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

Context before answering:

Our services are primarily virtual, meaning that the physical visitation schedule will be managed by the economic development staff members we work with in each community. Our role is to provide local business support, strategic support, data analysis, and digital tools to supplement and enhance the BR&E visitation efforts (outputs and outcomes).

My Answer:

Implementation Plan

1. Strategic Alignment
- Review the economic department's strategic plan (if available) to ensure BR&E efforts align with broader economic goals (outcomes).
- Develop BR&E goals in collaboration with the economic staff and board to define the desired outcomes.
- Identify key data points needed to measure success and guide decision-making.

2. Program Framework & Infrastructure
- Define Inputs & Outputs
  - Reverse-engineer what resources (inputs) and actions (outputs) are necessary to achieve the department's BR&E objectives.
- Identify Tools & Resources Needed
  - Software & CRM Systems:
    - Recruitment Relationship Management System
    - Existing Business Relationship Management System
    - Project Management Software
  - Community Data & Business Insights
    - Community-level data retrieval tools
    - Surveys and business visitation methodologies

- Decide between a paid staff or volunteer model for outreach (dependent on various community factors such as budget etc.)
- Incorporate strategies to build social capital
  - Local Business Resources
    - Business coaching
    - Local grants, loans, and other financial support programs

3. Targeting & Outreach Planning
- Determine Business Segments to Target
  - Prioritize industries or business types that align with economic development objectives.
- Develop Effective Survey & Data Collection Strategies
  - Ensure questions are structured to gather actionable insights that can be converted into information, knowledge, and ultimately innovation.
- Obtain Valid Contact Information
  - Leverage online databases, existing databases, chambers of commerce, and local partnerships to maintain an accurate business contact list.

4. Outreach & Engagement Execution
- Develop a Contact & Engagement Plan (tailored to each community's size and structure)
  - Establish multiple outreach avenues (calls, emails, in-person visits, digital engagement).
  - Assign responsibilities within the team to ensure efficiency and accountability.
  - Define how staff will log and manage interactions in the CRM.
- Create & Track Key Performance Indicators (KPIs)
  - Set benchmarks for outreach effectiveness, engagement rates, and business feedback.
  - Implement a continuous improvement loop to evaluate progress on a weekly, monthly, and quarterly basis.

5. Ongoing Relationship Building & Follow-Up
- Develop a structured follow-up plan to maintain engagement beyond initial outreach.
- Schedule periodic touchpoints (e.g., check-in calls, surveys, networking events) to strengthen relationships and foster long-term business support.

Response 2

100 Day Plan (June 1st – Sept 9thish)
Strategic Pillar – Supports all 4 Pillars in EDTS
Details
Background   The basis of all Economic Development starts with relationships. We cannot come up with solutions for our businesses if we don't know the problems. We cannot collaborate without knowing our partners and stakeholders. This is a key component to the foundation that future Blackfalds

economic development will be built on. This plan will be executed over the next 100 days (estimated) and will be completed and evaluated in September 2024. The intent is to use the information gathered in the plan to guide future work within the Town of Blackfalds economic development.

Goals/Objectives/Tactics

To establish myself as the new Economic Development Officer for the Town of Blackfalds. Connecting with businesses, businesses organizations, regional stakeholders and other government organizations in the Economic Development ecosystem.

1. Gaining a strong understanding of the Town of Blackfalds business community's opportunities and challenges and ensuring the municipality is aware and leveraging these issues and opportunities.
   a. Divide the business community into areas and conduct business visitations to these areas, meeting 75% of the businesses in each area. Target areas are:
      i. Downtown/Broadway area – *business walk for intros* – *(on going)*
      ii. Industrial areas (west side and south) – *tour to gain names and numbers, then follow up with calls* - *(on going)*
      iii. Highway 2a Commercial area – *business walks (done in sections)* – *(on-going)*

2. Reconnect with organizations, associations and strategic partners for Blackfalds.
   a. Set up meetings, reoccurring, if necessary, with all organizations that are involved in Blackfalds economy (example but not limited to, Blackfalds Chamber, Red Deer Tourism, Lacombe Tourism, etc.) – (ongoing)
   b. Reconnect with provincial and federal contact to introduce my new position and ensure Blackfalds is on their mailing lists. – (complete)
   c. Identify the leading developers in Blackfalds and meet with them. - (to start in August)

