

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

Business Retention & Expansion (BR&E) Visitation Program Plan of Work

I. Program Purpose and Strategic Alignment

The purpose of this BR&E Visitation Program is to establish a structured, relationship-driven system to support existing businesses while generating actionable information for economic decision-making. The program will formalize business engagement, moving beyond informal outreach to a consistent, documented process.

Primary objectives:

- Retain and grow existing jobs
- Identify expansion opportunities
- Detect risk factors early
- Strengthening coordination among community partners
- Build long-term social capital between businesses and local leadership

Initial focus will be on primary employers, high-impact small businesses, and strategically significant sectors.

II. Governance and Leadership

A BR&E Steering Committee will guide the program, including representatives from:

- Economic development
- City administration
- Chamber of commerce
- Workforce and education partners
- Utilities

Responsibilities:

- Set annual visitation targets
- Review aggregated findings
- Prioritize systemic issues
- Ensure follow-up accountability

A designated Program Coordinator will manage operations, volunteer training, scheduling, data tracking, and issue follow-through.

III. Visitation Strategy

Phase 1: Launch Blitz (First 60–90 Days)

A structured visitation blitz will establish momentum and baseline data. Target: 25–40 priority businesses. Volunteer teams (two-person teams) will conduct visits. All volunteers will receive training on:

- Program purpose
- Confidentiality standards
- Interview techniques
- Documentation procedures
- Escalation protocols
- The goal of visits is listening and documenting—not solving issues during the meeting.

Phase 2: Continuous Model

- After the blitz, the program transitions to ongoing visitation.
- Annual targets:
- Visit 20–25% of identified businesses
- Revisit major employers every 12–18 months
- Track trends over time approach supports relationship depth and long-term data integrity.

IV. Business Selection Criteria

Businesses will be prioritized based on:

- Employment size and industry importance
- Growth or expansion potential
- Supply chain impact
- Risk indicators
- Ownership transitions

This ensures strategic deployment of staff and volunteer capacity.

V. Data Collection and Categorization

The visitation instrument will include structured and open-ended questions addressing:

- Workforce availability and skills gaps
- Revenue and business conditions
- Expansion or contraction plans
- Infrastructure and facility needs
- Regulatory or permitting challenges
- Technology and capital needs
- Overall business outlook

Findings will be categorized into:

- Immediate action items (response within 1–2 weeks)
- Short-term issues (3–6 months)
- Long-term strategic challenges

All data will be entered into a secure tracking system to monitor progress and trends.

VI. Issue Response Protocol

A formal response system ensures credibility and accountability:

- Urgent issues escalated within 48 hours.
- Assigned partner agency identified with response timeline.
- Follow-up documented in tracking system.
- Business contacted within 30 days to confirm resolution or progress.

This structured follow-through differentiates the program from informal outreach efforts.

VII. Reporting and Communication

Quarterly reports will be presented to:

- City leadership
- Economic development board
- Chamber and partner organizations
- BR&E volunteers

Reports will include:

- Visits completed
- Industry distribution
- Issues resolved
- Emerging risks and opportunities

Early reports will focus on trends and qualitative themes rather than volume statistics. Findings will be translated into charts, summaries, and prioritized action steps to convert raw data into decision-ready information.

VIII. Volunteer Engagement and Sustainability

Sustained volunteer engagement will be supported through:

- Clear expectations and training
- Regular impact updates
- Public recognition when appropriate
- Annual refresher sessions

Maintaining volunteer involvement strengthens community ownership and social capital.

IX. Performance Measurement

Success will be evaluated through:

- Activity Measures
- Number of visits completed
- Percentage of target businesses contacted
- Volunteer participation
- Outcome Measures
- Issues resolved
- Referrals completed
- Expansion projects identified
- Jobs retained or created

Annual review will refine priorities and visitation targets.

X. Long-Term Vision

Over time, the BR&E program will evolve from reactive issue management to proactive business growth support. As trust deepens, businesses will engage earlier regarding expansion plans, workforce needs, and strategic investments.

By integrating structured visitation, disciplined follow-up, transparent reporting, and coordinated partner response, this program establishes a sustainable system for strengthening the local economy and positioning the community for long-term resilience.

Conclusion:

This plan reflects not only an understanding of BR&E best practices but also a practical roadmap for execution. The governance structure, visitation strategy, data management system, and response protocols

are designed to be implemented immediately with existing community partners and resources. By clearly defining roles, timelines, and accountability measures, this program is positioned to move from concept to action without delay. I am prepared to initiate stakeholder alignment, volunteer recruitment, and the launch blitz phase, ensuring that the BR&E program becomes a structured, sustainable, and results-driven component of our economic development efforts.

Response 2

Part 1

Plan of Work for Implementing the IEDP BRE Program

1. Establish the Purpose and Outcomes

Core Objective:

Strengthen existing business relationships, identify risks early, support expansions, and build long-term economic resilience.

