

# Fundamentals Course Homework

**Due Date: February 6, 2025**

## 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.

## Response 1

### **Cavalier County Business Retention & Expansion (BRE) Program**

#### **Vision of Outcomes**

The Cavalier County Business Retention & Expansion (BRE) Program aims to create a proactive, structured approach to understanding and supporting local businesses. Through targeted outreach, we will:

- Identify key opportunities and threats businesses face, allowing for the development of responsive programs and solutions.
- Gain insight into the strengths and weaknesses of businesses to help them leverage assets and address challenges.
- Ensure all businesses, including those outside Langdon, are aware of available resources and assistance.
- Foster stronger relationships between businesses and CCJDA

**Measurable Goal: By the end of the first year, we will engage with at least 25 businesses, including 5 outside of Langdon, to gather actionable data that informs county-wide economic development efforts.**

#### **Inputs (What We Need to Invest)**

To achieve our vision, the following resources and actions are essential:

- Survey Development: Create a structured business survey to assess needs, threats, and opportunities.
- Dedicated Employee Time: Establish a consistent schedule for BRE visits and follow-up.
- Board Engagement: Educate the CCJDA board on the BRE process and encourage them to advocate for the program.
- Public Awareness Efforts: Promote the initiative through the local radio, Borderland Press, and direct outreach to business owners.

## **Outputs (What We Aim to Achieve)**

By executing the BRE Program, we expect the following outcomes:

1. Business Engagement: Visit 25 businesses in the first year, ensuring at least 5 are outside Langdon.
  2. Threat & Opportunity Identification: Document key business threats and develop a communication strategy to address them.
  3. Resource Development: Identify business opportunities and create handouts showcasing these opportunities.
  4. Business Self-Assessment: Encourage businesses to conduct an internal strengths and weaknesses analysis, offering support and marketing assistance where applicable.
  5. Strategic Planning: Incorporate identified business needs into the County Strategic Plan, ensuring economic development priorities align with real business challenges.
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## **Response 2**

### **Situation**

Blackfalds is a small bedroom community of the City of Red Deer. We are challenged and blessed by our proximity to Red Deer. Red Deer is a city of 100,000 people and has all the major services a community needs, because of this many businesses look past Blackfalds and set up in Red Deer (i.e. Walmart, Costco, Movie theatres, restaurants). This is also a limiting factor for our current businesses looking at expansion. To expand they are looking at the customer base just south of us, instead of expanding their footprint and services in Blackfalds.

### **Outcomes**

#### **Long Term**

- More profitable businesses
- Increase in employment opportunities
- Businesses expanding
- Increase of services for our residents

#### **Medium Term**

- Create a regional tourist attraction
- Identify target market to attract to Blackfalds
- More pedestrian traffic
- More vehicle traffic on Highway 2A

#### **Short Term**

- Connect with regional stakeholders
- Connect with businesses in the tourism sector
- Connect with business in the tourism support sector

## **Outputs**

### Participation

- Reaching our target market
- Local businesses

### Activities

- Partnering with our stakeholders to create the new tourism attraction
- Meet and collaborate
- Plan and prepare

## **Inputs**

### What we invest

- Funds
  - Time
  - Skills
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## **Response 3**

### **Helping Local Businesses Thrive (and Not Just Survive!)**

#### **1. Overview**

Running a business is tough, and let's be honest—sometimes it feels like you're juggling flaming torches while riding a unicycle. That's where the Business Retention & Expansion (BR&E) Training Program comes in and I am thrilled to be taking this course in order to benefit my community!

Our goal? Help local businesses grow, adapt, and stick around for the long haul. By providing tools, training, and support, we're making sure businesses in our community don't just survive—they thrive. Whether it's finding funding, navigating workforce challenges, or figuring out why marketing isn't bringing in customers, this program is designed to give business owners the skills (and confidence) to tackle it all.