3. Using the Economic Development and Tourism Strategy (EDTS) create a plan to implement portions of the strategy.
   a. Using the information gathered from business and organization connections, build a 12-month, 3 year and 5 year plans to implement the EDTS.
   b. Prepare projects/ideas for future grant applications.
      i. Industrial – Business Walk (Nov.)
      ii. Broadway – Win your Spot (2025)
      iii. General – Econ Dev Newsletter (Sept)
      iv. General – Lemonade Day (2025)
      v. Attraction – Burman University/RDP/Olds partnerships
      vi. Retention – Speaker Series with Chamber (Jan 2025)
   c. Prepare a report document from the discussion and conversations. (Sept)
   d. Conduct full review of Econ Dev related webpages and local intel. (end of August)

Stakeholder
Organizations

- Blackfalds Chamber – Amanda
  - Connected and meeting with board member on June 11th
  - Met with Shawna on June 11
- CATA – Kerrie
  - Met on June 24th and added to CATA mailing list

- Lacombe Tourism – Austin
  - Met with on June 4
- Red Deer Tourism – Jesse
  - Email sent June 5 – meeting June 13
- School Districts –
  - Wolf Creek – sent message via online contact form – meeting June 21st
  - Red Deer Catholic - sent message via online contact form
- Post Secondary –
  - RDP - met with Robbie from DBS on July 4th
  - Burman – met with DR. Loucious Michel on June 25
  - Olds,
  - Bow Valley, – think about med and nurse schools
- Careers
- Community Futures –
  - message sent via online contact form
  - went for meeting on July 3rd with Sherry Lynn – she had a family emergency and needed to reschedule
- Commercial Real Estate Agents
  - Salomons – emailed team June 5 – signed up for newsletter – meeting July 9 (Mike)
  - Remax – emailed cam and Jeremy June 5
  - Colliers – email Blair June 5
- PCN Wolf Creek
- AHS = physician recruiter
- CAEP
  - Email sent to Tracy June 7 – undeliverable???? – called and left message
  - Connected with at AGM
- Invest Alberta –
  - email sent June 7 to general email
  - Connected with at CAEP AGM
  - Connected with Siao - July 2024
- Alberta Innovates – sent email to Matt Cornall – June 10
- BDC – connecting with Chad via Linkedin – met on July 17
- Business Link – signed up for newsletter – June 11, 2024
- MEE Cluster – email sent June 11, 2024
- Keep Alberta Rolling – signed up for newsletter
- Bulldogs – email send to Al on July 8th
- Bolt -
- Bild Red Deer – email sent June 12th – connected on July 12th

Should I add something about the DR recruitment – or is that a target industry?

Business Visitations - see spread sheet – approximately 33 completed

Deliverables
- Contact list of businesses in Blackfalds – list created with intent to be used as a future newsletter
  - Working with Marcomm to release 1/4ly newsletter, starting Fall of 2024.
- Contact list for economic development organizations and regional ecosystem – will build in Outlook
- SWOT Analysis of business environment in Blackfalds - ongoing

Strengths
- Dairy – quotas to increase in the next few years by 10 – 17%
- Highway 2 – a constantly changing midsized city. – 40,000 recreation and passenger vehicles/day
- Highway 2a – easy drive, easy to get on and off highway 2
- Young Growing Population
- Lots of opportunities (spaces open)
- Sterling Field/Abbey Centre area
- New public facilities
- Strong industrial park – Eagle Builders, CARE Industries, etc.
- RES

Weaknesses
- Lack of industrial land in town
- Lack of commercially developable land in town
- Downtown – no anchor tenant or draw (especially after the post office leaves)
- Highway 2a – not very walkable, does not encourage strolling, extended stays or window shopping.
- Areas of town not well connected for active transportation
- Affordable housing/rental products
- Major suppliers are in Red Deer, too close for secondary location.
  - Accommodation.
- Expensive lease rates in comparison to larger cities, but less customer base.
- Lack of general customers

Opportunities
- Dairy going to give boost to area in near future
- Connections with post-secondary schools in area (Burman, RDP) – research, business plan building, etc.
- Rural Entrepreneurs Stream – continued engagement
- Highway 2 – a moving mid-sized city new population every day - 45,000(ish) AADT
- Red Deerians – our customers, need to work on attracting them.
- Brewery, Golf Simulator, Fine Dining, great patio locations, par 3 course, etc.
- Biking!
- Eagle Builder Center – more events! i.e. Home Show, Career Fairs, etc.
- Vertical Farming
- Broadway

Threats
- Lack of walkability in town – can't easily get from Sterling Field to businesses
- Lack of accommodation
- Downtown has gone too far to be revived
- Way finding
- Red Tape

- Identification of potential opportunities for Blackfalds and base plan to take advantage of these opportunities to be presented to EDTAC at Sept. for consideration
  - Include conferences, workshops, etc.
    - [Western Dairy Council](#) – [Golf tournament 2024](#) – look for 2025 event

