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

The group I would be primarily sharing the BR&E report with would be the members of the Economic Development Partnership Advisor Board, which meets monthly and is made up of members who have invested financially in being a part of this board and who are stakeholders impacted by the welfare of the community.

My initial vision of the report will focus on my monthly activities, issues, and challenges and a summation of the overall perception of the program. I will also plan to address any details on follow-ups and other actionable items. Also, taking time to clarify the results by defining the analysis used for reporting, SWOT, PESTLE, or a combination of both.

Initially, I will be doing a lot of introductory meetings, but as I transition into my role and based on the questions deemed important to the survey, I will focus on reporting flagged issues and challenges businesses are facing and areas where assistance is needed; I'm already finding opportunities on a few of the visits I have made and given the time needed for data collection using the continuous reporting model, I would include any flagged issues and follow-up items that I continue to need help with or that have been completed. I will also give an overall view of the program's perception and reception and what I hope to achieve over the long haul. Growth, expansion, and workforce development are other hot-button issues that I will focus on during my visits and in sharing with the Advisory Board.

For the group(s) that I present to, turning the data from my visits into usable information will be key in detailing the vital signs of the business community. In my experience, dashboard reporting helps visualize the overall picture, validating the program and eliciting questions, which in turn will engage people to recruit an action committee for flagged issues. In my case, I would use frequency rather than averages until more data is collected. I have received offers from a few members of the board to accompany me on visits, which I believe will help with the BR&E program buy-in and direction.

Response 2

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

- Organization senior management
- External and Internal Economic Development Organizations
- Businesses that were surveyed
- Other interested businesses

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

- Provides baseline data to measure against
- Provides the direction to Economic Development Staff
- Confirms or denies assumptions
- Builds trust and excitement with businesses as the see the results and potentially progress.

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

My belief is that these reports should be quite short. One page, potentially both sides. It should be graphic heavy and text short. An online dashboard, although expensive, could track the data live as it is getting entered. In this approach I would be reporting on all questions asked. As the data slowly comes in, I would be also reporting on my effort (i.e. 'X' number of businesses visited). In the report there should be some recommendations or evaluation of the data collected to date.

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

Depending on the audience

- A one-page report
- Power point presentation with slides printed
- If cost was no issue, a short video.

Response 3

One of the most effective ways for an economic development department and its board to gauge the health of the local economy is through direct communication with business owners. However, there are several challenges to this approach, including making initial contact, engaging specific types of businesses, and collecting useful data that can be translated into actionable insights. Despite these challenges, when combined with other community level data, business outreach provides invaluable clarity for economic development strategies and policy adjustments.

To maximize the effectiveness of reports and presentations derived from BR&E visitation data, it is crucial to strike a balance between gathering enough detailed insights while avoiding excessive or overly broad questions that make quantification difficult. Open-ended responses can be valuable, but if they lack structure, they may be difficult to aggregate and analyze. Therefore, designing surveys with primarily closed-ended questions, supplemented by optional explanation fields, allows for both quantifiable data collection and deeper insights where necessary.

For example, a yes/no question followed by a brief optional comment box would enable the economic department to efficiently aggregate responses, while still allowing for qualitative analysis using tools like AI to identify common themes.

The reports and presentations would be tailored to key stakeholders, including:

- The Economic Development Board – to inform strategic decisions and funding allocations.
- City Officials & Local Government – to guide policy adjustments and infrastructure planning.
- Chambers of Commerce & Business Associations – to support initiatives that strengthen local businesses.
- The Broader Business Community – to share relevant insights and foster engagement.

Since data collection in a continuous model tends to be slow, reports would focus on monthly or quarterly trends, driven by specific information needs identified by the economic director or board. This ensures that the BR&E program remains proactive rather than reactive, delivering relevant and timely insights that support economic growth.

Response 4

Reports and presentations are crucial for a successful Business Retention and Expansion (BR&E) program. They provide accountability, demonstrate impact, and drive improvement. These reports and presentations would be delivered to a variety of stakeholders, including participating businesses, local government (city, county and state if applicable), economic development organizations, local school district, community college and universities, community stakeholders, and the volunteers themselves.

