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)?

Part B

The following Excel file (Open Ended Survey Homework.xlsx) contains a number of responses from a COVID-19 business retention and expansion survey conducted in Mississippi. What topics would you use to categorize these responses?

Due by the beginning of the July 21, 2022 session.

Part A

Response 1

- To whom or what groups would the reports/presentations be delivered? **I'd hope that the reports would be delivered to the decision makers or department heads that would find value in the report.**
- How would this benefit the strength of the BR&E program? **With any program you must have data to back up the process and determine if what you are doing is successful. You want value to be given to what you are trying to accomplish not only for our department but for the business as well. Value added services are always a plus and reporting would be value added.**
- What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow? **Not sure on this one... would think parameters would be set to allow enough time to collect data and create a report.**
- How would you turn data into information for the audience(s)? **summary report of the findings? Look for commonality with issues, and with successes. Maybe offer suggestions to improve on areas of weaknesses**

Response 2

Appealing to, and informing, everyone in the community is important to demonstrate the value of the Economic Development Partnership as well as the programs contained under its umbrella, including the BR&E Program. Depending on the audience, different reports will need to be generated in order to communicate the state of the local economy and business environment.

Community/Public (Including Local Policy Makers)
The community may not be as educated as groups familiar with economic development. It will be important to present information in a way that most people from different backgrounds can comprehend. One way to do this will be to create a verbal report to be presented at a public meeting. I would start by introducing the Action Team and stakeholders, followed by a series of slides explaining background census data to describe why certain questions were asked (key industry sectors by revenue, housing data, unemployment rates, airport screenings, etc.). Depending on the data obtained, or the message I will be trying to get across, some of the key features to highlight include:
● The processes and techniques employed to gather data.
● Pitfalls, or survey difficulties, including errors.
● The specific questions asked of top industry leaders and their answers (using graphics).
● Implications and potential steps forward.

At the end of the presentation I would include a Q & A slide so community members could ask specific questions about our program or clarify any of the results obtained from data collection.
Also, for City Council and policy makers, a comprehensive but shorter report (fact sheet) would be handed out so that they can review it after the presentation is complete.

Board of Directors
The Board of Directors are more informed and have background knowledge of economic development and the BR&E program. To appeal to this group will require more detailed and complete information in the form of an exhaustive written Annual Report. Many if the components are similar to the community's verbal report but will include:
● An executive summary and problem statement containing background census data to paint the business and economic climate of our county.
● The survey and data collection protocols employed including the difficulties faced and errors observed.
● Comprehensive survey findings with more detailed graphics to illustrate the information gathered from the data generated.
● Implication of the data including potential steps forward, other metrics to capture in the next round of data collection, action plans being employed and future plans to continue growth.
● Appendices

Response 3

- Different Reports/Presentations or portions of them, could potentially be delivered to:
  - EDO Board
  - Elected Officials
  - Surveyed businesses
  - Civic organizations
  - Organization member meetings
  - Media organizations
- The BR & E program would be strengthened because the reporting process is all about communication that helps build connections across the community and appreciation for businesses throughout the community.
- The report would include a summary of the program. It would answer the question WHY? By presenting the goals of the program and would describe the process and methods used briefly. Early on in the process if there isn't enough data to fully report any findings without jeopardizing confidentiality, the questions asked on the survey can still be shared so the audience can more fully understand how the data we are seeking can be used to influence planning and innovation in the community. As more data is collected the section containing actual results would become more robust. The report should also include a summary of any results that are already collected.

I would analyze how to best present the data by asking questions such as, whether data should be presented as frequency or as an average, maybe using standard deviation or some other presentation. The reports would use visual means of simple charts and graphs along with the verbal explanation in the primary written report, and even fewer words in a summary report or verbal presentation. The implications of the survey would be reported as an "application" section which would be produced by completing a SWOT analysis of the survey results to determine potential achievable action plans to address the issues uncovered whether they be red or yellow flags or green flag opportunities.

Response 4

- To whom or what groups would the reports/presentations be delivered?
  Businesses that were surveyed, city elected officials, economic council, chamber of commerce board and possibly their members and prospective business
- How would this benefit the strength of the BR&E program?
  Pointing out the key issues and discussing strategies for improvements will stress the benefits of the program to key stakeholders which most likely be from the business community and local government.
- What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?
  The data collected will be used to improve the relationship between the business, local government, chamber of commerce or any other business community. Many of the identified

weaknesses do not change quickly over time. The surveys should be performed on a continuous basis to show the newest findings and newest data can be used to compare to the initial data to show the progress. Many times the process can take years to see impactful results.

