

# Fundamentals Course Assignment

## Final Project

Throughout this course, we've talked about the different elements that are essential to develop a Business Retention and Expansion Visitation Course. For your final project, develop a concise narrative or outline that describes your plan of work for implementing this type of program in your organization. Be sure to provide some insight regarding the way that the elements that we've discussed throughout the course will be included in the program.

This outline is not meant to be definitive nor comprehensive, but it is meant to be an aid for you in developing the initial logic of the program. Please try to have this exercise completed and submitted by the end of business on April 14, 2022.

## Response 1

### I. Vision

Engage community partners and stakeholders to support local businesses, understanding their economic impact on Brenham and Washington County by

- 1) Offering resources
- 2) Implementing strategies that strengthen businesses and industry sectors
- 3) Providing connections among potential partners, customers and supply chains

### II. Offering Resources

1. Business Visitations – Focusing on 25% of businesses (established by # of employees and taxable value of the property). In addition to targeted visitation, capitalizing on all the time out in the community as a shopper. I believe that CREDIBILITY from the government is lacking so showing that you are a REAL person with interest in their business makes a difference. Along with that, saying that you are going to do something and then doing it – even if it's a phone call or an email – also lends to credibility.
2. Communication – Communicating in their preferred portal and doing so as regularly as they want it, is important. Emails, phone calls, newsletters, etc. – usually you just need to ask and then honor their answer.
3. Surveys – Surveys are valuable, but my experience has shown that you must communicate the value in the answers by reporting back the results. It helps to legitimize the work. Dialogue regarding survey content is also important.

### III. Partnerships

- A. Partnerships from organizations who also seek intelligence from businesses (the Chamber)
- B. Partnerships with businesses who have similar needs – For example, Key Accounts for a utility are those accounts who use a lot of energy or water and could face major detriment if there was an interruption in those services.
- C. Partnerships with those who provide services to businesses (government and non-government)
- D. Connectors – Connectors are people who can gather information and immediately find ways to connect to others via individually or organization.

### IV. Gauging Progress

In order to make the vision a reality, we must gauge our progress via measurable indicators or activities.

1. Business Visitations divided into levels. Level 1 – Shopper mode, Level 2 – visit with an appointment, Level 3 – visit while gathering solid “intelligence” about their business, Level 4 – a visit with a partner (other business, chamber, elected official, etc.)
2. Verification of how they would like communication from you.
3. How many surveys they participate in
4. How many requests for resources are received by a business. Directing to a website portal should always be available but offering concierge service is personal and provides more impact.

#### **V. Education**

1. Anyone who participates in the program must be educated to build awareness of the fundamental vision of the BREI program.
  2. A BREI toolkit should be provided with resources for anyone spending a large percentage of their time on BREI activities.
    - a. Builds awareness of BREI opportunities
    - b. Marketing tools so that everyone speaks the same language
    - c. Regular check-ins to discuss wins and/or challenges
    - d. A yearly workshop to exchange stories and make adjustments
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## **Response 2**

### **Recommendations for Business Retention & Expansion Program**

1. **Involve stakeholders and Economic Development board members** - Extend invitations to relevant stakeholders and board members to have them join company visits. This will help establish relationships and show that the County appreciates the company and its employees.
2. **Work closely with partners** - Other organizations in the County also provide resources for small business, and efforts should be coordinated among all of them to provide the best information and services. Knowing what resources are available and directing any firm to the proper resources for their needs will be beneficial, both for new business relationships and for our relationships with community partners.
3. **Identify priority industries** - Manufacturing has traditionally been the core economic activity of our County, and continues to be a significant source of employment, tax revenue, and primary production of goods. Manufacturing and Industry are the primary targets of state, regional, and county-wide Economic Development recruitment & incentive efforts and as such will be the primary focus for the Business Retention & Expansion program.
4. **Interviews** - It is important to ensure that all parties feel that they are receiving something of value out of the exchange. The more valuable the encounter, the more likely future interview requests will be granted. In addition to the questions that pertain to the needs of the organization, ask companies to share good news, success stories, and talk about why our County is the right location for their business.

5. **Data** - Having a record of the past activities of each company is very useful. It may show trends that will help to anticipate a need and It gives other office staff a record of past activities to seamlessly support the company. It provides a resource for quick reports to allow boards and managers to see what is being accomplished and what needs are still unmet. The reports also provide an overview for planning and budgeting to implement requested help.

6. **Communication** - Follow-ups after meetings should be as prompt as possible. Any questions asked should be answered as soon as possible in the follow-up email and resources that the company expressed an interest in or that they could benefit from should be provided. Communication should continue consistently and regularly to ensure that the relationships built become well established. Emails and newsletters about relevant issues in the county is a good way to stay in touch and provide the companies with valuable information at the same time.

7. **Assessment** - The business retention & expansion program should be assessed regularly to ensure that goals are being met and the program has value.

A Business Retention & Expansion program will ensure that businesses receive the support and resources they need to prevent their relocation or closure, and to encourage or even facilitate their expansion. The retention and expansion of local businesses can keep or increase local jobs; preserve or increase the local tax base; increase local property values; enhance community image and increase confidence; and maintain or diversify the economic base.

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## Response 3

- I. The team/resources: The BRE team is currently two business development managers, employed by the city/municipality. The goal is to eventually hire a third manager, and its unlikely the team would ever grow to more than four professionals. There are also no plans to utilize volunteers, EDA board members, chamber of commerce members, etc.  
The one additional resource may be an in-house, collaborative effort with our workforce development team, who also connect with local employers/companies form throughout the city. More on the workforce collaboration will be addresses later in the outline.
- II. The goals:
  - a. On an ongoing basis, establish at least minimal partnerships and interaction with 200 – 250 key businesses, universities and non-profits located within the city. With time and additional team members that number may grow to 300 or more businesses. This group of businesses is referred to as our Core Portfolio.
  - b. Within the fiscal calendar year, establish at least minimal partnerships and interaction with at least 150 businesses (core and non-core portfolio).
  - c. From those interactions, facilitate and manage a minimum of two (2) announced projects that include new hire job counts and capital investments.
  - d. Develop strong workforce partnership to facilitate the hiring of local residents, able to benefit from new jobs within their city
- III. The businesses:
  - a. The Core Portfolio of businesses will be determined through a series of factors.
    - i. Largest employers within the city
    - ii. Traded-sector businesses generating the majority of their revenue from business outside the state
    - iii. Key strategic employers as determined by department and city leadership
    - iv. Key education and workforce development partners

