within the ecosystem to create a more equitable and inclusive business environment for local small businesses?  
☐ Yes  
☐ No
- 2) Does the organization collect and analyze data on the revenue growth and financial performance of local small businesses participating in its programs?  
☐ Yes  
☐ No
- 3) List the three BSOs/ESOs your organization regularly collaborates with to support small businesses:  
1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

## Outcome 6: Questions to Collect Data about System Support

These questions are for BSOs/ESOs to measure their ecosystem partnership collaboration capacity and support.

- 1) Does the organization actively seek and incorporate user feedback to enhance its support services?  
☐ Yes  
☐ No
- 2) Does the organization track key performance indicators (KPIs) related to user satisfaction, such as Net Promoter Score (NPS) or customer satisfaction (CSAT) scores?  
☐ Yes  
☐ No
- 3) Does the organization provide low and/or no cost support services for small business owners and entrepreneurs?  
☐ Yes  
☐ No
- 4) Does the organization actively participate in and leverage the regional ecosystem hub's resources, events, and programs to support small businesses and entrepreneurs?  
☐ Yes  
☐ No
- 5) Does the organization actively participate in the SupplySTL Partner Network, collaborating with other partners to provide comprehensive support to small businesses?  
☐ Yes  
☐ No

## Small Business Support Collaborative Partner Survey

### Why This Data Matters

Your organization's contributions are vital to building a more resilient and opportunity-rich small business ecosystem in the St. Louis region. By sharing aggregate data from your client surveys, you help the Collaborative:

- Quantify regional impact in terms of business growth, job creation, access to capital, and procurement success.
- Demonstrate value to funders, policymakers, and anchor institutions.
- Identify gaps and opportunities to strengthen support systems.
- Elevate success stories that inspire continued investment and collaboration.
- Align efforts across partners to drive measurable, equity-focused outcomes.

This survey is designed to capture key metrics that reflect your organization's support for small businesses and entrepreneurs over the past year.

**Instructions:** Using aggregate data collected from the *Client Data Collection Surveys* or your organization's client surveys, provide the number of businesses supported, number of jobs added by those businesses, capital access, number of contracting opportunities your organization facilitated for small business clients, and the number contracting opportunities secured by your small business clients.

### Small Business and Entrepreneur Support

Provide the total number of clients you supported this year:

Small Business supported\_\_\_\_\_

Entrepreneurs supported\_\_\_\_\_

### Job Creation

Provide the number of jobs added by the small businesses you supported:

Full-time Jobs Created\_\_\_\_\_

Part-time Jobs Created\_\_\_\_\_

### Contracting Connections

Provide data on procurement-related support and outcomes:

Contracting Opportunities Facilitated (Connections Made) \_\_\_\_\_

Contracting Opportunities Secured by Clients\_\_\_\_\_

### Capital Access

Provide the total amount of capital accessed by the small businesses you supported:

Loans Secured\_\_\_\_\_

Venture Capital Dollars Received \_\_\_\_\_

Grants Received\_\_\_\_\_

## Glossary

**1099 Employee** - A 1099 employee is an independent contractor. The name comes from Internal Revenue Service Form 1099, which contract workers must complete to report their earnings. In contrast, regular employees receive a W-2 Form. An independent contractor is usually a temporary worker who businesses pay to complete specific duties or tasks.

**Anchor Institution** - An institution that is place-based and leverages its large economic power and resources to benefit local communities typically through philanthropic means.

**Backbone Structure** - an organization that services as a coordinating body that brings together diverse stakeholders and leads efforts to establish and achieve a shared set of goals. (*Backbone Organizations Field Guide, CollaborateUp 2018*)

**Business Acceleration** - A strategy that aims to move a business forward by providing resources, mentorship, and networking opportunities in a targeted, structured manner.

**Business Support Organization** - An institution that provides resources and assistance to the business community, particularly small businesses and entrepreneurs. BSOs can be nonprofit, public, or for-profit, and they aim to help businesses grow and succeed. They offer a variety of services, including consulting, mentoring, training, networking, and more.

