

Fundamentals Course Homework

Session 1

In this session, we've talked about developing a plan or roadmap for the implementation of a BR&E program. Given the planning model shown on Slide 9 of the presentation in Section 3, describe your (or your EDO's) vision of the outcomes, outputs, and inputs required to create an atmosphere of success for the program. Note that we're not asking for specific numbers (i.e., budget line items, numbers of employees, etc.), but rather a narrative of what should be considered when addressing each component of the planning model.

Due by the beginning of the May 14, 2026 session.

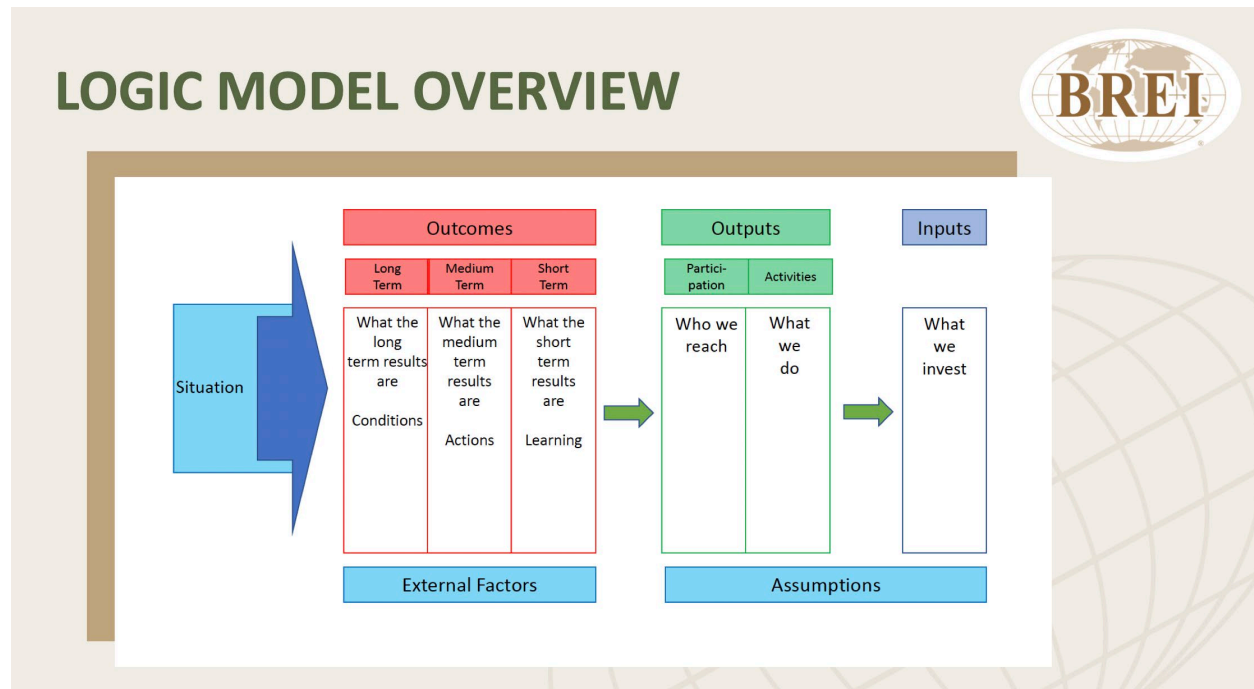
Response 1

My vision for the BR&E program for the Seabrook Economic Development Corporation in terms of long-term outcomes is to develop relationships with the businesses so they can trust the EDC and reach out to the EDC as a credible, reliable resource when they need assistance. In addition, we want businesses to feel like they can thrive in our community and that our community is business-friendly making it easy for their business to grow and expand. The medium-term results are the actions we take to address business issues or any roadblocks hindering their growth or success and come up with a plan to address those issues. We should have an internal staff taskforce to address items based on priority. In addition, we should develop ways the community can support businesses by celebrating business anniversaries or milestones and hosting appreciation luncheons. The short-term results are to develop business-related educational workshops on topics, such as marketing, budget analysis, etc., based on business needs and wants in partnership with the Small Business Development Center.

