

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

For our BR&E program, I will be conducting all the interviews and also compiling all of the information. I will be reporting the information to my direct team (Business Development and Retention Manager and Director) along with our sub-committee that focuses on our Prosperity Pillar. A simplified version of the report will also be presented to our Board of Directors.

The report will benefit the strength of the program as it will help to categorize and summarize the feedback that we have received. It will also help us, as a nonprofit, to plan for future events, training, and seminars that we will offer to our small business community. Being able to include our sub-committee and our Board with the information will help them to understand the obstacles that we are facing in Horry County, and it will also show them the work that is being done within our organization. After all, any Board wants to ensure that their money is not only being used, but they also want to know what it is being used on.

At this point, our focus is on getting our nonprofit's name out there to the community and to also build relationships with small businesses. The expectation provided is that we obtain as many surveys as possible in as short of a time period as soon as possible. The report will need to include the following:

- A reminder that there are over 8,000 small businesses in Horry County.
- It is difficult to get in touch with many of those businesses due to lack of readily available information (many of the businesses are home-based and not all are registered with the city and/or county in which they are located).
- There is only one person tasked with completing these surveys which are primarily being done in person.
- Our organization is not that well known in the community as it is still relatively new; this adds a challenge to getting businesses to meet with us along with their willingness to share information with us.

In addition to those challenges, the report will include an overview of the results:

- A summary of the objectives for the surveys, including the problem statement
 - The methods used to obtain the surveys
 - Graphs to visually demonstrated easily measured results (using percentages)
 - Summaries of the short answers broken in a category format
 - Recommendations for future PGS programming to be offered to our small business community
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Response 2

As the BR&E process can take an extended period of time, preparing reports and presentations for an ongoing update can help to maintain awareness of the program, trust that the program is effective, build social capital, and also prepare stakeholders for key components of the final report findings. Through this activity, potential interviewees may also be identified to participate in the BR&E.

Ideally the report/presentation would be delivered to relevant stakeholder groups, the Chamber of Commerce, the Business Improvement Area Association, Manufacturers Association, etc. This should also include Economic Development Commissions or Regional Marketing Boards (if the sector chosen for the BR&E is relevant) to share information with stakeholders that can support their mandate as well. For instance, if a BR&E was being delivered on a particular sector and a key finding is in regards to workforce issues, including local groups that support workforce development (Career Edge, Employment Agencies, etc.) would be helpful to make these groups aware of the concerns, but also that they may provide anecdotal information moving forward.

Including some members of Council may be beneficial for these reports/presentations. This may be a strategic decision. If there are one or two members of Council that can be included to be made aware of the progress of the program and can act as an ambassador of the program at the Council table, this is very beneficial to the continued success of the program as well as supporting a budget for the program.

If there may be the risk of Council involvement that may derail the process, it is likely better to provide brief updates at Committee/Council meetings to keep them aware.

These reports/presentations can strengthen the BR&E program by maintaining awareness, creating community buy-in of the program, and generating social capital. The information shared can assist stakeholder groups with their own mandates and information received may better support the final report. A stakeholder may recommend a local business that would benefit from participating and they may provide anecdotal information to help the interview process.

It would be beneficial to include an update on how many businesses have been interviewed to date, how far along in the visitation process the program currently is, and indicating if the program is still on schedule or if there have been any changes. This helps to set expectations and ensure partners are aware and supportive of the program. Some of the collected information that can be shared will depend on how much information has been collected so far, recognizing that the bulk of the data may change over time. At the beginning of the process, it is likely better to avoid sharing any striking positives or negatives in case these are outliers. It would be beneficial for the presentation to share any consistent trends that have been seen, and save the key findings for later in the process. If a presentation is taking place closer to the conclusion of the visitation process, it could be beneficial to share one or two of significant positive and negative findings in preparation for the final report. This can prepare the groups if there are any striking findings so as not to create too much shock/apprehension.