- v. Businesses our team has determined to have the greatest potential for growth and expansion
  - b. Additional businesses may be visited throughout the year due to referrals, call-ins, requests from leadership or strategic partnerships.
- IV. Research: Our department will determine which of the city's businesses qualify for the previously mentioned categories through the use of local, regional and state resources. We have a business intelligence team within our department, able to pull statistical data to better target companies within sectors, NAICS, hiring trends, updated business and market announcements, and lease agreements.
- V. Outreach: Multiple tools and actions will be utilized to facilitate the initial outreach and the eventual scheduling of meetings.
  - a. Direct email, phone calls or LinkedIn messages.
  - b. Referrals – City and regional partners
  - c. Postcards campaigns
  - d. Departmental marketing and communications efforts
  - e. Website
- VI. Pre-Meeting Research: Beyond the initial research to determine Core Portfolio businesses and other qualifying data, additional research is performed to determine such factors as:
  - a. Is the company located within an economic opportunity zone? Technology zone, enterprise zone, tourism zone, Federal HUB Zone or Arts District, business or commercial park
  - b. Who is the leadership team?
  - c. Any recent announcements?
  - d. Any background information on the specific professional we'll be meeting with?
- VII. Meetings:
  - a. Surveys:
    - i. We have a standard set of questions we utilize throughout the meeting.
    - ii. The discussion is kept very conversational, but we try to incorporate all the questions into the conversation as long as they remain relevant and necessary.  
Note: Not every meeting and business may require every question to be completed. We do not approach our BRE surveys as market research data, and never address the meeting attendees as survey respondents.
    - iii. Upon completion of the surveys and meetings, the surveys are completed within our CRM and survey system by the business development professional who scheduled the meeting.
  - b. Attendees: When appropriate other members of the economic development team may attend BRE meetings (either the first and/or follow-up meetings), to include the real estate, commercial corridor and/or workforce professionals. This is seldom done on the first visit, unless information was provided when scheduling the meeting that their attendance will add immediate value to the discussion.
  - c. Topics: Most of the discussion will be driven so as to provide answers to the predetermined questions (survey). However, due to our team's consultative approach, there may be opportunities for preliminary discussions as to how our department may be able to assist the company. This is done only when certain of the appropriate and applicable resources.
  - d. Conclusion: Be sure to thank the business, provide a brief review of any action points, and confirm the primary point of contact moving forward or relating to any given point-of-contact.
- VIII. Follow-up:
  - a. The expectation is that follow-up is provided to each business within one working day of the meeting, even to simply thank the business for their time.

- b. Be sure action points are addressed, with an expected timeline of completion for those items not completed on the initial email of response.
  - c. Be sure all information is placed within the CRM system, including any future communication or relevant information.
- IX. Potential Projects: For those meetings that lead to potential projects, there is a series of steps associated with the initial research, planning, partner communication and follow-up that is required, but will not be included within this outline.
- X. Reporting: Data from the surveys may be eventually utilized for reporting to departmental leadership, reporting to municipal leadership, strategic planning, budget planning, and budget book creation. This will take time, but the short-term responses may provide antidotal indicators if there are major concerns related to business climate.

CRM: While mentioned in the follow-up notes, it is important to remember that the information and data (including survey responses) is at least as important (if not more important) than the surveys. As department professionals move, goals change, companies and company employees require updating, consistent use of the CRM system can be the determining factor in how effective and useful this entire BRE program can be both short-term and long-term for the entire economic development department.

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## Response 4

### BR&E and Workforce Development

Goal	Activity	Metric/Timeframe	Expected Outcome
Develop Existing Business & Industry Site Visit Program	<ul style="list-style-type: none"> <li>Meet with primary employers in Longview</li> <li>Establish relationship with parent company of primary employers</li> </ul>	<ul style="list-style-type: none"> <li>Attend 100 BR&amp;E visits / year</li> <li>Attend 3 HQ Visits / year</li> <li>2 Domestic HQ visits and 1 International HQ visit</li> </ul>	<ul style="list-style-type: none"> <li>Continue to nurture and strengthen relationships</li> <li>Ensure HQ knows we are here to support growth and local expansion</li> <li>Successfully land 1 new relocation or expansion / year</li> </ul>
Facilitate Communication with Business & Industry	<ul style="list-style-type: none"> <li>Establish a CEO/Plant Manger Roundtable</li> </ul>	<ul style="list-style-type: none"> <li>Host 4 CEO Roundtables / year</li> </ul>	<ul style="list-style-type: none"> <li>Take the pulse of principle decision makers – where are their pain points/What’s going well</li> </ul>

and Community Partners	<ul style="list-style-type: none"> <li>Maintain and build Work Ready Community Program</li> <li>Establish an HR Roundtable with workforce development partners</li> </ul>	<ul style="list-style-type: none"> <li>Test 600 job Seekers / year with WorkKeys</li> <li>Recruit 4 employers / year to participate in WorkKeys</li> <li>Conduct 1 Job profile / year</li> <li>Create 1 employer testimonial / year</li> <li>Host 4 HR Roundtables / year</li> <li>Host CTE, Tech / Community Colleges, major employer meeting annually to determine talent prep for existing industry.</li> </ul>	<ul style="list-style-type: none"> <li>Continue to demonstrate strength in existing workforce with data</li> <li>Strengthen our position for new relocation opportunities</li> <li>Ensure alignment of training providers with industry needs – are we producing what industry needs in emerging workforce to ensure retention of existing and attraction of new industry</li> </ul>
Recruit New Talent to the Region & Retain Existing Talent in the Region	<ul style="list-style-type: none"> <li>Launch Internal &amp; External Marketing Campaign focused on Talent Attraction</li> </ul>	<ul style="list-style-type: none"> <li>Plan / Conduct sustained quality of life campaign with Marketing &amp; Communications Director</li> <li>Develop seasonal content / quarterly</li> <li>Host career signing day for local high schools and Tech/Community Colleges annually</li> <li>Co-host Big Techs/Little Big Techs industry open house tours annually</li> </ul>	<ul style="list-style-type: none"> <li>Expose local and external community to the breadth and depth of industry existing in the community</li> <li>Build a solid foundation for existing industry to grow and attract new industry to the community</li> </ul>
Recruit Military Veterans throughout the Region	<ul style="list-style-type: none"> <li>Promote Veterans' Employment Programs</li> <li>Develop Pipeline between area Military Installations to connect Employers to exiting members</li> </ul>	<ul style="list-style-type: none"> <li>Update inventory of available resources annually to provide to employers and veteran job seekers</li> <li>Connect with area installations quarterly to relay employer opportunities – what does Longview have to offer for work-life balance</li> </ul>	<ul style="list-style-type: none"> <li>Ensure 20% of vets separating from local installations relocate to our community</li> </ul>

## Response 5

- BRE Model
- Program Planning
- Community Assessment
- Social capital
- Roles of local leaders
- Survey design and implementation
- Visitation training
- Red Flag review
- Survey analysis and reporting
- Action team planning
- Program evaluation
- Community input and evaluation

Throughout the time in this BREI course my department has been developing a strategic plan for the various aspects of our Department. Myself and my team have been charged with developing a plan with BRE specifically. During this course I have attempted to work in some of the logic presented into this course into some of the the final edits of our BRE plan outlined below.

BRE follows the continuous model in our Department is practiced at a local government level in the US. Our BRE staff proactively connect with existing businesses to maintain relationships in an effort to build social capital, assist with identified growth needs, and better understand and support the overall business climate. BRE staff also broker resources designed to promote continued investment and job creation to benefit the residents of Norfolk.

The role of local leaders in our model is somewhat limited as it is primary driven by staff working in our local government. We have formerly briefed City Council on the program prior to launch along with our Economic Development Authority. The other touch point for local leaders is when we are working with a “top 10” employers we sometimes invite the City Manager to attend. Another touch point is following an expansion project where we invite City Council members to attend grand opening style events. After taking this course we believe there are likely additional ways to more regularly brief and get local leaders involved, specifically with our Economic Development Authority. This could come in the form of regular briefings, a BRE committee, and/or partnership on business outreach, leveraging their connections with local industry.

