

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?

Part A

Response 1

Reports and Presentations in a BR&E Program

Reports and presentations play an important role in a BR&E program, especially when using a volunteer visitor or "blitz" approach. While the primary focus of BR&E is direct engagement with businesses, reporting helps ensure the information collected is organized, understood, and used to support decision-making.

Audience for Reports and Presentations

Reports and presentations would primarily be shared with City leadership, economic development boards or committees, and key partner organizations such as utilities or workforce agencies. In some cases, a summary may also be shared with volunteers who participated in business visits to help reinforce the value of their involvement and maintain engagement.

Benefits to the BR&E Program

Preparing reports strengthens the BR&E program by demonstrating that business feedback is taken seriously and not simply collected and set aside. Presentations help build internal support for the program, encourage collaboration across departments, and reinforce accountability. They also provide a structured way to identify common issues and align leadership around potential responses.

Report Content in a Continuous Data Collection Model

Because data collection in a continuous BR&E model is gradual, reports should focus on early trends and recurring themes rather than complete statistical analysis. Content may include the number of visits completed, common concerns raised by businesses, notable observations from volunteers or staff, and examples of issues that required follow-up. Including qualitative feedback helps provide meaningful insight even when the data set is still developing.

Turning Data into Information

To make the information useful, raw data should be organized into clear categories such as workforce, infrastructure, regulations, or general business conditions. Summarizing findings through short narratives, simple visuals, or example scenarios helps audiences better understand what the data is indicating. The goal is to present information in a way that supports informed discussion and practical next steps, rather than overwhelming the audience with details.

Response 2

In the City of Converse, a BRE program blitz would yield information to understand the pulse of local business. Stakeholders in the community would benefit from understanding the trends and what support our business owners need. I would present our findings to our EDC Board of Directors, City Council, City department heads, and Education leaders including CTE program directors. With this knowledge, we can have support from these local leaders to combine efforts to support these businesses with the regulatory process, patronage and labor generation. These leadership groups can help implement programs within their scope of work to support the findings of the BRE initiative. The program would strengthen tremendously with collective buy-in from community leaders.

In the report, I would include how the program was executed, categories of business concerns and strengths, and telling the story of why this information is important. I would include information on how the survey was conducted, how many visits were made, and what selection process we used for choosing businesses to survey. It's important for the community Stakeholders to understand how we got to the information we share.

By analyzing the responses to the survey, we can group together similar responses in each industry and quantify those with a percentage of businesses interviewed. Narrowing the information down into groups or categories begins to shape the data into usable information. As we tell the story, backing it with data gives credibility to the findings as well as suggestions for change and support. Painting a picture of common pain points for the businesses and sharing why these concerns need their attention can help community leaders begin to think of ways they can help. These presentations can start a conversation with collective input to strengthen the backbone of community and pave a better experience in attracting new businesses. Our goal is the information from the data would show where support is needed and how we could all work to implement new resources for our business owners.

Response 3

- To whom or what groups would the reports/presentations be delivered?
Chamber of Commerce, Bankers, Retired Executives, Local Government Staff, Local College, Community Leaders
 - How would this benefit the strength of the BR&E program?
It would be a diverse selection of local citizens with different knowledge, experience and walk of life.
 - What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?
Housing, transportation, retail, quality of life, workforce, education, incentives, logistics & accessibility advantages
 - How would you turn data into information for the audience(s)?
slide deck, charts, maps, infographics, brochures
-

Response 4

The survey is a short questionnaire with basic information on the business with whom it is being conducted.

The report is presented to the MDD Director and then to the Board of Directors.

There are other organizations that would benefit from the report and/or presentation of the report. The City Manager and City Council, District Superintendent and School Board, Chamber of Commerce, also local Workforce. It would be beneficial for the report to be posted on these organizations' websites for public access.

This would benefit the BR&E program because all the organizations involved would have access to the information and would have the opportunity to work together to strengthen the business community, which strengthens the needs of the local public. Transparency helps those who can help or have a resource that can solve specific problems be available to those in need.

The data would include industry, hiring status, future expectation, facility square footage, range of employees, and challenges.

