

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

Choctaw Nation of Oklahoma

Business Retention & Expansion Visitation Program

Summary: The Choctaw Nation of Oklahoma's Economic Development team strives to support the long-term business climate across the 11,000 square mile reservation by the "good neighbor" approach focused on building strong relationships, identifying needs, and delivering meaningful outcomes.

Using a staff-led visitation approach, we will provide consistent engagement across all 10.5 counties to support businesses and the broader regional economy.

1. Approach

The regional Choctaw Nation Economic Developers will proactively conduct relationship-based visits focused on:

- Outreach, targeted to businesses with a staff of more than 25 employees
- Prioritization and more outreach to businesses that cite issues
- Ongoing engagement to drive long-term trust – not just one visit

The team has Economic Developers assigned to specific counties and tribal districts making the volume of BR&E visits more attainable per staff member.

2. Community Focus

The heartbeat of the BR&E program is focused on strong relationships built on trust in the communities we serve, this focuses on:

- Municipalities, counties, tribal, business, and local partners
- Supporting both tribal and non-tribal equally
- Building trust through consistency and follow-through
- Identifying challenges that impact communities and driving solutions

The “good neighbor” approach reinforces a stronger, healthier communities across the reservation.

3. Strategic Partnerships

Community partnerships are essential to program success, these partners include:

- Local municipalities and county governments
- Chambers of commerce, other business organizations
- Educators and workforce development organizations
- Utility, energy, and infrastructure partners
- Regional leadership and advisory groups
- Regional and state economic development entities
 - This is a gap in Oklahoma, there are typically only urban economic development and rural areas have none.

4. Visitation & Engagement

Choctaw Nation staff conducts business visits at a minimum of once per year (more as needed) and collects data on:

- Workforce and gaps
- Infrastructure and broadband access
- Supply chain
- Financial needs and access to capital
- Expansion opportunities
- Identifying both immediate concerns and future opportunities

5. Data Turned Into Action

Choctaw Nation staff members educate via the following during BR&E visits to employers and community stakeholders:

- Demographic, economic and labor force trends
- Wage and employment data
- Regional economic data with county breakdowns
- Retail data

Upon return from visits, we input data into the team database for recordkeeping. We are often the conduit for community growth facilitating problem solving by:

- Connecting businesses to funding, workforce data/programs, and technical assistance
- Addressing common challenges such as infrastructure and workforce shortages
- Helping businesses navigate available resources and programs
- Coordinating with partners to implement solutions at the community level
- Hosting educational and training events such as mock site visits to enable local economic development efforts

- This ensures that business feedback leads to real, measurable outcomes

6. Assessment & Continuous Improvement

We will track outcomes in business retention of employee count, expansion efforts, and growth and monitor local and broad issues.

Conclusion: The Choctaw Nation BR&E visitation program is relationship-driven, community-focused economic development strategy. Through strong partnerships, consistency, and a commitment to support businesses across the reservation, the program builds a more resilient and prosperous regional economy.

By focusing on collaboration, communication, and actionable results, the Choctaw Nation plays a key role in supporting the success of the communities we serve.

Response 2

1. Purpose and goals

The BR&E visitation program in LeFlore County will focus on listening to existing businesses in Poteau and surrounding communities, addressing barriers to growth, and strengthening our local business climate. The program is designed as an ongoing cycle of listening, action, and feedback.

- Retain and grow local jobs and investment in key sectors (retail, services, health care, education, manufacturing/food processing, tribal enterprises, and tourism/outdoor recreation).
- Build trust and social capital between businesses, local government, tribal partners, education, and other support organizations.
- Establish a structured, repeatable process for gathering business feedback and acting on it.

2. Program structure and partners

The program will be led by CNO and guided by a small steering committee, ensuring shared ownership and coordination across the county. This group will set direction and keep the BR&E effort focused and practical.

- Include representatives from the City of Poteau and surrounding towns, LeFlore County, Poteau Chamber of Commerce, Choctaw Nation, workforce and education partners, and major employers.
- Choose target businesses, design and refine a survey, and recruit volunteers.
- Review results, identify priority issues, and champion follow-up projects.