- - Alberta Brewers Association - Oct 9 - https://www.abcraftbrewing.ca/
    -
  - o Include Business Retention and Expansion and a Business Attraction plan
  - o Review 2021 EDTAC strategy and update with new info from 100 Day Plan
- Identify gaps in businesses in Blackfalds
- Website review document

Questions to Answer
- When did you open
  - o Start to establish turn over rate
- How many staff do you have?
  - o Establish base employee numbers for growth tracking and customer numbers
- In the past 5 years have you grown, shrunk or stayed the same?
  - o Establish business community current situation.
- In the next 5 years what do you expect to do? Grow? Shrink? Stay the same?
  - o Establish business community future optimism.
- What memberships do you have? Chamber, etc.
  - o Establish what they are looking for, might need or not know is available.
- What are the biggest challenges you are facing right now? What keeps you up at night?
  - o Where can I and the town help?
- What helps you get out of bed in the morning?
  - o Why you are in business?
- If time and resources weren't an issue, what would be your next venture/business?
  - o Business attraction question.
- What do you find yourself going to Red Deer for? Personally and professionally.
  - o Establish needs in Blackfalds for attraction work.
- Interested in newsletter? Quarterly?

Industrial Targets – Meg Global (see business visitation list)

Response 3

Cavalier County Business Retention & Expansion (BRE) Program Development

Step 1: Develop a Draft Program Guideline
The first step is to create a draft outline of the program to introduce it to stakeholders and establish a foundation for discussion and refinement. This document will provide an overview of the program's purpose, expected outcomes, required inputs, and measurable goals while remaining flexible to incorporate stakeholder feedback.

The draft will include our vision of outcomes, key inputs, expected outputs, and specific measurable goals for the short-term, mid-term, and long-term success of the program.

Step 2: Meet with Stakeholders

Early stakeholder engagement is critical to ensure the program meets community needs. Initial outreach will include:

1. **CCJDA Board** – First to review and refine the program.
2. **County Commission** – Gain support and additional input.
3. **City Commissions** – Engage local municipalities across the county.
4. **Langdon Area Chamber of Commerce & Other Business Groups** – Gather input from the business community.

Stakeholder Engagement Approach:
- Share the draft program outline and discuss its goals, structure, and expectations.
- Seek feedback on additional outcomes or priorities stakeholders would like to see.
- Incorporate relevant input while maintaining CCJDA's authority over the final direction of the program.
- The stakeholder engagement will be the first step in building social capital

Step 3: Develop the Final Plan

While referred to as the "final plan," this document will be a living document that can evolve based on findings, feedback, and business needs. It will include:
- The finalized BRE program structure
- Key focus areas based on stakeholder feedback
- A defined timeline for implementation and evaluation

Step 4: Develop the Business Survey

The survey will be designed using insights from stakeholder discussions and best practices from economic development resources, such as:
- UM Question Databank
- Surveys from other North Dakota economic developers
- Topics identified during stakeholder outreach

Key Survey Topics:
- **Workforce Availability** – Hiring challenges, skill gaps, and training needs.
- **Workforce Housing** – Availability, affordability, and barriers to attracting employees.
- **Daycare Availability & Workforce Impact** – Assessing its effect on local labor participation.
- **Knowledge of Available Programs** – Identifying awareness gaps in business resources, and gaps in knowledge of programs already available.
- **Impact of Border Hours on Business** – Effects on cross-border commerce and potential solutions.
- **Impact of the New State Park (2025 Opening)** – Assessing opportunities and challenges for businesses.
- **Other Business Challenges & Opportunities** – Capturing additional concerns and growth potential.

Survey Design Considerations:
- Unbiased questions to ensure accurate, actionable results.

- Mostly closed-ended questions for ease of analysis, with some open-ended questions for additional insights.

Step 5: Survey Approval
The finalized survey will be reviewed and approved by the CCJDA Board of Directors before implementation.

Step 6: Develop a Business Database
A centralized database will be created based on survey responses to:
- Track business trends and concerns over time.
- Identify potential support programs tailored to business needs.
- Serve as a resource for future economic development efforts.

Step 7: Develop a Visit Schedule
A structured schedule will be established to ensure consistent engagement with businesses. The schedule will:
- Prioritize businesses across different sectors and locations.
- Ensure geographic diversity, including businesses outside Langdon.
- Allow for flexibility to adapt based on business feedback.

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Step 8: Begin Business Visits
Business visits will commence in a phased approach:
1. **Pilot Phase:** Initial visits will be conducted with businesses owned by CCJDA Board members to refine the survey and interview process.
2. **Full Implementation:** Expanded outreach to businesses countywide.