Define Measurable Outcomes

- % of target companies visited annually (.05%)
- Number of expansion projects
- Jobs retained
- Capital investment supported
- Issues resolved within defined timeframe
- CEO satisfaction score (post-visit survey)
- Business confidence index (annual)

2. Build Internal Alignment

- Lead department (Irving Economic Development Partnership)
- IEDP (Data owner)
- Salesforce (CRM platform)
- City of Irving Response Team (City manager's office, Permitting, Workforce, Utilities)

Create:

- Standard visit protocol (100 per fiscal year)
 - Confidentiality policy
 - Issue escalation process (72-hour internal review standard is ideal)
 - Reporting cadence (monthly dashboard-board report/Semi-Annual City Council report)
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3. Define Target Companies

- **Primary employers** (Advanced Manufacturing/Logistics & Supply Chain Management/Aviation & Aerospace Services, Information Technology & Data Centers/Financial Services & Corporate Operations)
- **High-growth sectors** (AI, renewable energy, electric vehicles & sustainable transportation, automation and cloud computing, plant-based foods and alternative proteins)
- **Industrial/manufacturing** (Celebrate during manufacturing week)
- **Headquarters & Corporate Offices** (11 **Fortune 1000** once per year)
- **At-risk industries** (Companies in consolidating industries, companies nearing major lease renewals, businesses affected by regulatory or supply chain changes)

Tier system:

- Tier 1: Strategic employers (annual executive visit)
 - Tier 2: Growth firms (bi-annual touchpoint)
 - Tier 3: Small business clusters (Small Business Services Committee roundtables/BOSS events)
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4. Develop the BRE Visit Framework

Standard Visit Structure: Utilize 5 Year Strategic Plan

1. Workforce
2. Supply chain
3. Infrastructure
4. Regulatory experience
5. Expansion outlook
6. Risk indicators

Collect both:

- Quantitative data (employment, capital plans)
 - Qualitative intelligence (confidence, challenges, relocation risk)
-

5. Build a Rapid Response Protocol

After each visit:

- Issues logged within 24 hours (Salesforce)
- Internal review within 72 hours (BRE Director)
- Assigned lead (BRE Director)
- Follow-up within 7 business days (BRE Director)
- Closed-loop communication (Update Vice President)

Track:

- Issue type frequency

- Average resolution time
 - Repeat issue patterns
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6. Reporting & Metrics Dashboard

Board/Executive Committee Report/Semi-Annual City Council Report:

- Visits completed vs. goal (100 visits per fiscal year)
 - Expansion leads identified (No metric required/data entered in Salesforce)
 - Jobs Retained (2,625 per fiscal year)
 - Capital investment (No BRE quota)
 - Top 5 recurring issues (N/A)
 - Satisfaction index (N/A)
 - Risk heat map (Optional)
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7. Institutionalize the Program

- Annual BRE strategic review (September with ED team)
 - Ambassador recognition event (During the Best in Irving event-April)
 - Results included in Semi-Annual City Council report
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PART II:

Steps to Create the IEDP BRE Ambassador Program

Step 1: Define the Role of Ambassadors

Ambassadors are:

- Relationship builders
- Intelligence gatherers
- Trust connectors
- Early warning system participants

They are not:

- Sales reps
 - Regulatory enforcers
 - Political advocates
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Step 2: Recruit the Right Profiles

Ideal Ambassador Candidates:

- Retired executives
- Industry leaders
- Banking professionals
- Workforce leaders
- Utility reps
- Board members (current/previous)

Selection Criteria:

- Strong business credibility
- Discretion and professionalism
- Community commitment
- Ability to listen (critical skill)

Target size:

- 10–20 ambassadors
-

Step 3: Develop a Structured Training Program

1. What is BRE and why it matters
2. Confidentiality standards
3. Interview techniques
4. Economic development basics
5. How to identify expansion signals
6. Risk indicators (mergers, automation, layoffs)
7. CRM reporting process

Include:

- Mock visit simulations
 - Standard script templates
 - Issue escalation protocol
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Step 4: Assign Coverage Areas

Structure ambassadors by:

- Industry
- Geography
- Company tier
- Sector expertise

Pair ambassadors- one to conduct interview/one to take notes:

- Staff + Ambassador
 - Two ambassadors for all visits when possible
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Step 5: Implement Reporting Discipline

After each visit:

- Ambassador submits visit summary within 48 hours
- BRE Director (or Coordinator) reviews and categorizes issues
- Dashboard updated bi-weekly

Ambassadors should never independently promise solutions — all responses coordinated through staff.

Step 6: Recognition & Retention

To sustain engagement:

- Annual recognition event (With the Best in Irving)
- Quarterly briefings
- Economic trend updates
- Exclusive CEO roundtables (relaunch program & include Mayor)
- Recognition awards (Holiday gift)

Provide ambassadors:

- Program impact report
 - Community economic snapshot
 - Confidential insights briefings
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Integration Model: Staff + Ambassador Hybrid

Best practice is a **tiered hybrid model**:

Company Tier	Staff Lead	Ambassador Role
Tier 1	Yes	Support/Relationship
Tier 2	Shared	Lead
Tier 3	Ambassador	Light touch

Timeline to Launch (90-Day Model)

Month 1

- Define goals
- Secure board approval
- Build CRM structure
- Draft visit protocol

Month 2

- Recruit ambassadors
- Conduct training
- Identify first 50 target companies

Month 3

- Launch pilot visits
 - Review early issues
 - Refine process
 - Issue first internal dashboard
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Risk Factors to Avoid

- Treating BRE as reactive only
 - No formal issue tracking
 - Lack of executive-level visits
 - Overpromising during visits
 - Failure to report outcomes
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Long-Term Impact of a Strong BRE Program

- Higher business survival rate
 - Earlier expansion identification
 - Reduced surprise relocations
 - Stronger public-private trust
 - More accurate economic forecasting
 - Greater political credibility
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Become a Business Retention & Expansion (BRE) Ambassador

Strengthen Local Business. Strengthen Our Economy. Strengthen Our Future.

Why This Matters

Existing businesses create the majority of new jobs and capital investment in any community. A strong BRE program ensures we:

- Identify expansion opportunities early
- Address business concerns before they become risks
- Retain key employers
- Strengthen public-private trust
- Improve economic resilience

As a BRE Ambassador, you become part of the trusted network that supports and protects our local economy.

What is a BRE Ambassador?