3. Target businesses and visitation approach

To keep the first round manageable and effective, the program will focus on a defined group of existing businesses that reflect the county's economy. A volunteer "blitz" will allow many visits in a short time.

- Target 40–60 businesses across Poteau and other communities, including major employers and locally owned small businesses.
- Ensure a mix of sectors:
 - Retail and services, health care, education, manufacturing/food processing, tourism/outdoor recreation, and key tribal or institutional employers.
- Use trained volunteer pairs to conduct visits during a 4–6 week blitz, emphasizing conversational, relationship-building visits rather than inspections.

4. Survey content and social capital

The survey will collect both quantitative and open-ended information on core business issues and on the networks that support them. Questions will be designed to help us understand not only problems, but also connections and opportunities.

- Cover topics such as workforce, sales and markets, facilities and infrastructure, regulations and permitting, supply chain, technology, and future plans.
- Include questions about who businesses turn to for advice (chamber, city, Choctaw Nation, lenders, peers) and what networks they participate in.
- Ask about interest in peer roundtables, mentoring, or joint marketing, so the program can help build social capital among local firms.

5. Volunteer recruitment and training

Volunteers will be the face of the program, so careful recruitment and training are critical. The goal is to send people who are trusted, well-prepared, and clear about their role.

- Recruit volunteers from the business community, civic groups, education, and partner organizations who understand local conditions and can keep information confidential.
- Provide training on program goals, confidentiality, how to ask questions consistently, and how to handle sensitive topics or "red flag" issues.
- Offer simple tools for scheduling visits, recording responses, and returning completed surveys.

6. Data management, analysis, and reporting

Collected surveys will be compiled and analyzed to identify both individual follow-up needs and broader patterns. Results will be shared in clear, actionable formats for different audiences.

- Enter and clean data in a spreadsheet or simple database, coding open-ended responses into themes (for example, workforce, finance, infrastructure, regulations, technology, special populations).
- Summarize findings by topic and, where helpful, by location or sector.
- Prepare concise reports and presentations tailored to city and county officials, the chamber and partners, and participating businesses and volunteers.

7. Follow-up actions and communication

Follow-through is what gives the BRE program credibility and long-term value. The emphasis will be on a few visible, achievable priorities and clear communication back to businesses.

- Have the steering committee select 2–4 priority projects (for example, workforce initiatives, process improvements, small-business marketing support, or broadband/technology efforts).
- Arrange one-on-one follow-up with businesses that voice specific or urgent needs.
- Share a summary of “what we heard” and “what we are doing” with all participating businesses and recognize volunteers and partners for their role.

8. Timeline and continuous improvement

The program will start with a pilot round and then evolve based on what is learned. The aim is to make BRE a permanent, learning-oriented tool for economic development in LeFlore County.

- **Year 1:** Form the steering committee, finalize the survey, recruit and train volunteers, and conduct the first visitation blitz.
- **Year 2 and beyond:** refine questions, adjust the list of target businesses, and repeat visits on a cycle (for example, every 2–3 years for key employers).
- **After each cycle,** review what worked and what did not, and update the plan of work accordingly.

Response 3

The goal of implementing a Business Retention and Expansion (BR&E) visitation program within our organization would be to strengthen relationships with local businesses, better understand emerging challenges and opportunities, and support more informed and responsive economic development planning. The program would be relationship-based and action-oriented, with a focus on building trust and creating stronger connections between businesses, community partners, and decision makers.

The program would begin with a phased implementation approach to allow time to refine processes, identify meaningful data points, and ensure the system remains practical and sustainable for staff. BR&E visits would be conducted directly by in-house staff to support relationship continuity, trust building, and stronger understanding of local business needs over time. The course materials emphasize the importance of

determining how firms are selected, how visits are scheduled, and how follow-up processes are managed before visits begin.

In the early stages of implementation, data collection and analysis would be intentionally simple and manageable. A Microsoft Forms-based intake process would also be explored to support more efficient data collection and some automated analysis capabilities. The alignment with Excel would allow for additional data such as tracking business visits, number of touchpoints, referrals, emerging concerns, and follow-up actions. One anticipated challenge will be determining how to effectively track ongoing follow-up visits and relationship-based interactions over time while maintaining a clean and usable dataset.