The local survey design we use is a series of questions the local BRE professional memorizes and incorporates into the visit with the business (sometimes in order, sometimes not). Each visits focuses on listening to the needs to the business and looking for opportunities to support retention and expansion. Following the visit, staff enters their notes into HubSpot CRM system and the questions into Survey Monkey (kiosk mode). Survey analysis is conducted at the end of the fiscal year with the use of Survey Monkey analytical tools. If trends are spotted that impact business climate, these issues are communicate to the Department Director and City Manager, along with recommendations, if applicable, for consideration for potential action.

Visitation training is conducted by senior staff and is similar to medical training using the see one, do one, teach one model. While this is done over several visits, not just “one,” the principle remains. Staff

also has access to a manual (that needs to be updated as it was created primarily during the COVID-19 outreach).

During visitation, BRE staff is looking for red (defined locally as issues that impact retention) and green flags (opportunities for new investment resulting in net new headcount or net new taxes). Our program team does not have an action team but depends on sector BRE staff to provide services directly. Those services include site selection and technical support in areas such as city process, exporting, marketing, grants, and financing connections to support business expansions that create high-wage jobs with benefits, new real estate, and investments in state-of-the-art machinery, tools and equipment. For business expansion and retention projects, BRE staff serve as the primary liaison to the Virginia Economic Development Partnership (VEDP) [the state economic development authority for the Commonwealth of Virginia], the Hampton Roads Alliance, and for the Virginia Enterprise Zone, along with other outside agencies to develop joint proposals and coordinate the collection of state and federal zones, grants, local location-based economic zones, and other local resources to focus on the retention and expansion of existing traded sector businesses operating in the city of Norfolk.

Program evaluation is conducted annually and measured against performance measures below. City Council then reviews the performance of the program and appropriates funding on a fiscal year basis. Additionally, for the last three months in the fiscal year, Department of Economic Development staff review all aspects of the BRE program with a focus on metrics and the makeup of our “Core Portfolio” of businesses that we will target for outreach to the following fiscal year.

The ultimate goal of our BRE visitation program is the protection and expansion of the employment and business tax base. Below outlines a snippet of our strategic plan and primary goals and metrics of our BRE program. I have also included our 3 year implementation plan for the benefit of others who are interested in understanding our city’s approach to the continuous BRE model.

## APPENDIX

Goal 1: Grow, support, and retain existing businesses - with a focus on traded sectors - generating new taxes and the creating high-wage jobs

Objective 1.1: Facilitate a minimum of two annual expansion and/or retention projects to retain/increase available job opportunities and tax revenue for Norfolk

Strategies:

- 1.1.1 Develop and proactively engage a tiered core portfolio of approximately 200-300 key business relationships to maintain, monitor, and market relevant retention and expansion resources
- 1.1.2 Broker internal and external wrap-around support to existing businesses
- 1.1.3 Utilize business intelligence resources to target companies with a noticeable trend toward job and/or physical expansion or are “at-risk” for potential relocation outside of Norfolk

Objective 1.2: Establish direct engagements with and provide relevant services to a minimum of 150 existing Norfolk businesses

Strategies:

- 1.2.1 Conduct direct outreach to existing businesses via cold calls, emails, and marketing to engage and establish/maintain relationships with existing Norfolk businesses; complete business research prior to outreach to customize engagement value proposition



1.2.2 Participate and support local business networking and sponsorship activities supportive of BRE outreach and engagement objectives

1.2.3 Leverage the tools made available via the department's marketing & communications team

Goal 2: Foster economic competitiveness through the promotion of our local economic zones and proactively soliciting business community feedback

Objective 2.1: Utilize the four (4) economic zones the Department of Economic Development administers/coordinates for Norfolk to assist with business attraction, retention and expansion efforts  
Strategies:

2.1.1 Incorporate the sharing of information about local zone benefits within the expansion and retention projects and BRE visits

2.1.2 Evaluate one local economic zone each quarter to ensure proper operation

Objective 2.2: Regularly solicit business community feedback to support a business-friendly climate  
Strategy:

2.2.1 Utilize a business climate survey during BRE visits and log into CRM system to identify trends impacting competitiveness related to City policy; recommend updates to local economic zones, policies or processes, as appropriate

Goal 3: Promote workforce development resources as part of business retention and expansion efforts; provide regular feedback and connect expanding employers, creating livable-wage jobs to Norfolk Works

Objective 3.1: Connect at least twelve (12) businesses per year to Norfolk Works for general workforce needs or to retain or support expanding businesses in Norfolk.

Strategies:

3.1.1 Collaborate with Norfolk Works to determine a core workforce portfolio of businesses for Norfolk Works to maintain for direct employment referrals or incorporation into community events, tours, etc.

3.1.2 Incorporate Norfolk Works overview and benefits during BRE visits as appropriate

3.1.3 Proactively introduce the Norfolk Works team to expanding businesses creating new jobs during project development, as appropriate

Program Dashboard Metrics

Facilitate of a minimum of two (2) annual expansion and/or retention projects for Norfolk per fiscal year  
Completed direct engagements and services provided to minimum of 150 Norfolk businesses; primarily focus on traded sectors

Record qualitative existing business feedback; make recommendations as appropriate  
Annual review of the four (4) economic zones (one zone per quarter)

Connect at least twelve (12) businesses per year to Norfolk Works for general workforce needs to retain or support expanding businesses in Norfolk.

	Year 1	Year 2	Year 3+
Core portfolio of existing businesses;	Review core portfolio of businesses; add/edit based on the most	Identify the feasibility of expanding the core portfolio with a focus on	Continue to update the portfolio based on business intelligence

target growth and “at risk” firms	recent business intelligence available	traded sector industries and relevant business intelligence; review resource allocation	and review resource allocation as related to the size of the core portfolio
1.1.2. Broker services and resources for existing businesses	Develop comprehensive set of primary and secondary grants, incentives & services (internal and external) applicable for a given business type to broker	Review the need to eliminate or create internal incentives/services to assist with business expansion & retention creating new taxes and higher wages jobs for the residents of Norfolk	
1.1.3 Leverage business intelligence (BI) to connect with expanding/relocating businesses	Inventory and/or implement existing and potential BI tools (evaluate the need for future budget requests)	Implement/review new BI tools, and discontinue products based on results. Begin new procurement processes as needed	
1.2.1 Conduct outreach and provide value-added services to existing businesses	Conduct direct outreach via cold calls, emails and available marketing tools; complete pre-research and customize outreach	Continue to establish new relationships with existing Norfolk businesses with a focus on traded industries, expanding and at-risk businesses; evaluate pre-research approach, including databases leveraged for effectiveness.	
1.2.3 Engage in business networking and related activities	Locate and participate in relevant networking opportunities or sponsorships aligned with and advancing BRE objectives and connecting with existing Norfolk businesses		
1.2.3 Incorporate marketing and communications and develop marketing campaigns	Incorporate dept. & city marketing into outreach, lead generation, zone promotion, and develop pilot campaigns	Evaluate previous campaign(s) and inquiries. Develop subsequent campaigns in aforementioned areas and budget for new sponsorships accordingly	
2.1.1. Incorporate economic zones into BRE visits and projects	Evaluate how and when zones being incorporated into expansions and BRE visits	Continue to incorporate information sharing about the benefits of local economic zones into BRE visits and expansion/retention projects	
2.1.2 Evaluate local economic zones	Evaluation of local zones each quarter to determine proper operation; recommend policy or code changes as necessary to maintain competitiveness		
2.2.3 Business climate survey/feedback	Evaluate existing survey/feedback tool(s) and better	Review/revise survey/feedback tools; review acquired data; provide recommendations as needed in support of a healthy business climate	