A BRE Ambassador is a trained business leader who:

- Conducts structured company visits
- Builds trusted executive-level relationships
- Identifies workforce and operational challenges
- Flags expansion opportunities
- Serves as an early warning system for risk indicators
- Provides feedback to the economic development team

Ambassadors do **not**:

- Promise incentives or solutions
 - Negotiate on behalf of the city
 - Act as regulators or inspectors
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Ambassador Responsibilities

- Participate in training (2–3 hours annually)
 - Conduct 6–12 company visits per year
 - Submit visit summaries within 48 hours
 - Maintain strict confidentiality
 - Attend quarterly briefings
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Ideal Candidates

We are seeking:

- Current or retired executives
- Industry leaders
- Banking and finance professionals
- Workforce and education leaders
- Utility and infrastructure professionals
- Chamber or board leaders

Key qualities:

- ✓ Strong business credibility
 - ✓ Excellent listening skills

 - ✓ Discretion and professionalism
 - ✓ Commitment to community prosperity
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Program Impact Metrics

Our BRE Program tracks:

- % of target employers visited annually
- Expansion projects identified
- Jobs retained
- Capital investment supported
- Average issue resolution time
- CEO satisfaction scores

Ambassadors directly contribute to measurable economic outcomes.

Why Serve?

- Expand your executive network
 - Gain exclusive economic intelligence briefings
 - Shape the future of our business climate
 - Support long-term community prosperity
 - Be recognized annually for your leadership
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Time Commitment

Estimated: 3–5 hours per month

Interested in Serving?

Contact:

Sharon Hardaway

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Help us build a stronger, more resilient business community.

BRE KPI DASHBOARD TEMPLATE

This template can be used for quarterly board reporting or internal management review.

BUSINESS RETENTION & EXPANSION (BRE) DASHBOARD

Reporting Period: Q__ 20__

1. Activity Metrics

Metric	Goal	Actual	YTD	% of Goal
Total Company Visits				
Tier 1 Visits				
Tier 2 Visits				
Ambassador-Led Visits				
CEO-Level Meetings				

2. Expansion & Retention Outcomes

Metric	Qtr	YTD
Expansion Projects Identified		
Projects Assisted		
Jobs Retained		
Jobs Created (Expansion)		
Capital Investment Supported		
Incentive Requests Facilitated		

3. Issue Resolution Performance

Metric	Qtr	YTD
Issues Identified		
Workforce Issues		
Infrastructure Issues		
Regulatory Issues		
Avg. Resolution Time (Days)		
% Resolved Within 30 Days		

4. Business Confidence Indicators

Indicator	Current	Previous Qtr	Trend
CEO Confidence Index (1–5)			
% Planning Expansion (12 mo.)			
% Reporting Workforce Shortage			
% At-Risk (Consolidation/Relocation)			

5. Ambassador Engagement Metrics

Metric	Goal Actual
Active Ambassadors	
Ambassador Retention Rate	
Avg. Visits per Ambassador	
Training Participation Rate	

6. Risk Heat Map (Narrative Summary)

Top 3 Emerging Risks:

1. _____
2. _____
3. _____

Top 3 Expansion Signals:

1. _____
2. _____
3. _____

7. Executive Summary

- Key Wins:
- Emerging Concerns:
- Recommended Policy or Process Adjustments:
- Resource Needs:

A fillable Excel KPI template structure and a CRM data field structure for tracking BRE metrics

Below are two implementation-ready structures you can hand directly to your data manager or CRM administrator.

FILLABLE EXCEL KPI TEMPLATE STRUCTURE

(Designed as a multi-tab workbook for quarterly BRE reporting)

Workbook Structure (Tabs)

1. **Company Master List**
 2. **Visit Log**
 3. **Issues Tracker**
 4. **Expansion Pipeline**
 5. **Ambassador Activity**
 6. **Quarterly Dashboard (Auto-Calculated)**
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TAB 1: Company Master List

Field Name	Description	Data Type
Company ID	Unique identifier	Text
Company Name	Legal name	Text
Industry Sector	NAICS / cluster	Dropdown
Tier Level	Tier 1 / 2 / 3	Dropdown
Primary Contact	CEO/Plant Manager	Text
Email		Text
Phone		Text
Address		Text
Employees (Current)		Number
Square Footage		Number
Year Established		Number
Risk Level	Low / Medium / High	Dropdown
Last Visit Date		Date
Next Visit Due		Date
Assigned Staff Lead		Dropdown
Assigned Ambassador		Dropdown

TAB 2: Visit Log

Each row = one visit

Field	Type
Visit ID	Auto
Company ID	Lookup
Visit Date	Date
Visit Type	In-person / Virtual
Conducted By	Staff / Ambassador / Both
CEO Confidence Score (1–5)	Number

Field	Type
Workforce Concern (Y/N)	Dropdown
Infrastructure Concern (Y/N)	Dropdown
Regulatory Concern (Y/N)	Dropdown
Expansion Discussed (Y/N)	Dropdown
Risk Indicators Present (Y/N)	Dropdown
Notes Summary	Text
Follow-Up Required (Y/N)	Dropdown

TAB 3: Issues Tracker

Each row = one issue identified

Field	Type
Issue ID	Auto
Company ID	Lookup
Date Identified	Date
Issue Category	Workforce / Infrastructure / Permitting / Utilities / Tax / Other
Issue Description	Text
Assigned To	Dropdown
Status	Open / In Progress / Closed
Date Assigned	Date
Date Resolved	Date
Resolution Time (Days)	Formula
Escalated (Y/N)	Dropdown
Notes	Text

TAB 4: Expansion Pipeline

Each row = one expansion lead

Field	Type
Project ID	Auto
Company ID	Lookup
Date Identified	Date
Expansion Type	Jobs / Capital / Facility / Automation
Estimated Jobs Created	Number
Estimated Jobs Retained	Number

Field	Type
Estimated Capital Investment Currency	
Stage	Lead / Active / Committed / Closed
Incentive Request (Y/N)	Dropdown
Outcome	Won / Lost / Pending
Announcement Date	Date

TAB 5: Ambassador Activity

Field	Type
Ambassador Name	Text
Active Status	Yes/No
Visits Completed (Qtr)	Formula
Visits Completed (YTD)	Formula
Training Completed (Y/N)	Dropdown
Assigned Companies	Count
Satisfaction Rating	Optional survey

TAB 6: Quarterly Dashboard (Auto Calculated)

Use pivot tables pulling from other tabs.

