

# Fundamentals Course Homework

## Session 3

### Part A

In this session, we've touched on the idea of the necessity of reports and presentations for a BR&E program using a volunteer visitor methodology with a "blitz" approach.

For this session, I'd like for you to think about the benefits (and perhaps challenges) in preparing reports and presentations for the BR&E visitation program that you are envisioning in your area. Please think about the following questions:

- To whom or what groups would the reports/presentations be delivered?
- How would this benefit the strength of the BR&E program?
- What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?
- How would you turn data into information for the audience(s)?

### Response 1

- To whom or what groups would the reports/presentations be delivered?

*There are several groups that benefit from the BR&E findings including those who are directly and indirectly involved.*

#### **Business Owners (Small Group)**

*I think it would be extremely beneficial, as a first step, to present a draft of the final report and finding to a small group of business owners. This could be in a workshop type setting where there is opportunity for feedback and confirmation of the assumptions and conclusions based on the data. This provides the opportunity to extrapolate on recommendations and validate the findings before presenting to stakeholders and the local politicians. After this workshop I would expect that some tweaking of the draft report will result in a better final report.*

#### **Stakeholders**

*Next it might be beneficial to present the findings to the group of Stakeholders involved in the project from the beginning. Once again this will provide an opportunity for further input into the findings. This will, also, begin to set the stage for community support from active leaders on the strategies to support the business community begins to take shape.*

#### **Staff / Action Team**

*A presentation to city staff and an action team needs to take place to begin the process of implementing strategies to support the business community as a result of the BR&E data. Staff need to*

*clearly understand what areas of service delivery require changes or improvements so that preparations for the action items can start to get implemented.*

### **Local Government and City Council**

*As a final step, it is critical to present the salient findings to the city council. This is important to ensure that support for city staff to make the appropriate changes in service delivery is approved, understood, and supported by the mayor and members of council.*

- How would this benefit the strength of the BR&E program?

*Presenting data is meant to gain support for the strategies and tactics that arise from the BR&E data. Having support from Stakeholders, Staff, Action Teams and the Local Government is critical for any BR&E program to succeed. Politician support will result in community support and adoption of strategies. Politician support will also ensure that city staff are empowered to do what needs to be done to support the business community.*

- What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?

*Data through this model is a continuous evolution. Results should be shared at periods where a significant number of data points have been collected. Once enough data is collected the report should focus on the following key areas: 1. Business firmographics 2. Business Performance (Revenues, Workforce and the changes that have occurred. 3. Red, Yellow and Green flags and the issues summarized for both 4. Highlight the recommended strategies.*

*With that said I would recommend modifying the presentations based on the audience. For instance a presentation to city council should be short on focus on the salient points whereas a presentation to the city staff should be detailed and focus on all of the data.*

- How would you turn data into information for the audience(s)?

*Starting with an analysis by each question and creating the appropriate graph or chart to display the data for each of the question area. Summarizing the key findings and implications of the data into easy-to-understand strategies and tactics that will ultimately assist in the success of the business community.*

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## **Response 2**

- **To whom or what groups would the reports/presentations be delivered?** - Stakeholders in the community and in Economic Development. These presentations would be presented to council, Chamber board, Community leaders, and even businesses themselves. Any group that could benefit from this data would be welcome.
- **How would this benefit the strength of the BR&E program?** -After assembling data, a report or presentation would hopefully generate understanding of the BR&E program. Having reports

and presentations validate the hard work put into the program. It shows the business community that we are invested in them and that we listen to their concerns and are there to help and support. Hopefully increase the level of engagement and open that door for communication. This would clarify the labor force/market shortage, find out any expansion/relocation plans and be able to offer guidance and find our plan of action.