Our current staffing levels and limited experience with data analysis may make preparing these reports a challenge initially. To address this, we can explore several options, including: 1) partnering with local colleges or universities for data analysis support, 2) providing targeted training for existing staff members on data analysis techniques, and 3) investigating cost-effective data analysis software or tools. Using one of these methods we can develop a sustainable reporting process.

Sharing aggregated and anonymized data with businesses allows them to see trends and benchmark themselves, while reports to government officials justify resource allocation and inform policy decisions. Economic development organizations can use the data to refine their strategies, and sharing key findings with the community builds awareness and support. Colleges, universities, and the local school district can use this information to align education with workforce needs and foster community partnerships. Recognizing volunteer contributions is also vital for continued engagement.

Regular reporting strengthens the BR&E program by increasing credibility, enabling data-driven decision making, enhancing communication, improving collaboration, providing an advocacy tool, and supporting volunteer retention. With a "blitz" approach and potentially slower data collection, reports can focus on baseline data, qualitative insights gathered by volunteer visitors, success stories, progress on action items, key trends (reported cautiously), and future plans. Turning data into information requires clear visualizations, concise summaries, compelling narratives, and tailored reports for different audiences. While challenges like data accuracy, limited resources, a focus on qualitative insights, success stories, and clear communication will ensure that the BR&E program generates valuable reports and presentations, even with limited initial data, setting the stage for more robust data collection and analysis in the future.

Response 5

To whom or what groups would the reports/presentations be delivered?
I would deliver this presentation to our local chamber members at our Chamber Luncheon. I strive to provide value to this group in particular as they choose to support the efforts of the Chamber throughout the year whether through monetary support, volunteering their time, or gathering of resources to complete projects/events.

How would this benefit the strength of the BR&E program?
The vast majority of the businesses in my area are members of the Chamber of Commerce. We are a relatively small community and our business owners support growth and economic development on a wide scale. Including the Chamber members in the presentation would reiterate to them that the BR&E program is in place to further their businesses and help them overcome obstacles that they may be facing. It would also strengthen them by learning that other businesses may have also faced struggles similar to theirs and help them overcome those road blocks more efficiently. A lot can be learned from those that have gone before you and not every business is at the same place financially or structurally.

What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?
I think it would be important to include how we went about gathering the information for the survey, how the data will be quantified/measured, and what we hope to glean from the data that is gathered. In

other words, we want to show the audience that we plan to use this data to help further their business and provide solutions for the issues that they may face. They need to know that we have their best interest at the heart of what we are doing and being transparent about how we gather data would help in that effort. We would also need to outline the potential issues that we may have run into already in gathering data. If we wait until someone points it out, credibility may be lost.

How would you turn data into information for the audience(s)?
Working with data is not my strength, however, I have plenty of connections with folks that can turn data into useful information that can be used to tell a story. The goal of the data is to tell the stakeholders a story and allow them to use that story to create solutions going forward to better their businesses.

Response 6

1. Reports would be distributed to leadership, local elected officials, those on the BRE team, and the business or businesses depending on the type of report being assembled.
2. The benefits of preparing reports from the data gathered during surveys allows up to present the real factors that are affecting the businesses in our areas. It would help us to present in a structured manner with analytics to support the strengths and weaknesses of our local and regional areas. This assists us in making the most educated decisions as we move forward. The report also allows the areas of concern to have a more thoughtful considerations when addressing any issues and allow us to continue supporting areas of strength.
3. In a continuous model, we can establish a start point with a business and begin a selected survey. The survey would allow us to highlight areas of concern for the business. We can provide information and work with identified partnering organizations to address any red flags or yellow flags after gaining permission from the business if working with a 3rd party. As we continue to build the rapport and have continued conversations with the business, we can build a better analysis of the individual business. The individualized report provides each business information to develop an action plan laying out objectives and strategy. It allows for each business to understand the local environment and build the social capital. We would also include a fact sheet.
4. Turning data into information helps paint the picture for the audience. We can use the data to create visual representations such as charts and graphs to support the information being reflected. This allows the audience to see the information in different formats and highlights it in a way to bring attention to certain matters. We are also able to include the aggregate data in the report. We can show areas of concern, addressed issues, and trends that are relevant.

