

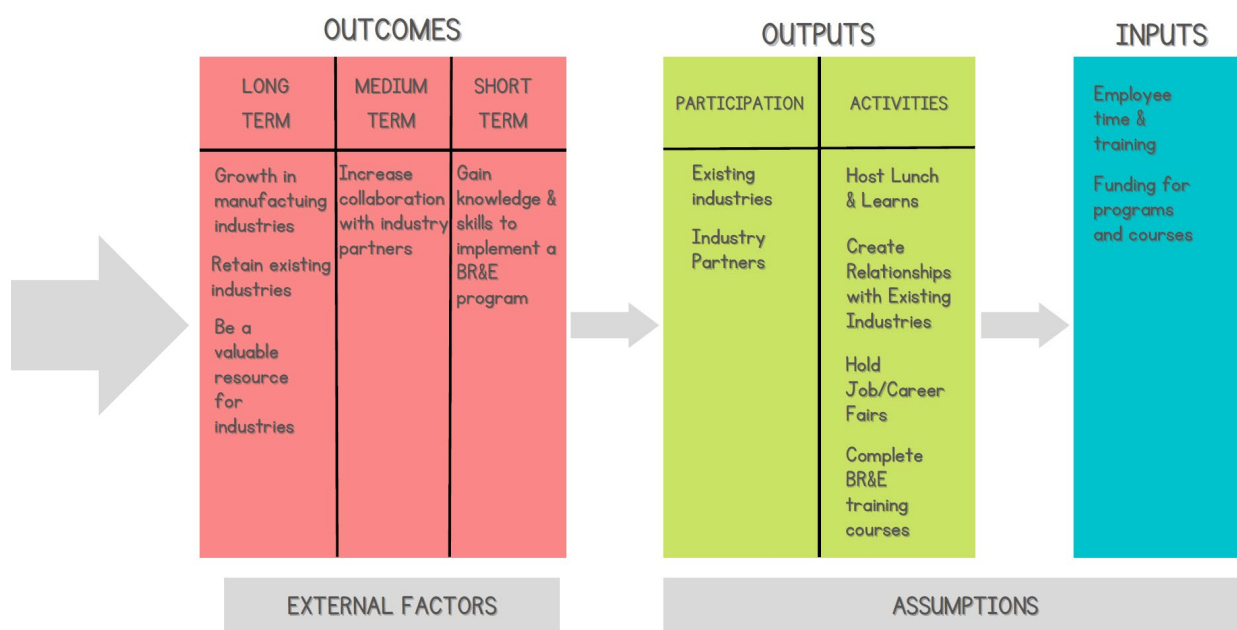
## Fundamentals Course Homework

### Session 1

In this session, we've talked about developing a plan or roadmap for the implementation of a BR&E program. Given the planning model shown on Slide 9 of the presentation in Section 3, describe your (or your EDO's) vision of the outcomes, outputs, and inputs required to create an atmosphere of success for the program. Note that we're not asking for specific numbers (i.e., budget line items, numbers of employees, etc.), but rather a narrative of what should be considered when addressing each component of the planning model.

Due by the beginning of the July 14, 2022 session.

### Response 1



### Response 2

#### Outcomes

As Charlottesville embarks on a strategic plan rewrite in the first half of 2023, we have been working to develop short-, medium, and long-term outcomes for our department and the business community at large. Being a college town with limited greenspace, we mainly focus our economic impact to retail, food service, and traded-sector businesses. Our office has a BRE program, but it is still getting off the ground. One of the main benefits to developing this program is the strengthening of the Charlottesville business community, which greatly and tangibly impacts the surrounding population.

## **Outputs**

Working to connect City businesses to the appropriate resources is the ultimate activity that needs to take place as part of our BRE program. Oftentimes, the locality portrays itself as having all the answers, which results in both the department and the business suffering. Our office does not claim to know everything, so we are quick to connect businesses to the appropriate local, state, and federal resources (SBDC, VEDP, etc.).

## **Inputs**

Economic development is a relationship-driven industry, regardless of the locality. Charlottesville is committed to investing numerous hours of staff time to build those relationships with City businesses and companies. Our office currently has 3 individuals dedicated to economic development, but only one (myself) dedicated to performing BRE activities. Investing in additional training (and potentially staff) for BRE efforts is key. In addition, our office uses very basic technology to conduct our BRE visits and track information. Our CRM platform is not suitable for our current (or future) BRE program, so it is paramount that staff upgrade the technology to keep up with the program.