An important part of the program design would be tracking not only issues identified during visits, but also the actions taken afterward. Businesses concerns and opportunities could be categorized using a green flag, yellow flag, and red flag system to help prioritize responses and identify trends over time. Follow-up check-ins would also be recorded to better understand outcomes and whether supports or referrals were effective. Tracking the number of visits and ongoing business touchpoints would help tell the story of the continuous support and relationship-building work taking place behind the scenes.

As the program evolves and the organization gains a clearer understanding of the data that is most useful for decision-making and reporting, additional tools and systems could be explored. This may include the use of Notion, which our organization already uses as a customizable project management platform with CRM capabilities. A longer-term goal would be to create an integrated and user-friendly system that supports relationship management, issue tracking, reporting, and outcome measurement without creating unnecessary administrative burden for staff.

Ongoing reporting and communication with stakeholders would also be an important component of the program. Quarterly reporting would help identify emerging trends and recurring concerns in a timely manner while demonstrating the value of the BR&E program to businesses, municipal partners, funders, and the broader community. The course materials highlight that marketing and communication are important for building community awareness and strengthening stakeholder confidence in the program. Reports would focus not only on business concerns, but also on actions taken, partnerships formed, referrals completed, and opportunities identified through the visitation process.

I am also particularly interested in measuring the outcomes and “ripple effects” of this work over-time. While some impacts of BR&E activities may be direct and measurable, such as referrals or workforce supports provided, other impacts may emerge more gradually through stronger partnerships, improved communication, increased trust, or earlier identification of business challenges. Designing systems that can capture both quantitative and qualitative outcomes will be important for supporting stakeholder engagement and demonstrating long-term community impact.

Ultimately, the success of the BR&E program will depend on balancing strong systems with strong relationships. The data collection and reporting systems should support the work, not overcomplicate it. Creating practical and user-friendly processes will allow the Business Outreach Officer to focus primarily on relationship building, business visits, and responsive follow-up while still ensuring the organization can collect meaningful information to support economic development planning and community resilience.

PHASE 1 — PROGRAM FOUNDATION

- Define BR&E goals and outcomes
- Identify priority sectors and businesses for year 1 & 2
- Develop sector specific surveys and discussion guides
- Establish Green / Yellow / Red flag criteria
- Develop follow-up process
- Prepare communications and stakeholder engagement plan



PHASE 2 — INITIAL DATA SYSTEMS

- Create Microsoft Forms intake process for survey for excel analysis
- In addition, track:
 - Business visits
 - Business touchpoints
 - Concerns and opportunities
 - Referrals and actions taken
 - Follow-up/check-in outcomes

- Refine data collection fields over time



PHASE 3 — BUSINESS VISITS & RELATIONSHIP BUILDING

- In-house staff conduct BR&E visits
- Identify emerging trends and concerns - assign Green / Yellow / Red flags and track their frequency
- Build ongoing relationships with businesses
- Record findings:
 - Workforce concerns
 - Infrastructure barriers
 - Expansion opportunities
 - Supply chain issues
 - Success stories



PHASE 4 — FOLLOW-UP & ACTION

- Immediate response to Red Flag issues
- Coordinate referrals and partner support
- Conduct follow-up check-ins

- Track outcomes and unresolved issues
- Identify opportunities for collaboration and advocacy



PHASE 5 — REPORTING & ANALYSIS

- Quarterly reporting cycle
- Identify:
 - Recurring themes
 - Emerging trends
 - Gaps and opportunities
 - Actions taken
 - Business sentiment
- Share reports with:
 - Board of Directors
 - Liaison & Oversight Committee
 - Municipal Units & Pictou Landing First Nation
 - Province of Nova Scotia
 - Funders
 - Community stakeholders
- Use simple visuals and practical summaries