The business visits will continue building on our social capital.

Ongoing Program Activities
1. Continuous Business Visits
- Regular outreach to businesses beyond the first 25 visits, ensuring ongoing engagement.
- Adapt survey questions and strategy based on findings and evolving business needs.

2. Reporting & Communication
- Regular reporting to stakeholders (CCJDA, County Commission, City Commissions, Chamber of Commerce).
- Generalized findings will be shared with the public and business community to increase transparency and awareness.
- Reports will help guide future economic development priorities in Cavalier County.
- Reporting will continue building our social capital.

3. Survey Analysis
- As surveys are completed, results will be analyzed for common themes and trends.
- Open-ended responses will be reviewed manually to capture qualitative insights.
- Technology tools such as SurveyMonkey, Qualtrics, Excel, and AI-driven analytics will be used to efficiently analyze large datasets.
- Data privacy & confidentiality:

- o Identifying information will be removed from any shared reports.
- o Sensitive business data will be handled with care when using technology tools to ensure privacy and security.

By incorporating survey analysis into the ongoing program, we will ensure that the insights gathered are actionable, data-driven, and effectively inform future economic development efforts.

Response 4

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.

The inception of the BR&E program in Independence, Missouri, and the reason for my position is to focus on building relationships with local business leaders and creating awareness within the business community that such a program exists. Overall, assisting with expansion projects, barriers to workforce issues, and ideally, building social capital and connecting business owners with resources such as the Independence Square Association and Community Improvement Districts to help build mutual trust and strengthen group cohesiveness and collaboration.

Working to build a basic program structure, my initial and natural inclination would be to over-think the process, but after taking this course, hearing from other participants, and reading through a few of the provided resources, I have determined that taking a "Pounding the Pavement" approach initially to learn who the stakeholders are and what is working and the challenges businesses are facing may be the best approach for me to take in avoiding "analysis paralysis."

So far in my assessment, I have identified three key stakeholders who will initially benefit from the information obtained: the Chamber of Commerce, the City of Independence, and the Economic Development Advisory Board. These are groups that I will report to regularly and who will find relevance and clarity in the implementation of the program. Additionally, other stakeholders I will meet with are the Square Association, local school districts, and area Community Improvement Districts. Working together with each of these groups will help identify trends and develop a collaborative relationship with developing initiatives to enhance our community's economic and social culture.

So far, in my brief time in this position, I have focused on a segregated and continuous approach, discussing the program, obtaining data that I can use to update contact records, asking questions about opportunities where I may help, and translating the gathered data into relevant information to share with stakeholders. As I gain confidence and meet additional players, my goal is to extend my focus, delving into workforce opportunities, connecting job seekers and employers, and establishing and highlighting the value and importance of the program and how we compare and collaborate with surrounding communities. So far, the reception from business owners has been welcomed, and during a few conversations, I have learned of upcoming expansion projects, which have provided me with opportunities to connect with key people in the city and to get familiar with property locator programs.

In conclusion, I am focused on creating a successful BR&E program, but with the recent retirement announcement of our Chamber President and CEO, the person tasked with the attraction duties of the E.D.C., I have been learning more and more about the overall scope of Economic Development, and until someone is identified to fulfill this role, I am, as they say, drinking from the proverbial, fire hose!

Making firm visits, gathering relevant data that addresses common and specific business issues to help solve problems, analyzing the data, providing quick follow-up, and sharing information with stakeholders are my initial areas of focus in establishing trust and making the case for a successful BR&E program.

Response 5

BREV Outline
- PREWORK
  - Gather partners for discussion/purpose of visits
  - Discuss outreach rolls
  - Targeted visits (Industry, Industry Cluster)
  - Survey (build and consensus approval)
  - Schedule of visits
  - Practice visit outreach with partners (what to say)

- OUTREACH
  - Visits
    - Ask questions of survey

- DATA GATHERING/BUILDING REPORTS
  - Pull together information (data) from each partner
  - Review data, note similarities and individual responses
  - Build report of data.
  - Discuss information with partners.

- Presentation of information
  - Present information to partners (leadership)
  - Publish information to public.

- 360 Review (Additional)
  - What did we do right/wrong?
  - How could we improve?
  - When do we schedule the next event?

Response 6

Business Retention & Expansion (BR&E) Visitation Program Plan
Langdon and Cavalier County, ND

Objective:

To strengthen the local economy by identifying challenges and opportunities within existing businesses, fostering engagement, and providing targeted support to enhance business growth and sustainability.