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## **Response 3**

Situation: Growing and expanding the traded sector businesses within our city's industrial/commercial parks.

Outcomes: Our department's long term goals are to strengthen the conditions for traded sector businesses to grow and expand within our city, even as the corridors continue to provide a limited amount of space and availability of industrial-zoned acreage. The growth of these traded sector businesses will allow us to improve the hiring of Norfolk citizens to higher wage jobs. The medium term goals are to facilitate retention and expansion projects within the next fiscal year, meeting the minimum required job and capital investment necessary to meet project announcement parameters. The short term goals are to ensuring we're meeting with enough businesses to develop a clear understanding of the market trends, address topics that could prevent business and job growth in those areas, and ultimately determine which businesses are prepared to reach project completion.

Outputs: Once we've established defined geographic boundaries for each industrial/commercial park, we'll then confirm data points, such as company history, product type, exporting history, job growth or declining trends, economic zones, and primary points of contact. From this data, we will work to anticipate those companies most likely to grow and expand within the next quarter, six months, year

and 24 months. Based on those expectations, we'll develop a core portfolio of businesses with which to contact, in order of expected growth. We'll begin reaching out via direct phone, email, mail and referred communications to schedule introductions, meeting and tours.

Inputs: Work with our department's Business Intelligence team to obtain necessary data for creating a game plan to targeting businesses within our industrial/commercial parks. Specifically traded sector businesses within the 8 parks, which also coincide with our Enterprise Zones.

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## **Response 4**

### **Vision**

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

#### **(INPUTS)**

- 1) offering resources
- 2) implementing strategies that strengthen businesses and industry sectors and
- 3) providing connections among potential partners, customers and supply chains.

#### **(OUTPUTS)**

In terms of participation, we would focus on existing businesses within Washington County and utilize a wealth of partners including Brenham Community Development, Brenham Economic Development Foundation, elected officials, city/county staff and the three local Chambers. We would gather intelligence for support and growth of the business.

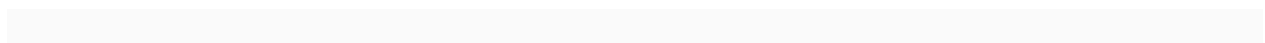
#### **(ACTIVITIES)**

The activities chosen include

- Business visitation – focus on top 25% of businesses (established by # of employees and taxable value of the property) within a two-year period and other businesses as needed.
- Surveys – a pool of questions will be developed and the surveyor will tailor questions to specific businesses as appropriate
- Resources – Businesses always need resources and the business visits will serve to share the website placeholder (BrenhamED.com) as the main resource receptacle.

#### **(OUTCOMES)**

1. (Short Term) Establish healthy (communicative) relationships between local businesses and local government
2. (Med Term) Become a trusted partner to a business who is willing to provide referrals for other economic development targets
3. (Long Term) Assist companies to locate, stay and expand their business in the community



## Response 5

Inputs What we will invest	Outputs		Outcomes - Impact		
	Activities - What we will do	Participation – Who we will reach	Short Term Results	Medium Term Results	Long Term Results
External consultant	BRE business survey	325 businesses surveyed	Learning	Behavioural Action	Ultimate Impact
BRE EDO hired 2-year term position	BVP designed and delivered	EDO and comm's to reach all county businesses with new marketing and website.	EDO connects with businesses for follow-up questions to the survey (year 1)	Support programs are delivered on the top 5 identified business barriers for at least 75 Nisku businesses (year 2)	# of jobs created # of new businesses created, maintained or expanded (year 2)
Partner organizations to support both paid and unpaid	Peer programming start-up training/ resources for new bus.	Existing growth stage industries (commercial and industrial)	Survey expands to an additional 200 businesses' per year	Implementation of a workforce program	Additional training/course/programming is set for year 3 and beyond
Collaborate with partners	Chamber, Airport and municipalities	Regional businesses will have the opportunity to mentor/get involved	Share findings with our urban partners and work with them to expand reach	Leduc Region sets common goals for growth and support	Champions and mentors continue programs without our leadership
\$\$ sector-specific (BEC) to support community building	Reno BEC kitchens to be a community hub for new innovative products/learnings and collaboration	Agrifood/agritourism hub for food and beverage businesses in Leduc County	Anchor tenants to offset costs and act as co-space hosts and mentors	The BEC is full with a good rotation of businesses and a cooperative community is formed and grows	EC DEV steps out of the center and it is community ran
Marketing costs and time	Build to suit spaces and supply of reno's, furnishings and equipment for the bookable social space	Consultants (design) tenant businesses, industry leaders	Build relationships with business	Business relations are improved	The BEC is recognized as a community business hub
Grant funding/municipal funding			Coffee meet ups and a few events and training programs occur	Year 2 – regular events and programming shows a busy schedule	Year 3 – see some ROI to maintain building operations
Infrastructure					