PHASE 6 — CONTINUOUS IMPROVEMENT & IMPACT

- Refine survey questions and workflows
 - Explore expanded systems such as Notion CRM
 - Measure outcomes and “ripple effects”
 - Strengthen stakeholder engagement
 - Support long-term economic resilience planning
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Response 4

Purpose and Vision

- Strengthen relationships with existing employers through consistent communication
- Identify business concerns early before they become significant challenges
- Support business retention, expansion, and stability within the community
- Create a proactive, relationship-driven approach to serving local industry
- Gather feedback from employers regarding workforce, infrastructure, and operational needs
- Connect businesses with resources and partners to help address identified challenges
- Improve collaboration between industry, local government, workforce partners, utilities, and education providers
- Encourage business growth, investment, and job retention in the community
- Build trust and increase communication between employers and the Economic Development Corporation
- Establish a continuous visitation model that provides year-round support

Target Businesses

- Start with our larger employers and manufacturers since they make up a significant part of our employment base and local economy
- Prioritize companies that have large utility demands, significant workforce needs, or long-term community impact
- Reconnect with companies where communication may have fallen off over the last few years due to turnover in BRE staffing
- Include industries that may have future expansion opportunities or infrastructure needs so we can be proactive instead of reactive
- Continue outreach to smaller employers as the program grows to ensure all businesses feel supported
- Focus on building relationships with key contacts at each company so there is regular communication
- Make sure employers know the EDC is a resource and partner, not just someone who checks in when there is a problem

Visitation Strategy

- Establish a continuous visitation model so we are staying in front of employers on a regular basis rather than only reaching out when there is a problem
- Schedule quarterly visits with larger employers and regular check-ins with smaller companies depending on need and engagement level
- Meet with plant managers, HR staff, operations personnel, and ownership when appropriate to better understand what is going on inside each company
- Use a standard survey or list of topics to help guide conversations while still allowing flexibility discussion
- Focus conversations around workforce issues, utility and infrastructure needs, expansion plans, supply chain concerns, training opportunities, and any operational challenges they may be facing
- Keep notes and track concerns so issues can be followed up on after the visit

- Use existing events such as Plant Manager Roundtables, HR Luncheons, Big Techs Tours, and other networking opportunities as another way to stay connected with employers
- Make follow-up a priority so companies know their concerns are being heard and acted on when possible
- Build long-term relationships and trust with employers so they view the EDC as a partner and resource rather than just a survey program

Partnerships and Stakeholder Engagement

- Work with the City and partners to help identify and address issues employers may be having related to infrastructure, permitting, or other local concerns
- Continue building relationships with utility providers so we have a better understanding of electric, gas, water, wastewater, and broadband needs for our industries
- Partner with workforce organizations to better understand labor shortages and available workforce training opportunities
- Continue working with local colleges and workforce training programs to help align training opportunities with the needs of our employers
- Build on programs we already have in place such as Plant Manager Roundtables, HR Luncheons, Career Days, and Big Techs Tours to stay engaged with local employers
- Encourage employers to share ideas and common challenges with one another and create stronger relationships between industries in the community
- Utilize regional and state partners when companies have needs that require resources or assistance beyond the local level

Data Collection and Management

- Gather information during company visits, follow-up conversations, roundtables, luncheons, and other interactions with employers
- Use a standard survey or list of discussion topics to help guide conversations while still allowing flexibility for open discussion
- Track information related to workforce issues, utility concerns, infrastructure limitations, expansion plans, and other operational challenges
- Keep organized notes from visits so concerns are documented and follow-up items do not get overlooked
- Look for trends among employers to better understand common challenges and opportunities within the community
- Identify companies that may need additional support or that could have possible expansion opportunities
- Focus on collecting useful information over time through regular contact instead of trying to gather everything at once

Problem Solving and Business Response

- Follow up on concerns brought up during company visits and work to connect businesses with resources when possible
- Coordinate with city staff, utility providers, workforce partners, and education partners to help address identified issues

- Assist companies with workforce, infrastructure, or operational concerns when resources are available
- Make follow-up a priority so employers know their concerns are being heard and taken seriously
- Stay proactive and try to identify concerns before they become larger problems for the business or community
- Continue building trust with employers so they see the EDC as a resource and partner