Core Metrics to Calculate:

- Total Visits (Qtr & YTD)
 - % of Tier 1 Companies Visited
 - Expansion Leads Identified
 - Jobs Retained (YTD)
 - Jobs Created (YTD)
 - Capital Investment Supported
 - Issues Identified
 - Avg Resolution Time
 - % Issues Closed within 30 Days
 - CEO Confidence Average
 - Ambassador Participation Rate
-

Suggested Dashboard Layout

Section 1 – Activity

- Total Visits
- CEO-Level Meetings
- Ambassador-Led Visits

Section 2 – Outcomes

- Jobs Retained
- Jobs Created
- Capital Investment
- Projects in Pipeline

Section 3 – Performance

- Avg Resolution Time
 - % Closed in 30 Days
 - Risk Companies (High Risk Count)
-
-

2 CRM DATA FIELD STRUCTURE FOR BRE TRACKING

This structure works for systems like Salesforce, HubSpot, ZoomProspector, Bludot, etc.

CORE OBJECTS (Modules)

1. Companies
 2. Contacts
 3. Visits (Custom Object)
 4. Issues (Custom Object)
 5. Projects / Expansions
 6. Ambassadors (Custom Object)
-

A. COMPANY RECORD FIELDS

Basic Fields

- Company Name
- NAICS Code
- Industry Cluster
- Tier Level
- Total Employees
- Facility Size
- Headquarters (Y/N)
- Risk Score (Auto-calculated field)
- Confidence Index (Rolling average)

BRE-Specific Fields

- Last Visit Date
 - Next Scheduled Visit
 - Workforce Risk Flag
 - Relocation Risk Flag
 - Automation Risk Flag
 - Supply Chain Risk Flag
 - Expansion Probability (Low/Medium/High)
-

B. VISIT OBJECT (Linked to Company)

Each visit record should include:

- Visit Date
- Visit Type
- Conducted By
- Ambassador Involved (Y/N)
- CEO Confidence Score (1–5)
- Top 3 Issues Identified (Multi-select)
- Expansion Discussed (Y/N)
- Risk Signals Present (Checklist)
- Summary Notes
- Follow-Up Required (Y/N)

Automation Suggestion:

If "Follow-Up Required = Yes" → Auto-create Issue record.

C. ISSUE OBJECT

- Company
- Issue Category
- Priority Level (Low/Medium/High)
- Date Identified
- Assigned Staff
- Status
- Escalation Flag
- Date Closed
- Resolution Time (Auto-calculated)

Automation Suggestion:

If open > 30 days → Auto alert.

D. EXPANSION / PROJECT OBJECT

- Company
- Project Type
- Estimated Jobs Created
- Estimated Jobs Retained
- Estimated Capital Investment
- Incentive Request
- Stage
- Probability %
- Expected Decision Date
- Outcome

Automation:

Pipeline value auto-calculates total projected capital investment.

E. AMBASSADOR OBJECT

- Name
 - Industry Expertise
 - Assigned Companies
 - Visits Completed (Auto-count)
 - Training Completed
 - Active Status
-

Advanced CRM Calculated KPIs

You can configure dashboards to auto-calculate:

- % Target Companies Visited (Rolling 12 Months)
 - Avg CEO Confidence by Sector
 - Issue Volume by Category
 - Resolution Time Trend
 - Risk Heat Map by Industry
 - Expansion Pipeline Value
 - Ambassador Productivity Score
-

Recommended Reporting Cadence

Monthly (Internal)

- Visits completed
- Open issues
- Expansion leads

Quarterly (Board)

- Jobs retained
- Capital investment
- Resolution performance
- Risk assessment

Semi-Annual (City Council)

- Total companies engaged
 - Expansion wins
 - Economic impact
-

If you would like next, I can provide:

- A KPI maturity model (Level 1–5 BRE sophistication)
- A risk scoring formula model
- A CEO confidence survey template
- Or a BRE playbook formatted for board adoption

Let me know which direction would be most helpful.

CEO confidence survey

Below is a structured, executive-level **CEO Confidence Survey** designed specifically for a Business Retention & Expansion (BRE) program. It is built to generate measurable, board-reportable data while maintaining executive credibility.

You can deploy this digitally (SurveyMonkey, Qualtrics, CRM form) or use it during structured BRE visits.

BUSINESS RETENTION & EXPANSION

CEO Confidence Survey

Purpose:

To assess business climate confidence, expansion outlook, and risk indicators in order to strengthen long-term economic resilience.