The information would be easily understood with graphs that contain percentages and statistics. Including any suggestions for solutions to overall challenges.

Response 5

For a volunteer visitor, blitz style Business Retention and Expansion program in DeKalb County, reports and presentations are not just administrative outputs. They are strategic tools that help sustain momentum, build trust, and convert raw visitation data into actionable community intelligence.

1. Target Audiences for Reports and Presentations

Key audiences would include:

- DCEDA leadership and board members
- Local elected officials and municipal partners
- Workforce and education partners such as community colleges and training providers
- State and regional economic development partners
- Participating in businesses and volunteer visitors
- Community stakeholders such as chambers and industry groups

Each group would receive tailored versions of the same core findings. For example, elected officials may need high level trend summaries tied to policy implications, while workforce partners may need deeper detail on skills gaps and training needs.

2. Benefits to the Strength of the BR&E Program

Regular reporting strengthens the BR&E program in several ways:

- Accountability and transparency. Stakeholders can see measurable progress and outcomes.
- Credibility. Structured reporting positions the program as data driven and professional.
- Alignment. Shared findings help partners coordinate around common priorities.
- Engagement. Volunteers and businesses feel their input is valued and acted upon.
- Early intervention. Emerging risks can be flagged before they become crises.

In a blitz model, where many visits occur in a compressed timeframe, reports help capture insights quickly and translate them into coordinated follow up actions.

3. Report Content in a Slow, Continuous Data Collection Model

Because continuous visitation generates data gradually, reports should focus on trends and signals rather than waiting for perfect datasets. A practical report might include:

- Executive summary with key themes from recent visits
- Number and type of businesses visited
- Top recurring issues such as workforce, supply chain, or regulatory concerns
- Immediate assistance requests and status of follow up actions
- Early trend indicators compared to prior reporting periods
- Short case studies or business spotlights

Even with small sample sizes, consistent structure allows stakeholders to track movement over time.

4. Turning Data into Information for Audiences

Raw comments and survey notes become useful when they are:

- Coded into themes and categories
- Quantified where possible, such as frequency of issues mentioned

- Connected to local benchmarks or economic indicators
- Illustrated with short narratives or examples
- Linked to recommended actions or decision points

Dashboards, summary charts, and simple visualizations can make patterns easier to interpret. The goal is to move from isolated comments to clear stories about what local industries are experiencing and what responses are warranted.

Response 6

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

Typically, the results of the survey will be available for the community. I will prepare several reports, social media posts, and presentations for different target audiences.

Example of Audiences

- General Public
- Elected officials
- Educational institutions
- Survey participants
- BR&E team
- Any entities mentioned in the survey
(Public infrastructure and public safety etc.)

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

Reporting the results and findings of the survey will benefit the strength of the BR&E program by showing the work of BR&E team and driving results to survey participants' concerns and issues. Reports will contribute to building community support for 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?

The continuous model, which focuses on relation building tends to require longer periods with several visits to complete survey questions compared to other models which focus on data collection for a short period of time. For reporting with continuous models, it should include the method used to complete the survey, period of the survey to consider political, economic, social, technological, legal, and environmental changes.

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

1. Determine the target audience and what information is critical and meaningful to them
 - Executives – strategic/political impact
 - Investors – Return on investment and risk
 - Community – Quality of life and jobs
 - Staff – Operational implications
2. Explain and narrate the findings from the survey data
Turn data into stories and visuals with key insights, simple charts, and infographics.

3. Divide action items into timelines (short, medium, long) and assign appropriate groups as action team for long-term action items and response teams for short-term action items with detailed breakdowns and outcome expectations.
 4. Use multiple sources to share the survey results
 - Business meetings
 - Civic group meetings
 - Social media
 - Website
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Response 7

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

Reports and presentations would be delivered to:

- Western REN's funders, such as the Municipality of Digby, Yarmouth, Clare, Argyle, and the Town of Yarmouth and Digby.
- Western REN Board of Directors
- Business community groups (Chambers of Commerce, sector associations)
- Provincial departments and partner agencies
- Economic development stakeholders (workforce agencies, post-secondary institutions, industry groups)

Different versions may be required: a technical report for internal partners and a summary presentation for business audiences.