Response 7

1. Target Audience for Reports/Presentations

- Local Government & Economic Development Organizations: City councils, county commissioners, JDA, and chambers of commerce. All of my favorite Suit & Ties 😊
- Business Owners & Industry Leaders: Key stakeholders in the community who need insights to make informed decisions.
- Community Groups & Volunteers: Those involved in the BR&E process and interested in outcomes.
- State or Regional Economic Development Agencies: Potential funding sources or partners who need data to allocate resources.
- General Public: Creating transparency and engagement through presentations or summaries in local media.

2. How Reports Benefit the Strength of the BR&E Program

Data isn't just numbers on a spreadsheet—it's the secret sauce that keeps businesses and communities thriving. By making data-driven decisions, we're not just guessing our way through economic development; we're using real insights to keep things sustainable. Keeping everyone in the loop—volunteers, businesses, and policymakers—ensures that we're all rowing in the same direction (and not in circles). Plus, transparency and accountability mean we can actually prove we're making progress instead of just saying, "Trust us, it's going great!" Solid reports don't just impress grant committees and sponsors—they unlock the funding that turns big ideas into reality. And let's be honest, identifying and prioritizing needs is way easier when we have facts instead of just loud opinions. It's about making sure we focus on what actually matters, not just what's making the most noise.

3. What to Include in the Reports

With data coming in bit by bit instead of all at once, we won't get one big "aha!" moment—but that's not a bad thing. It gives us a chance to keep updating and improving our reports as we go. Each report should start with a quick summary of the most important takeaways, so no one has to dig through a bunch of numbers to find the good stuff. We'll look at big-picture trends, like job shortages or supply problems, and highlight success stories to show how businesses are benefiting from BR&E efforts. But we won't ignore the tough stuff—recurring problems will be called out so they can be fixed. The action plan will lay out the next steps, and if we've been tracking data long enough, we can compare past and present trends to see what's working (and what still needs work).

4. Turning Data into Information

Nobody wants to stare at a wall of numbers, so using visual aids like charts, graphs, and heat maps makes the data way easier to understand (and a lot less boring). A storytelling approach helps bring the numbers to life by sharing real business experiences—because people connect with stories, not spreadsheets. But reports shouldn't just dump a bunch of data and call it a day; they need to offer real solutions and strategies that can actually make a difference. And since not everyone needs the same level of detail, we'll break it down—quick, easy-to-read insights for the public and deep-dive analytics for the policymakers who like to get into the nitty-gritty.

Response 8

To whom or what groups would the reports/presentations be delivered?
As a public entity, we report to multiple groups, and the level of detail in our presentations will vary based on the audience. The most comprehensive presentation will be delivered to our board. We will also share relevant information with the county commission, various city commissions within the county, the local Chamber of Commerce, and the broader community.

How would this benefit the strength of the BR&E program?
Sharing these reports and presentations will enhance community engagement and foster stronger buy-in. In a small community like ours, many local leaders are also business owners and employers, making their involvement crucial. By keeping them informed, we can encourage participation, collaboration, and strategic decision-making that directly benefits the business retention and expansion (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?

The content of each report will be tailored to the audience:
- Board of Directors: Monthly updates, including which businesses we visited (in compliance with state confidentiality rules) and any emerging trends.
- County Commission: Biannual updates on the number of businesses reached in the past six months, total outreach efforts, and notable trends. We will also highlight responses relevant to county-level activities.
- City Commissions: Updates provided on an as-needed basis, particularly when feedback pertains to city operations, such as infrastructure or municipal programs.
- Public Outreach: Monthly notifications via a local radio show, primarily to remind the public about the program and share ways they can support local businesses, such as promoting new openings, expansions, and special initiatives.

