

# Fundamentals Course Homework

## Session 3

### Part A

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

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

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

### Part B

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

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

### Part A

#### Response 1

Part A: The BR&E visitation program is a critical step in gaining a greater understanding of our community. Our area has several areas to survey to gain information.

- Manufacturing
- Transportation & Logistics
- Defense

Groups receiving the information gathered would fall into the following categories:

- Government-city, county, state
- Economic Development Team

Our governing board meets monthly and data points gained will be presented in a report. It will consist of recent information gathered as well as a roll-up of previously obtained data. This will enable them to view and compare the latest data as it relates to previously obtained information. A combination of charts, graphs have been used depending on the decision of our CEO/President.

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## Response 2

We work with individual organizations to connect them to the resources they would need. These resources could be funding resources, programs to attract workers, or products that a business nearby is thinking of venturing into (we had a company that was making residential sheds that was thinking of producing some residential units; so we connected them with a large organization experiencing staff housing issues). A few years ago, our local forestry industry was in crisis with the sudden shutdown announcement of a local mill, which was an anchor for the timber industry. We were able to get our business owners to come together with Government and industry officials to save the industry.

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## Response 3

There are many benefits and potential challenges in preparing reports and presentations for a BRE program.

- 1) You need to identify who these reports are for. Stakeholders that fund your organization will be interested in different metrics than a government policy maker. Stakeholders will want to know the positive impact these visits are having on local businesses. They would like to know, after 6 months have any businesses made new hires, or made productivity gains – such as new evening production shift etc. Some policy makers may be interested in broader themes, such as access to funding, town infrastructure, demographics of workers etc.
  - 2) Sharing these reports will strengthen the BRE program, because you need to communicate the work you're doing. Making the information as clear and understandable as possible will make it easier for your stakeholders, other community and government entities to buy in and continue to support your work.
  - 3) A report could have information on number of businesses visited, number of follow ups, a list where you directed them for resources, example being if you suggested a particular government program etc.
  - 4) Honestly, if I was turning data into information for an audience, I would suggest we hire a professional in this field. A third party looking at the data is helpful, it would eliminate or lessen bias. If this wasn't an option then breaking the data down into manageable chunks, such as HR Concerns, Funding, Marketing etc would be a good starting point.
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## Response 4

Our reports/ presentations are delivered to our Board of Directors and CEO once a month in our Board Meetings. A report is built and broken down to help explain the outcomes of the BRE visits. This keeps them informed of any issues going on within industries and positive or negative outcomes. The breakdown starts from issues in supply chain, issues, solutions etc. Also, the number of visits in the year, this

will help with the goal we have set to see if we have met it or are going to meet it. I believe this benefit strengthens the program knowing the strong connection we have with the industries and also hear some feedback on ideas. When things do get slow because we do have a time of the year where industries are getting ready for holidays or in the middle of a transition we just give information explaining why. The layout of our report is different and flashy more of a presentation almost like a PowerPoint where it doesn't specifically involve extra unnecessary information.

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## Response 5

Some of the benefits of preparing reports and presentations for the BR&E visitation program would be increasing social capital by providing an opportunity for partnership; working together as a community; and building trust. By sharing the results, it shows that meetings, surveys, and interviews can have an impact. The report will include an abstract/executive summary, problem statement, survey methods and procedures, survey findings, implications (aka the translation into what it means) and appendices. The report would include simple visuals such as easy-to-read charts and graphs with user-friendly statements explaining the data. The report and especially the presentation will adapt depending on the audience. Some of the groups that may benefit from a presentation are: municipal council; community partners such as the local Chamber of Commerce; business community, focus groups, and Provincial/ Federal government if identified issues fall under other jurisdictions. Summarized results could be published in the community newsletter that is distributed to residents. As municipal government, we aim to write to a grade 8 level whenever possible for reports intended for the general public. We are also currently working on improving our documents to be more visually accessible. This is difficult with complex graphs etc. Another challenge is the length of the report. It is important to include as much as possible while being mindful that too much data-heavy reporting may make the report lengthy and disengage the audience.

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## Response 6

- To whom or what groups would the reports/presentations be delivered?  
The presentations will be delivered to upper lever staff and the City manager, council members and boards. Then finally a presentation will be delivered to the small business owner/ or entrepreneur.
- How would this benefit the strength of the BR&E program?  
This will benefit the creation of the program and its future. Learning what it is that entrepreneurs need will help us have a better understanding. It will also help educate the champions, economic development staff, stakeholders, about the types of economic activity within the community.
- What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?

Offer the information on a rolling basis, there could be a possible lag, or a skew in the information.

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

To display information for an audience, I would create a story to display information, create charts, tables, maps, graphs, infographics. I would use these multiple tools that a person can see and visualize. Using visuals could possibly make it easier for you and your audience to better remember concepts and practices.