Reporting and Communication

- Provide reports to the Board that summarize company visits, recurring concerns, trends, and potential risks identified through the program
- Share overall findings with the Mayor, Council, and City Manager to help with planning and understanding employer needs
- Coordinate with utility providers when recurring infrastructure or service-related concerns are identified
- Share workforce-related information with schools, colleges, and workforce partners so training opportunities can better match employer needs
- Use reports to identify common issues and priorities as information is collected over time
- Present information in a way that helps stakeholders understand what employers are experiencing and where support may be needed

Program Evaluation and Success Measures

- Track the number of company visits completed and overall participation from employers
 - Measure issues identified and whether they were addressed or connected to resources
 - Monitor expansions, investments, and jobs retained when possible
 - Evaluate employer participation and engagement in roundtables, luncheons, and other outreach efforts
 - Continue gathering feedback from employers to better understand what is working and where improvements may be needed
 - Adjust the program over time based on employer feedback and changing community needs
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Response 5

OSCEOLA COUNTY ECONOMIC DEVELOPMENT

Business Retention & Expansion

Visitation Program — Plan of Work

BREI Fundamentals Course — Final Project | May 2026

Osceola County, Florida • Tourism • Agriculture • Semiconductor / Advanced Manufacturing

I. Executive Summary

Osceola County sits at a rare economic inflection point. Its three foundational pillars — Tourism, Agriculture, and Semiconductor / Advanced Manufacturing — represent distinct industries with distinct labor markets, site needs, and growth trajectories. Yet all three share a common vulnerability: they are underserved by a structured, continuous business retention and expansion (BR&E) visitation system that listens, responds, and converts intelligence into action.

This plan of work describes how Osceola County Economic Development (OCED) will design, implement, and sustain a professional-grade BR&E visitation program aligned with the BREI Fundamentals Course framework. It also addresses a strategic opportunity — Agritourism — as a controlled bridge between the Tourism and Agriculture pillars. The goal is not to dilute the county's three-pillar focus, but to identify where Agritourism creates additive value without redirecting resources from the county's primary economic priorities.

Strategic Premise: Agritourism is treated here as a cross-pillar amplifier, not a fourth pillar. It is managed inside the Agriculture visitation track with a Tourism lens — never replacing or overshadowing the semiconductor and advanced manufacturing pipeline.

II. Program Foundation — Organizational Readiness

A. Organizational Commitment

A successful BR&E visitation program requires that leadership treats it as a core function, not an ancillary activity. OCED will secure explicit endorsement from the County Manager and Board of County Commissioners, position BR&E work within the economic development strategic plan, and ensure that staff time, data systems, and partner relationships are allocated as standing operational resources — not seasonal priorities.

B. Selecting the Right Model

BREI defines two primary operating models: the Volunteer Visitor Model and the Continuous Model. Given OCED's three-pillar complexity and the depth of relationship required to support advanced manufacturing and semiconductor businesses, the Continuous Model is the correct choice. This model uses professional staff to conduct ongoing structured visits, collect intelligence, and respond to business needs year-round. Volunteers from the business community may supplement outreach in the Tourism and Agriculture sectors, particularly for Agritourism outreach where peer relationships are culturally important.

C. Staff Capacity and Role Clarity

The program will require the following defined roles from the outset:

- BR&E Program Lead — owns the overall program, visit strategy, partner coordination, and executive reporting.
- Sector Liaisons — dedicated to each of the three pillars; responsible for visit preparation, relationship management, and issue triage within their sector.
- Data and Reporting Analyst — manages the information system, issue coding, KPI tracking, and executive brief preparation.
- Agritourism Navigator — a hybrid role sitting between the Agriculture and Tourism liaisons; responsible for identifying farms with tourism potential and coordinating with Visit Kissimmee and relevant hospitality partners.