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

Preparing reports strengthens the program in several ways:

- Demonstrates accountability to municipalities and funders
- Shows businesses that their input leads to action
- Builds regional alignment around shared priorities
- Enhances Western REN's credibility as a trusted convener

In rural Southwest Nova Scotia, visible follow-through is essential. If businesses see no reporting or action, trust weakens quickly.

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

Because data collection in a continuous model is gradual, reports should focus on:

- Emerging themes rather than large statistics
- Early trends (e.g., workforce shortages, broadband gaps, succession risk)
- Case examples (anonymous success stories or issue resolution examples)

- Actions taken to date

The goal is not volume of data, but meaningful insight.

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

To turn raw data into useful information:

- Group responses into key themes aligned with regional priorities
- Compare findings across sectors and municipalities
- Highlight implications (e.g., “Broadband gaps are limiting tourism expansion”)
- Identify recommended actions

Visual summaries, short dashboards, and clear key messages are especially effective for our funders and business groups.

Response 8

Reports from BR&E visits serve multiple audiences, including the action team, stakeholders and businesses, city and county officials, workforce partners, and educators. These reports provide valuable insights by identifying what is working well within a business and highlighting any challenges it may be facing. By clearly outlining findings, the reports help inform both the action team and the business about the appropriate next steps to support retention and expansion efforts. They also improve responsiveness by identifying potential issues early.

One analytic approach suggested in the material is the SWOT analysis. In the past, I have utilized another method known as SOAR (Strengths, Opportunities, Aspirations, and Results). I prefer the SOAR framework because it keeps desired outcomes and long-term goals at the forefront of the conversation. While it still surfaces potential threats and weaknesses, it fosters a more collaborative and positively focused approach to problem-solving. Including a business’s future aspirations in the report allows those goals to be incorporated into action plans, creating a proactive strategy for growth and retention. Information gathered through this process also equips staff and the action team to serve as stronger advocates for local businesses.

In addition, reports should document the number of businesses visited, the size and type of each business, any identified red or green flags, concerns or opportunities to monitor, and action steps that have been taken or are planned. One challenge in reporting, however, is maintaining confidentiality. Data ultimately tells the story of the business being represented, and that story must often be tailored to the audience. For example, when communicating with city officials, the data may highlight infrastructure needs. In contrast, when working with educators and workforce partners, the focus may shift to workforce gaps and skill development needs.

Response 9

The primary audiences for these reports include city councils and county commissioners, who need to understand the challenges and opportunities facing local businesses in order to make informed policy and investment decisions. Reports would also be shared with business owners themselves, helping them see that their concerns are not isolated and that many of their peers are navigating similar issues. Finally, the general public benefits from high-level summaries that highlight the health of the local economy and reinforce the importance of supporting local businesses.

Delivering tailored reports to these three groups strengthens the BR&E program by ensuring that the data collected during the blitz is translated into meaningful, actionable insights. Each audience requires a slightly different lens: elected officials need strategic implications, business owners need peer-to-peer validation and resource connections, and residents need a sense of pride and awareness. Knowing these audiences in advance helps shape the survey questions, volunteer training, and data-collection priorities so the program remains focused and relevant.

Because data collection in a continuous BR&E model can be slow, early reports would focus on themes rather than numbers. These might include emerging trends, common challenges, shared opportunities, and stories that illustrate the lived experience of local business owners. As more data accumulates, reports can gradually incorporate metrics, comparisons, and year-over-year insights.

Turning raw data into useful information requires thoughtful interpretation. This means grouping responses into categories, identifying patterns, and translating business feedback into clear recommendations. Visuals such as charts, heat maps, or simple infographics can help audiences quickly grasp what the data means. For business owners, this might look like a summary of shared workforce challenges or opportunities for collaboration. For councils and commissioners, it might highlight policy gaps or areas where targeted investment could make a measurable difference. For the public, it could showcase success stories and reinforce the value of shopping local.