In terms of outputs, my vision is to reach the majority of business owners or managers in Seabrook by conducting face-to-face visitations with each business and survey them using a standard, all-encompassing questionnaire that's suitable for all business sectors. Ideally, we should visit at least four or more businesses per month with the assumptions that the owners or managers are present and the businesses are open when we stop by to conduct these visits.

With respect to inputs, my vision is to have a CRM to capture and analyze data and a survey with questions that encompass different business sectors, such as retail, restaurants, service, and industry all integrated within the CRM. The CRM will be a great tool in aiding with analyzing data to present to the EDC Board with the assumption that we have a budget to purchase the software and have buy-in or approval from the EDC Board to invest in this software. We should also have a target list or a comprehensive list of businesses to visit. We can also explore the option of possibly having interns from the University of Houston – Clear Lake to conduct the business visits.

Response 2



Outcomes

When working with the Logic Model, starting with the end goals in mind is critical to its success. Only after determining what conditions are showcased in the desired long-term results, can the real work begin. What action steps will create those conditions? Since each community is unique, we must learn by survey and subsequent conversations what the state of health is – We must always listen with integrity and without assumption. Meaning, we cannot assume results or determining factors. We must gather unbiased data and use it to identify systemic issues occurring for many businesses and then prioritize projects which address them. Only after desired outcomes have been determined by this data gathering can we decide where to invest monetary and human capital.

One of the most valuable components of this model is building community capacity, a network of collaborators who come together to solve existing problems can rely on each other when issues arise in the future. Additionally, local leaders prioritize collective good when they band together to address policy issues holding the desired outcomes at the heart of their work.

Outputs

A strategic action plan gives a framework for implementation which improves chances of success. The plan should be specific in action steps and agency contacts for support. The visitation process itself sends a very important message that business health is important to the community.

Cross sector collaboration is an underlying key component because without this ecosystem integration we risk the integration of essential components necessary for the desired outcomes. Community and economic partnerships will create intrinsic value and motivation for mutual involvement and success. There are many links between the health of business and social communities. Economic developers

must be aware of how economic vitality and holistic community development are part of the same animal. Public, private, education, and philanthropic collaboration can unlock creative funding opportunities to address desired outcomes. Public policies can support or destroy existing or proposed businesses. Traditional thoughts around economic development have maintained a very siloed approach that has been detrimental to growth over time. We realize now that a thriving populous and business sector have different perspectives of but mutual benefit in workforce development and retention, education, housing, healthcare, varied business types and the business retention and growth of existing businesses.

Another important consideration is a trusted, unbiased organization to lead these conversations, gather data, and present solutions. Furthermore, that same organization is vested in the success of all economic and community parties and maintaining project updates and communication to continue these collaborative efforts ensuring the integration of a healthier network.

Inputs

Human capital and time are the most valuable inputs. A task force of government, business, economic development, education, and community leaders provides a well-rounded perspective and professionally grounded guidance. A leadership team should have longer terms so that projects have consistent oversight and support.

Response 3

Our vision for a successful BR&E program is a relationship-driven and action-oriented process that helps businesses identify challenges, access supports, and contribute to a stronger regional economy. In a rural region, businesses often face interconnected issues related to workforce availability, infrastructure, investment readiness, succession planning, and navigating available resources. At the same time, businesses also hold valuable knowledge about emerging opportunities, sector trends, and barriers affecting the broader economic environment. A successful BR&E program must operate as both a business engagement tool and a coordinated system for gathering and responding to business intelligence.

The long-term outcome of our program is a more resilient, connected, and investment-ready regional economy where businesses are supported to retain, grow, and adapt over time. Medium-term outcomes include stronger relationships between businesses and economic development partners, improved coordination among support organizations, and increased awareness and use of available programs and services. In the short term, the program should improve communication with businesses, identify company-specific and systemic issues, and strengthen trust between businesses and the Pictou County Partnership.