D. Partner Network

BR&E issues regularly exceed what a single EDO can resolve. OCED will maintain active working relationships with Osceola County Public Schools and Valencia College for workforce issues, the Kissimmee Utility Authority (KUA) for utility reliability and economic development rate structures, the Florida Department of Agriculture and Consumer Services for agricultural program access, Visit Kissimmee for tourism alignment and agritourism marketing, and the Florida High Tech Corridor Council for semiconductor and advanced manufacturing intelligence.

III. Community Assessment — Understanding the Business Environment

Before visitation begins, OCED will conduct a structured community assessment to establish a baseline understanding of business conditions in each pillar. This reflects the BREI course framework (Section 4), which treats community assessment as a prerequisite for credible, context-aware visitation.

Data Sources and Domains

The assessment will draw from both public secondary data and proprietary sources:

- Lightcast — labor market conditions, occupation demand, wage benchmarking for semiconductor/manufacturing workforce gaps.

- ESRI Business Analyst — tourism retail spending, consumer demand analysis, and lodging performance benchmarks.
- FDACS and USDA NASS — agricultural land use, commodity values, farm count trends, and direct-marketing revenue in Osceola County.
- Florida DEO and Enterprise Florida — target industry intelligence, site selection competitiveness, and economic impact baseline.
- Census / American Community Survey — population, income, demographics, and poverty profiles.

Three-Pillar Assessment Summary

The community assessment will produce a sector profile for each pillar, including:

- Number of active establishments and employment by sector.
- Top recurring challenges from prior interaction or publicly available surveys.
- Known workforce, infrastructure, or regulatory pressure points.
- Site and facility conditions that affect retention or expansion decisions.
- Competitive positioning relative to comparable Florida counties.

For Agritourism specifically, the assessment will identify farms currently operating or expressing interest in direct-to-consumer experiences, evaluate proximity to existing tourism corridors, and review any applicable land-use or permitting barriers that currently suppress on-farm visitor activity.

Assessment Standard: The assessment produces intelligence — not confirmation. Every finding should improve a visit, sharpen a question, or inform an action plan. It is not a marketing document.

IV. Social Capital — Building the Relational Infrastructure

BREI's Section 5 on Social Capital reflects a foundational truth: BR&E programs succeed or fail based on the quality of relationships between the EDO and the business community. Businesses are more likely to disclose concerns, expansion plans, and vulnerabilities when they trust the people asking the questions.

Social Capital Methods for Osceola County

- Sector-Specific Roundtables — Quarterly convenings organized by pillar (hospitality, agribusiness, and manufacturing/tech). These are not pitch events; they are listening environments where businesses share challenges and identify shared priorities.
- Advisory Groups — A formal BR&E Advisory Council with representatives from each pillar and, over time, Agritourism. The council reviews aggregate program findings and recommends strategic priorities.
- Network Navigator Function — The Agritourism Navigator and Sector Liaisons actively broker connections between businesses and resources (financing, permitting guidance, workforce programs) rather than waiting for businesses to request referrals.
- Relationship-Centered Visitation — Visits are structured not just as data collection but as relationship investments. The team follows a consistent protocol for opening visits, reinforcing confidentiality, and closing with explicit next steps — signaling that the visit is the beginning of a response, not the end of one.

- Trust Cadence — Each business that participates in a structured visit will receive at least one documented follow-up contact within 10 business days, regardless of whether a formal red flag was identified.
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V. Visitation Program Design

A. Target Business Universe

The initial visitation universe will be drawn from three sources: the Osceola County Business Tax Receipt database, NAICS-coded employer records from FDEO, and sector-specific referrals from the advisory council and utility partners. The program will prioritize businesses based on strategic sector alignment, retention risk indicators, expansion signals, and relationship gaps.

Year 1 visitation targets:

- Tourism / Hospitality — 30 structured visits including major lodging operators, attractions, event venues, and food service employers.
- Agriculture / Agribusiness — 20 structured visits including active farms, packing and processing operations, and nursery businesses; plus 10 targeted Agritourism discovery conversations with farms that have expressed or shown interest in visitor-facing activity.
- Semiconductor / Advanced Manufacturing — 25 structured visits including existing manufacturers, precision machining and fabrication firms, and emerging sensor/photronics companies.