Confidential – Results reported in aggregate only

Section 1: Overall Business Climate Confidence

1. How confident are you in the local business climate over the next 12 months?

(Scale 1–5)

- 1 = Very Uncertain
- 2 = Somewhat Uncertain
- 3 = Neutral
- 4 = Confident
- 5 = Very Confident

KPI: CEO Confidence Index (Average Score)

2. Compared to 12 months ago, your outlook is:

- Significantly More Positive
- Slightly More Positive
- About the Same
- Slightly Less Positive
- Significantly Less Positive

KPI: % Reporting Improved Outlook

Section 2: Expansion & Growth Outlook

3. Are you planning any of the following in the next 12–24 months?

(Check all that apply)

- Increase employment
- Capital investment
- Facility expansion
- Automation/technology investment
- New product/service line
- Relocation of operations
- No expansion planned

KPIs:

- % Planning Expansion
 - % Planning Capital Investment
 - Early Relocation Signals
-

4. If expanding, what is your expected timeline?

- 0–6 months
 - 6–12 months
 - 12–24 months
 - Undetermined
-

Section 3: Workforce & Talent

5. How would you rate your ability to find qualified workers?

- 1 = Very Difficult
- 2 = Difficult
- 3 = Moderate
- 4 = Manageable
- 5 = No Difficulty

KPI: Workforce Constraint Index

6. Are workforce shortages limiting your growth?

- Yes – Significantly
- Yes – Somewhat
- Not Currently
- No

Section 4: Infrastructure & Regulatory Environment

7. Are infrastructure factors limiting your operations?

(Check all that apply)

- Utilities
- Transportation/logistics
- Broadband
- Site constraints
- Permitting timelines
- None

8. How would you rate your experience working with local government?

1 = Poor

2 = Fair

3 = Adequate

4 = Good

5 = Excellent

KPI: Government Responsiveness Score

Section 5: Risk Indicators

9. Have you considered relocating any portion of your operations in the past 12 months?

- Yes
- No

If yes (optional): What primary factors influenced this consideration?

10. What are the top three risks to your company in the next 24 months?

(Open response)

Section 6: Engagement & Support

11. How valuable are BRE visits and outreach from our organization?

- 1 = Not Valuable
 - 2 = Slightly Valuable
 - 3 = Moderately Valuable
 - 4 = Valuable
 - 5 = Highly Valuable
-

12. What additional support would be most helpful?

(Open response)

Dashboard Metrics Derived from Survey

From this survey, you can generate:

- CEO Confidence Index (Average Qtr & Trendline)
- % Planning Expansion
- % Reporting Workforce Constraint

- % Experiencing Regulatory Barriers
 - % Considering Relocation (Risk Flag)
 - Government Responsiveness Score
 - BRE Value Rating
-

Suggested Reporting Format (Board-Level)

Quarterly Snapshot:

- CEO Confidence: 4.1 (+0.3 from Q2)
 - 62% Planning Expansion
 - 48% Reporting Workforce Constraints
 - 9% Considering Relocation
 - Avg Gov't Responsiveness: 4.3
 - BRE Program Value Rating: 4.5
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Best Practice Deployment

- Conduct during executive-level visits
 - Limit to 5–7 minutes
 - Ensure confidentiality
 - Report in aggregate only
 - Track rolling 12-month trend
-

Response 3

The purpose of this BR&E visitation program is to create a structured, proactive system for engaging existing businesses, identifying challenges early, strengthening relationships, and supporting long-term business retention and expansion.

Rather than relying on informal conversations or reactive responses, this program establishes a repeatable process for outreach, documentation, analysis, and follow-through. The goal is to ensure that business input consistently informs local decision-making and that businesses view the organization as a responsive and reliable partner.

Program Framework and Design

1. Continuous Engagement Model

- This program will operate using a continuous visitation model, allowing for manageable outreach and sustained relationship-building. A continuous model ensures that:
- Visits are scheduled regularly throughout the year
- Data collection remains steady and organized
- Issues are identified before they become urgent
- Trends can be monitored over time

The program will begin with a defined group of businesses across key sectors and gradually expand.

2. Organizational Inputs and Commitments

- Successful implementation requires clear internal alignment and defined responsibilities.
- Core Inputs Include:
- Dedicated staff coordination and scheduling
- Leadership support and visible endorsement
- Collaboration with utilities, workforce partners, and relevant City departments
- A standardized visitation questionnaire
- A secure tracking and reporting system
- A documented follow-up protocol

Confidentiality, consistency, and accountability will guide all interactions. Businesses will be informed that their feedback is valued and that realistic expectations will be communicated regarding what can and cannot be addressed.

3. Visitation Process and Workflow

The BR&E process will follow a structured workflow:

Step 1: Target Identification

Select businesses representing various sizes and sectors to ensure a balanced understanding of the local economy.

Step 2: Scheduling and Outreach

Initiate contact with a clear explanation of the program's purpose and confidentiality standards.

Step 3: Structured Visit

Use a standardized set of questions addressing:

- Workforce conditions

- Operational challenges
- Infrastructure or regulatory issues
- Future expansion plans
- Business outlook

Step 4: Documentation and Categorization

Responses will be entered into a tracking system and categorized (workforce, infrastructure, regulatory, business confidence, etc.).

Step 5: Follow-Up and Referral

Issues requiring action will be assigned to appropriate departments or partners. Follow-up communication will be documented.

Step 6: Reporting and Trend Analysis

Recurring themes will be summarized and prepared for leadership review.

- Volunteer visitors may be integrated in later phases once internal systems are fully operational and reporting mechanisms are established.
- Integration of Key Course Elements
- Strengthening Social Capital
- This program intentionally builds social capital by:
 - Establishing consistent, face-to-face communication
 - Demonstrating responsiveness and follow-through
 - Connecting businesses to relevant resources
 - Improving coordination between departments
 - Trust will be built through reliability, transparency, and steady engagement over time.
- Reporting and Presentations
- Quarterly summary reports will be prepared for:
 - City leadership
 - Economic development boards or advisory groups
 - Key partner organizations
- Because the model is continuous, reports will emphasize:
 - Number of visits completed
 - Emerging trends and recurring concerns
 - Notable success stories
 - Follow-up actions taken

Data will be translated into information through categorized summaries, concise narratives, and clear identification of patterns that may require policy or operational adjustments.