Outputs would include participation from businesses, municipalities, support organizations, and sector partners through activities such as business visits, one-on-one engagement, business diagnostics, workshops, and coordinated partner discussions. These activities should generate both immediate responses to business concerns and longer-term insight that informs regional planning and action.

Inputs required for success include dedicated staff trained with BR&E fundamentals, strong partnerships, reliable data collection and analytical systems, communication tools, and clear processes for follow-up and accountability. Most importantly, the program requires ongoing engagement, collaboration, and a commitment to turning business feedback into measurable action and continuous improvement.

Response 4

Outcomes			Outputs		Inputs
Long Term	Medium Term	Short Term	Participation	Activities	
Thriving Communities within the Choctaw Nation of Oklahoma. (Increased economic impact on our area. Increased tax revenue. Less “leaking” to other markets.)	Increased number of retailers and manufacturers in our area providing good jobs at or above the average income for the area.	Assessing our local market to determine needs and where we are leaking to outside markets.	Focus on manufacturers with more than 20 employees and with retailers our organization has assisted in located to our area.	Visit all the targeted businesses for BRE visits and follow-ups as needed during a calendar year to assess needs and possible risks. BRE Visits will be logged in a CRM and reported to leadership each month. Follow-ups will be on an as-needed basis and logged/reported accordingly.	<ul style="list-style-type: none"> • Time. • Money. • Labor.

Response 5

Our community has a population of approximately 13,000 people and we have a Type A Economic Development Corporation typically staffed by four. We are coming off of a time of historically steady employment within the EDC where a full time dedicated BRE staffer has always been in place. In the past three years the absence of a steady BRE person has minimized our engagement with our existing employers.

My goal would be to establish a full time, long term and experienced BRE specialist position and program. I would start with visits and reach out quarterly at a minimum to our companies and maintain regular communication.

We currently host a once-a-year Industry Appreciation event for our CEO's and several smaller employee appreciation initiatives throughout the year such as delivering snow cones directly to local facilities. This not only touches base with the companies but allows us to recognize employees as well. It also gets us in the door as a regular interaction and make sure we are not operational concerns or potential closures. I would continue these initiatives.

With a professional BRE program in place, I would establish partnerships with the Small Business Administration, the local colleges, CTE Career and Technical Education at the high school level so our existing industries have access to workforce development resources.

Also lastly, I would like to open the upstairs portion of our building that we don't use as an incubator space or training space for companies. It is set up as private offices and cubicles. It could serve as a free space for companies to use for a short amount of time either during company visits or even expansions.

Response 6

Inputs (What We Invest)

The Choctaw Nation of Oklahoma has a strong BR&E program in place. We have a dedicated and growing staff of eight Economic Development professionals that serve a 10.5 county, 11,000 square mile tribal territory in the southeastern quadrant of Oklahoma. The tribal leader, Chief Gary Batton, has remained steadfast and committed to the economic prosperity of not only tribal interests, but to being good neighbors and giving back to communities across the entire reservation, tribal or not.

The Choctaw Nation economic development team fill gaps in local communities, providing consultative style assistance to municipalities who lack economic development infrastructure. One of the most important facets is our community relations, we pour heavily into partnerships and relationships including collaboration with tribal leadership, local government and municipalities, chambers of commerce, workforce development entities, educational institutions, employers, and utility providers with emphasis on forming long-term relationships and trust.

The tribe also invests heavily into technology, including customer relationship management software, and data tools that are very expensive, aggregating and providing the data to all counties under our umbrella.

Outputs (What We Do and Who We Reach)

The Choctaw Nation BR&E program focuses on proactive business outreach including regular site visits focusing on the health of the business and its workforce, and follow-up engagements with businesses across the region.