How would you turn data into information for the audience(s)?
We will primarily present data through typed reports, supplemented with visual elements for accessibility and engagement. Key methods include:
- Annual Summary Report: A concise document analyzing collected data, featuring business highlights (with permission), photos, and simple graphics. This report will be shared with all stakeholder groups and made available in our office brochure rack.
- Strategic Planning Integration: In collaboration with our local planning council, we update our strategic plan every five years in alignment with their Comprehensive Economic Development Strategy (CEDS). The data collected over the past five years will be incorporated into each strategic plan update, which will be published on our website. We will also coordinate with the planning council to determine if any of our findings should be included in their CEDS.

Privacy Considerations
For all reports and presentations, we will strictly adhere to privacy regulations to ensure confidentiality and responsible data handling.

Response 9

- To whom or what groups would the reports/presentations be delivered?
  - EDC Board
  - City Council
  - County Commissioners
  - Chamber of Commerce
  - Business groups that have been surveyed
  - Other leaders of the community
- How would this benefit the strength of the BR&E program?
  - The first BRE Survey would be first and could be the base from which we will grow
  - The survey will provide a direction for members of the community and could also enlighten the issue that need to be addressed
  - Inclusion and collaboration of participation would strengthen the community
- What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?
  - The report should include graphic data that shows the results, good or bad. A report of data that can be used to make informed decisions by leadership and targeted businesses and community. The information should be overloaded with data, simple is best.
- How would you turn data into information for the audience(s)?
  - Graphs and pictures are important to the receiver of the information, but the data needs to focus on what the results actually state.

Response 10

Preparing reports and presentations for the BR&E visitation program serves multiple crucial purposes. Reports and presentations would primarily be delivered to key stakeholders such as local government officials, economic development boards, community leaders, and potentially participating businesses themselves. These groups are essential for understanding the program's progress, outcomes, and areas needing improvement, thereby fostering transparency and accountability in economic development efforts.

The benefits of these reports lie in their ability to showcase tangible results and insights derived from the continuous data collection process. Despite the slow accumulation of data, reports would include trends, challenges identified, success stories, and recommendations for enhancing business retention and expansion strategies. By transforming raw data into meaningful information, these presentations not only inform stakeholders but also empower them to make informed decisions, allocate resources effectively, and adapt strategies to better support local businesses. This approach strengthens the BR&E program by fostering a data-driven culture that prioritizes ongoing improvement and responsiveness to community needs.

In summary, these reports and presentations are vital tools for fostering collaboration, enhancing program effectiveness, and ensuring sustained economic growth and resilience in the community. They provide a structured way to translate data into actionable insights that support informed decision-making and continuous program refinement.

Response 11

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

The first group, my reports would go to, is my community's Chief and Council. They need to hear from our community's entrepreneurs as they are the group that makes decisions on how funding is spent and the priorities for community development strategies.

The second group would be the business owners. They have the right to see their data, so they can understand the trends among other businesses across industries. They can learn about other businesses that are having issues with the same things they are, such as community internet, or struggling with property damage, or garbage pickup.

This report should also be viewed by the band's department managers to see if there are grants or funding opportunities for business owners, or to see how they can meet the needs/wants from the entrepreneurs, or programing that can assist with work force. We have an employment and training department that are looking for businesses to give their clients work experience to build resumes. But if it's discovered in my reports that businesses don't know about these programs, department managers can post on our social media platforms that are directed at employers.

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

In our case, I think this would, if executed properly and with real intention, begin to build the trust between leadership and community, which can be very strained, in our small and excluded community. The more businesses see other businesses' success after working with us, the more they may consider participating themselves.

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

Here in my community, this would be their first BREI interaction so I would keep it very basic, maybe a 1 pager, point form, as I don't want to give heavy content that no one will read, and lowering my chance of their second round of interviews.

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

I would assemble the team I can count on, my senior Ec. Dev. manager and Communications manager. I'd rely on my manager to pick out the highlights of the data, and then my excellent communications manager, that has years of experience communicating information to our people. She would create an attractive but informative digital print message to go on our social media platforms.