Key Components:

1. **Stakeholder Engagement & Partnerships:**
   - Collaborate with the Langdon JDA, Chamber of Commerce, City leadership, and industry partners.
   - Engage business owners, workforce organizations, and community leaders for input and support.

2. **Business Outreach & Data Collection:**
   - Conduct structured visitations with local businesses, prioritizing key industries (agriculture, retail, services, and manufacturing).
   - Use surveys and Advan Place Making software to assess business needs, workforce issues, expansion opportunities, and economic trends.

3. **Actionable Reporting & Analysis:**
   - Aggregate and analyze data to identify common challenges, strengths, and potential areas for growth.
   - Provide businesses with individualized feedback and connect them with relevant resources.

4. **Follow-Up & Support Programs:**
   - Develop customized solutions, such as workforce development initiatives, financial assistance guidance, and marketing support.
   - Advocate for infrastructure and policy changes to address business concerns.

5. **Long-Term Program Sustainability:**
   - Establish a recurring visitation schedule (annually or bi-annually) to maintain engagement and track progress.
   - Leverage insights to inform broader community and economic development strategies.

By implementing this structured BR&E program, we aim to create a resilient business environment that supports local growth, enhances economic opportunities, and strengthens the overall vitality of Cavalier County.

Response 7

Choosing a type of program

As the "local champion" for BRE efforts in my community, the first step in starting a BRE program would be to determine the type of program that best suits our situation and scenario. Based upon the resources that we have available and the number of volunteers that we have (essentially just me), the best path to take would be the segregated program.

We do not have the resources to put together a paid professional led program or a volunteer led program. The continuous method does not utilize the community in any way and I believe a truly successful program in a small rural community has the best chance to be effective when the community is involved and bought in. It would also be difficult for one person to operate the continuous model by themselves.

Under the segregated approach, the BRE professional, myself, takes the lead for the program and does not create a "task force" to complete any part of the process. Stigler is a place that requires a level of trust and a solid relationship prior to any business dealings. The business owners in this area respond much better to programs and initiatives when they have a point of contact that they can trust and they know has their best interest at heart.

Choosing a Survey/Executing Survey

I would definitely seek out a pre-made survey. I would not attempt to create my own survey due to the time constraint and lack of experience in that field of expertise. It takes a lot of time and effort to create a survey that provides valuable data that can be transformed in to information that is useful to our local economy.

After choosing a survey, I will need to identify the participants in the survey and determine the tool or resource I am going to use to analyze the data. In my case, I would most likely use a local university to help break down the data and turn it into information that I could use to find commonalities among businesses, identify areas of growth opportunities, and develop strategies to aid local businesses with the challenges they face.

I would then categorize these issues as green, yellow, or red. Red items would be things that need direct attention immediately. These things would be things that might cause closure of the business, severe financial hardship or consequence, etc. Yellow flags are things that are areas that could be opportunities for growth but may need further research before proceeding or items that will need attention but aren't urgent (employees need further training or more in depth training, lack of talent locally, upgrades that may be needed to systems, software, or equipment). Green flags would be things that are ready to proceed immediately and would benefit the business by implementing right away. Sometimes green flags are the low hanging fruit, but can significantly impact the business in a positive way.

Follow Up

After conducting the survey and gathering the information, I would share the information with the local businesses and provide them with resources to seek assistance for the issues they are facing. I would also use our Chamber Luncheons to follow up

Response 8

1. Plan a two-part community visioning session with community partners and stakeholders to speak about in what direction that they would like to see their community grow in. See what they feel like is the most important steps in creating a community primed for growth and expansion as allow them to bring up their concerns. This accomplishes a multitude of things such as bring them together in the same room to generate the first steps towards social capital and allowing the primary focuses to be put first while working towards solving issues. It also allows the community partners to know that we are all on the same team and working towards bettering our communities by lifting each other up and gives insight to the community capital.

2. Take the information that has been provided at the visioning sessions and create a detailed report of areas that was chosen to work on and send this out to the stakeholders and input the information in the CRM. Then create a community development action plan with milestones and annual action plan steps.

3. Host a second visioning session with the community and bring the information of what was identified and work towards solving the issues identified in the first session. Planning actions for addressing the top issues and how to further elevate all the things that in great condition. Identify how to build upon each other and foster a sense of collaboration on all levels.

4. Develop a rough draft of a plan and submit to the leadership team and local elected officials for their input and adjustments of what was the desired outcomes of the visioning sessions.

5. Hold a meeting with the stakeholders, leadership, and local officials to discuss the action plan. Conduct a survey to provide insight and help build the community's capacity to sustain long-term growth and address the needs of the businesses.