A noteworthy effort that is part of the Choctaw Nation BR&E ecosystem is a small business advisory initiative with tribally owned businesses we call “Chahtapreneurs”. This initiative focuses on small businesses and startups, some of which grow into large businesses that become the economic heartbeat of their communities with the jobs they supply. So the tribe assists from startup, through initial growth, all the way through the expansion of these businesses into large sized employers.

Outcomes

The region of southeastern Oklahoma that we serve, especially the most rural areas, often lacks background knowledge of what economic development is. A personal goal of mine is to bring education to the businesses I serve in hopes that this education creates increased knowledge and awareness among both businesses and municipalities. Businesses gaining a better understanding of the programs, incentives, and support available free of charge from the Choctaw Nation.

Short-Term (Learning)

- Our Economic Development team will help develop a clearer pictures of business needs, challenges, and opportunities. The includes items such as gaps in the workforce and educational pipelines, supply chain issues, or infrastructure needs.
- Most importantly, these interactions build trust and communication channels which are critical to the economic growth and success of the state of Oklahoma.

Medium-Term (Actions)

- As trust and knowledge increases, we hope to build tangible actions by responding to identified needs such as improving infrastructure, growing talent pipelines through technical training at local trade schools, or adjusting policies for better growth.
- Collaboration across agencies will strengthen responses to business concerns and BR&E becomes a mechanism for solving problems and growing businesses rather than just gathering information.

Long-Term (Conditions)

- Create sustainable, positive economic conditions within the Choctaw Nation and beyond including increased business retention, business expansion, and job creation.
 - Drive a resilient and diversified economy where businesses are supported and growing.
 - Improvements in workforce readiness, infrastructure, and overall business climate in the region.
 - Achieve the longstanding tribal of tribal economic sovereignty and independence.
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Response 7

A strong Business Retention and Expansion program isn't built around a checklist it's built around a clear vision of what success looks like for local businesses and the community. The goal is to position the economic development organization (EDO) as a trusted, disciplined, and genuinely responsive partner to existing employers. When we get that right, businesses feel heard, problems surface early, and the information we gather turns into real action that supports retention, competitiveness, and growth.

Vision of Desired Outcomes

What we're really after isn't just a high number of business visits, it's measurable change in how the community supports its employers. In the short term, that means building trust, developing honest intelligence about business conditions, and demonstrating responsiveness when concerns are raised. In the medium term, it means improving how we coordinate with partners to solve real problems, from workforce gaps to permitting bottlenecks. Long-term, success looks like stronger retention, more local expansions, and a business climate where employers genuinely see our community as a place worth investing in for the long haul.

Vision of Necessary Outputs

Outputs are what show the program is working. First, we need consistent outreach completed visits, structured interviews, and disciplined follow-up with businesses and partners. Second, we need to convert those conversations into something useful: documented concerns, trend analysis, sector reports, and red-flag summaries that leadership can act on. Third, we need to close the loop with action plans, referrals, and issue-tracking that proves we don't just listen we respond. Finally, we need to build in honest internal reflection so the program can evolve as conditions change rather than running on autopilot.

Vision of Required Inputs

None of this works without the right foundation. Leadership has to treat BR&E as a core function, not a side project that signal shapes how seriously staff, elected officials, and businesses take the whole effort. We also need clear role ownership, because inconsistency and dropped follow-up can kill a program's credibility fast. Beyond internal capacity, we need strong partner alignment workforce boards, utilities, lenders, permitting offices because most business problems can't be solved by the EDO alone. A reliable information system is non-negotiable, too; without structured documentation, good conversations become forgotten conversations. And finally, training and shared protocols ensure consistency and protect the program's integrity across whoever is doing the work.

Building an Atmosphere of Success

The real measure of this program isn't how many visits we log it's whether we're becoming the kind of organization that businesses rely on. That happens when inputs, outputs, and outcomes are aligned and reinforced by each other rather than treated as separate boxes to check. The vision isn't to launch a visitation effort. The vision is to build a coordinated system that listens well, organizes information effectively, responds consistently, and makes local employers believe that staying and growing here is worth it.