*Example: Small Business Development Centers: These are resource partners of the Small Business Administration that provide individualized business advising and technical assistance to small businesses and pre-venture entrepreneurs.*

**Capital Access** -The ability for businesses and individuals to obtain financial resources that can be used for various purposes such as starting or growing a business, funding educational or training programs, or investing in projects.

**Capacity Building** - The process in developing and strengthening an organization or individual's ability to achieve goals and adapt to change.

**Ecosystem** - The essence of an entrepreneurial ecosystem is its people and the culture of trust and collaboration that allows them to interact successfully. An ecosystem that allows for the fast flow of talent, information, and resources helps entrepreneurs quickly find what they need at each stage of growth. As a result, the whole is greater than the sum of its separate parts. (*Kauffman Foundation Entrepreneurial Ecosystem Building Playbook 3.0, 2019*)

**Ecosystem Hub** - A mechanism to streamline support for small businesses, especially underrepresented ones, by creating a collaborative network that facilitates access to the necessary tools, capital, and expertise, ultimately driving economic growth and community wealth building. (*NextStreet, 2025*)

## Glossary Continued

**Entrepreneur Support Organization** – ESOs support, mentor, train, and sometimes fund entrepreneurs and early-stage businesses. ESOs help spur innovation and economic growth by providing business development services and resources to help founders develop, scale, and sustain viable businesses. *(U.S. Securities and Exchange Commission, 2025)*

*Example:* Organizations support, mentor, and train entrepreneurs, often with a focus on helping them develop and scale viable businesses.

**Micro Business** – A business is classed as a microbusiness if it has fewer than 10 full-time equivalents.

**Minority-Owned Businesses** – A business that is at least 51% owned, operated, and controlled by one or more minorities. *(Wikipedia, 2025.)*

**North American Industry Classification System** – The standard used by federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business *economy*. *(U.S. Census, 2025).*

**Procurement** – A vital business function, responsible for securing all the goods and services needed by an organization. *(SAP, 2025)*

**Procurement Reform** – An effort to improve and modernize the process of buying goods and services, with the aim of increasing efficiency, transparency, and accountability.

**Small Business** – The Small Business Administration (SBA) defines a small business primarily based on industry-specific size standards, which can be either the average number of employees or average annual receipts. While a general rule of thumb is 500 or fewer employees for many businesses, the SBA utilizes the North American Industry Classification System (NAICS) to assign *specific size standards for each industry*.

The SupplySTL Small Business Support Collaborative defines a small business as a business that has less than 500 paid employees (nuance by industry type) and has an annual revenue between \$100k and \$20 million (nuance by industry type). Additionally, the Collaborative considers the age of the small business — new, young, or mature — when determining the types of resources and opportunity referrals to provide businesses seeking support.

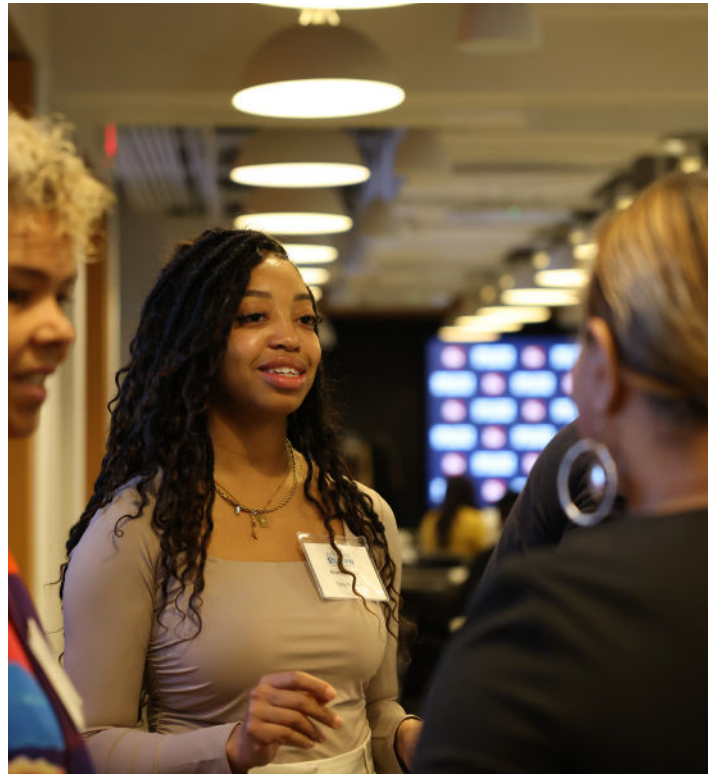
**Small Business Navigator** – Provides dedicated support and guidance to small businesses, particularly those in underserved communities or facing challenges accessing resources. Navigators act as a point of contact, connecting businesses with the resources they need, such as funding, business advice, and other assistance programs.