- How would you turn data into information for the audience(s)?
  When presenting the data, it is best to be concise and display the information so that it is easily comprehended. Most people like to see the information in tables or graphs. Survey monkey is a free online survey that can be used to collect the data and provide a rudimentary analysis of the information. This can be displayed to the stakeholders via power point or document.

Response 5

Who would I give these reports to? I thought these would need to be given to quite a few of our stakeholders that are in our community. I think they should be given to our retail coalition group (we have a lot of retail businesses in our area that are influential), mayor, chamber of commerce, economic development, committees handling our red and yellow issues, community development director, aldermen, chamber of commerce board of directors, all whom are key players in our city that have a hand in helping our city grow/thrive.

How would the reports benefit the strength of the BR&E program? By getting the support from everyone mentioned in the paragraph above they will be able to help us with the data from our survey's and meetings to help us with specific problem solving issues and provide and guide us with a plan for resolving the most critical issues first then working on the next set of issues.

What would be included in the report? We will need a detailed report of what the findings were to even know where to begin. Then we can organize a list of issues and a possible time line established along with a list of solutions that can be addressed rather quickly and then other solutions and time line for next set of determined issues.

How to turn data into information? Knowing what your trying to accomplish (goal) will determine the type of data you are trying to collect. There is going to be a lot of date possibly, so we will need to pull out what is accurate and relevant to what we are asking (when talking or interviewing there might be other comments or suggestions presented that does not meet your survey questions), so pull out what is really needed. Based on which group you are addressing or talking to you can use written summaries, charts, examples, presentations or focus groups to get your information delivered. Education is key here, figure out the best delivery methods and educate, educate, educate your findings.

Response 6

- To whom or what groups would the reports/presentations be delivered?
  Businesses involved in the collection of information process
  City council
  Church associations
  County supervisors
  School district
  Neighboring areas – if information was pertinent to that area
  Tourism Director/Economic Development
  Civic/Service type groups
- How would this benefit the strength of the BR&E program?
  These reports can capture real information and data and give the program credibility and continuity for future projects. The community "buys-in" to the program.
- What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?
  Information already collected such as how many businesses already participated and are participating in the program, how many volunteers/staff are involved, current program goals with education as to how the incoming data will be translated and used, other data related to the area (population, median income, median age, school enrollment, #of businesses, etc)
- How would you turn data into information for the audience(s)?
  Data tells a story, and we would write that story by telling what the data reveals. Ex..4 out of 10 respondents scored high to needing access to handicap parking…

Response 7

- **To Who or what groups would the reports/presentations be delivered?**
  Stake holders, business owners, Chamber of Commerce.

- **How would this benefit the strength of the BR&E Program?**
  This is an opportunity to show support and help the business grow. It shows the business community that you are invested in them and allows community leaders to get a better understating of the issues and challenges that need to be addressed.

- **What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?**
  Data collected based on the site visits and surveys, including general business operations, expansions, challenges, and overall business climate.

- **How would you turn data into information for the audience(s)?**
  The data collected could be presented in reports and charts.

Response 8

 1. To whom or what groups would the reports/presentations be delivered: Board of Aldermen, Board of County Supervisors, Chamber of Commerce Board members, School Board of Trustees, Interviewed Business Owners, our local Planning and Development District, and Local Community College President of Operations.

2. How would this benefit the strength of the BR&E program: The reports are the chief communication tool that the BR&E program will have in conveying its recommendations. First and foremost is the need to address vertical and horizontal integration of all the major policy and decision makers within our city's business area of influence. Within the city, our target audience would be the Aldermen and Mayor, Chamber Board, School Board, and all the interviewed business owners. External to the City, our target audience is the County Board of Supervisors and Local Community College President of Operations. This creates the road map that the information needs to travel in order to ensure that knowledge can be synthesized from the information. At these decision nodes, knowledge can be processed in order to impact/develop policies that can address our identified business/community issues and goals.

3. What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow: I think this should be reported in a phased report sequence. The initial report would lay out the framework of the categories for data collection and whatever current returned survey/interview data that has been collected. Scheduled report updates would be clearly articulated in the program timeline in order to keep our designated report receivers update and prepared.

4. How would you turn data into information for the audience(s): Based on the selected grouping categories of the reported question data; I would attempt to provide substantive evidence to achieve the desire endstate objectives of my BR&E program. For example if one of our goals is to demonstrate the need to improve walkability; I would ensure my survey included questions asking for data specific to foot traffic vs automobile traffic in terms of sales and shopping.

Response 9

To Whom:

- Manufacturing – plant owner or manager
- Large retail – would more than likely be store manager(s)
- Small retail – owner-operator and/or store manager
- Service – office manager or business manager

How would it benefit the BR&E Program? Businesses would realize that the community is interested in helping all businesses, not just the big box or most popular boutique or restaurant. Businesses would be more engaged because they would feel "listened to". The BR&E program would have more credibility,

then local stakeholders would want to be a part, making the organization stronger, more able to handle the colored flag issues. City government would be more willing to support with the BR&E program (financially and with departmental support for issues). It would be a train everyone would want to jump on.