To turn data into information for the audience, it is best to create data visualizations or charts to show trends and snapshots of the findings. In a slide deck presentation, showcasing trends in an image helps the stakeholders understand the trends and findings in an easy and palatable way while still respecting the confidentiality of participants. It is also a great way to encourage engagement ie. "Here is the findings from a question we have asked about workforce, what do you see and what can we extrapolate/infer from the data you see?". Showcasing the data in this way can also allow for a storytelling approach to give the audience a sense of "what is the current state of this sector". Showcasing data using charts and visualizations can also help to show averages, and as the average will change as more data is collected, this can be noted such as "last time we spoke, the data indicated XYZ. From the additional collected data, we know this to be true and the average has increase as well".

Response 3

- To whom or what groups would the reports/ presentations be delivered.
 - City Council, Chambers, Elected Officials

- How would this benefit the strength of the BR&E Program
 - Connection and Social Capitalism
 - Data to recruit more businesses and developers

- What would be included in the report that the collection of data in a continuous model is likely to be relatively slow?
 - Job creation
 - Job retention
 - Salary increases
 - Retirement Age

 - How would you turn data into information for the Audience
 - Bar graphs, Pie Charts
 - Chamber Book showcasing easily readable data. Picture graphs
 - Comparison to other local communities
 - Newsletters
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Response 4

Reporting and presentations for the model of visitation I am considering would be challenging because of the length of time for actual results and the anecdotal nature of the conversations. It would be important to ensure that conversations stay on track and that reporting is made available as to progress and early results. However, reporting early result information may taint future conversations.

For this reason, I would limit early reporting to the BRE oversight body (i.e. Board of Directors). Although it would also be important to insert information on early data and trending if there is an event that would be influenced by the results, for example a new city plan.

That said, using a one person visitation strategy would reduce discrepancies in data gathering and interpretation of results and context. It would also allow for strategic relationship building and enhance social capital.

Response 5

To whom or what groups would the reports/presentations be delivered?

- Local businesses
- Municipal council and staff
- Valley REN Board of Directors
- Local business improvement districts
- Local service clubs
- Engaged community members (general public)

How would this benefit the strength of the BR&E program?

- A targeted report allows a group to feel their issues are important and worthy of attention. Thus more buy-in.
- Targeted presentations impart more exact information to the group.
- Targeted reporting addresses and highlights different concerns and perspectives relevant to that group
- More meaningful conversation can be generated
- Engaging businesses and business improvement districts allows for a greater outreach of businesses as the program goes forward.
- Engaging municipal staff and council allows for better communication and transparency with our funders for better awareness of business issues and a joining of forces when work overlaps.
- Engaging the Valley REN board of Directors ensures the BR&E program is adhering to the mandate of the Valley REN.
- Engaging local service clubs and engaged community members will increase social capital in the program.

What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?

- Numbers of businesses engaged
- Types of businesses engaged/present in the community
- Red flag, yellow flag, green flag issues
- Potential cost of issues to community/economy if not addressed
- Potential solutions to issues addressed and/or any solutions that were implemented as a result of the BR&E program

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

- Executive summaries with the key takeaways at the forefront
- Short statements and/or summaries of the data e.g. "almost 1/3 of businesses experienced supply chain issues" – not having to be exact.
- Framing the data in relatable and understandable terms as much as possible. For example, "If 'X' issue isn't addressed we could lose 'X' percentage of businesses within the next 5 years." or by contextualizing the importance by pointing out the businesses we already enjoy and the value they bring to the community before providing data so that the impact of the data is clear.
- Simple graphics and graphs wherever possible
- Accessible, plain language
- Ensure the audience can make the connections to how it affects their interests. Then data can more easily be turned into knowledge, action and innovation.

Response 6

To whom or what groups would the reports/presentations be delivered?

In our region, the primary presentation and reports would be delivered to our Council. Additionally, we share it with our other stakeholders including community organizations, local colleges and the chamber of commerce.

How would this benefit the strength of the BR&E program?

