



U.S. Small Business
Administration

U.S. Small Business Administration

Nexus Project Overview and Status
July 2023

Office of Entrepreneurial Development

Background – Existing Solutions

- **Entrepreneurial Development Management Information System-Next Generation (EDMIS-NG):** EDMIS-NG is a centralized web-based reporting system that allows OED program offices, SBA resource partners (Women’s Business Centers (WBC), Small Business Development Centers (SBDC), and SCORE) and the agency’s field offices the ability to key in or upload information on training and counseling activity. EDMIS-NG is the repository for client activity data. It is being used to ensure effective management of OED programs, as well as providing sound statistical reports for the Office of Management and Budget (OMB) and Congress. EDMIS-NG uses Dynamics 365 hosted on the Microsoft Azure Platform.
- **Community Navigators Management Information System (COMNAVS):** COMNAVS is a data collection and management application that stakeholders use to report on the effectiveness of the Community Navigator Pilot Program (CNPP). COMNAVS is a centralized web-based reporting system that harmonizes and homogenizes data from a diverse cross-section of government, non-profits, and non-governmental organizations (NGO) regarding small and underserved business communities. COMNAVS uses Salesforce hosted on the Salesforce Government cloud.

Nexus Overview

- ❑ Nexus is a project with the goal of efficiency, consolidation, and a common data repository
- ❑ Nexus will bring EDMIS-NG and COMNAVS into a single enterprise platform architecture on the Salesforce platform

Benefits for Resource Partners:

- ❑ Collaborative development approach with Resource Partner Subject Matter Experts (SMEs)
- ❑ Goals tracking and reporting
- ❑ Improved user experience with streamlined data collection and validation
- ❑ Ad hoc reporting capability
- ❑ Improved performance and error handling
- ❑ Future API implementation



Nexus Plan

- Nexus is a Salesforce solution leveraging the same platform as the Community Navigator Pilot Program (CNPP) system COMNAVS
- Nexus will replace EDMIS-NG
- Nexus is being designed and developed in FY23
- November 2023 will be the Go Live for Resource Partners on Nexus
- All FY23 reporting will be done in EDMIS
- All FY24 reporting will be done in Nexus
- SBA Internal stakeholder and external Resource Partners are being engaged in the Nexus deployment to provide insight and feedback on the Nexus system design
- EDMIS-NG will decommission by March 2024

Next Steps



End of July

- Error reporting design
- 3rd Iteration of CRM Analytics Dashboard
- Interconnection



Summer 2023

- Third Party system development
- Data Migration
- Integration Testing
- UAT
- Initial Training



Fall 2023

- Data Migration
- Ongoing Training
- EDMIS-NG Freeze and Nexus Go-Live



Key Resource Partner Concerns

- Timing of Integration Testing
- Timing of the Nexus Go Live
- Nexus performance and error handling
- Data Migration Approach
- Key Metric Definitions

Proposed FY24 WBC Metrics

- WBC Metric #1 Unique Clients Served (641)

- Definition:

Total number of unique clients receiving training or counseling services during a specific time period counted at the branch level. If a client had at least one counseling or training session during the time period, the client will be counted as one unique client served

Proposed FY24 WBC Metrics

- WBC Metric #2 New Business Starts (641)

- Definition:

A “New Business Start” is defined as a Business that started with the assistance of an SBA Resource Partner.

A “New Business Start” in Nexus is based on the following two indicators:

- Is the client verified to be in business? (Yes)
- Reportable Impact? (Yes)

Step 1: Is the client verified to be in business?

During a counseling session, counselor verifies that the business is meeting the legal requirement for the establishment of a business entity in the state in which the business is located and one of the following:

- Generating revenue
- Accessing capital
- Hiring an employee, or
- Incurring an expense

Once the counselor verifies the client is in business, the counselor selects “Yes” to the question Is the client verified to be in business and enters the business start date.

Step 2: Reportable Impact?

During the same counseling session, the counselor determines that the Resource Partner provided assistance with the business start. When the Reportable Impact indicator is marked Yes, it will be counted as a new business start if no other previous session has reported the same client to have Reportable Impact. The date of Reportable Impact will default to the session date.

The New Business Start will be counted within the Fiscal Year and Quarter of the session in which the Reportable Impact was reported.

Proposed FY24 WBC Metrics

- WBC Metric #3 Percent of WBC Clients Accessing Equity or Debt Capital
- Definition:
 - If the client received an SBA Loan, Non-SBA Loan, or Equity Infusion (question 46) and received Business Financing/Capital Sources counseling (question 47) during a specific time period.
 - The metric is calculated by dividing the sum “true” responses to SBA 641 question 46 (SBA/Non-SBA Loan Amount, Equity Amount) by the sum of responses to question 47 on the SBA 641 (“What was the nature of the counseling you provided the client?”, Box: Financing/Capital (such as, applying for a loan, building equity capital)
 - Equity: Money that is invested in a company by purchasing shares of that company
 - Debt: Money that one entity owes another entity.

QUESTIONS?