Ultimately, the reporting process is not just a formality, it is a relationship-building tool. When businesses see their voices reflected in the findings, when councils see data guiding decisions, and when residents see progress, the BR&E program gains credibility and long-term support. Thoughtful, audience-specific reporting ensures that the blitz visitation effort becomes more than a one-time event; it becomes a foundation for ongoing economic resilience and community pride.

Response 10

Part B

Response 1

Public Infrastructure

Funding/Financing

Communication/Information

Marketing skills

Labor

Supply Chain

Response 2

1. Public Infrastructure
 2. Communication
 3. Funding
 4. Local Business Support
 5. Economic Incentives
 6. Supply Chain
 7. Health Requirement Access
 8. Local Government Leadership/Support
 9. Federal Government Leadership/Support
 10. Education
 11. Social Media Marketing
 12. Child and Adult Day Care
 13. Grants
 14. Business Restrictions
 15. PPP
 16. Essential Needs
-

Response 3

- Labor and Transportation Shortages
 - Inventory and Demand Instability
 - Rising Costs
 - Crisis Management
 - Financial Stability
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Response 4

- Financial Assistance and Funding
Grants, loans, relief funds, and direct financial support requests.
 - Public Health Guidance and Safety Measures
Masks, distancing, sanitation protocols, and workplace safety guidance.
 - Government Restrictions and Regulations
Concerns about closures, operating limits, and regulatory flexibility.
 - Communication and Information Clarity
Requests for accurate updates, consistent messaging, and reliable information.
 - Operational Adaptation and Business Continuity
Shifts to remote work, curbside service, digital tools, and process changes.
 - Workforce and Staffing Challenges
Employee availability, childcare issues, and labor stability.
 - Customer Demand and Market Conditions
Changes in sales, customer behavior, and economic uncertainty.
 - Media and Public Perception
Opinions about media coverage and public messaging.
 - No Assistance Needed or Uncertain
Responses such as none or not sure.
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Response 5

The survey received 100 responses. Some responses addressed multiple topics, so I separated those into individual items. As a result, the total number of response items is 107. First, I have categorized these 107 responses into 12 topics. After reviewing, those topics were merged and realigned into the final 10 topics. The result is as below.

“What business supports do you think would be beneficial as we navigate this global challenge?”

	Answer Category	Count	%
1	Grant/Funding	33	31%
2	No Answer	27	25%
3	Policy	24	22%
4	Workforce	5	5%
5	Supply Chain	4	4%
6	PPE	4	4%
7	Sales	3	3%
8	Health Care	3	3%
9	Accurate Pandemic Information	2	2%
10	Internet Infrastructure	2	2%

According to this result majority (53%) of responses concentrated in categories of Grant/Funding and Policy. The one-third of all responses expressed financial assistance is beneficial, and one-fifth mentioned better policy, decision making, and better communication would be helpful. Interestingly, one-fourth of responses were non-suggestive such as “I don’t know” and “(they are not) affected.”

Response 6

1. **Public Infrastructure**
 - a. *Municipal assets*
 - b. *Community infrastructure systems*
 - c. *Core public facilities*
2. **Communication**
 - a. *Public engagement*
 - b. *Strategic messaging*
 - c. *Information dissemination*
3. **Funding**
 - a. *Financial capital*
 - b. *Monetary support*
 - c. *Fiscal resources*
4. **Local Business Support**
 - a. *Enterprise assistance*
 - b. *Small business advocacy*
 - c. *Commercial support services*
5. **Economic Incentives**
 - a. *Business inducements*
 - b. *Performance-based incentives*
 - c. *Development incentives*
6. **Supply Chain**
 - a. *Vendor network*
 - b. *Distribution channels*
 - c. *Operational pipeline*
7. **Health Requirement Access**
 - a. *Healthcare accessibility*
 - b. *Public health compliance resources*
 - c. *Health services availability*
8. **Local Government Leadership/Support**
 - a. *Municipal leadership*
 - b. *City-level governance support*
 - c. *Local administrative backing*

9. **Federal Government Leadership/Support**
 - a. *National policy guidance*
 - b. *Federal administrative support*
 - c. *National governance leadership*
-