The reports and presentations will deliver valuable insights to the public, educating them about the challenges businesses are facing and the current economic landscape. This will also help us to brainstorm potential solutions to these challenges. Also to demonstrate to stakeholders that we are committed to our responsibilities and dedicated to driving positive change for them.

What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?

The report would highlight the communities' challenges, including issues related to skilled labor, internet access, and transportation. It will also emphasize strengths such as quality of life, competitive salaries, and a well-educated workforce. Additionally, the reports will provide insights into the duration of business operations, property ownership versus rental status, expansion or relocation opportunities, and key contacts for future engagement. It will be essential to explain how this information contributes to the future success of these businesses.

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

We utilize infographics to effectively convey the story behind our data. By simplifying and condensing tables and graphs, we ensure they remain relevant and accessible to our audience.

Response 7

To whom or what groups would the reports/presentations be delivered? The Reports and/or presentations would be delivered to the Economic Development's Executive Leadership Team at a minimum, and all other departments who have an interests and response for the item. Additionally, the Mayor and City Council would also be included per request.

How would this benefit the strength of the BR&E program? This effort would provide an opportunity to build social capital (relationship building) with the City of Austin's business community. Assisting businesses where they have issues or resolving their pain points so that they can rebound, focus on their business, and grow it only benefits the city in retaining or expanding the business. Long term, this stabilizes our unemployment rate.

What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow? Will provide two different reports. 1) A Quarterly Reports of the numbers businesses engaged, and issues brought forth, and 2) An Annual Report that would provide the current state, desired state, summary of objectives, logic model, quarterly/annual goals, the survey instrument, method used, Action Teams participants for both the GBE Division, SBP, the goals, number of businesses engaged, type of businesses engaged, and the effort achieved.

How would you turn data into information for the audience(s)? We would provide a response to the following, if needed: Hiring; Rising expenses; Added Factors; Pain Points, Specific Needs of the City of Austin. This would be developed into a quarterly report, and we would share this with any other city departments necessary. Within the reports we could use Bar Graphs, Pie Charts, and plain language.

Response 8

In Oakland Park, our Business Retention and Expansion program is all about staying connected with our local businesses. Regular reports and presentations will help us share insights, track progress, and keep our partners informed.

1. Who Will Receive the Reports and Presentations?

- **City Commission and Leadership:** They'll use the insights to make informed policy and funding decisions.
 - **CRA and Economic Development Department:** Our team will rely on the data to guide and adjust programs as needed.
 - **Business Associations and Downtown Partners**
 - **Broward County Organization and South Florida Partners**
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2. How This Will Benefit the BR&E Program

- **Builds Trust:** Being transparent with stakeholders about what we're hearing from businesses keeps confidence in the program high.
 - **Informs Decisions:** Real data helps leaders prioritize issues and target resources effectively.
 - **Encourages Collaboration:** Sharing results creates opportunities for partners to work together on solutions.
 - **Tracks Progress:** By measuring what's working and what's not, we can adjust strategies and celebrate successes.
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3. What the Reports Will Include

Since we'll be gathering data gradually through a continuous model, our reports will focus on:

- **Number of Business Visits:** Tracking participation and outreach.
- **Emerging Trends:** Highlighting common challenges and opportunities using a red, yellow, and green flag system.
- **Business Feedback:** Sharing insights from business owners in their own words.

- **Preliminary Recommendations:** Offering suggestions for programs, policies, or resources that could help.
 - **Visual Summaries:** Using charts and infographics to make data easy to digest.
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4. Turning Data into Actionable Information

- **Flag System:** Using red, yellow, and green flags to indicate how urgent an issue is will help prioritize responses.
 - **Visual Reports:** Simple, clear graphs and charts will tell the story behind the numbers.
 - **Storytelling:** Featuring quotes or short case studies will make the data relatable and highlight real-world impact.
 - **Comparisons:** Where it makes sense, we can compare local data to regional or state trends to give context.
 - **Regular Updates:** Providing quarterly updates will keep everyone in the loop and allow us to track progress over time.
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Response 9