	incorporate into CRM as usable data; review collected data	(related to City of Norfolk controlled policies). Feedback trends related to non-City controlled policies will be referred to the appropriate agencies as appropriate.	
3.1.1. Develop a core workforce portfolio	Evaluate most applicable business types to utilize Norfolk Works services.	Determine a “core workforce partners” list consisting of businesses the BRE/Norfolk Works teams can regularly partner with to utilize potential referrals or participate in Norfolk Works events	Re-evaluate the “core workforce partners” each year to ensure the best mix of ‘core’ workforce partners.
3.1.2 Incorporate Norfolk Works into BRE visits	Determine which BRE visits are best suited to connect Norfolk Works with and if participation during or post-BRE visit is most appropriate.	Continue to evaluate how Norfolk Works is integrated into the BRE outreach and engagement process; set up meetings and facility tours for Norfolk Works staff with existing businesses as appropriate.	
3.1.3 Connect Norfolk Works with new/expanding business hiring	Connect expanding businesses with Norfolk Works (Norfolk Works will determine employment referral and training opportunities)	Continue to connect expanding businesses to Norfolk Works and evaluate future expansion projects with future job matching opportunities by utilizing data collected from previous pairings with expanding/new businesses.	

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## Response 6

### 1. Determine Scope

- a) Identify and create target industries/industry sectors
  - AgTech
  - Manufacturing
  - Aviation/ Marine
  - Information Technology
  - Distribution/Logistics
  - Life Sciences
- b) Develop and create business survey based on determined scope:
 

Draft survey attached

### 2. Program Action Team Development

- a) Develop task force of key leaders as leads for partner resource and to accompany on business visitation as needed including the following:
  - EDC St. Lucie Program Coordinator
  - Small Business Development Center
  - Indian River State College
  - St. Lucie Public Schools

- Executive Committee/Board Members
- County/City representative
- Community Partner representative
  - Boys and Girls Club of St. Lucie County
  - Project Lift
- Chamber of Commerce representative
- Trade Association representative
  - Treasure Coast Builders Association
  - Treasure Coast Manufacturers Association
  - Marine Industries of the Treasure Coast
- Workforce representative
  - CareerSource Research Coast

- b) Review program outline and develop meeting timeline to formulate program action team:
- Schedule quarterly update meetings
  - Schedule meetings as needed

### **3. Develop measurable outcome expectations of BR&E program**

- Learn about the current business climate
- Understand challenges and opportunities
- Create an action plan to support business success

#### **4. Survey and Business Visitation**

- Distribute survey (email, mail, print, social media, community outreach)
- Review individual responses and identify strengths and weaknesses; determine appropriate resource partner to attend visitation, if needed
- Schedule on-site visitation with businesses
- Determine post meeting actions items and document in business contact management system and/or one note (determine CMS)
- Review action items at program team meetings

#### **5. Program Outcome Analysis**

- a) BR&E coordinator identifies consistent themes of strengths and weaknesses; documents green and red flags
- b) BR&E Coordinator presents program outcome analysis to Program Team on core areas of strengths and weaknesses in the following core economic development areas: ie: site expansion needs and assistance, expedited permitting, vendor/supplier connections, peer to peer connections, funding assistance, workforce assistance, training grants, state/local grant assistance, recognition opportunities, City/County department navigation, healthcare/business costs, etc.
- c) Develop plan of action to address survey results with Program Team

#### **6. Outcomes presentation**

- a) Identify internal and external organizations for outcome presentation
- b) Create an easy-to-understand presentation focusing on key strengths and weaknesses to deliver outcomes; develop supporting material with a one-page infographic handout

#### **7. Monitor Program**

- a) Develop meeting schedule to review the measures and benchmarking to ensure project outcomes are being achieved



INDUSTRY + INNOVATION + LIFESTYLE

## BUSINESS OUTREACH SURVEY

### 1. Company Information

Company Name

Name

Title

Email

Phone

2. What are your top three (3) reasons for keeping or expanding your business in St. Lucie County?

- ☐ Cost of doing business
- ☐ Proximity to home
- ☐ Workforce availability
- ☐ Vendors/Suppliers
- ☐ Logistics
- ☐ Quality of housing
- ☐ Quality of life

Other (please specify)

3. What is the largest challenge facing your business? (select all that apply)

- ☐ Expansion needs
- ☐ Skilled labor
- ☐ Competition
- ☐ Capital costs
- ☐ Logistics
- ☐ Governmental regulations
- ☐ Workforce readiness

Other (please specify)

4. How many employees work at your St. Lucie location?

5. Please check the areas in which your current employees need training: (select all that apply)

- ☐ Managerial/Supervisory Skills
- ☐ Customer Service Skills
- ☐ Computer Skills
- ☐ Technical Skills
- ☐ Equipment/Machinery Operation Skills
- ☐ Mechanical Skills
- ☐ Specialized skills

Other (please specify)

6. Are you interested in grant assistance for training new/existing employees?

☐

Yes

☐

No

7. Do you have any plans for modernization, renovation or expansion? (if yes, please select all that apply)

- ☐ Facility Space
- ☐ Warehouse Space
- ☐ Office Space
- ☐ Parking Area
- ☐ Department, Division or Business Addition
- ☐ Expansion into adjacent space
- ☐ Expansion into a new building/site
- ☐ Expansion by acquisition

Employee growth

Other (please specify)



8. Are you facing any urgent issues that require immediate attention, such as relocation, closing, employee layoffs or expansion problems?

(If yes, please explain)

9. How can the Economic Development Council of St. Lucie County assist and support you?

10. May we contact you to schedule a meeting with a member of our staff to further discuss your survey responses?

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## Response 7

### Narrative of BRE program for Leduc County

#### Step 1: Background

Leduc County successfully applied for a BRE grant from Prairies Canada (formerly western diversification). This grant is 2 parts, but both are connected to BRE. The first component is repurposing an old recreation event centre into a business entrepreneur centre, and the second is to hire an EDO to develop and implement a BRE program. The County hired a consulting firm, specializing in BRE to conduct a business survey. The primary collection was via phone calls direct to the business community. The survey was also on the website. 325 surveys were collected, and the data was compiled for reporting both to Council and the community. A second company was hired to support the BEC and work with companies in agri-food to fill the spaces for kitchens, co-work, offices and warehousing/sales.

**Step 2: Planning:** Because our initial survey was conducted for us, our program starts a bit differently than most.

Follow-ups: We are now in the follow-up phase of the BRE program. This is being conducted by myself with a goal of 5-7 business visits a week. We are finding that with the direct visits by a staff member, that the topics can vary beyond the survey follow up questions and can take between 45-90 minutes per visit.

The initial target businesses are those that were flagged by the consultant in one of the following areas:

Expanding, moving or closing their business within the next 12 months  
Identified labour or training challenges  
Identified as a “yes” to being involved in a mentorship group

These flagged businesses will be further coded as:

Support needed now – and resources provided  
Future follow-up for labour support programming.  
Info shared on Peer mentorship program

### **Step 3:**

We need to build social capital and awareness into our plan. A new economic development website with a section on BRE activities is in the works. Through the survey, we have collected interest in a BRE newsletter to continue building the champions and communications for our program beyond just the survey. Marketing our BRE programs, such as a peer mentorship forum, training, and supporting resources, will align with our KPIs of businesses contacted, supported and maintained or expanded.