## Response 6

**Situation:** Employers in our manufacturing sector have expressed the need to improve the quality of applicants to their positions and improve stability in their workforce.

### Outcomes:

**Long-term:** Create a sustainable talent development pipeline starting with secondary education Career and Technology Education (CTE) providing baseline skills (Math, Graphic Literacy and Workplace Documents) necessary to enter advanced manufacturing directly out of high school. Validated results using entrance turnover data and every CTE student leaving with a National Career Readiness Certification with at least one level of improvement at exit.

**Medium-term:** Certify Industry driven core curriculum for credit/certificate for the new Advanced Manufacturing and Industrial Technology course developed in partnership with Kilgore College. Industry will provide subject matter experts as course trainers and placement opportunities upon graduation or course completion.

**Short-Term:** Course is offered as continuing education at this time to permit employers to refer employees needing additional skill attainment or refinement in order to limit turnover, improve employee performance and provide for leveling of the existing workforce.

## Outputs:

**Who we reach:** High School CTE Directors and Superintendent's to strengthen existing relationships where they exist with industry and to build relationships where none exist currently.

Industry Leaders, CEO/Plant Managers, Production and HR managers, students/parents

**What we do:** Hold regular CTE, Community College and Industry Round Table events to ensure open communication of existing and emerging needs and adjust curriculum to accommodate.

Coordinate with industry to open their doors once a year for community tours to better educate the community what opportunities exist for existing and emerging workforce.

**Inputs:** Longview Economic Development Corp, under our Business Retention & Expansion and Workforce Development program, funds WorkKeys Assessments to promote use of the program and to provide tangible assessment of workforce quality and identify potential deficits in existing education levels.

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## Response 7

Our BRE program focuses on supporting the protection and expansion of the employment and business tax base. Our vision of the outcomes, outputs and inputs required to create an atmosphere of success for our BRE program is as follows:

- **Outcomes:** facilitating support for new business expansions resulting in new jobs and capital investment and our ability to connect that growth with our workforce (resulting in hires and increased household income on the workforce side of our programming)
- **Outputs:** the number of traded sector businesses we can maintain relationships with and the efficient administration of our four local economic zones to promote new business investment in our community.
- **Inputs:** \$367K program budget supporting three BRE staff, training, travel, marketing, and promotions.

As it relates specifically to the Logic Model, below are some of our some of our considerations for each component:

- **Situation:** Our city has approximately 3,800 businesses with paid employees operating at about 5,300 establishments. We estimate that 1,100 of those businesses are basic employers (with customers primarily located outside of our area bringing money into our community). We have a total staff of 20 with three staff dedicated to BRE.
- **Outcomes -**
  - **Short-term:** business visitation; identifying red/green flags; business expansions, relocations, leases ending, and industry patterns.
  - **Medium-term:** Facilitating support for firm-level business expansion projects (securing a public commitment to invest/create jobs in our city); ensuring the announcements

translate into the physical build/investment (tax revenue) promised (work relates to: site plan, permitting, purchase of machinery and tools, etc.)

- **Long-term:** ensuring the the jobs ultimately benefit our highest unemployment communities and potentially influencing the unemployment rates and household income of our most vulnerable census tracts
- **External Factors:** Macro US economy; situated as a mid-level market; trend/loss of fortune 500s; far off I-95; “brain drain;” military presence; university presence; year-round ice-free port; population decrease; concentrations of poverty; water/bridge-tunnel systems and related impacts on commerce
- **Outputs -**
  - **Participation:** basic employers exporting goods/services outside of our city domestically or internationally
  - **Activities:** BRE staff proactively connect with existing businesses to maintain relationships, assist with identified growth needs, and better understand and support the overall business climate. BRE staff broker resources designed to promote continued investment and job creation to benefit the residents.
- **Assumptions:** businesses are willing to partner/meet with us and will see value in our offered services/support, such as: workforce services, tax reductions, grants and city process assistance offered (among other value-added support)

**Inputs:** As outlined above: \$367K program budget supporting three BRE staff, training, travel, marketing, and promotions. Related considerations include: how do we continue to increase staffing in the face of a potential recession? How do we cover 1,100 basic employers with only three staff? What businesses should we focus on and how should we divide the businesses amongst the staff we have?