B. Survey Design and Interview Protocol

OCED will develop a structured interview instrument aligned with BREI's Section 7 guidance on survey design. The instrument will include both quantitative (Likert scale, yes/no) and qualitative (open-ended) components, and it will be tailored by sector so that manufacturing businesses answer questions specific to facility and workforce needs while agricultural operators answer questions relevant to land use, market access, and on-farm experience development.

Core survey domains across all sectors:

- General business conditions and outlook.
- Workforce — hiring, training, retention.
- Facilities and infrastructure.
- Regulatory and permitting experience.
- Market and supply chain conditions.
- Expansion plans and obstacles.
- Awareness and use of available programs and resources.
- Overall confidence in the county as a place to grow.

Agritourism-specific additions (Agriculture track only):

- Interest in or current operation of direct visitor experiences.
- Knowledge of applicable zoning or permitting requirements.
- Interest in linking to Visit Kissimmee's agritourism trail initiative.

- Barriers to adding hospitality-oriented activities on working agricultural land.

C. Visitation Workflow

Each business visit will follow the 10-step workflow established in OCED's operating protocol:

- Business selection and prioritization.
- Pre-visit research and preparation.
- Professional scheduling with clear purpose statement.
- Visit opening — introductions, purpose, confidentiality confirmation.
- Structured interview using the sector instrument.
- Active listening for red flags and expansion signals.
- Professional close — summary, next steps, thank you.
- Post-visit documentation in CRM within 24 hours.
- Follow-up routing — red flags to escalation protocol; opportunities to expansion planning.
- Confirmed follow-through with the business within 10 days.

D. Red Flag Review and Escalation

The BREI course (Section 9) designates red flag identification and review as a formal program component. OCED will use a structured escalation protocol tiered by urgency: Low, Moderate, High, and Critical. Critical red flags — relocation language, facility closure signals, major layoff indicators — will trigger same-day notification to the BR&E Program Lead and County leadership. All red flags will be documented, tracked, and reviewed for resolution at weekly team check-ins.

VI. Agritourism Integration Strategy — Amplifier, Not a Fourth Pillar

Osceola County's agricultural heritage and its status as one of Florida's top tourism destinations create a natural opportunity for Agritourism — experiences that generate revenue on working farms through direct visitor engagement. However, introducing Agritourism into a BR&E program without a clear strategic boundary risks diluting focus from semiconductor and advanced manufacturing recruitment and retention, which require a very different set of resources, relationships, and policy levers.

This plan positions Agritourism as a cross-pillar amplifier: it strengthens Agriculture by adding a revenue stream that improves farm viability and retention, and it strengthens Tourism by expanding the experiential visitor economy beyond theme parks. It does not replace or compete with the semiconductor and advanced manufacturing pillar.

Strategic Boundary Rules for Agritourism

- Agritourism visitation is conducted under the Agriculture sector track — not as a separate program and not as a Tourism sub-program.
- The Agritourism Navigator role shares resources with the Agriculture Liaison and reports to the BR&E Program Lead — never to Visit Kissimmee directly.

- Agritourism findings are reported within the Agriculture pillar section of executive briefs — not as a standalone program dashboard.
- When Agritourism activities require permitting or land-use changes, the issue is routed through the same escalation protocol used for any other red flag or barrier — no special track.
- Agritourism does not compete for the site selection, incentive program, or workforce pipeline resources dedicated to semiconductor and advanced manufacturing.

Agritourism Opportunity Areas in Osceola County

- U-pick operations and farm stands connecting to I-4 and US-192 visitor corridors.
- Agri-education experiences for the school group and ecotourism visitor segment.
- Farm-to-table dining partnerships with lodging operators in the Tourism pillar.
- Rural lodging (glamping, agri-stays) on underutilized agricultural land.
- Participation in Florida Department of Agriculture's "Fresh from Florida" and agritourism trail mapping programs.