Having a physical space for businesses to gather, share and learn with events that are both county and partner-led will further support the business community. We are looking to partner with the chamber, community futures other communities for our training, meet-ups and events.

Regular reporting to council and asking for feedback from council, planning and development (new permits) will help us continue to meet with new or expanding businesses and gather the same data as time goes on.

Using our logic model from week 2 will help us keep the activities and outputs aligned with our outcomes as we grow the BRE program and add new data requests to the survey.

### **Step 4 2024 goals**

- Continue BRE survey collections and follow-ups. Set a yearly goal for a number of new and follow-up visits scheduled.
  - Have scheduled newsletters to reach 500 subscribers, with relevant business news and info.
  - Continue to expand programs and resources based on feedback and business needs.
  - Host and partner on at least 7 business-focused events, forums and training events per year.
  - Continue to grow partner networks and functions in the BEC (bus and entrep centre)
  - Strive to have the leasable and working spaces full by end of 2024.
-

## Response 8

The City of Charlottesville currently maintains a BRE/business visitation program but has worked to refine the organization and implementation of it. The Business Visitation (BV) program is designed to provide City businesses with a single point of contact to help them find solutions for today's business issues. Currently, the Program seeks to accomplish the following:

- **Proactively connect with Charlottesville businesses** (private-sector: sole-proprietors, micro enterprises, small-to-mid sized businesses, and large employers) to determine ongoing needs and challenges.
- **Offer immediate business retention solutions** by utilizing City, State, and non-profit resources, emerging external grants and loans, and providing technical assistance to Charlottesville businesses, including non-financial assistance
- **Support recovery** by maintaining relationships with local businesses by following up quickly and delivering exceptional customer service in an ongoing disaster situation; businesses deemed "at-risk" will be followed up with regularly until the crisis is resolved and during the recovery period
- **Inform policy decisions**; information collected via conversations will help to identify trends and inform policy decisions for the City Manager and City Council.

Historically, the City has utilized the Continuous model to conduct our BRE visits. Our staff consists of the Economic Development Director, two Business Development Managers, and one Workforce Development Manager. As discussed in the first session, the goal of the continuous model is to build ongoing and long-lasting relationships with City businesses. One of the main areas that the City falls short in is the utilization of partners in our BRE program. While we are quick to introduce businesses to our various partners (SBDC, VEDP, Chamber, etc.), we don't use these partners in the BRE program. It is our goal to development these relationships so that when a partner meets with a business, the information is relayed back to our office so we're kept in the loop. We intend on strengthening this relationship by developing an educational program designed to introduce our partners to the BRE model and to ensure they understand our expectations and desires.

Our office started working on a BRE manual prior to undertaking the BRE-C course. After being introduced to the Halifax Partnership BRE Program Manual, we are seeking to modify and add to our guidelines. The draft document is included in the email.

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# **Business Visitation Program Guide**

Business Attraction, Retention & Expansion for Charlottesville Businesses



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# Overview: Defining the Goals

The Charlottesville Office of Economic Development's Business Visitation (BV) Program is designed to accomplish the following:

- **Proactively connect with Charlottesville businesses** (private-sector: sole-proprietors, micro enterprises, small-to-mid sized businesses, and large employers) to determine ongoing needs and challenges.
- **Offer immediate business retention solutions** by utilizing City, State, and non-profit resources, emerging external grants and loans, and providing technical assistance to Charlottesville businesses, including non-financial assistance
- **Support recovery** by maintaining relationships with local businesses by following up quickly and delivering exceptional customer service in an ongoing disaster situation; businesses deemed "at-risk" will be followed up with regularly until the crisis is resolved and during the recovery period
- **Inform policy decisions**; information collected via conversations will help to identify trends and inform policy decisions for the City Manager and City Council.

## Program Goals

The BV program is designed to provide City businesses with a single point of contact to help them find solutions for today's business issues. In discussions with businesses, please ensure the below objectives of the program are highlighted:

- **Solutions to Business Growth Barriers**
  - Confidential meetings to understand challenges faced by the business
  - Staff serve as liaison with City offices, agencies, and officials
  - Business & regulatory assistance
  - Specialized assistance with business challenges
- **Assisting with Business Expansion**
  - Site/Building selection assistance
  - Database of available properties for sale or lease
  - Permitting/site plan guidance and application support
  - Information on local, state, and federal incentives
- **Valuable Resource Connections**
  - Labor market information and analysis
  - Workforce development resources
  - Minority business resources and programs
  - Taxes and utility costs
  - Grants and loan programs

## Core Portfolio + Target Sectors

In addition to the standard business visits that staff conducts, OED has developed a separate “core portfolio” of businesses. Many of these businesses are vital to the Charlottesville community and would have a significant impact on the workforce and the City’s tax revenue if the business closed/relocated. This list is derived using several different methods, including:

- ES202 Data (Virginia Employment Commission)
  - *See Appendix A*
- Target NAICS Codes
  - *See Appendix B*
- Top 25% tax revenue-generating companies (Commissioner of Revenue)
  - *Must be requested*
- Media reports
  - *announced expansions, financing deals, major investments, awards, etc.*

## Outreach Efforts

To offer tailored solutions and gain relevant business intelligence, staff will attempt to gain information about the following information listed below using open-ended questions. Questions are not expected to be asked all at once but are intended to serve as a guide for discussion.

### Key Information

1. Discuss relevant grant / loans / services to assist small businesses
2. What are the business' key challenges?

### Workforce

1. In the past 12 months, has the business hired, maintained, or reduced staff?
2. In the next 12 months, does the business expect to hire, maintain, or reduce staff?
3. Has the business had difficulty locating qualified employees?
4. Has the business previously utilized the Downtown Job Center?

### Real Estate and Capital Investment

1. Will the business need additional space for their operations over the next 24 months?
2. If the business were to expand their facility, could they add-on to/expand within their current facility/nearby, or would they need to relocate?
3. Has the business made any new investments in the past 12 months?

4. What types of investments were made?
5. Is the business planning on making any new investments in the next 24 months?
6. What types of investments?

### **Exporting / Supply Chain Attraction**

1. Where are the business' customers located?
2. Does the business directly or indirectly derive 51% or more of its revenue from out-of-state sources?
3. Are there suppliers or customers that the company would benefit from having in closer proximity?

### **Incentives**

1. Is the business presently taking advantage of any local or state incentives?
2. Is the business located in any of the following location-based zones?
3. Is the business aware they are located in a location-based zone?

### **Business Climate**

1. Have you interacted with any City Departments (or constitutional offices)? If yes, which department(s) and could you tell us about your experience?
2. Overall, has the business had a positive/neutral/mixed/negative experience with City Departments and constitutional offices?
3. What is your overall opinion of Charlottesville as a place to do business?
4. Are there any projects or initiatives the City should consider in order to improve the business climate?

## **Response Time & Warm Referrals**

If a question cannot be answered during or a referral needs to be made, ask the business owner if you can call/text/email them back with what they need. Contact the business owner/manager back as soon as possible; but not longer than 24 hours following the call.