- **What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?** A brief description of the survey and procedure, a run down of the number and types of businesses visited. Perhaps mentioning who took part in those visits and who analyzed the data. Use our community profile to include background information. Results of the analysis of the data with some of the most important averages / or indicators that relate to BRE for the region. It would be good to highlight any Red, Yellow and Green flags found during the visits. Trends observed, conclusions drawn from the data. If there were any open-ended questions, I would include the answers that were noteworthy or recurring. Also, any potential action items.
  - **How would you turn data into information for the audience(s)?** To relay the data received into information for the audience, I would put together a presentation that I would share at a group presentation, Board/council, or commissioners meeting. Along with a presentation, we usually include handouts with key information or graphics for further understanding. Using data that's been analyzed from the survey, I would also compile a report including simple graphs and summaries on main findings about the data. I would elaborate on the survey methods and procedures and findings. Not going into extensive details but to get the main information out in an easy to digest format. Open up the room for discussion and questions.
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## Response 3

**To whom or what groups would the reports/presentations be delivered?**

- Organizations to which this would impact
- Stakeholders
- Mayor, council, coworkers
- Economic Development Commission
- Planning
- Chamber(s) of Commerce
- Media
- RENs

**How would this benefit the strength of the BR&E program?**

I think one of the challenges is that we currently haven't discussed using the exact BRE methodology. As a team, we have a common continuous model to surveying and report regularly into a data management system. Quarterly, reports are pulled from this system. The idea of implementing a

visitation program is exciting though – especially as I learn my community and build essential relationships.

While we may hear individual issues, having a visitation program would allow us to analyze common issues at one and compile a collaborative report to bring forward to the business community. I believe the responses of these surveys also help educate the general community on the state of business.

**What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?**

To show that it is a collection of data in a continuous model you would have to show the projection of growth, changing technology, challenges faced by the business community - which could consist of supply issues. I think it would also depend on whether the model is written or verbal. Everything now is written, but it should still have the key components.

**How would you turn data into information for the audience(s)?**

In my previous roles, I was a social media coordinator. I cannot begin to explain how much I love data and analysis. The challenge for me was always deciphering the data and communicating it in common language which everyone could understand. I believe BRE is a similar experience. Analyzing for a particular audience will be similar.

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## **Response 4**

After the completing our first round of visits and being able to combine the information we received, I feel it would be beneficial to prepare presentations for the following groups:

- Representatives of the District and/or Region's Economic Development and Workforce Development entities. (This would include non-governmental heads of organizations such as our Planning and Development District, Chambers of Commerce, Division of Workforce Services Lead, Rep. from the Local Workforce Development Board, etc.)
- Governmental representatives of the district, county, cities, towns, and hamlets.
- Heads of unions and sector specific organizations (dependent on needs shown in reporting)
- Educational Partners and Training Service Providers
- Others if needed. This is something I thought about after looking at the Excel sheet. If there was an underlying need shown for help that was specific to small, independently owned businesses it would be good to present our information to SBA representatives and SCORE. If there was an underlying need that leaned agricultural- Office of Rural Development, USDA, etc. Flexibility is going to be key. The results may steer us in a direction of including new partners we may not have considered before.
- I also feel like rather than having a meeting to present results to the companies interviewed, an initial round of results could be shared via email. To prioritize their time and ours, I'd rather save an in-person meeting with them for when we have an action plan in place. This also helps to keep their anonymity amongst peers in their fields.

These presentations would show that we have already garnered participation and buy-in. Knowing that we already have people involved lets the resource partners know that they're entering 'warm waters.'

Important information to share with the resource partners would be who was visited- Not by specific company name, but by cluster or sector, number of companies represented. We would also want to include overviews that included workforce issues such as current concerns/areas with room for improvement, flags, and projections on staffing (garnered from upcoming layoffs, hiring plans, contracts, waves of retirement, etc.).

At this point, with only a hypothetical group of responses in hand I feel the best way to present this information would be through a spreadsheet or a set of simple graphs. Rather than trying to make one graph that is representative of all the data, I would have different graphs showing average number of current workers vs. expected workers, training needs, groups of concerns, and possibly workplace demographics.

The challenge would be making this information accessible and understandable to all parties.

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## **Response 5**

### **To whom or what groups would the reports/presentations be delivered?**

The BR&E visitation program is to continue the relationship with those companies that we helped recruit to our community. The data collected helps generate a monthly report that is reviewed by the EDC president, Board of Directors, and City officials. These reports keep them inform of the continuous activity our EDC has each month. These visitation program opens more opportunities to help existing businesses to grow by connecting them with the proper resources that can assist them to expand in more successful and strategic way.