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## Response 8

### Situation

Our region’s local business community is made up of small and medium sized businesses that typically are run by business owners that don’t have much formal business training but started with an idea and a lot of passion to bring a product or service to market in Truro-Colchester and want to be successful or have been successful in doing so and want to further expand/grow their business.

The current situation for many of these business owners is that they can’t afford consultants or industry experts to help them start or expand their business and the owners themselves can’t always find a solution for the business challenge blocking their growth or determine how best to seize an opportunity for expansion due to being “in the business” versus working “on the business”.

In the long-term we would like to see more business owners gain the foundational business skills that allow them to be working “on their business” (strategically planning for growth) than be “in the business” (reactively putting out fires). We also want to provide support in identifying individual

business and sector-wide challenges or gaps that prevent them from achieving their growth objectives and help them find solutions for these roadblocks.

### **Specific Outcome Example**

Long-term Goals - We would like to see our businesses achieve higher than (their) industry standard profit margins within 1-2 years of working with us.

Medium-term Goals - We would like to have every business owner that works with us learn the important difference between strategy and tactics and how proper business strategy should always dictate the tactics you choose for your business. We would also want business owners to fully understand the importance of proper cash flow tracking and management and teach them, if needed, how best to identify trends from monitoring their monthly and quarterly cash flow.

Short-term Goals - Identify and provide the proper training, coaching and advisement plan for each business owner, with a completion target of 2-3 months from the first meeting, to help them achieve optimum profitability for their business.

### **Outputs**

Participation - Of the 1600 businesses in Truro-Colchester we would like to reach a minimum of 10-12 SME businesses per month for every Business Development Officer on staff.

Activities - Our BDO's will conduct one on one employer visits, using the BRE model, with owners and/or management and utilize other experts for group training where appropriate.

### **Inputs**

Our organization will start by investing in a business development expert that can work with clients but also train new business development officers that join our team. A specific budget will be allocated for the HR, outside contractors and training resources required to make this happen by year end.

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## **Response 9**

### **Situation (Problem)**

- A business ecosystem that is largely undisciplined and does not apply best practices in business planning, management or operations.
- Low awareness of the many resources and supports available to existing businesses and startups.
- Too many startup misfires or failures.
- Lower comparative productivity and profitability.
- Lack of measurability in terms of business success or broader community economic factors regarding the growth of the business ecosystem.
- A strong desire among a large demographic to own and operate successful micro-businesses.
- 6 underutilized business parks across the region.
- Supply chain challenged/opportunities associated with business attraction efforts.

### **Outcomes**

#### ***Short Term***

- A well supported and informed business ecosystem with the resources, training, and support businesses needed to prosper.
- A robust and well-resourced startup community.
- Training program and hands-on consulting support in place and top of mind awareness of them is high.
- A regional Business Attraction/FDI Program in place.
- Business Accelerator Program operational for selected, high potential, clients.

#### ***Medium Term***

- Best practices in business planning and operations being deployed by startups and key businesses.
- Active participating in training.
- Clear progress across business ecosystem on key KPIs as described above.
- Quantifiable (targeted) increase in Business Starts.

#### ***Long Term***

- More profitable and better run businesses.
- Easier access to business growth and trouble-shooting support.
- Measurable improvements across all KPIs, based on specific targets.
- Quantitative Business Attraction/FDI targets achieved.