Response 8

The overall goal of a BR&E program for our community should be to create an environment where existing businesses feel supported, connected, and confident in their future within the local community, resulting in increased business retention and expansion. Long-term success would include growth in quality jobs and wages, stronger confidence in local leadership and economic development efforts, and an improved reputation as a business-friendly community. The program should also strengthen partnerships among businesses, workforce organizations, and educational institutions with the goal of long-term economic sustainability.

To achieve those outcomes, the BR&E program should focus on improving communication and collaboration between businesses and the EDC. Regular business visits, surveys, and roundtable discussions can help identify recurring barriers to growth and provide valuable feedback for developing actionable strategies. Over time, local leadership should become more responsive to business concerns, and the information gathered through the program should help guide workforce development, infrastructure improvements, and other community priorities. Increased collaboration between employers, workforce partners, and other local resources is also an important part of creating a supportive business climate.

In the short term, the program should focus on learning and information gathering. Collecting accurate business intelligence helps establish baseline data and provides a better understanding of local business needs, workforce and training challenges, and regulatory or infrastructure obstacles affecting growth. The process should also help identify at-risk businesses and industries early enough to connect them with available assistance programs, incentives, or support services.

The outputs of the program should focus on both participation and activities. Participation should include businesses of all sizes and industries, workforce and education partners, local government officials, utility providers, regional and state economic development organizations, and community groups such as the Chamber of Commerce. Activities should include conducting regular business retention visits, administering surveys and interviews, maintaining a database of business contacts and project activity, tracking concerns and follow-up actions, and providing referrals to workforce, financing, or technical assistance resources. The program should also include analyzing economic and workforce data and coordinating with local, regional, and state partners.

Finally, a successful BR&E program requires inputs in the form of investment in staff time, leadership commitment, funding, and operational support. The organization should have reliable data management systems and communication tools in place to track visits, issues, and outcomes. Strong partnerships with workforce, education, government, and regional organizations are also essential, along with access to economic and demographic data that can support informed decision-making and long-term planning.

Response 9

The scope of this plan is to target established social enterprises. Social Enterprises are organizations that generate revenue to primarily serve their mission while meeting a community need or doing community good. Examples of social enterprises include a thrift shop where the revenue is used to fund the local animal rescue; or a coffee shop that employs adults with diverse abilities. Social enterprises require a unique approach that includes both business related resources and non-profit resources.

Outcomes

Long-term - My long-term vision is that organizations are less reliant on government or foundation funding to deliver their mission. This means that organizations have more autonomy over the programming they offer and aren't always adjusting a project proposal to meet government or funder priorities.

Medium Term – My medium-term work would focus on taking action to address the barriers organizations are facing. While broad sector issues will be brought forward as part of a world café, the individual circumstances will be addressed on a case-by-case basis following a “coffee chat”.

Short Term – Awareness of the Business Retention and Expansion for social enterprises will be communicated through our various channels. We connect with organizations through a bi-weekly newsletter and a monthly community of practice. These are avenues where we can directly and indirectly generate awareness of this BR&E for social enterprises. This awareness phase will ideally bring forward current social enterprises and spark ideas for organizations looking to diversify their revenue stream beyond grants.

Outputs

Participation – Reaching Executive Directors or CEOs of the organizations that operate social enterprises; if the organization hasn't self-identified as being a social enterprise, we'll use their organization profile to discern whether they fit the social enterprise definition.

Activities – host world café style meeting to understand sector level challenges that can be worked on for the sector (professional development, PD training like first aid, leadership development). The information gathered at the world café session informs the types of questions that should be considered in a discussion guide for social enterprise BR&E. Coffee chats will be arranged to discuss the elements that are included in the discussion guide.

Inputs

Human capital will be the greatest investment. We'll leverage relationships with a local foundation to fund the costs associated with hosting a world café. We'll invest staff time to develop a conversation guide that is reflective of what we've heard from sector leaders while ensuring open-ended spaces for organizations to provide their unique circumstances.

Response 10

Response 11