Try to avoid just giving the business owner/manager a number to call (cold referral); whenever possible, try to introduce the business owner/manager, by email, group text, or conference call, or by calling the resource first, and then having the resource contact the business owner/manager (warm referral). Finally, with any referral: it is important for the Outreach team member to follow up with the business owner/manager to ensure they got the resource they needed and minimize referrals/businesses “slipping through the cracks.”



## After the Visit

Immediately following the business visit, take the below actions:

1. Log the visit in InfoFlo.
  - a. OED uses InfoFlo as our CRM platform. If a business does not have a profile, make sure to create one by inputting all relevant data as best as possible.
- 2.

## Appendix A: ES202 Data

The Virginia Employment Commission offers workforce data (ES-202) for purchase. OED purchases this data for the 1<sup>st</sup> and 3<sup>rd</sup> quarter of every year.

## Appendix B: Target NAICS Codes

The Office of Economic Development has developed a list of Target NAICS Codes that closely aligns with the Virginia Economic Development Partnership's (VEDP) list of [key industries](#). The list is further supplemented by high-revenue NAICS Codes in Charlottesville as determined by the Weldon Cooper Center for Public Policy [taxable sales database](#). Additional NAICS codes can/will be added as necessary.

### Information Technology

- 518210 Computing Infrastructure Providers, Data Processing, Web Hosting, and Related Services
- 541330 Engineering Services
- 541511 Custom Computer Programming Services
- 541512 Computer Systems Design Services
- 541513 Computer Facilities Management Services
- 541519 Other Computer Related Services
- 513210 Software Publishers
- 519290 Web Search Portals and All Other Information Services
- 541690 Other Scientific and Technical Consulting Services
- 541990 All Other Professional, Scientific, and Technical Services

### Life Sciences

- 325412 Pharmaceutical Preparation Manufacturing
- 325414 Biological Product (except Diagnostic) Manufacturing

### Food & Beverage Processing

- 311 Food Manufacturing
- 312 Beverage and Tobacco Product Manufacturing

### Manufacturing

- 31-33 Manufacturing

- 314 Textile Product Mills
- 316 Leather and Allied Product Manufacturing
- 323 Printing and Related Support Activities
- 325 Chemical Manufacturing
- 334 Computer and Electronic Product Manufacturing
- 337 Furniture and Related Product Manufacturing
- 339 Miscellaneous Manufacturing

### **Research and Development**

- 541713 Research and Development in Nanotechnology
- 541714 Research and Development in Biotechnology (except Nanobiotechnology)
- 541715 Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)

### **Corporate HQs**

- 551114 Corporate, Subsidiary, and Regional Managing Offices

### **Corporate Services**

- 541214 Payroll Services
- 5413 Architectural, Engineering, and Related Services
- 5415 Computer Systems Design and Related Services
- 5416 Management, Scientific, and Technical Consulting Services
- 541611 Administrative Management and General Management Consulting Services
- 541612 Human Resources Consulting Services
- 541613 Marketing Consulting Services
- 541618 Other Management Consulting Services
- 541614 Process, Physical Distribution, and Logistics Consulting Services
- 5418 Advertising, Public Relations, and Related Services

### **Miscellaneous**

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**Response 9**

As the Rural Account Executive with the Halifax Partnership, I am a part of the operational team that meets with business, conduct a business survey, and collect and input data on the businesses. I also network and meet with community stakeholders and/or action team members when finding solutions to help individual businesses address individual business needs.

Understanding that the business Retention and Expansion program is an economic development tool that animates strengthening businesses and communities through collecting data and the distribution of key information generated from the data leading to community economic development and stronger individual businesses important. A successful BRE program is achieved by engaging key stakeholders, businesses, community partners, and local politicians(inclusive of social capital). Through this engagement business survey can be developed that will be used to measure key indicators and factors. This data can be converted into information that can be distributed back to businesses, communities, stakeholders, local politicians, and community partners and can lead to meaningful local and regional economic development.

If I were to set up a specific BRE program in the rural Halifax Regional Municipality, I would go through the following process:

1. Examine the conditions that are impacting business and the economy within the various communities with rural HRM. This is achieved through having conversations and engagement with key community stakeholders such as local chambers, business associations, business improvement districts, politicians, environmental groups, recreational groups and other stakeholders.(Note: community capital consisting of infrastructure and natural resources can be identified. In addition, Social capital inclusive of the bridging and bonding components can also be identified too.)
2. Recognizing that there are three types of BRE visitation programs (Volunteer led, Paid Professional led, and Segregated/Continuous led programs), it will be important to

determine the financial and human resources and capacity needed to successfully conduct the proposed BRE program. Optimally, given the geographic size, population, and diversity of economic activity in rural HRM, a Continuous / Segregated approach would be the preferred model.

3. Establishment of the BRE Team(s) will be required, which under a Continuous or Segregated model would consist of:
  - a. An Operational Team- which interfaces with the business and uses the business survey too to collect data. The operational team can also make referrals to action team members when specific issues are identified during a BRE business visit.
  - b. Management Team- This team analyzes the data as it is recorded and is able to generate information and reports that can be presented to community stakeholders, politicians and the action team. The Management team may also establish a response team if specific data indicates a specific issue is happening in a community that is of critical importance. For Example, if access to broadband is leading to business shutdowns in a particular region, then a “Broadband response team” might be established to examine and expedite a resolution to the problem. The management team is also responsible for marketing and media relations.
  - c. Action Team- This team often represents the key stakeholders and partners that have an interest in the information generated through the BRE program. They can provide key information to the management team. They can also receive or provide referrals to the operational team.
4. The next step in establishing a local BRE program will be the development of the Business Survey tool which will be used by the operational team when conducting individual business visits. There are a number of BRE Surveys that exist and are available through online sources or can be shared through BREI. It is also possible to develop an individualized survey. It is important to develop a survey using a combination of open-ended and closed-ended questions. The open-ended questions allow for a broader discussion on a specific issue and are helpful in more qualitative statistical data. Closed-

ended questions are questions with a “yes or no” answer or consist of a multiple-choice answer. This kind of question will lead to more quantitative data.

At this point, it is also important to consider the statistical relevance of the data being collected and to understand quantitatively how many BRE visits are required to validate the data that is being collected in order to be able to report back to the community stakeholders relevant and reliable information.

5. Once the BRE Team(s) have been established and the initial survey developed it is important to market the program in advance of meeting individual businesses. The marketing initiative can be done through the Action Team members, community and business partners and industry associations. Through outreach and presentations to politicians, stakeholder organizations and community leaders. Promotional material can be sent to specific industries and businesses through regular e-mail or through social media posts and shares. It is imperative that businesses are aware of the BRE program in their community this will make it much easier to get a positive response when setting up a BRE visit and when doing the survey. In rural HRM, it is also important to identify specifically the account executives that will be doing the survey work. If individual businesses expect a visit from a specific individual, then they will often be more receptive and open.
6. Upon successfully marketing the BRE initiative throughout the targeted community of rural HRM, it is now time for the operational team to start the process of meeting businesses within the community. The visitation process can be broken into five stage process:
  - a. Premeeting prep-Once a business meeting date has been set, it is important to get some initial information on the business by possibly looking at the business website and social media and trying to understand the business prior to meeting with the owner or management.
  - b. Firm visit- Meeting with the business owner or management. Though you are trying to complete a survey, try and make the meeting conversational. In this regard, you will probably get more pertinent information. A conversation about someone’s business is often more appreciated than going through a step-by-step survey.