### **Outputs**

- A regional, BR&E-based Strategic Plan, with SMART Goals and clear KPIs, for business expansion and retention efforts within the community
- Marketing Plan promoting the Partnership and our services to the business community and public
- A comprehensive Training regime for businesses and entrepreneurs (eg financials, succession planning, marketing, pricing, CI)



- Hands-on, objective, expert business planning consultation
- Business Accelerator Program for selected clients
- A Regional Business Attraction/FDI Program

### ***KPI Examples***

- # Business Starts
- # Businesses still operating and profitable in 3 years
- # Businesses exporting outside region

#### Specific Support KPIs

- Export
- Better Profitability
- Cost reductions
- Expanded workforce
- Funding support
- Incremental Revenue
- Process Improvement
- Resource Navigation

### **Inputs**

- Truro Colchester Partnership for Economic Prosperity (TCPEP)
  - Budget: \$400,000
  - Team of 4
    - CEO/CED with 30+ years of private sector experience, primarily in marketing strategy
    - Community and Business Liaison with 20 years of product management experience
    - Business Development Officer with 25+ years in private sector, pharmaceuticals, and business planning support
    - Connector Resource dedicated to workforce development
    - Other related agencies (eg ACOA, CBDC/NOBL, Invest NS, Futurpreneur, MentorsPlus, Municipal partners) and their associated budgets and resources.
- Other Consultants as needed

## **Response 10**

Having successfully attracted a large multi-national employer to our region 40 years ago, one of the key goals of our BR&E program is to support the expansion of that employer's operations in our region. Our current objective is to develop a light industrial park near the large employer that can allow several the employer's suppliers and service providers to locate closer to the employer's production facility, strengthening supply chains and developing the technical expertise in the local population to continue to support the plant. We aim to do this in partnership with the local First Nation, the provincial and the

federal governments. As the municipal government, we would be responsible for the provision of services, the modification of our land-use bylaw to ensure proper zoning, and the subdivision of the parcel of land we plan to develop.

We also continue to focus on the SMEs in our region, with particular emphasis on the agricultural and agri-tourism sectors. A number of food producers have identified the need for additional manufacturing and storage space in the area, and we are partnering with a local First Nation to encourage the development of cold storage space. We are providing the business case for the development as communicated to us by the business community, and will assist with requisite land-use amendments and development agreements, as required.

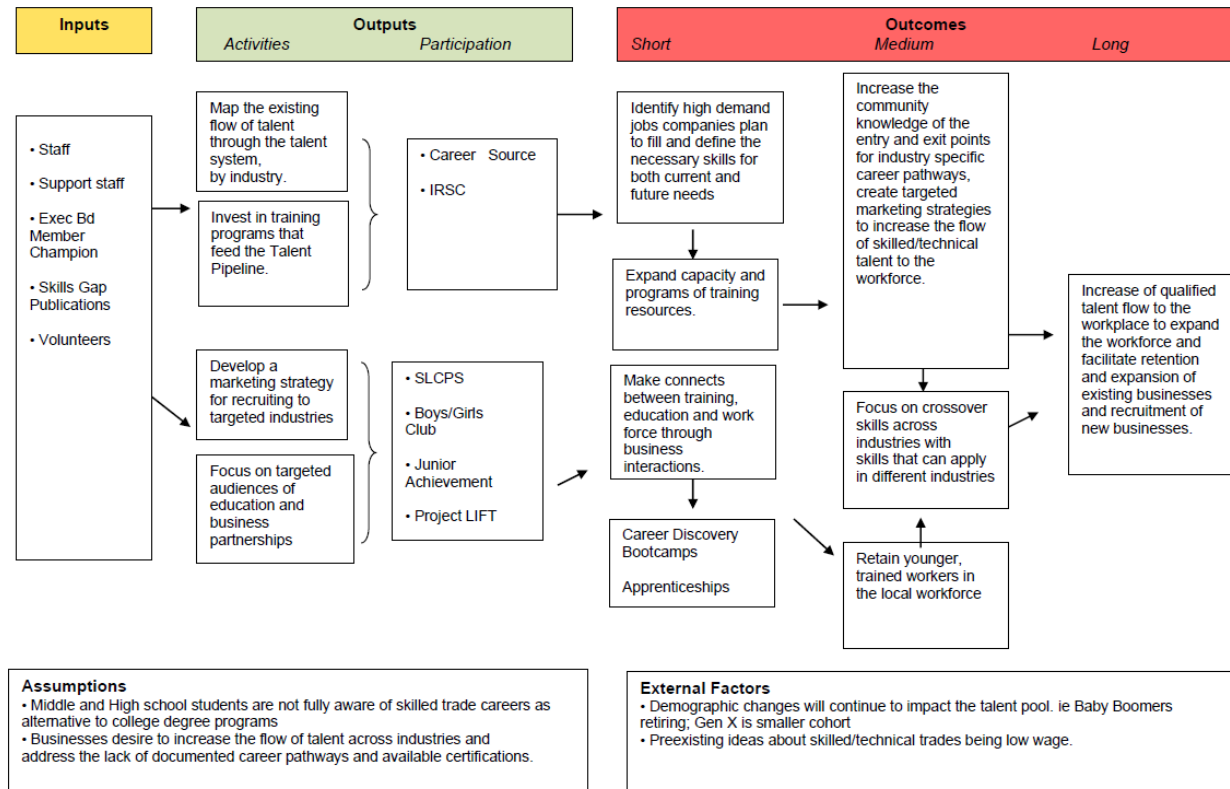
Many of the BR&E functions in our region are carried out by our local Regional Enterprise Network. The Municipality continues to partner with them to further the objectives of workforce development and continuous improvement.