#### **2. Inputs (What We Need to Get Started)**

No great program happens without outside input, collaboration, or awareness of what's happening around them. We want to build a relationship with our local businesses! Here's what we'll need to make this work:

##### **A. The Dream Team (aka Key Partners & Supporters)**

- City Officials, County Officials, and Local Leaders – Because having their support makes things a whole lot easier.
- JDA & Langdon Area Chamber of Commerce – They know business, and they know the community.
- SBDC & Local Banks – Helping businesses find funding without selling a kidney.

- Schools & Training Centers – Because today’s students are tomorrow’s business owners (or at least tomorrow’s employees). We’ve already done a lot of work with the local businesses and schools hosting our Job Fair. Last year some businesses hired all their summer help from our Job Fair!! We have another coming up in April.
- Local Businesses – Investing in our local economy and giving back to the community.

#### **B. Where’s the Money Coming From? (Funding Sources)**

- JDA Economic Development Budget – Because supporting local businesses is part of our plan.
- Grants & Donations – Free money is always good, and we’ll apply for as much as we can.

#### **C. The Tools of the Trade (Training Materials & Tech)**

- Advan Place Making Software – A fancy tool that helps track where people actually go for services (so businesses aren’t just guessing).
- Training such as BR&E that will teach us to teach them! Think of the pyramid picture in class! We take data and turn it into information. Information turns into knowledge that we then pass on to the businesses which in turn creates innovation!

#### **3. Outputs (What We’re Actually Going to Do)**

We’re not just throwing information at businesses and hoping it sticks. Here’s how we’ll deliver real value:

- One-on-One Business Coaching – Personalized advice that doesn’t involve Googling “how to run a successful business” at 2 AM.
- Networking Events – Because sometimes, who you know is just as important as what you know.
- Business Surveys & Visits – Actually listening to what businesses need, instead of assuming we already know. Let them know we are thankful they are there and that the community appreciates them!

#### **4. Short-Term Outcomes (What Businesses Get Right Away)**

Once businesses participate, they’ll start seeing real benefits—and not just a stack of handouts they’ll never read.

- Awareness of available funding (so they’re not leaving free money on the table).
- A clear action plan for growth and sustainability.
- Stronger connections with the people who can actually help. *Put us on their speed dial!! We are here for you!!*

#### **5. Medium-Term Outcomes (Changes That Start to Take Hold)**

After businesses apply what they’ve learned, we expect to see:

- More grant and funding applications (because now they finally know where to look).
- Stronger business collaborations – Think shared marketing, joint hiring, and creative partnerships.
- Smarter strategies for handling workforce and financial challenges.
- Increased community engagement

## **6. Long-Term Outcomes (The Big Picture Impact)**

This program isn't just about today—it's about building a stronger local economy for years to come. If all goes well, we hope to see:

- Fewer business closures – Keeping our local businesses alive and thriving.
- More jobs and a stable workforce – Because successful businesses create employment opportunities.
- A vibrant, attractive community – A place where businesses (and people) actually want to be.
- Better data-driven decision-making – Thanks to tools like Advan Place Making, businesses will know exactly where their customers are coming from or where are they going if not to them?

## **7. Challenges (And How We're Going to Tackle Them)**

We know there may be some roadblocks, but we've got a plan:

- Limited Budget & Resources – We'll get creative with partnerships, volunteers, and grant funding.
- Economic Uncertainty – We'll adapt some of our training topics based on business needs and market changes.

## **8. Next Steps (How We Get Started)**

Alright, here's the plan:

- Build Community Support – Get JDA, the Chamber, and local leaders on board.
- Secure Funding if needed by applying for grants.
- Start small, gather feedback, and tweak as needed.
- Expand & Improve – Scale up based on what's working.

## **Final Thoughts**

The BR&E Training Program isn't just another business seminar—it's a real, practical, hands-on effort to help our local businesses succeed. Whether it's through better financial planning, workforce strategies, or data-driven decisions, we're setting them up for long-term success.