## Glossary Continued

**St. Louis Anchor Action Network** - SLAAN is a team of institutions working together to advance racial equity, remove barriers to economic opportunity, and create a more inclusive regional community.

**Supply Chain** - The series of processes involved in the production and supply of goods, from when they are first made, grown, etc. until they are bought or used. *(Oxford, 2025)*

**Supplier Diversity** - A strategy that actively includes diverse-owned businesses, suppliers, and vendors in a company's supply chain. Promoting inclusivity and equal opportunities in procurement, with the goal of expanding the supplier base to include businesses owned by individuals from traditionally underrepresented/underserved groups.





## SupplySTL Partner Network

Carlos Suarez, International Institute of St. Louis  
Jackie Bernstein, BJC Healthcare  
Candace Bingham, Saint Louis Zoo  
Erin Braxton, The Rebel Geek  
Brandi Brooks,  
Harris Stowe State University, Center of Entrepreneurship  
Sheila Burkett, Spry Digital  
Alketa Ceta, BMO  
Alicia Chestnut, FDIC  
Regina Crandall, St. Louis County Library  
Philip Lloyd, LGBTQ Chamber of Commerce of St. Louis  
Janelle Turner, Washington University in St. Louis  
Tori Gonzales, Holistic Service Collaborative  
Aleta Grimes, Urban League of Metropolitan St. Louis  
Emily Hemingway, TechSTL  
Jermecia Jackson, St. Louis Anchor Action Network  
Alfred Jackson, Arch Grants  
Emeka Jackson Hicks, City of East St. Louis, Illinois  
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St. Louis Anchor Action Network  
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Ben Molina, Cortex  
Adrian Moore, Schnucks Markets  
Christopher Nolan, BJC Healthcare  
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Marvin Steele, Heartland St. Louis Black Chamber of Commerce  
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Beverly Jenkins, R&R Marketplace  
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Molly McKay, Enterprise Bank & Trust  
Nancy Jordan, North County Inc.  
Ron Lassman, Challenge Unlimited  
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Felice McClendon, Delmar Main Street  
Katrina Scott, World Wide Technology  
John Chen, Neighborhood Innovation Center  
Bonnie Finger, Bayer  
Christopher Dennis, WePower  
Chrystal Schneider, American Water  
Yoni Blomberg, WePower  
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Tabitha Kittrell, Beyond Housing  
Juliana Schneidhauer, Reimagine Resources  
Lynette Watson, SBDC  
Lynette Robinson, Lighter Living  
Will Jordan, Justine Peterson

## SupplySTL Small Business Support Program Working Group (Previously the Holistic Service Collaborative)

Marvin Steele, Heartland St. Louis Black Chamber of Commerce

Emily Hemingway, TechSTL

John Chen, Neighborhood Innovation Center

Justin Raymundo, BioSTL

Philip Lloyd, LGBTQ Chamber of Commerce of St. Louis

Richardo Martinez, Hispanic Chamber of Commerce of St. Louis

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Juliana Schneidhauer, Reimagine Resources

Sheila Burkett, Spry Digital