6. Develop an action plan

6.1

a. Have an inventory of your sites and work towards making them ready to be viewed. Try to have a list of the information that will be asked for if available.

   - Ownership status
   - Description of parcel(s), including current uses, zoning, special zones, and current assessment information
   - Boundary survey
   - Phase I environment audit/assessment
   - Geo-technical studies
   - Topographical analysis and maps
   - Aerial photography
   - Engineered site development plans
   - Detailed analysis of development cost
   - Complete information on pricing
   - Utility services, including types of services and names of providers
   - Industrial power quality

- Transportation access

b. Development of flyers, websites, or other marketing information so that the information needed is at hand if a specific lead is looking at certain parcels

c. Build a list of needs for those properties and map utilities

d. Make a list of your top ten employers and meet onsite with them

e. Continue to build rapport with those targeted businesses within the community and conduct scheduled BRE visits. Use your Business Visitation Guide.

BUSINESS VISITATION GUIDE

- A business visitation guide establishes standard operating procedures for all community partners to use when conducting business visits.

- The guide should contain the following elements:
    - Sample text for emails or phone calls to set up business visits
    - Checklist for preparing for visit
    - Tips for research the business and identify relevant industry trends
    - Reviewing information from last visit or interaction
    - Topics for the interview
    - Must-asks
    - Headcount
    - Hiring/expansion plans
    - Needs or barriers to successful operations
    - Headquarters – any new initiatives or growth plans that might affect the region
    - Other topics to explore
    - Suppliers – who are they & where are they located
    - Customers – who are they & where are they located
    - Industry trends and their implications on the business
    - Resources to respond to business needs
    - Referral directory
    - Regular regional BRE roundtable

f. Using the Continuous Model, generate a survey, move information into a digital program, code the questions, analyze the data, and form a report. Include visuals to support the data such as graphs or charts

g. Return to the business and provide them with a copy and go over the results with them. Help search for ways to address any red flags that may come up and assist them with resources. Lay out a plan of action and work towards SMART goals by providing progress milestones that can be measured. Generate data from multiple sources that would include relevant information for that business such as industry trends, employment trends, regional information and other important data. Set a

quarterly meeting with those businesses so that they know that they are important to the community and that you are there to help them succeed

h. Work with the local businesses to see if they have a resource that another business may need. An example could be a manufacturer has an excess of pallets, and another company needs a supplier

i. Help the community set up small business guides and make them available to the community/public

j. Work with the leaders in the community, businesses, and local schools to see where we can fill the gap when it comes to employment and education

k. For existing employees, see if there is a way to bridge the gap in education to get everyone on the same page

l. Host meetings and invite the stakeholders and leaders in the community to join

m. Develop a website for marketing and highlight the uniqueness of the area as well as all the strengths of the community and region

n. Place the sites that are available on the website for viewing as well as all information of that particular parcel

o. Develop the retail and commercial property inventory list

6.2

a. Conduct semiannual visits with businesses, expand from the top ten to top twenty-five industry leaders/employers, and follow up directly with on information gathered during visits. Enter information into CRM such as changes in employment or leadership, any yellow or red flags, reports of expansion or retraction

b. Stay up to date on incentives that are available for targeted businesses that you are trying to attract and for businesses within your community that are eligible

c. Update website and marketing materials to reflect what is available and any progress towards making those parcels more site ready if they were not already

d. Create handouts and develop a presentation on a devise that visualizes your area and makes your community stand out and provide this at retail trade shows that are being attended. Information should highlight your region, community, a certain parcel, demographics, local culture, unique appeal, and businesses that may compliment the targeted business

e. Host a networking event invite legislators, stakeholders, and community leaders

f. Visit with other economic development organizations that have areas like ours. Talk about what issues each area is facing and see what has worked for each other and what hasn't

g. Host a business leaders' luncheon where leadership of local companies come together

h. Work with local schools and local industries to have a career day/tour

       i.   Work with local workforce organizations to help meet employer's needs

6.3

a. Develop a capital improvement plan for parcels that are available. Discuss with leadership, stake holders, and elected officials to see if there are resources available to fund these projects to improve the capital (grants, state, or federal funds)

b. Conduct BRE visits and discuss needs such as supply issues or to see if they can possibly get their supplies from local verses an outside area supplier which would boost local economy and shorten the supply chain

c. Work with other EDOs to see if there are any resources available such as grants, state, or federal funds for the community, businesses, or projects

d. Generate data for reports to check progress on a quarterly basis. Ensure that I followed up with assisting stakeholders with yellow and red flags that have been identified

e. Work with the industry leaders and secondary educational institutions in the area to see if they can create career interest through career specific educational courses. May see if businesses leaders help put together the course material, rubric, or instruct the course

f. Continue to expand BRE visits from twenty-five to fifty and follow BRE best practices

Response 9

To effectively implement our Business Retention and Expansion (BR&E) visitation program, we are starting from scratch, offering us a unique opportunity to build a robust foundation tailored specifically to Liberty Hill's needs. Given that this is the first BR&E initiative for the Liberty Hill Economic Development Corporation, and with our recent growth expanding our staff to two individuals, it has become my primary responsibility to design and implement this vital program.