And hey—if we can make the business world a little less stressful (and a little more fun) along the way, why not? I look forward to implementing what we've learned in the upcoming course!

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## **Response 4**

Development Plan:

BR&E is new to the Independence Economic Development Partnership; there has been a long focus on attraction and expansion, but until recently, the implementation of retention as being part of the focus is relatively new.

City officials, Board Members, and local community leaders have recognized the importance of building relationships and giving an ear to the concerns, challenges, and obstacles facing businesses in the city. With a targeted focus on growth, maintaining local businesses, and increasing occupancy rates throughout the city and on our main square, the development and implementation of the BR&E program is now a primary focus.

Stakeholders with a keen interest in this program are IPL, the local utility company, and its customers who have the greatest impact on the community in terms of workforce and services provided. Secondly, several associations and CID community improvement districts in Independence will benefit from the information obtained from a BR&E program.

#### The Outcomes:

Long-term - Business growth and expansion for Independence. Increased workforce opportunities and affordable housing with the reputation of being a city that invites growth, expansion, and a place to live and raise a family.

Medium-term – Building relationships and connecting with city leaders and municipalities to help bridge gaps to progress and expansion.

Short-term – Making contacts meeting business owners and becoming familiar with the business landscape within the community. Identify challenges, needs, and obstacles businesses face in growing and attracting business and workforce.

#### Outputs:

Participation - One of my goals as the director of BR&E is to work closely with the top twenty utility customers of Independence Power and Light, building relationships, looking for challenges and opportunities, and reporting activities and findings back to IPL leadership. I also plan to work with the Square Association and Community Improvement Districts in the area to reach business owners whom these organizations have relationships with.

Activities – Introductions, emailing, cold calls, and drop-ins with a purpose. Maintaining and growing the workforce development plan that is in place, connecting with local school districts to introduce students to other employment options and opportunities.

#### Inputs:

The investments the partnership has made to make this program successful for the city include the creation of the position and the hiring of a director who will focus on fulfilling the goals of the program. Secondly, investments have been made in research and data systems to help successfully articulate and produce reliable and useful information. And finally, getting buy-in and bringing local stakeholders to the table to help champion the program will be key in making for a more vibrant and lasting community.

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## Response 5

### RESPONSE:

My vision for the BR&E program is to create a thriving business environment in our community by fostering strong relationships, supporting business growth, and addressing local challenges. The desired **outcomes** of our program include long-term economic stability, increased business engagement, and a well-connected network of local entrepreneurs. In the **short term**, our focus is on learning and gathering insights through business visits, identifying key needs, and strengthening communication channels. **Medium-term** success will be measured by actionable steps taken to support businesses, such as resource-sharing, strategic initiatives, and EDC recommendations that directly address concerns.

To achieve this, our outputs will focus on meaningful engagement, who we reach and what we do. This includes regular business visits, collaborative discussions, and program offerings tailored to our local business community. The inputs required for success revolve around strategic investment, both in time and resources, to ensure businesses have access to the support they need. By fostering collaboration between the city, the EDC, and business owners, we can create an atmosphere where businesses feel valued, supported, and empowered to grow.

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## Response 6

As someone who is both new to economic development and new to the executive director role for the chamber, putting together a BRE program for my community presents an opportunity to bring fresh perspective on retention and expansion for local businesses that may not have been present in years' past. The challenges that we face as a small community will be different than the challenges faced by larger metro areas and a one-size-fits-all approach would not be beneficial to our local stakeholders. I believe the segregated approach would be the best option when considering the resources that we have available.

**Inputs:** Time. We would need time to gather a number of local business owners and entrepreneurs for a luncheon/roundtable. We already have Chamber luncheons once a month so no additional resources would have to be used to facilitate this meeting.

**Outputs:** Local businesses would sit together in "focus" groups and be presented with a few questions and given an opportunity to share their frustrations, challenges, obstacles, and areas for improvement. Someone would take notes and we would gather these notes to compile the responses from each group. What challenges do shop owners, businesses, start ups, etc. face in our community?