### **How would this benefit the strength of the BR&E program?**

This program would be strengthened due to the amount of data that will be collected from the companies. The most important data that is collected from the existing businesses would be the number of existing employees, new employees, expansion projects that would generate new jobs or expand the current size of the facility to be able to set up new equipment to help the company maximized their productivity. It would also track challenges that the company is facing in trying to move forward with their expansion.

### **What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?**

The most important data that will be included in the report is the number of new potential employees and projected size of facility. Our EDC is measured by the number of new companies that are committed to our area and the continuous growth of the existing companies by following the BR& E program guidelines.

**How would you turn data into information for the audience(s)?**

The data is collected by our staff in a form that has a set of questions. This information is then entered in a Customer Relationship Management system that has been formatted to capture the information collected by the EDC team. Monthly reports are generated by pulling the information that is most important to our Board of Directors and City Officials. Our audience's primary focus is to know how many new active projects are active each month, how many of those projects visited our city to begin negotiations to sign a lease agreement, what is the time line for the project to come to fruition by measuring time line in months (3-6 Months, 6-9 Months, 6-12 Month) Also how many jobs they project will be created and how much square feet they will be occupying. This information is what drives the enthusiasm within our audience and governing board.

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**Response 6**

There are a couple of difference groups and people that could benefit from the information collected during a BR&E process. In my opinion, the most significant benefit of providing the information openly is building social capital and trust within the community. When we make this information available to the survey respondents and people who are responsible for economic development it creates a bridge between these two entities. Business owners feel heard and hopefully people in positions in power are able to make changes. It also builds trust between the organization delivering the report and the community. Trust is an essential element in the building of social capital.

Groups that would benefit from hearing this information include:

- The Volunteer survey team
  - Local government & elected officials
  - Chamber of Commerce
  - Main Street Organizations
  - Business owners
  - Economic Development Districts
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**Response 7**

Benefits and Challenges in report preparations for my community:

Reports/Presentations will mainly be given to our Board of Directors. Other potential groups could be our local Community College and Technical Institute, Chamber of Commerce and CVB's. Reports could be of use to the community via service clubs and round table meetings via myself or a community ambassador.

Knowledge can lead to change and growth. My BR& E program will focus mainly on Manufacturing and Warehousing and Distribution businesses. Keeping the stakeholders and

community at large aware of what is working and what isn't creates awareness and promotes shared problem solving. Above all else, I feel easily understood reporting proves your program is necessary and helpful to retain your current businesses and see them grow. Part of the BR&E program is bringing awareness to how keeping and growing existing businesses is the backbone to the Economic Development of the community.

I will be using the continuous model in my BR& E program, and I think an explanation of how the model works and what the focus is should be included so everyone has reasonable expectations. I think I could ask a few more questions about this for my own understanding.

Working with a small team, I plan to use Excel for data maintenance. Some additional training in Excel would be useful. As I turn the data into information, I have two main goals, presenting the information in the most straight forward and easily understandable format and focusing on the information that is pertinent to each specific group.

The main challenge for me is taking the large-scale BR&E program and making the adjustments necessary for my small-scale office where one person is wearing most of the hats. It is really just a matter of fine tuning and creating the "just right" program for my community.

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## Response 8

### **To whom or what groups would the reports/presentations be delivered?**

The BR+E reports would be delivered to my EDO executive team members. I would gather BIA/BID; Business Association members; Chamber of Commerce; Board of Trade; and other economic development professionals to support the delivery of my presentation and assist with data.

### **• How would this benefit the strength of the BR&E program?**

It would showcase the community and provide us with feedback on what might be missed opportunities and strengths for our community. It is an opportunity to market and brand your community differently from other competing organizations and communities.

### **• What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?**

It would provide an overview of the community; provide a list of businesses; include highlights of success stories and testimonials of business owners choosing our community; it would provide risk assessments and projection of further goals and initiatives to improve the business community.

### **• How would you turn data into information for the audience(s)?**

Surveys – provide a summary of findings through graphs

Interviews – develop case studies and testimonials

Focus Groups – to assist with presenting stories to the audience and examples of how the community came together.