- c. Immediate Follow-up-Following the initial visit to the business by the account executive and after the information has been analyzed it is important to report back to the business on any opportunities or programs that could benefit the business.
- d. Data Analysis and Recommendations- The Management team will distil the information collected during the BRE process and will present the data in a report format that can be presented to the Action Team, Stakeholders, Politicians, and others.
- e. Commencement meeting and Implementation

Note: During the visitation process the operational team will make referrals to specific action team members as individual business issues are being identified. The operational team will also receive referrals from action team members as well they may be aware of specific issues facing businesses that they know might benefit from a BRE visit.

- 7. Once the BRE visits have been completed and the data collected Management Team is responsible for presenting information from the data in a report that will be made available to the action team, business participants, other community stakeholders, local politicians and other beneficiaries of the information.
- 8. Program Evaluation process is the final step within a BRE program. During this phase, it is important to go back to the logic model and review if the short-term objectives have been achieved and if the information resulting from the collected data can result in actions that will lead to the program reaching its medium and long-term results.

In conclusion, the Business Retention and Expansion program is a very useful economic development process which requires community buy-in, support and inclusion. Data that is collected must be useful and meaningful to all stakeholders and result in development that is useful to all relevant community partners.

Personally, I have found the BRE program educational and useful as the Rural Account Executive working with the Halifax Partnership.

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## Response 10

### I. Introduction:

The purpose of this Business Retention and Expansion (BRE) Visitation Plan is to help TCPEP build a strong and sustainable business ecosystem. TCPEP will work to identify the needs and challenges facing local businesses, and will develop strategies to support their growth and success.

### II. Objectives:

The primary objectives of this BRE Visitation Plan are:

- To increase the number of successful businesses in the area.
- To retain existing businesses and prevent them from leaving the area.
- To support business expansion and growth.
- To create a supportive and proactive business environment that encourages investment and job creation.

### III. Methodology:

The BRE Visitation Plan will be implemented through a series of steps, including:

- Identification of Businesses: TCPEP will conduct a survey of local businesses to identify their needs and challenges.
- Planning and Preparation: Based on the results of the survey, TCPEP will develop a plan of action to address the needs of local businesses.
- Visitation Program: TCPEP will help implement a visitation program, where representatives will visit local businesses to discuss their needs and challenges, and provide support and assistance where needed.
- Follow-Up: TCPEP will follow up with businesses to ensure that their needs are being met and to track the progress of their growth and expansion.

### IV. Support Services:

TCPEP will provide a range of support services to local businesses, including:

- Business counseling and technical assistance
- Access to financing and funding opportunities
- Networking and collaboration opportunities with other businesses and organizations
- Support in accessing government programs and incentives
- Training and development opportunities

### V. Evaluation:

- The BRE Visitation Plan will be evaluated on an ongoing basis to measure its effectiveness and make any necessary improvements. The evaluation will focus on:
- The number of businesses visited and the level of engagement with local businesses
- The level of support provided to local businesses and their level of satisfaction with the support received
- The number of businesses that have expanded or created new jobs
- The overall health and growth of the local business community.

#### VI. Conclusion:

The Business Retention and Expansion (BRE) Visitation Plan will be a comprehensive approach to building a strong and sustainable business ecosystem. By working closely with local businesses, TCPEP can help to create an environment that supports growth and expansion, and helps to retain and attract businesses to the area.

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## Response 11

The Truro&Colchester Partnership for Economic Prosperity (TCPEP) will pull community leaders, key stakeholders, and partners together to launch a business retention and expansion program for the Truro Colchester region. This program will serve to ensure that (1) business owners in the region are and feel fully supported by the community, (2) business growth opportunities are fully optimized, (3) business pain points that can be addressed are addressed in a timely fashion, and (4) our region develops a reputation for supporting and championing our entrepreneurs at every turn.

The desired outcomes of the BRE program will be as follows:

1. A growing business community that is and feels fully supported by the community.
2. A business development support engine to help address pain points and solve problems quickly.
3. A business community that feels confident that it can achieve its full potential within our region.

Outputs will include:

1. Hands-on, free, expert and objective consultative support of business owners.
2. An accelerator program for high potential businesses.
3. Regular touchbases with business owners to track progress.
4. Report of survey results.
5. Labour Skills Needs Audit.
6. Responsive Action Plans arising out of that analysis.
7. A community Action Team to address macro challenges facing multiple businesses.

Inputs:

1. Project scoping.

2. Hire a market research firm to help design survey, including labour skills needs audit, and conduct necessary analysis.
3. Complete comprehensive regional business directory.
4. Sector prioritization based on Sector Opportunity Assessment already underway.
5. Positioning sessions with stakeholder groups to socialize BRE concept and functions.
6. Situational Analysis (benchmark) of economic landscape, key influencing factors, and possible KPIs.
7. Preparation of background materials, surveys, and orientation of (staff) surveyors.
8. Face to face interviews. (Continuous/segregated model)
9. Documentation and input (into Insightly) and analysis of both internal and external factors impacting businesses.

#### Action Plan

Action	Owner	Target Completion Date
Scope Project	TCPEP BD Team	April, 2023
Hire market researcher	CEO	April , 2023
Design survey instrument(s)	CEO and research consultant	April, 2023
Complete Business Directory	CBL and contractor	April, 2023
Prioritize sectors	TCPEP BD Team	April, 2023
Conduct orientation sessions with stakeholders/partners/volunteers*	TCPEP BD Team	May, 2023
Conduct secondary research on current situation (macro)	TCPEP BD Team	May, 2023
Schedule client engagements	TCPEP BD Team	May, 2023
Client initial engagements	Action Team	June, 2023
Data input	Action Team/Researcher	June-September, 2023
Survey analysis	Researcher	September, 2023
Follow-up sessions with stakeholders and partners to review results and key themes, and to collect anecdotal and qualitative data.	TCPEP BD Team	October, 2023
Develop Action Plans	Action Team	October-November, 2023
Client follow-ups	Action Team/TCPEP BD Team	November, 2023-June, 2024
Regular (quarterly?) client engagements to track progress	TCPEP BD Team	November, 2023-June, 2024
Engage community leaders to address macro pain points	Action Team	June, 2024
Select clients for Accelerator Program	TCPEP BD Team	June, 2024
Present results and impact on BR&E program at AGM	CEO/BDO	June 2024
Regular Open Houses to build relationships among	TCPEP BD Team	June, 2024 and ongoing

stakeholders/partners and business owners.		
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\*Action Team Volunteers may include TCPEP Staff, CBDC, Futurworx, BDC, ACOA, MentorsPlus, and representatives of other like-minded organizations.

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## Response 12

### **BUSINESS RETENTION & EXPANSION PROGRAM ELEMENTS OUTLINE (Staff processed – no volunteers)**

#### ▪ **SURVEY QUESTIONNAIRE**

- Receive input from EDC Board and City Council to determine the vision of the program.
- Draft survey instrument
- Provide to EDC Board and City Council for review and sample completion
- Process samplings into data to review if any revisions need to be made
- Finalize survey instrument

Must make sure questions are directed to receive data-transferable information, not open-ended and random responses.