### **Outcomes:**

Short term – provide these businesses with the resources currently available to them for assistance in gathering talent, streamlining processes, expanding to new markets, etc. (Oklahoma Small Business Development Center, The Choctaw Nation Economic Development team, Kiamichi Technical Center).

Medium term – What are the problems issues that they face that may not be able to be solved with the current resources available? Who can be of assistance with those issues? What kind of funding is required to aid these businesses in those areas?

Long term – Are there opportunities to create long term solutions for the issues at hand? If not, what can we do to change that? How often will we follow up with the businesses to check on their progress? As we look to the future, how can we make it more appealing and accessible for small business and start ups to expand and grow?

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## **Response 7**

As we build out our BRE program we will need to assess the situations our business community is facing and our ability to impact change in that area. Once this is done, we can assess the outcomes that will benefit our community the most. Determining the outcome we want, the actions our businesses will need to take and the resources we can provide them to do achieve the long-term goal. In order to do this we will need to determine which businesses we will speak with and how we will do that. To build a BRE program there will need to be an allocation of resources, from the chamber, the community. A full budget will need to be developed and managed.

Even without a formal BRE program we receive general feedback from our businesses with what they are struggling with. As a small staff it is often difficult for us to address these issues without a greater understanding of the issues and the support of our stakeholders. One of the biggest issues we hear about is the difficulty in attracting and retaining qualified employees. We are a suburb with a lack of affordable housing. It is easier for potential employees to live and work in the neighboring city.

**Situation:** Employers face challenges in attracting and retaining qualified employees due to competition for talent.

**Outcomes:** We want to develop a comprehensive talent pipeline strategy. That fosters a strong employer-employee ecosystem that supports career advancement and professional growth. Secure sustainable funding for workforce development initiatives.

**Long Term** – A thriving business community in Andover with a robust talent pipeline and a diverse workforce that meets the needs of our businesses.

**Medium Term** – Businesses implement skills training and apprenticeship programs and advocate for policies that support workforce development (i.e. affordable housing and childcare).

**Short Term** – Increase employer awareness of available resources and develop new resources and programs to address immediate needs. Host career fairs connecting employers with potential employees.

**Outputs:**

**Participation** – Speak to our retail stores, service businesses, and manufacturing plant to assess both the employer needs and employee perspective. Connect with local partners to learn more about the resources that they have available.

**Activities** – Go meet with individual businesses. Develop and promote the resources available. Establish partnerships with the local community college, welding school, workforce development and hair school.

**Inputs:**

- Chamber staff and resources
  - Funding via grants or sponsorships. Develop a budget.
  - Partnerships with local educational institutions
  - Data and research on workforce trends
  - Marketing and communication materials
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**Response 8**

Before addressing the question, I want to provide context. My company delivers contracted BR&E services on behalf of economic development departments, chambers, and other entities. We do not operate within a single economic department as W-2 staff, but instead work across multiple communities.

From our experience, most communities share similar goals for their BR&E programs. A successful BR&E program is typically envisioned as one with **effective systems and processes** that drive key **outcomes** such as attracting new businesses, retaining existing ones, and fostering job creation and sales tax growth.

To achieve these long-term outcomes, our clients recognize that **local business support is essential**. This translates into **outputs** like providing businesses with the resources they need to solve operational challenges—for example, helping a business navigate the process of hiring its first employee. When businesses receive **short-term support** (e.g., coaching and resources), it facilitates **medium-term action** (e.g., implementing new business practices), ultimately leading to the **long-term results** the department seeks.

As a BR&E service provider, we play a significant role in the **short- and medium-term stages** by offering coaching, facilitating access to resources, and ensuring that local businesses have the necessary support to take action. Additionally, we emphasize **data acquisition and analysis** to help communities make informed decisions. Many clients consider **community-level data collection** to be a critical output, as it allows them to tailor their BR&E efforts to real business needs.