Having entered economic development without prior experience, I have actively pursued training, found valuable mentors, and engaged in extensive research, including consultations with neighboring communities to understand their successful BR&E strategies. Additionally, participating in this BR&E fundamentals course has greatly enhanced my ability to structure our program logically and strategically.

Our initial focus has been on establishing essential inputs, such as structured visitation schedules, dedicated personnel time, effective communication strategies, and acquiring a robust CRM system. Previously, Liberty Hill EDC lacked an adequate database to systematically collect, retain, and analyze historical business information. Addressing this gap has been crucial, and we have made significant strides toward establishing a comprehensive and user-friendly CRM system, which will facilitate efficient data management and reporting.

The outputs of our program will include regularly scheduled business visits, clear and actionable reporting to stakeholders, and meaningful categorization of qualitative data into core themes such as Workforce Development, Infrastructure, Technology Needs, and Business Operations. This structured approach ensures stakeholders can easily interpret collected data and make informed decisions.

Through ongoing engagement and leveraging social capital—primarily via collaborations with the Chamber of Commerce, local educational institutions, and neighboring communities—we aim to create strong community connections. This network-building will provide essential support and resources to our local businesses, fostering an environment of sustained economic growth.

The desired outcomes of our BR&E program include improved business retention, strengthened stakeholder collaboration, enhanced economic stability, and ultimately, a thriving business ecosystem within Liberty Hill. With the groundwork laid over recent months, including overcoming initial barriers and establishing foundational tools, our organization is now better positioned than ever to achieve these ambitious goals.

I have attached to this response my outline of a structured BR&E program designed specifically for implementation in my community. I am open to any feedback and insights you may be able to provide to further strengthen my approach.

Liberty Hill EDC Business Retention & Expansion Program DRAFT

Overview

The Liberty Hill Economic Development Corporation (LHEDC) is dedicated to the growth and economic development of the City of Liberty Hill, Texas. Our mission is to help Liberty Hill prosper by facilitating positive and self-sustaining growth.

One of our key initiatives is the Business Retention & Expansion (BRE) Program. This program is designed to understand the needs and challenges of local businesses to pave the way for their success. The BRE Program allows LHEDC to directly address businesses needs and compile the necessary tools for the business community.

The BRE Program is designed to nurture existing businesses, recognizing their vital role in our community's success. Supporting current businesses and industries not only strengthens the local economy but also serves as a key factor in attracting new companies that complement and enhance the business ecosystem. This program is renowned for delivering a high return on investment in economic development. By building personalized relationships and providing exceptional customer service, the BRE Program fosters an environment of growth and prosperity, ensuring Liberty Hill continues to be a thriving hub for businesses.

The objective of the BRE Program is to cultivate a supportive environment that drives economic growth and sustainability, positioning Liberty Hill as a dynamic and thriving area for businesses.

Short Term Objectives:

Business Identification: Identify and engage with all businesses in the community, not limited to major employers, to ensure inclusivity and thorough understanding of the local business landscape.

Effective Business Management System: Develop and implement a comprehensive business management system to streamline operations and improve communication with local businesses. We are integrating HubSpot as our CRM platform to efficiently manage projects, programs, and the business directory for Liberty Hill. This system will enable us to create a detailed inventory of all existing businesses in the community, including their contact information, ensuring a well-organized database.

Regular Business Visits: The monthly target is to conduct 8–12 visits to local businesses, dedicating time to address specific needs as they arise. These visits will focus on building personal connections, assessing business needs, and providing tailored support to ensure each business receives the attention it requires.

Problem Resolution: Offer prompt support to address and resolve business concerns and challenges.

Proactive Follow-Up: Follow up with businesses after visits to address any outstanding issues, provide additional support, and reinforce the EDC's commitment.

Long Term Objectives:

Relationship Establishment: Establish strong, lasting relationships with local businesses to foster trust and collaboration.

Increased Engagement Frequency: Connect with businesses more frequently than once a year (Especially Downtown) to stay updated on their progress and evolving needs.

Tailored Solutions: Address unique challenges and needs faced by the business community as a whole by providing tailored solutions and resources.

