



DATE	MARCH 2026
PROJECT	INCLUSIVE CONTRACTOR PLAYBOOK
SUBJECT	NEEDS ASSESSMENT

Inclusive Contractor Playbook

Needs Assessment

The Center by Lendistry | March 2026

Introduction

The contractor will complete this self-assessment to identify their business’s unique strengths, challenges, and support needs. Once submitted, the results will be shared with your team and used to guide decision-making around onboarding, training, and ongoing support. This information will help you tailor resources to each contractor’s specific needs and design a more personalized and effective onboarding experience.

Section 1: Goals and Aspirations

What are your company’s biggest challenges right now?	
What areas would you like support in?	
● Technical training for staff	● Certification assistance
● Bidding and estimating	● Supply chain/procurement assistance
● Access to capital/financing	● Project management support
● Workforce recruitment and training	● Other

What would you like to gain from a partnership with [company]?

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Section 2: Financial Health and Operational Capacity

Rate your company's current situation in the following areas	<i>1=significant challenge, 5=strong position</i>
Access to working capital/cash flow	
Ability to front costs before payment	
Financial management systems	
Bidding/estimating accuracy	
Supply chain reliability	
Finding qualified workers	
How many months of operational expenses could you cover with current resources if no new revenue came in?	
Do you have a line of credit or other financing available for project materials?	

Section 3: Business Operations and Systems

Do you have an in-house team for:

● Site assessments
● System design
● Permitting
● Customer acquisition/sales
● Project management
Do you have written processes/procedures for your projects?

Section 4: Workforce and Training

Do you have a formal training program for new hires?
Do you currently face challenges finding qualified workers? <i>If yes, which roles are most difficult to fill?</i>

Section 5: Support Needs and Interests

Which training formats would be most beneficial for your team?
<input type="checkbox"/> In-person workshops
<input type="checkbox"/> Online webinars
<input type="checkbox"/> Self-paced online courses
<input type="checkbox"/> One-on-one mentoring
<input type="checkbox"/> Hands-on technical training
<input type="checkbox"/> Written guides/manuals
How much time could you realistically dedicate to training/PD per month?

Section 6: Additional Information

Is there anything else you'd like to share about your business that would help us understand your needs and opportunities for partnership?