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## Response 7

- To whom or what groups would the reports/presentations be delivered?  
Based on my limited experience the target groups for this area would include community partners such as the manufacturing & processing industry, the energy sector, and resource groups such as primary educators through higher learning.
- How would this benefit the strength of the BR&E program?  
The strength of the BR&E program would benefit through communication with the educators and workforce about the individual and industrial needs of their sector. By collecting this data from the partners, our organization could filter and consolidate the relevant information in a presentation to the resources that provide or supply these industries.
- What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?  
Based on my understanding of a continuous model, which uses surveying to understand the needs of community partners, the data conversion is relatively slow in the evaluation process because of its transformation to useful information. This may be the most important step in the visitation process.
- How would you turn data into information for the audience(s)?

Data can be converted to information for your audience using graphs, charts, or models. However, the information generated by your BR&E program must make sense to the audience or reader in order for it to be useful in the industry. The program must also ensure that the information generated from the industry leader is relevant to small and medium-sized companies and organizations in the industry, as well.

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## Response 8

These reports and presentations would be delivered to the Economic Development Director and our City Manager. I believe that sending raw data as well as organized information would allow for a second, and third, set of eyes to view the information from a different perspective. This would also give them the opportunity to see what our community is saying and what challenges they are trying to overcome.

I'd also like to share this information with our local Chamber of Commerce so they can have a better understanding of where some of their members may be standing.

I think this is beneficial in the way that other leaders may have different view points in helping understand the data and may have more efficient solutions than I have.

I would include raw data as well as compiled information into a more organized and summarized report that is easier to read.

I think providing information into shared drives and sharing said information as it comes in would be the most beneficial way to have it accessible with other viewers in the program.

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## **Response 9**

1. My reports/presentations would be delivered to Municipal government officials and Stakeholders.
2. This would benefit the strength of the BR&E program buy providing economic data without bias or opinions. It will help government officials to makes informed decisions on economic planning and help stakeholders to make and build community support for the programs.
3. You want to be transparent and let them know where you're at and that your report will be continuous.

You should try to present data in person over a written report if possible. Show your objectives, relevant key findings, and survey difficulties (be transparent) using simple graphics. You want use exact wording from your questions and present the questions that make sense for your audience.

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## **Response 10**

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## **Response 11**

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## **Response 12**

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**Response 13**

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**Response 14**

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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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## Part B

### Response 1

#### Government

-Guidance  
-Mandates  
-Medical/PPE  
-Financial  
-Unknown

#### Community

-Concerns  
-Safety/PPE  
-Medical  
-Financial  
-Unknown

#### Business

-Concerns  
-Supply Chain  
-PPE/Medical  
-Financial  
-Unknown

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### Response 2

Emergency financial resources

Listening to concerns of the public

Listening to concerns of the businesses

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### Response 3

Here are my categories I would use to examine this data:

- 1) Funding and Grants
  - 2) More Government Support, PPE, communication of events
  - 3) Less Government Support (businesses left alone)
  - 4) Marketing and Internet/Online Shopping Support
  - 5) No Support or Do not know
  - 6) Doing well, no extra support needed
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### Response 4

- Small Business Assistance
  - Remote/flexibility Work Schedule
  - Employee Retention
  - Unemployment
  - Financial Assistance with Benefits
  - Childcare Funds Post Pandemic
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## Response 5

The following topics can be used to categorize the responses from the COVID-19 business retention and expansion survey:

- Funding Improvements
- Workforce Improvement
- Covid Prevention Measures
  - o Increase Covid Prevention Measures
  - o Reduce Covid Prevention Measures
- Government Leadership
- Internet Connectivity
- Supply Chain
- No additional supports
- Unknown
  - o Don't know
  - o No Answer

Other (there were 4 answers that I couldn't fit into the categories above)

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## Response 6

Human Resources  
Funding/Accounting  
Marketing  
Undecided

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## Response 7

Undecided  
Less Government Involvement  
More Government Involvement  
Supply Chain Issues  
Business Operations: best practices

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## Response 8

What safety precautions is your business taking in protecting your staff and your customers?

How have you been affected financially by Covid?

- What assistance programs have you used, if any, to help your business?

Would you prefer to keep your business open or close it during a pandemic?

What changes have you seen in your sales since cutting your hours back?

Have you been affected by supply chain issues?

What would help your business right now?

What would help your employees right now?

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## Response 9

Safety

Communication

Funding/Financial Relief

Government

Supply Chain

Internet improvements

Hiring/Retaining staff

Not shutting down/Less restrictions

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## Response 10

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## Response 11

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## Response 12

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**Response 13**

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**Response 14**

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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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