Expected Outcomes

Short-Term

- Improved understanding of current business conditions

- Increased communication between businesses and local leadership
- Early identification of emerging challenges

Medium-Term

- More coordinated interdepartmental responses
- Targeted adjustments to policies or procedures
- Strengthened relationships and increased trust

Long-Term

- Higher business confidence
- Increased likelihood of retention and local expansion
- A more resilient and connected business environment

First 90 Days Implementation Plan

- A structured rollout ensures momentum and clarity.

Days 1–30: Program Foundation

- Finalize visitation questionnaire
- Develop tracking and documentation system
- Identify initial target business list
- Communicate program purpose to leadership and internal departments
- Establish follow-up protocol and departmental points of contact

Days 31–60: Initial Outreach and Visits

- Begin scheduling and conducting visits
- Complete initial round of 8–15 business visits
- Document and categorize responses
- Initiate early follow-up actions
- Identify emerging themes

Days 61–90: Evaluation and Reporting

- Conduct additional visits to broaden representation
- Prepare first summary report outlining participation levels, themes, and actions taken
- Present findings to leadership and discuss recommended next steps
- Adjust processes as needed based on feedback

By the end of the first 90 days, the program will be operational, documented, and producing actionable information.

- Sustainability and Continuous Improvement
- The program will be reviewed semi-annually to assess:
 - Participation levels
 - Responsiveness to identified concerns
 - Emerging economic trends

- Effectiveness of follow-up procedures
- Adjustments will be made to improve efficiency, outreach coverage, and impact.

Conclusion

This BR&E visitation program provides a structured, accountable, and implementable framework for engaging existing businesses in a consistent and strategic manner. The program integrates relationship-building, organized data collection, meaningful reporting, and measurable follow-through.

The operational structure is defined, the first 90 days are planned, and the evaluation process is established. This plan is prepared for implementation and positioned to strengthen business retention and expansion through sustained engagement and informed decision-making.

Response 4

Preparation is a crucial part of the visitation process. Creating a small packet to leave with business owners and/or management that consists of contact information and resources, for example grant applications, list of contacts for the city, workforce, and chamber of commerce.

Make a list of businesses to call and request an appointment to meet and participate in a survey. Schedule on a weekly basis for BR&E visits.

Preparations for visits include packet and survey. Take a planner for notes and make plans to return for a follow-up visit. Take a list of who will be visited on that day.

If possible, recruit a colleague to help with the survey and make sure they are prepared for the visit.

When arriving for BR&E visit be prepared with all items. Share appreciation with the business owner/manager and go over what to expect for the survey portion of the visit. Make sure that everyone attending the visit is introduced. Start the survey and once completed make sure to thank them for their time and participation. Leave them a packet and explain content. Once you leave the meeting plan a return follow-up visit in your calendar.

After the visits for the day are completed return and make go over notes and enter any pertinent notes. There will be tasks to complete in the following days depending on the information gathered at each meeting.

CRM updates should be entered and at the end of the month have a report of information gathered for presentation purposes. This could include any graphs of information if needed.

Plan on having a relationship and get to know businesses and the community by being present and visible on a regular basis. Problem solving and connecting business with business or resources.

The course was informative, in particular Section 3. We are staff members of one at the MDD BR&E program. The need for reports, strategic planning, collection of data and presentations have not yet been integrated, however it will be part of the program moving forward.

Response 5

DeKalb County EDA

Business Retention & Expansion (BR&E) Visitation Program

Plan of Work Narrative

Program Purpose and Strategic Context

The DeKalb County Economic Development Authority (DCEDA) will implement a structured Business Retention & Expansion (BR&E) visitation program to proactively support existing employers, strengthen local competitiveness, and inform data-driven decision-making.

Existing businesses represent the county's largest source of jobs, capital investment, and tax base stability. A formal visitation program ensures that DCEDA:

- Identifies risks before they become crises
- Supports expansion and reinvestment opportunities
- Aligns workforce and infrastructure resources with employer needs
- Integrates real-time business intelligence into long-term planning

The program will follow a phased three-year approach focused on foundation, scale, and maturity.

Logic of the Program

The program is structured around the following flow:

Inputs

Staff capacity, CRM/database, visit questionnaire, partner network, leadership support.

Activities

Business inventory development, structured site visits, issue tracking, partner coordination, reporting.

Outputs

Number of visits conducted, issues identified, referrals made, data dashboards produced.

Outcomes

Jobs retained, expansion supported, capital investment secured, improved employer satisfaction, stronger workforce alignment.