What would be included in the report?

For most of them, it would be interesting to show business longevity, employee retention, recruiting, benefits, expansion plans & timetable, skilled or unskilled labor, most and least important skills, educational needs for labor force, likes and dislikes about operating in the community, impediments to doing business in the community, business forecast and reasons why it might not look very good, competitors, internet presence, infrastructure needs, etc.

If surveys are done every year, it would be good to provide year-over-year data to show areas of improvement or decline.

- Manufacturing – more detailed because plant owners/managers are more familiar with statistical reports and charts. They would probably more interested in statistics than the human factor
- Large retail –could also be more detailed. They probably would not be interested in any sector other than the large retail sector.
- Small retail – could be less detailed and geared toward their sector of business. These reports could be statistical, but more personal in nature.
- Service – this could include a great deal of businesses (hospice care, insurance, real estate, etc) so you might want to break this one down even further by sub-groups.
- Civic Clubs – fairly simple report by sector with high points, then a general interpretation of all results.
- General Public – fairly simple and short media blasts, and then a community-wide meeting to present results.

How to turn data into information for the audience?

Based on which group you are presenting to and how strong your written and social media presence is, it could look a little different.

- Make sure to put together a short, concise graphic to be posted on social media with contact # for more information.
- Conduct meetings by sector to presenting BR&E findings or HAND DELIVER BR&E findings to each large business and ask for an opportunity to go over it
- Have your local newspaper publish an article outlining the BR&E program, it's vision and some of the highlights of the report, then announce a community-wide meeting.
- Each presentation should be catered to their sector, with a general finding at the end. They will be more interested in their own sector, but you could spark interest in the business community as a whole.   When a business next to you succeeds, it seems to spread to the surrounding businesses (if you are consistent with visitation and communication).

Response 10

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

This is for the businesses in your community and those who participated in the survey. The participants would love to see the fruition of the data gathered through the surveys they participated in. They appreciate it when they realize that the time that they spent doing the survey and/or interviews had a purpose.

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

The effort put forth by all the community partners, local businesses, and the BRE program team demonstrates your (BRE team) commitment to presenting the community with relevant information they can use to make better-informed decisions on the direction of where to proceed.

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

Analyzing open-ended questions would be a lengthy process because the answer will vary from short one-word answers to paragraphs long. Then the answers need to be categorized.

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

It depends on how much experience you have with reporting. If you haven't made any reports before, I would consider hiring and 3 party researchers to analyze the data for you and come up with the report. If you are experienced and have done many reports and you are confident enough to do it yourself, then go for it.

Response 11

Once we have completed the business interviews/surveys and all the data has been sorted and tabulated into cohesive information, we can then create our reports. These reports would be provided to the City officials, Chamber, local economic development office and to our stakeholders and community. The reports would also be provided to our Action Team to address anything that they may be able to address and correct quickly.

In order to turn the data into information, a process that would take place before we could make our reports, we would hire an outside source that has the expertise to analyze and populate the information.

By populating the information and creating informational reports that reflect the information gathered and identified issues, we are creating an even stronger relationship with our businesses which will

strengthen the BR&E program. Sharing the information is provides a tangible asset that leads everyone to a cohesive action plan to address the needs in the community.

In a continuous model, the variables are changing over time that could cause collection to be slow. Workforce development or even improving education systems take time. Unlike a blitz of volunteers gathering information, the results of the conversations are not reflective of the issues at a single point in time. The continuous model is more of an independent coordinator facilitating most of the data and working the program which takes more time.

Response 12

Response 13

Response 14

Response 15

Response 16

Part B

Response 1

Funding/Grants/Incentives

Policy/Leadership

Communication

Customer Service /Business Retention/Best Practices

Workforce Development

Response 2

Infrastructure
Funding
Internet/Broadband
Policies
Information/Guidance
Staffing
General Services
Marketing
Supplies/Tools
Healthcare
Not Sure
Nothing

Response 3

Supply Chain

Human Resources/Workforce	Information
Financial Assistance	Government Response/Policy
Health/Safety	Infrastructure
Technical Assistance	No Concern/Not Sure

Response 4

Improved broadband
Funding
Technical support/communication
Federal/State guidelines
Keeping businesses open
None
Unsure

Response 5

Financial Aid
Staffing/Workforce
Grants
Stimulus Payments
Education
Communication
Customer Service/Help Desk
Shop Local Campaign
Technology Training
Energy Assistance
Resources
Economic Incentives
Global Economy
Tax Incentives
Healthcare
Research
Marketing
Guidelines/Measures
Benefits
Management
Unemployment
Government