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## Response 11

### Priming the Talent Pipeline Logic Model

**Situation:** Recent Skills Gap Study identified a common issue across all industries as impacting the workforce was the difficulty filling entry level skilled trades and technical positions.



## Response 12

### 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
- 

## **Response 13**

### **OUTCOMES:**

*Long term:* To retain companies and businesses to stay in our city and to capture potential growth and expansion opportunities by establishing and sustaining a relationship.

*Medium term:* Actions performed should be aligned with what businesses need (within reason). Depending on the challenge, the community or the community's partnerships can lend assistance to alleviate issues. Creating strong partnerships with various organizations is key (workforce, higher education, trade organizations).

*Short term:* To understand and gain knowledge on what our business community needs (resources, services, potential partnerships, etc). A variety of methods can be used: surveys, visitation meetings, research, seminars, conferences and first-hand accounts from existing and prospective companies can help build a consensus.

### **OUTPUTS:**

*Participation:* Existing companies, prospects (leads), site selectors and brokerage firms.

*Activities:* Activities can be wide and varied, especially if you have diverse industry clusters in your community. Retention/visitation meetings are highly beneficial, however, participation of company events or celebrating achievements of the company (a gift, a note) can also help in building relationships.

**INPUTS:**

*Investment:* Considerable time and resources should be devoted to survey questions and methodology. Make sure you're asking pertinent questions which may differ depending on the size and industry of the company.

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## **Response 14**

Understanding the purpose of BRE and its impact on the business community is very important.

The purpose of BRE is to include all efforts to encourage the retention of existing businesses in communities.

How do we go about encouraging the retention of these existing businesses?

First, a BRE account executive or EDO visits this business community and meets with business owners, stakeholders, etc. Stakeholders are a significant group in the community.

During the business visit, the business, its operation, challenges and opportunities are identified. It is also important to identify local stakeholders and support systems and look to make referrals. The program network is built with the support of community stakeholders who have a greater understanding of the local economy. A Follow-up process is also required to monitor progress.

The data collected during the process will identify any weaknesses and threats and, in that case, the local economic environment issues will be addressed. After that, the data will be passed on as knowledge up the innovation pyramid.

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## **Response 15**

**Situation:** Service industry businesses need more skilled workers and workers in general. This is causing companies to need help with meeting clients' demand and service quality.

**Outcomes:**

**Long-term:** Coordinate with Prince George's Community College and Bowie State University to establish a service industry training program. The program will provide college credits as well as continuing education certifications. Credit and continuing education courses will provide

concertation in conflict resolution, effective and clear communication, time management and adaptability skills.

**Medium-term:** Organize with business owners to create paid and unpaid internship programs that will allow students to understand the field better while providing workers for the businesses.

**Short term:** Find a workforce assistance liaison from Employ Prince George's, the Maryland Department of Labor, and local high schools, colleges, and Universities.

**Outputs:** Current and potential service industry employees will take educational courses to help develop more effective service skills.

**Who we reach:** Professionals in the service industry, high school, college and university students.

**What we do:** With the assistance of business owners and management, we conduct interviews with current employees and exit interviews to get a better needs assessment.

**Inputs:** The city of Bowie Economic development will assist with some funding to promote the educational service program. Service industry professionals, education institutions with help with creating the best type of curriculum potential and current employees in the field.