Implementation of Work Plan

Phase 1: Foundation and Infrastructure (Months 1–3)

1. Business Inventory and Database Development

- Build a comprehensive inventory of all employers with 10+ employees
- Segment by industry, size, and geographic distribution
- Establish CRM tracking protocols and issue categorization

2. Visitation Questionnaire Development

- Standard visit tool focused on:
 - Workforce availability and training
 - Infrastructure and utilities

- Market pressures and trends
- Expansion plans
- Capital investment needs
- Quality of life factors

3. Internal Protocols

- Define issue escalation procedures
 - Establish 1–5 day follow-up standard
 - Clarify roles between BI & Workforce Specialist and Executive Director
-

Phase 2: Business Outreach and Visitation (Months 4–12)

4. Launch Structured Retention Visits

- Complete baseline visits with 80% of large employers (100+ employees)
- Conduct at least 25 additional retention visits in Year 1
- Maintain detailed visit documentation in CRM

5. Issue Identification and Classification

Categorize findings into:

- Workforce gaps
- Infrastructure and utilities
- Regulatory barriers
- Housing and childcare concerns
- Supply chain and colocation opportunities

6. Partner Coordination

Coordinate solutions with:

- Workforce agencies
 - Community colleges
 - Utilities
 - Municipal governments
 - Chambers of commerce
-

Phase 3: Targeted Assistance and Expansion Support

7. Direct Business Follow-Up

- Acknowledge issues within 1–5 days
- Provide resource referrals
- Track resolution status

8. Expansion & Investment Support

- Confidential executive-level coordination for growth projects
- Align workforce training, infrastructure, and incentives

9. Supply Chain & Colocation Strategy

- Identify cluster-based opportunities
 - Facilitate introductions between complementary firms
-

Phase 4: Reporting, Accountability, and Continuous Improvement

10. Performance Metrics (KPIs)

Track:

- Number of visits
- Number of contacts
- Jobs retained or created
- Capital investment supported
- Issues resolved
- Resources provided

11. Reporting Cadence

- Quarterly BRE data summaries
- Interim Year 1 leadership report
- Annual County Business Climate & Retention Report (Year 3)

12. Communication Strategy

Implement communications that reinforce:

- DCEDA as a trusted partner
- Responsiveness and accountability
- Countywide collaboration
- Data-informed decision-making

Channels include:

- Business retention visits
- Quarterly newsletter (Year 2)
- Board updates
- Partner briefings
- Municipal coordination meetings

Governance Structure

- **Business Intelligence & Workforce Specialist:** Leads daily program operations, visits, and follow-up
- **Executive Director:** Handles executive-level engagement and strategic issue escalation
- **Board of Directors:** Oversight and advocacy
- **Partners:** Technical assistance and workforce coordination

Three-Year Progression

Year 1: Build the Engine

- Complete database
- Establish visit cadence
- Identify recurring themes
- Produce interim leadership report

Year 2: Scale Impact

- Achieve full employer contact coverage
- Launch dashboards
- Increase workforce and infrastructure coordination
- Begin public-facing communications

Year 3: Full Maturity

- Establish predictable visit cycles
- Publish formal County Business Climate & Retention Report
- Integrate BR&E intelligence into attraction strategy

Expected Long-Term Outcomes

- Increased job retention
 - Measurable capital investment growth
 - Reduced business risk
 - Stronger workforce alignment
 - Enhanced reputation as a responsive, data-driven economic development organization
-

Response 6

The Business Retention and Expansion (BR&E) program is designed to strengthen local economies by supporting the long-term wellbeing of both businesses and residents in the communities we serve. In Northern Minnesota, this initiative demonstrates to business owners that they are not alone—that a network of resources, partners, and support systems exists to help them navigate challenges, plan for the future, and ultimately thrive. The program aims to shift business owners from a mindset of survival to one of sustainability, growth, and intentional transition planning. Central to this work is the development of social capital: building strong, interconnected relationships among local entrepreneurs. By fostering regular in-person networking opportunities and rotating gatherings through different business locations, the BR&E program helps owners share their stories, build trust, and recognize their collective role in the community's success. This foundation of connection and collaboration is what enables meaningful, lasting economic resilience.

1. Select the Community

- Identify which community is best positioned for a BR&E cycle based on readiness, leadership support, business density, and current economic conditions.
- Confirm the community has **\$10,000 available to invest in a business redevelopment program**, ensuring financial capacity to act on BR&E findings.
- Ensure the community understands that the BR&E program is designed to help business owners move from a mindset of survival to one of sustainability, growth, and intentional transition planning.

2. Initiate Conversations with City Staff

- Meet with city leadership (administrator, clerk, EDA, council members) to introduce the BR&E process.
- Clarify roles, responsibilities, and communication expectations.
- Gather initial insights about community priorities, business climate, and any known challenges or opportunities.
- Establish a primary point of contact for coordination.

3. Create a Tailored Survey for the Community

- Customize the BR&E survey to reflect local industries, community priorities, and unique challenges.
- Include questions that capture both quantitative data (employment, expansion plans, workforce needs) and qualitative insights (business climate, community strengths, barriers).
- Review the survey with city staff to ensure clarity and relevance.
- Prepare both digital and paper versions for flexibility during visits.

4. Plan Business Visits

a. Block off dedicated days for visits

- Reserve uninterrupted time on the calendar to ensure consistency and momentum.
- Group visits geographically to maximize efficiency.

b. Reach out to business owners

- Contact owners via phone or email to introduce the program and request a meeting.
- Provide a brief overview of the purpose and expected time commitment.
- Offer flexible scheduling options to accommodate business operations.

c. Conduct cold visits when necessary

- If outreach attempts receive no response, stop in during business hours.
- Approach respectfully, acknowledging their time constraints.
- Offer to schedule a future meeting if they cannot meet immediately.

d. Determine the feasible number of visits

- Assess total number of businesses in the community.
- Prioritize based on industry mix, business size, and strategic importance.
- Decide how many visits can be realistically completed within the program timeline.

5. Conduct Business Visits

- Meet with owners/managers in person to build trust and rapport.
- Administer the survey, ensuring clarity and accuracy in responses.
- Listen actively and document key themes, concerns, and opportunities.
- Observe business operations to better understand context and needs.
- Reinforce confidentiality and the purpose of the program.

6. Collect Surveys

- Gather completed surveys from all visited businesses.
- Follow up with any owners who requested additional time.
- Ensure all data is organized and stored securely.