Resource Sharing: Share information about available business resources, programs, and opportunities to help businesses thrive.

Awareness Creation: Create awareness of the EDC's role and services among local businesses to encourage their active participation and engagement.

Implementation Strategy

Utilize a multifaceted approach to connect with local businesses, including walk-ins, scheduled visits arranged through calls or emails, and introductions made via networking opportunities. Proactively reach out by phone and email, providing businesses with clear contact information to ensure they can easily connect and have their needs prioritized. The monthly goal is to conduct 8–12 visits to local businesses, allowing time to focus on individual businesses as specific needs are identified during visits.

Structural Initiatives for BR&E Visits:

Personalized Business Visits: Personally visit each employer and business in Liberty Hill to discuss needs, build relationships, and assess challenges.

Structured Information Gathering: Conduct visits in a check-in style format to gather comprehensive information on each business. Focus on understanding both the successes and challenges they face, identifying trends, and uncovering any issues. This approach will provide valuable insights that help develop tailored solutions, fostering long-term growth and success for each business.

Identify Opportunities: Identify opportunities to support local businesses facing challenges, such as staffing needs, expansion, and relocation.

Educational Outreach: Educate companies about LHEDC services through meeting visits, events, and communications to increase awareness and participation.

Issue Resolution: Follow up on issues raised during visits to ensure timely resolution and support.

Resource Awareness: Inform businesses of available resources and programs to support their growth and development. Facilitate introductions and provide requested information for support.

Testimonial Collection: Capture testimonies from local companies about why they chose Liberty Hill to showcase success stories.

Follow-Up: Send a standardized email recap after visits to reinforce discussions and next steps.

Business Directory Updates: Update the business directory with visit information to maintain an accurate and up-to-date database.

Communication Tools

Website Utilization:

- Utilize the LHEDC website as a central hub for information dissemination, providing businesses with easy access to resources, program details, contact information and ability to schedule meetings.

Emails:

- Use standardized visit follow-up/recap email to ensure consistent communication and follow-up after business visits. These emails should include a summary of the discussion, any action items, and a reminder of available resources.

Community Engagement:

- Engage with the community through various communication channels, such as social media, newsletters, and press releases, to raise awareness about the BRE program and its benefits for local businesses.

Networking Events:

- Organize and engage in networking events to facilitate communication and collaboration among local businesses, providing them with opportunities to share experiences and best practices.

Feedback Mechanism:

- Implement a feedback mechanism, such as surveys or feedback forms, to gather input from businesses about their experience with the BRE program and identify areas for improvement.

Business Development Tools/Resources

Industry and Individual Recognition Programs:

- Implement industry and individual recognition programs to celebrate the achievements and contributions of local businesses, fostering a culture of excellence and innovation.

Business Development Initiatives:

- Engage in various business development initiatives, including participation in industry associations, business groups/clubs, management seminars, and market research activities. These initiatives can help businesses expand their market reach and improve operational efficiency.
  - Small Business Administration (SBA), Service Corps of Retired Executives (SCORE), Texas Manufacturing Assistance Center (TMAC), Opportunity Austin, TEDC

Incentives/Grants (Local, State, and Federal):

- Provide information on available incentives and grants at the local, state, and federal levels to encourage business growth and investment. These incentives can include tax incentives, grants, and other financial support programs.

Workforce Solutions Rural Capital Area:

- Collaborate with Workforce Solutions Rural Capital Area to access workforce development programs, training opportunities, and recruitment services. These resources can help businesses address their workforce needs and enhance their competitiveness.

Capital Area Council of Governments (CAPCOG):

- Partner with CAPCOG to leverage their resources, expertise, and regional network. CAPCOG can provide valuable insights, funding opportunities, and collaborative platforms to support business growth and economic development.

Education Entities Collaboration:

- Collaborate with education entities, such as Texas State Technical College in Waco, East Williamson County Higher Education Center, and Texas State University Round Rock Campus, and other local higher educational entities to develop workforce training programs and educational initiatives tailored to the needs of local businesses.

Networking Events:

- Organize networking events, and business matchmaking sessions to facilitate connections between businesses, suppliers, and potential partners. These events can help businesses expand their networks and explore new opportunities.

Professional Development Opportunities:

- Provide access to professional development opportunities, such as workshops and seminars, to help businesses enhance their skills and capabilities. These opportunities can empower businesses to innovate and achieve sustainable growth.

- Participate in the Hiring Our Heroes program to support veterans, spouses, caregivers and transitioning service members in finding meaningful employment opportunities. This program can benefit businesses by providing access to a skilled and dedicated workforce.

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