Response 7

1. Intended Audiences for BR&E Reports & Presentations

BR&E reports and presentations should be tailored to multiple stakeholder groups, each with different interests and decision-making roles:

- Internal Economic Development Board, Staff & Leadership
 - City Leadership & Elected Officials (City Council, Mayor, Boards/Commissions)
 - Partner Organizations (Chamber of Commerce, Workforce Boards, Utilities, Colleges, Regional EDCs)
 - BR&E Volunteer Visitors / Ambassadors
 - Business Community (Aggregated/Non-Confidential)
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2. Benefits to the Strength of the BR&E Program

- Accountability & Credibility
 - Continuity in a Long-Term Program
 - Strategic Focus
 - Stakeholder Buy-In
 - Institutional Knowledge
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3. Report Content in a Continuous, Slow-Build Data Model

- Program Overview
 - Number of visits completed (to date: Q1/Q2/Q3/Q4)
 - Industry sectors represented
 - Size of organizations visited (employees, square footage, tenure in community)
- Early Findings & Emerging Themes
 - Common challenges and opportunities
 - Early warning signals (risk of relocation, workforce shortages)
 - Growth indicators (expansion interest, capital investment discussions)
- Response & Follow-Up Actions
 - Issues resolved or in progress
 - Referrals made to partners

- Policy or process changes under review
 - Case Snapshots (Non-Confidential)
 - Short narratives illustrating impact or responsiveness
 - Next Steps
 - Upcoming visit targets
 - Partner engagement needs
 - Resource or policy considerations
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4. Turning Data into Meaningful Information

- Aggregation & Trend Analysis
 - Group data by sector, size, or issue area to identify patterns.
 - Visualization
 - Simple charts, heat maps, or dashboards to quickly convey themes.
 - Narrative Framing
 - Explain why a trend matters and what happens if it's not addressed.
 - Comparative Context
 - Compare current findings to past visits or regional benchmarks when possible.
 - Audience-Specific Messaging
 - Elected officials: economic impact and risk mitigation
 - Partners: service gaps and collaboration opportunities
 - Volunteers: proof of impact and appreciation
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5. Challenges to Acknowledge

- Limited early sample sizes
 - Time lag between issue identification and resolution
 - Confidentiality constraints
 - Managing expectations about immediate outcomes
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Response 8

- Financial Assistance & Capital Access
 - Government Policy & Regulation
 - Workforce & Unemployment Issues
 - Health & Safety Measures
 - Supply Chain Disruptions
 - Business Operations
 - Business Sectors
-

Response 9

Funding

Infrastructure (internet)

Supplies

Customers

Hiring

Mental Health

Physical Health

Education around PPP Loans

Marketing

Childcare

Response 10

- Communication
 - Funding
 - Marketing
 - Retail Strategy
 - Employee Support and Recruitment
 - Infrastructure
 - Legislative Opportunity
-

Response 11

- Financial Assistance and Relief Programs
(grants, stimulus checks, help with rent, utilities, taxes)
 - Access to Funding / Simplified Funding Processes
(less complicated state or federal funding, startup grants)
 - Workforce and Employment Concerns
(staffing challenges, keeping employees working)
 - Operational Changes and Business Restrictions
(lobby closures, limited operations, remaining open)
 - Public Health Guidance and COVID-19 Protocols
(clear guidelines, consistency, following expert advice)
 - Communication and Information Sharing
(accurate information, updates on the pandemic)
 - Technology and Internet Infrastructure
(internet reliability, online business capabilities)
 - E-Commerce and Online Business Support
(doing business online, online shopping tools)
 - Supply Chain and Access to Materials
(difficulty obtaining supplies)
 - Customer Demand and Consumer Behavior
(local buying, changes in customer activity)
 - Local Support and “Buy Local” Initiatives
(encouraging residents to shop locally)
 - Regulatory Environment and Government Policy
(rules affecting operations, economic shutdown concerns)
 - Business Confidence and Outlook
(uncertainty, feeling “lucky,” unsure responses)
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Response 12