Response 10

Part B

Response 1

- Funding/Capital
 - Communication
 - Marketing
 - Workforce
 - Government Relief
 - Less Government
 - Unsure
 - None
 - Infrastructure
 - All
-

Response 2

<i>Financial Support for Operations</i>	<i>35</i>
<i>Government Transparency and Effective Communication</i>	<i>15</i>
<i>Marketing Support</i>	<i>3</i>
<i>Resource Support/Information Share</i>	<i>15</i>
<i>Standardized Guidelines</i>	<i>18</i>
<i>Broadband Access</i>	<i>2</i>
<i>Workforce and HR Support</i>	<i>5</i>
<i>Supply Chain Concerns</i>	<i>4</i>
<i>Healthcare Support</i>	<i>4</i>
<i>Self-Employment Support</i>	<i>2</i>
<i>Reduced Closures</i>	<i>4</i>
<i>Childcare Support</i>	<i>1</i>

Response 3

Financial Support- Grants/Loans etc.

Unsure- Not Sure/ Don't know

Information Source/ Media

Economy/ Covid/supply chain

Incentives

Government/Leadership Roles/ Political

Response 4

I would utilize the following categories:

- Funding
 - Results
 - Challenges
 - Resources
 - Leadership
 - Policy
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Response 5

1. **Financial Support and Grants:** Federal grants, loans, payroll protection, tax relief, and other monetary assistance, help to maintain business operations, expenses, and compensation for business disruption.
 2. **Internet and Technology Improvements:** Better internet infrastructure for online business operations, better bandwidth, improved access to community-specific, relevant information for SMEs.
 3. **Government and Policy Leadership:** Clearer, more consistent guidelines, less government interference, better leadership at all levels of government, transparent and trustworthy communication on the pandemic, overall a stronger, more localized focus on community's unique needs.
 4. **Health and Safety Requirements:** Access to PPE, access to healthcare and COVID-19 testing, consistent health and safety protocols, more autonomy in choice of opening while respecting health needs.
 5. **Workforce Challenges:** Hiring difficulties due to unemployment benefits, managing payroll, covering COVID-related absences, and dealing with layoffs and the loss of employees.
 6. **Supply Chain and Economic Recovery:** Support and strengthen supply chain both internationally and locally, improved localized economic activity.
 7. **Business Operations and Reopening:** Recovery and reopening support, planning to deal with / avoid future shutdowns, navigating the ongoing uncertainties of pandemic realities.
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Response 6

1. Financial Support
 2. Policy & Regulation
 3. Communication & feedback
 4. Labour and Employment
 5. Health care and Safety
 6. Business Continuity and flexibility
 7. Neutral Responses
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Response 7

Funding/Capital

Communications

Education/Community College Support

Healthcare Options

Childcare Support

Workforce

Supply Chain

Training

Zoning

Infrastructure

Mentor/Protégé Program

Local Chamber Support

Response 8

When reviewing the open-ended survey responses from the Mississippi COVID-19 survey, it's helpful to break them down into clear categories. This makes it easier to identify patterns and figure out what actions might be needed.

- **Financial Support and Capital Needs:** Comments about needing grants, loans, or other funding.
 - **Workforce and Labor Concerns:** Issues related to hiring, retaining staff, wages, or finding qualified employees.
 - **Government and Regulatory Issues:** Feedback on policies, government programs, or frustrations with regulations.
 - **Operational Challenges:** Supply chain issues, closures, reduced hours, or other disruptions.
 - **Marketing Needs:** Requests for help with promotions, social media, or finding customers.
 - **Health and Safety:** Concerns about safety protocols, protective equipment, or health regulations.
 - **Technology and Infrastructure:** Businesses that mention needing better internet, digital tools, or other tech solutions.
 - **General Business Outlook:** Broader reflections on how businesses see their future, their challenges, and their opportunities.
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By organizing feedback into categories, it will be easier to identify trends and develop targeted solutions. This also helps in making sure each concern gets the right attention from the right people.

Response 9

Response 10