Response 6

Safety/Security
Supply
Financial
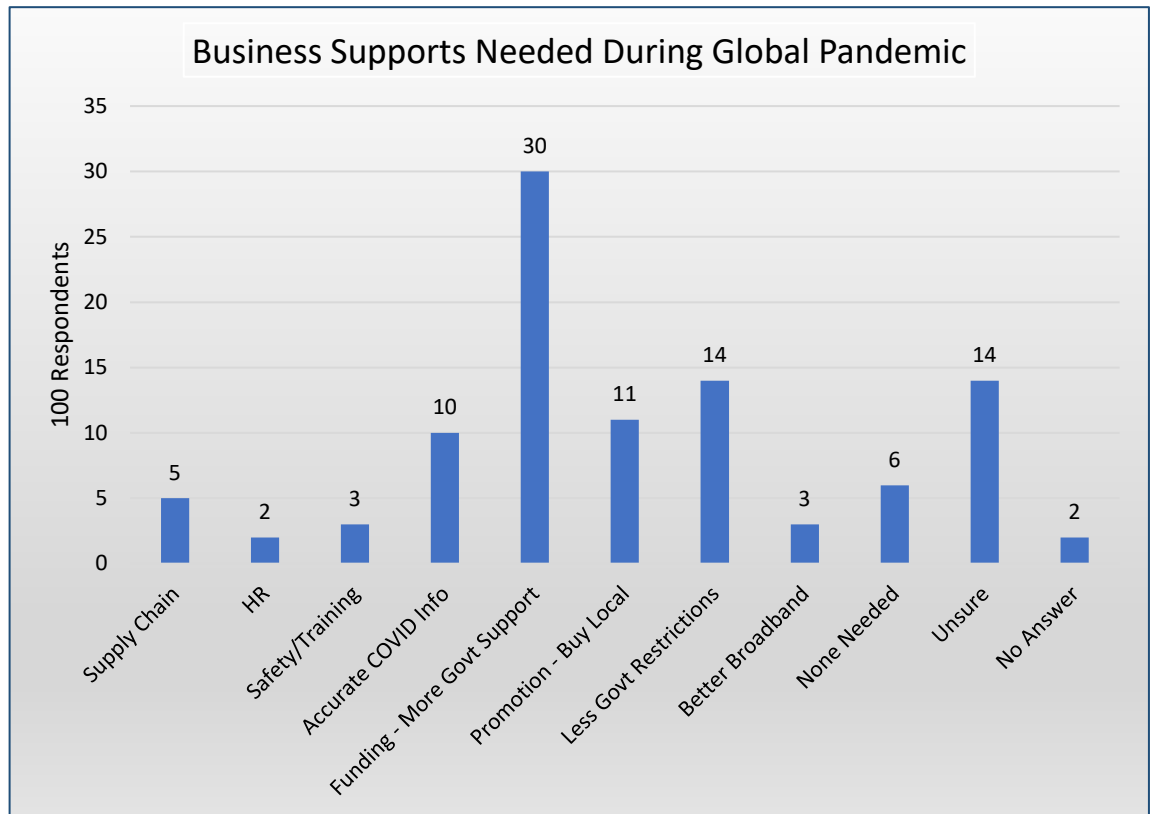Social
HR/Business
Communication
 Logistics
No effect/not sure

Response 7

- Marketing
- Funding
- Workforce
- Communication

Response 8

COVID Impacts, Ordinances/Regulations, Information Technology, Workforce, Capital Improvements, SBA/Business Grants, Logistics/Supply Chain, HR/Insurance

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Response 9

Business Supports Needed During Global Pandemic

This analysis of 100 business surveys brings out several interesting factors:

- 16% of respondents had no idea how to help their business, while 6% needed no help at all.
- 30% of respondents were looking to the government for more help, while 14% wanted no government interference
- 11% of respondents wanted help to creatively promote their business
- only 5% of respondents cited supply chain issues

An overwhelming 94% needed some sort of assistance, whether it be education, promotion, safety, accurate communication or government assistance (funding). Several of these issues could be handled on the local level through a robust BR&E program. Even if they did not know what they needed, a visitation program (through ZOOM if necessary) could have brought issues to light.

Response 10

- Don't Know/Unsure
- Government Support Programs
- Less Government Involvement
- Technology Infrastructure
- Supply Chain Issues
- Adapting to Change
- Better Marketing and Accessibility of Services

Response 11

Financial Assistance
Workforce challenges
Communication
Political Opinions
Medical Care
Supply Chain Issues
Loss of Revenue
Covid education
PPE supply

Response 12

Response 13

Response 14

Response 15

Response 16