The methods used to gather data—such as surveys, direct outreach, and multi-method approaches—vary by department. However, we find that a diversified data collection strategy leads to better program efficacy. That said, **data collection, aggregation, and action require investments** in both time and money. Therefore, the **inputs**—including financial resources, staffing, and expertise—are often shaped by the department’s budgetary constraints and internal capabilities.

Ultimately, the success of a BR&E program depends on the **alignment between inputs, outputs, and desired outcomes**. Our role is to bridge the gap by providing structured support, facilitating actionable insights, and ensuring that local businesses have access to the tools they need to thrive.

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## Response 9

The county that I reside in has multiple manufacturing corporations. They are the largest employers in our area and range from natural resource manufacturing to food processing. The biggest issue that each of these companies’ face is the shortage of workforce and skilled labor. As students graduate from the local high schools move away from this area due to other opportunities which adds to a growing shortage in the local workforce. Housing is also another huge concern. Currently we have a substantial portion of our workforce commuting up to 1.5 hours away to work at our manufacturing plants.

Long Term: To assist in addressing the future of workforce and skilled labor, we can bring our community partners, businesses, high schools, and trades together to see what businesses are looking for in employees. From there we can create a curriculum that would assist in the education and certifications of those pursuing a career in those fields. We can work to find incentives for those businesses wanting to expand and work towards partnering with supportive businesses.

Medium Term: Expanding the curriculum that complements our regional strengths and implementing expected skilled labor needs in robotics and aviation. Expansive coursework will expose our youth to greater opportunities. Partnering with local businesses to host field days and mentorship programs.

Short Term: Community partnership meetings where we can share ideas and voice concerns to try and get ahead of the issues that are able to be mitigated. This will build stronger bonds and relationships in the community. It will also show that we want the businesses that are in this area here and that we appreciate what they do for our communities.

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## Response 10

With me being new to BREI, and Ec. Dev., I feel that it would be beneficial to complete a micro-planning model of supporting my community's Indigenous Mi'kmaw crafters, and how they can be better supported while growing their business

### **Outcomes**

**Long-Term:** gain a deep understanding and connection to the crafters for their lasting success and enhancing the

**Median Term:** Gain crafters trust that they are being heard and valued

**Short-term:** Learn who is crafting what in our Mi'kmaq community

### **Output**

Activities: building a crafting survey, conducting a crafters' survey, analyze the results

### **Input**

Staff time – Ec. Dev. Manager, Treaty Truckhouse Manager

Program funding

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## Response 11

Development Planning (In a nut shell):

### **Business Retention/Expansion/Workforce Development Programs (BREWD)**

We identify that the Workforce Development component is equally as important as the BRE and works in union with to provide the EDC with community/economic strategy to assist businesses, in order for the businesses to continue to remain competitive and keep a community thriving.

### **Situation:**

Most businesses are in need of employees/workers. After much discussion the issues are not only immediate but also will need future employees for continuous operations and possibly for future growth.

### **Outcomes:**

Long Term: Trained and prepared employees with a graduated education in the field of study related to local industry for the local student population (6-12 grades).

Medium Term: Collaborate and advise the local training entities with the type of training needed with the proviso of that change in the type of training is inevitable.

Short Term: Review what is in place (with regards to training) and see where we can modify quickly to assist with training.

**Outputs (Participation/Activities):**

Long Term: Work with the High School(s), College(s) and University(ies) to build long term training programs (pipelines) that assist the industries with future employees

Mid Term: Look at the local college(s) to see what graduate are available and what is necessary to get those students to complete their training in order to get them hired by the business(es).

Short Term: Working in collaboration with our partner the local workforce board put together a multi-company (industry focused) job fair for employers of the same industry or singular (one company) job fair with the same partner.

**Inputs:**

EDC should place funds towards training equipment, job fair(s), curriculum and training the trainer: and any other training related matter that cannot be covered by other partners (education entities).

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**Response 12**