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## Response 9

- To whom or what groups would the reports/presentations be delivered?
    - Reports and presentations for the BR&E program would be delivered to those participating in the survey and to community partners that could help mitigate some of the issues outlined by the businesses surveyed. In doing that, we want to ensure that the information shared does not explicitly name these businesses and therefore the data shared should remain anonymous. This sharing of information would allow for the businesses to see what trends are going on in the community and help businesses outline where they need to do more work. Additionally, this would allow local universities, economic development organizations, and technology centers to create and scale programs that would help with workforce development needs based on survey feedback.
  - How would this benefit the strength of the BR&E program?
    - The sharing of this data to these groups would strengthen the BR&E program because this would allow groups to create the trainings and programs necessary to prepare for future workforce needs. The purpose of these surveys is the retention and expansion of these businesses, so the correct programming would allow for the community to have the necessary resources to fulfill the needs of these jobs. This would also ensure that the productivity and efficiency of these businesses are improved.
  - What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?
    - The number of people currently employed at the business, future projection needs, and information over current company trainings would be what is in the report. For the Ada Jobs Foundation, we are looking to do a talent demand survey that helps us see what digits skills and trainings would be necessary to help grow and expand the businesses in the area. With our organization wanting to focus on workforce development we want to know more about what trainings the community would benefit the most from to help them obtain employment with these local businesses. We want to know where we're at to see what needs to be worked on.
  - How would you turn data into information for the audience(s)?
    - Tables and charts would be created to illustrate the information for my audience. The data through graphs would give the audience a sense of how participants responded without letting them know how specific businesses responded.
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## Response 10

### Response:

- To whom or what groups would the reports/presentations be delivered?
- How would this benefit the strength of the BR&E program?



Stakeholder	Method	How would this benefit the program
Municipal council	<ul style="list-style-type: none"> <li>Quarterly and annual reports</li> <li>Strategic planning sessions</li> </ul>	<ul style="list-style-type: none"> <li>Data which measures local business climate</li> <li>Company common issues help identify strategic projects.</li> </ul>
Local businesses	<ul style="list-style-type: none"> <li>Future visitations</li> <li>Presentations at business chamber events and meetings</li> </ul>	<ul style="list-style-type: none"> <li>Demonstrates that we are listening to them which would increase engagement in the program and improve quality of information provided.</li> </ul>
Action team members	<ul style="list-style-type: none"> <li>One on one meetings</li> <li>Regional economic development partner meetings</li> <li>Quarterly reports via email</li> </ul>	<ul style="list-style-type: none"> <li>Keeps our community 'top of mind'</li> <li>Builds support for our BRE program</li> <li>Gives partners feedback and validation for their efforts and programming</li> <li>Enhances programming</li> </ul>
Other municipal departments: planning, parks and recreation, public works, etc.	<ul style="list-style-type: none"> <li>Presentations at staff meetings (SMT, annual staff meeting)</li> <li>Email communication with department heads</li> </ul>	<ul style="list-style-type: none"> <li>Municipal projects are most often have cross-departmental impacts.</li> <li>Feedback received from local businesses can impact projects in other departments.</li> <li>Can shed light on root causes of challenges. Other departments offer different insight.</li> </ul>
Prospects	<ul style="list-style-type: none"> <li>Positive testimonials from existing businesses included in marketing material</li> </ul>	<ul style="list-style-type: none"> <li>Attracts more businesses to the municipality</li> </ul>
Residents	<ul style="list-style-type: none"> <li>Municipal newsletter</li> </ul>	<ul style="list-style-type: none"> <li>Builds community appreciation for businesses</li> <li>Builds community support for the program</li> <li>Builds community support for strategic projects</li> </ul>

#### What would be included in the report?

- Overview of the program
  - Objectives
  - Timeline
- Profile of businesses visited

- # of visitations
- Survey difficulties
- What issues and opportunities really stood out and were common across multiple firms
- What can the municipality do to respond to the concerns and opportunities for local firms

**How would you turn data into information for the audience(s)?**

I would turn the data into information by using graphs and tables to make it easier to digest. I would tie the findings to strategic priorities and potential projects that could address any common issues or opportunities that presented themselves. I would not likely present a full report but more fact sheets and presentation style delivery.