#### ▪ **BUDGETING**

- Determine what supplies, equipment, education, time, consultants, contractors, volunteers, personnel, professional fees, software, etc. will be necessary to complete the project
- Ensure all necessary resources are attainable

No need to begin a program that cannot be completed due to lack of resources.

#### ▪ **BUSINESS VISITATIONS**

- Receive input from EDC Board and City Council to determine which businesses will be visited
- Prioritize business list
- Accumulate any missing contact information for the businesses on the list
- Research each business sector and each specific business to be knowledgeable for your visits
- Accumulate area census data and any other necessary assessment data relevant to the business community

There is no way 1 person can visit all businesses, so prioritization is of the utmost importance.

#### ▪ **MARKETING & OUTREACH**

- Develop marketing plan
- Develop participation marketing materials
  - Ensure any necessary prints will be received in a timely manner
- Develop project calendar for ease of setting up and management of appointments
- Establish and create website, social media, newspaper, and email information to be provided
  - Create digital images, files, documents, information
  - Create a deployment plan, including dates for information to be released
- Determine start date
- Set up local speaking engagements

A good marketing program will help to educate the citizens and the business community so they have a good understanding of the purpose of the program and the importance of their participation. Get them excited about the program.

- **SURVEY IMPLEMENTATION**

- Send out introduction and participation request letters
- Follow up with call to business contacts to receive their acceptance or declination
- Set up appointments with business contacts
- Complete visitations
- Review survey for any red or yellow flag issues to address immediately
  - Utilize an instrument similar to the “Red Flag Follow up Worksheet” provided in this training to determine immediate steps needed to assist with urgent needs
  - Follow up as quickly as possible

Having established relationships with the C Suite officials of the businesses is greatly important. Our businesses must know firsthand that we are here to assist where needed to ensure their success.

- **SURVEY DATA**

- Compile responses to survey
- Categorize responses into types of concerns
- Determine how deep the responses will be drilled down

Keep resulting reports the least complicated they can be, relevant to the audience to which it will be provided/presented. No need to over complicate, people will not want to spend their time having to figure out what the data means, it should be clear and concise.

- **ACTION PLANNING**

- Determine long-term, medium-term, and short-term outcomes
- Utilizing a worksheet like the BR&E Action Plan Worksheet sample provided in this planning, develop an implementation plan for short-term issues and determine priorities on longer-term issues
- Gain EDC Board and City Council backing regarding the final action plan

Create clear and sustainable actions and goals, realizing this process will likely take a few years to complete.

- **PLAN IMPLEMENTATION**

- Celebrate the end of the planning stage with community and participants
- Hold quarterly program reviews to ensure the program remains on track and continue to evaluate significance
- Keep EDC Board and City Council apprised of progression
- Release periodic updates for community awareness throughout the long term

Keep everyone informed on a regular basis so the perception is not that the program is not being completed.

\*\*\*Communication is of the utmost importance. Inform the EDC and City leaders, inform the business leaders, inform the public. **Perception is reality** – if people do not see/hear updates it will be perceived as a dead project.\*\*\*

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## Response 13

The Municipality of the County of Kings had a small business survey program in place a number of years ago that was discontinued due to staff turnover and, eventually, the vacancy of the Economic Development position due to Covid-19. That leaves the opportunity to develop a new program from scratch, taking into account learnings from the old program.

There are a couple of key considerations in developing a BR&E program for the Municipality. First, the Valley Regional Enterprise Network (Valley REN) already runs a BR&E program, and the Municipality contributes the lion's share of the funding for the REN. Any BR&E program the Municipality were to create could not encroach on the work the REN does, both from a relationship perspective (with both businesses and the REN) and from a fiscal responsibility perspective (paying for the same work twice). The second (and related) consideration is that I am a staff of one. It is unlikely that Council would approve additional resources to run a second BR&E program, and I have other responsibilities. Any program would have to be small in scale and specifically targeted to generate value for the Municipality.

A BR&E program implemented by the Municipality would most likely resemble a Continuous Model, as it would likely happen in conjunction with other work and lack a reporting component. A BR&E program run by the Municipality would likely focus on small, home-based businesses, leaving the “big fish” for the REN. Our outreach could be through municipal communications such as e-newsletters, through our regular district meetings with Councillors and the Mayor, through our tax bill mailouts, or through targeted outreach meeting, either individually or at town hall style meetings.

The Municipality is limited in the supports we can provide to businesses by the Municipal Government Act, so our efforts would likely be focused on providing infrastructure, cutting red tape, reviewing policies and by-laws, and lobbying other levels of government. Otherwise, we would likely direct businesses to the organizations and programs that could help them better (CBDC, REN, Chamber, Invest NS, ACOA, etc).

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## Response 14

At the Truro & Colchester Partnership for Economic Prosperity (TCPEP) we have been incorporating one on one visitation with clients for a few years now. However, we haven’t had a formal structure that has been written down for guidance and optimal implementation.

Our first steps for implementing a formal BRE visitation program at TCPEP will first include proper program planning. In taking the BREI course we will utilize the four (4) components to program planning to guide us in deciding how best to plan for the implementation of our BRE client visitation program. These will include **validating** the feasibility of such a program within our region and structure and then determining the best **utility** of the program (i.e. our distinct regional issues needing to be addressed). We are already in the process of engaging stakeholders for determining the **proprietary** nature of our program and that it is aligned well with our regional stakeholders in the business community. We want to be critical and constructive for what has worked well from our existing service delivery and how we can improve on the **accuracy** of delivery of our services via a more formal BRE visitation program.

After learning about the **logic model** in our BREI course I believe that we can implement this for the new TCPEP client visitation program as it will help us to more logically connect the proper **outcomes** to pursue by the **activities** we choose and resources we specifically determine to put into the program.

I have been trained on **SMART objectives and goals** throughout my career, so this is a philosophy we have already included in our process, so these will continue to be a focus in our new visitation program. The TCPEP program will tweak our **Key Performance Indicators** based on stakeholder feedback and our logic model work, but we do believe our current KPIs will most likely be in-lign with the needs of our region, economic development stakeholders and ourselves internally.

We also need to update our local business community research and data analysis, so we have been looking at some of the EMSI data that was uploaded via the BREI course/website (i.e. **Truro NS Occupation and Jobs data**). We also have been sourcing some available data from our local partners (i.e. Chamber of Commerce)

and we have purchased a database specifically with business growth and expansion data in-mind. This is a database called gazelle.ai.

I learned a lot from the BREI course on who to source information and data from, how to **design and implement surveys**, and how best to interpret and **analyze the data** obtained. We will use the **red flag review process** to best determine our priorities.

One area where TCPEP needs to improve greatly is on the **marketing of our program** and services. This will be a heightened focus once we develop our new BRE client visitation program. We will also need to measure where best we have impact on our identified client(s) focus and how best to market our services to this priority group. TCPEP is tasked with supporting any and all businesses in our region, however, for optimal impact on the finalized KPIs we agree to we need to also identify high-impact sectors for achieving as much as we can on the local economic development front in Truro-Colchester.

An important activity inline with the development of our new BRE client visitation program is engaging our key stakeholders in providing input into our 3-year strategic plan. We are in the midst of preparing for this stakeholder engagement and will always be an organization that keeps **community input and implementation** feedback a core focus of our growth.

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## Response 15

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## Response 16

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## Response 17

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## Response 18

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