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## Response 16

The Ontario BR+E Model is an action-oriented and community-based approach to business and economic development. The goal is to promote job retention and growth and help communities prioritize their efforts

### Inputs

- 1) Provide tools, resources, and programmes
- 2) Staff guidance and support (e.g., assistance with business interviews)
- 3) Technical advice and insight (e.g., training, Qualtrics demos)
  - a. Provide guidance on implementing strategies that strengthen businesses, community, and industry sectors

### Output

Focus on connecting with lead organizations from municipalities., example BR+E coordinator from the county, economic development officers. We would connect and offer support throughout on how they can implement a BR+E program in their area.

### Activities

To prepare the organization for Stage 1: Preparation and Stage 2: Collect and Analysis. Provide:



- 1) Surveys – A comprehensive business retention survey and optional business sector questions (Agriculture, Manufacturing, Mining, Natural Resources, Retail, Tourism and Local Food)
  - a. Face to face, telephone, web-based, email/mail
- 2) Access to an online data management tool (Qualtrics) that is a sophisticated, yet easy-to-use system that allows for data entry and extensive reporting capabilities.

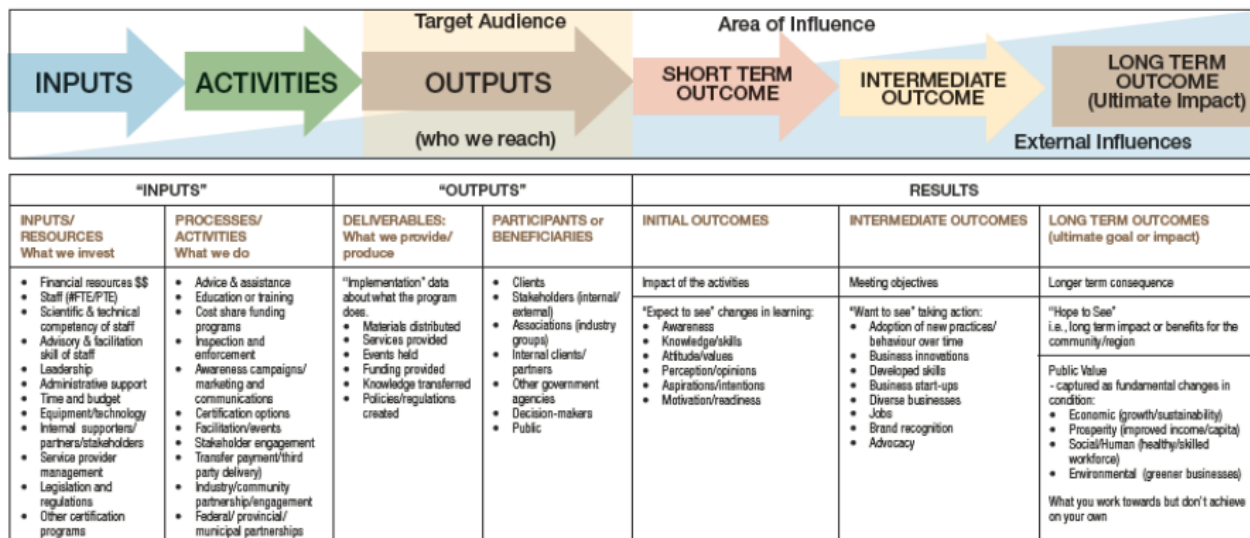
## Outcomes

### Short Term

1. Build and improve relationships with businesses
2. Build capacity between organizations in the community
3. Collect business and market data
4. Identify and address immediate concerns
5. Create a strategic action plan

### Long Term

1. Increase the competitiveness of existing businesses
2. Enable business investment and job creation
3. Foster a suitable environment for business development



## Response 17

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### OUTCOMES

#### LONG TERM

- \* Growth, expansion, retention of existing businesses
- \* Lucrative and enticing business environment that draws in new business
- \* Strong, sustainable, local workforce and retention of education young adults

#### MEDIUM TERM

- \* Work with area ISDs, Colleges, non-profits to develop identified training/certification/degree programs necessary to support local business
- \* Facilitate access to programs, assistance, resources identified as necessary and possible unobtainable by local business

#### SHORT TERM

- \* Meet with local business leaders to determine the community's largest needs for a sustainable business environment

### OUTPUTS

- \* Create media flyers for education and notification of available programs and resources
- \* Facilitate and assist with community-wide programming (if needed)

### INPUTS

Staff time for interviews with local businesses

Staff or volunteer time for interview data input

Staff or volunteer time for interview data interpretation

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## Response 18

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