Part B

Response 1

- Communication
- Staffing
- Employment support
- Business Support
- Supply chain issues
- Funding assistance
- More government assistance
- Less government involvement
- None
- Unsure

Response 2

- Financial assistance (grants, loans, PPP, tax relief)
- Hiring and employment challenges
- Customer service and business continuity
- Supply chain disruptions

Response 3

Proposed Categories for Responses:

1. **Not Applicable** – Responses that do not relate to the survey's intent.
2. **Uncertain/Not Sure** – Responses indicating a lack of clarity or knowledge.
3. **Actionable Feedback** – Responses that highlight clear issues or opportunities for intervention.
4. **Non-Actionable Complaints** – General grievances that lack specificity or a feasible solution.

To refine these categories further, I would leverage AI tools to conduct pattern recognition and sentiment analysis on the responses. This would help identify additional subcategories and uncover common themes that might not be immediately obvious.

One of the biggest challenges with fully open-ended survey questions is that responses can be highly subjective and varied, making it difficult to extract clear, actionable insights. Contradictions are common, and without structured analysis, the data can quickly become overwhelming and inefficient to process. Using AI-driven categorization would streamline this process, making it easier to separate meaningful trends from noise and prioritize actionable items that can drive meaningful economic development initiatives.

Response 4

- Financial Concerns
- Workforce Issues: Hiring, etc.
- Access to resources
- Operational Challenges

Response 5

- Legislation/Law/Regulations (let business remain open if they choose)
- Government assistance/funding (Grants, stimulus checks, payroll protection)
- Unsure of question/Don’t know
- Lack of resources (workers, utilities (fast internet), marketing services, social media presence)

Response 6

- COVID
- Product
- Market
- Ownership
- Supply chain
- Workforce
- Recovery
- Community assets

Response 7

If possible, I would first sort by

1. Size
2. Location
3. Industry

I would then sort the survey answers by

1. Workforce
2. Financial
3. Logistics
4. Infrastructure
5. Support

Response 8

I've categorized the open-ended survey responses into key topics such as **Financial Concerns, Employment & Workforce, Health & Well-being, Business Sustainability, Supply Chain & Logistics, and Government & Policy**.

Response 9

Based on the survey results, responses can be broadly categorized into four key areas, though some outliers exist. Several responses could reasonably fit into multiple categories. Additionally, I disregarded answers such as "none," "unsure," "don’t know," and similar responses.

1. **Financial Support**

I identified ***39 responses*** related to financial assistance. These responses referenced needs such as funding for personal protective equipment (PPE), the Paycheck Protection Program (PPP), lines of credit, payroll support, state and federal grants, stimulus packages, and other financial relief programs.

2. **Regulations**

I found ***15 responses*** concerning regulations. The majority focused on government-mandated shutdowns, while others mentioned vaccines, mask requirements, and concerns over government interference in private business operations.

3. **Operations**

There were ***12 responses*** that addressed operational challenges. Many of these related to supply chain issues, while others mentioned PPE, business signage, interest rates, and best practices for working during the pandemic.

4. **Communication & Information**

I identified ***10 responses*** highlighting the need for clearer and more accurate communication regarding policies, regulations, and available resources.

Additionally, ***24 responses were disregarded***—most commonly because respondents indicated uncertainty or stated that nothing could be done. Some also provided vague answers such as "anything would help" or expressed a lack of understanding of the question.

Response 10

Grouping open-ended responses can get messy because people word things differently, talk about multiple things at once, or go off on tangents. To make sense of it all, we can sort them into a few main categories:

1. **Money & Financial Support** – Anything about funding, loans, grants, or needing financial help.
2. **Business & Operations** – Comments about running a business, hiring, regulations, or challenges with growth.
3. **Technology & Resources** – Mentions of internet access, software, tools, or things needed to improve work.
4. **General Feedback & Concerns** – Everything else, like opinions, complaints, or random suggestions.

This way, even with all the variety, we can still get a clear picture of the main themes people care about!

Response 11

Government Funding Supports

Public Health concerns

Government/Leadership concerns

Not really answers category