7. Analyze Data

- Compile survey responses into a structured dataset.
- Identify trends, recurring challenges, and emerging opportunities.
- Segment findings by industry, business size, or other relevant categories.
- Highlight strengths, gaps, and actionable insights.
- Prepare a summary of key themes to guide next steps.

8. Determine Next Steps for Business Owners

- Identify immediate support opportunities (workforce programs, financing, succession planning, marketing assistance).
- Connect businesses with appropriate partners or resources.
- Develop a community-level action plan addressing systemic issues (infrastructure, zoning, broadband, workforce housing).
- Prioritize initiatives based on impact and feasibility.

9. Create Presentations

Prepare three tailored presentations that reflect the same core findings but speak to each audience's needs and interests.

a. Business Owners

- Share aggregated results and themes.

- Highlight strengths and opportunities for collaboration.
- Provide resources and next steps relevant to their operations.

b. City/County Staff

- Present data-driven insights that inform policy, planning, and investment.
- Recommend actionable strategies for economic development.
- Outline potential funding opportunities or partnerships.

c. Public

- Communicate high-level findings in an accessible, positive, and community-focused format.
- Reinforce transparency and community pride.
- Celebrate local businesses and highlight upcoming initiatives.

10. Conduct Informational Sessions

- Host three separate sessions tailored to each audience group.
- Facilitate discussion, answer questions, and gather feedback.
- Encourage collaboration and shared ownership of next steps.
- Document input to refine the final action plan

11. Strengthen Social Capital (Ongoing Component)

- Find local champions to facilitate and continue the momentum.
- Host monthly in-person networking events that rotate through local businesses.
- Allow business owners to introduce their operations, share their stories, and highlight their contributions to the community.
- Use these gatherings to build familiarity, trust, and a shared sense of purpose among local entrepreneurs.
- Encourage collaboration, peer learning, and community pride.
- Integrate insights from these events into ongoing BR&E support and planning the city staff, EDA, or local Chamber can implement.

Response 7

BR&E Program Implementation Plan

1. Purpose and Regional Context

The goal of the BR&E program is to strengthen existing businesses in Southwest Nova Scotia by improving communication, identifying risks early, and connecting businesses to practical solutions.

Southwest Nova Scotia has strong industries such as fisheries, seafood processing, manufacturing, tourism, agriculture, and small service businesses. At the same time, the region faces real challenges:

- Labour shortages and an aging workforce
- Housing shortages that affect worker attraction
- Broadband gaps in rural areas
- Succession risks among small business owners.

Most businesses in Nova Scotia are small or medium-sized enterprises, so business retention is critical to regional economic stability. A well-designed BR&E program will help Western REN better understand business needs and respond in a coordinated way.

This program aligns with Western REN's 2025–2030 strategic priorities, especially workforce development, business resilience, investment readiness, and regional collaboration.

2. Program Approach

Western REN will use ongoing continuous visits to businesses focused on key sectors or communities

Target businesses will include small and medium enterprises across all municipalities (Digby, Clare, Yarmouth, Argyle, Shelburne, Barrington), with special focus on key sectors and businesses facing transition or growth

3. Key Program Elements

• Inputs (What We Invest)

- Staff time and leadership commitment
- Standardized survey tools and interview guides
- CRM system to track visits, themes, and follow-ups
- Strong partnerships with municipalities, provincial agencies, chambers, workforce organizations, and post-secondary institutions

Trust-building will be a major investment. In rural communities, relationships are essential for honest conversations.

• Activities (What We Do)

- Conduct structured business visits
- Collect data on workforce, infrastructure, supply chain, succession, growth plans, and confidence
- Identify urgent issues and provide warm referrals
- Organize sector roundtables where common issues emerge
- Produce reports and dashboards for stakeholders

4. Reporting and Communication

Because data in a continuous model grows slowly, reports will focus on:

- Key themes and trends
- Business sentiment (confidence, expansion, risk)
- Sector-specific challenges
- Actions taken and next steps

Reports will be delivered to:

- Western REN Board
- Municipal councils
- Provincial partners
- Business groups and sector associations

The purpose of reporting is to maintain transparency, demonstrate action, and strengthen trust.

Data will be grouped into clear categories (e.g., workforce, housing, broadband, capital access). Instead of presenting raw numbers only, reports will explain what the findings mean and what actions are recommended.

5. Integration With Current Western REN Programs

The BR&E program will not operate separately. It will support and strengthen existing initiatives:

BusinessNow Program: Businesses identified through BR&E as needing operational or growth support can be referred directly.

Connector Program: Labour shortages identified during visits can inform talent-matching efforts.

Business Transition and Continuous Improvement Support: Succession risks identified during visits can trigger targeted support.

Immigration and Workforce Initiatives: Labour data from BR&E can guide employer engagement with newcomer and immigration programs.

6. Innovative Enhancements

To strengthen impact, Western REN may introduce:

- Business Resilience Toolkit for businesses.
- Cross sector employer forums on workforce and housing

7. Expected Outcomes

Short Term:

- Stronger relationships with businesses
- Clear understanding of current challenges
- Improved coordination among partners

Medium Term:

- Faster response to workforce, housing, and infrastructure issues
- Increased participation in Western REN programs
- More informed municipal and regional planning decisions

Long Term:

- Higher business retention
- Increased investment and expansion
- Stronger regional resilience and competitiveness

Conclusion

The BR&E visitation program will serve as a practical and strategic tool for Western REN. By combining structured engagement, clear reporting, and coordinated follow-up, the program will strengthen business confidence and improve regional economic resilience across Southwest Nova Scotia

Response 8

Response 9

Response 10

Response 11

Response 12

Response 13

Response 14

Response 15

Response 16