Pillar Alignment Matrix

Core Pillar	BR&E Focus Areas	Agritourism Bridge
Tourism	Hospitality operators, attractions, lodging, workforce retention, seasonality planning	Farm-to-table experiences, agritourism trails connecting to existing visitor circuits
Agriculture	Working farms, agribusiness, supply chain, land use, access to markets	On-farm experiences, rural lodging, U-pick, agri-education—expanding revenue without changing land use
Semiconductor / Advanced Manufacturing	Supply chain, workforce pipeline, site selection, utility reliability, expansion planning	Minimal direct link; agritourism should not compete for industrial site resources or workforce attention

VII. Survey Analysis, Action Teams, and Reporting

A. Data Analysis Protocol

Following each visitation cycle, OCED will code responses by issue category (workforce, permitting, infrastructure, market, financing, expansion, etc.) and analyze patterns across businesses within each sector. BREI Section 10 materials will guide the use of frequency analysis, open-ended response coding, and SWOT synthesis. The goal is to move from individual business conversations to sector-level intelligence that can inform policy, partner coordination, and implementation planning.

B. Action Team Structure

Issues that emerge from visitation will be routed to cross-functional action teams aligned by issue type, not by sector. This ensures that a workforce issue surfaced in manufacturing and a similar one surfaced in tourism are addressed through a unified workforce response rather than separate siloed efforts. Action teams will include the relevant OCED liaison, the partner agency best positioned to respond, and in some cases the business itself when direct engagement is appropriate.

Standard action team types:

- Workforce Action Team — OCED, Valencia College, CareerSource Osceola.
- Infrastructure and Permitting Action Team — OCED, County Growth Management, KUA, FDOT.
- Business Financing Action Team — OCED, SBA, CDFI partners, Enterprise Florida.
- Agritourism Development Team — OCED Agriculture Liaison, Agritourism Navigator, FDACS, Visit Kissimmee (advisory only).

C. Reporting Cadence

Program findings will be reported on the following schedule:

- Weekly — Active case summaries and red flag status to the BR&E Program Lead.
- Monthly — KPI dashboard and issue trend summary to County leadership.
- Quarterly — Full sector-level analysis with action plan status, expansion opportunities advanced, and program evaluation findings.
- Annual — Comprehensive program report including logic model evaluation, stakeholder satisfaction results, and strategic recommendations for the next program year.

VIII. Program Evaluation — Measuring What Matters

BREI Section 12 requires that BR&E programs evaluate effectiveness against a logic model that connects inputs, activities, outputs, and outcomes. OCED will use a SMART-goal-driven evaluation framework aligned with the following logic model structure.

Logic Model Summary

- **Inputs:** Inputs:
 - Staff time, partner relationships, data systems, survey instruments, training, and community goodwill.
- **Activities:** Activities:
 - Business visits, structured interviews, red flag review, action team coordination, community assessment updates, and executive reporting.
- **Outputs:** Outputs:
 - Visits completed, surveys collected, red flags identified and resolved, action plans opened and closed, expansion opportunities advanced, and reports delivered.
- **Short-Term Outcomes:** Short-Term Outcomes:

- Stronger business relationships, improved intelligence about local conditions, faster red flag response, and better partner coordination.
- **Intermediate Outcomes:** Intermediate Outcomes:
 - More issues resolved, increased business confidence, stronger Agritourism pipeline, reduced unresolved barriers.
- **Long-Term Outcomes:** Long-Term Outcomes:
 - Jobs retained, expansions supported, capital investment advanced, and a business climate that reinforces Osceola County as a place where businesses choose to grow.

Year 1 SMART Goals

- Complete 85 structured business visits across all three pillars by December 31.
- Resolve 80% of identified red flags within 30 calendar days of identification.
- Advance at least 3 Agritourism discovery opportunities into formal action plans by Q3.
- Deliver quarterly executive reports to County leadership on all four reporting cycles.
- Achieve a minimum 75% business satisfaction rating on post-visit follow-up surveys.

IX. Stakeholder Communication Plan

Consistent with BREI Section 13 guidance on community input and implementation, OCED will treat communication not as a one-way broadcast but as a bidirectional trust-building system. The communication plan distinguishes between internal coordination, business-facing outreach, leadership reporting, and public-facing program narrative.

Key Communication Principles

- Businesses hear back from us before they expect to — responsiveness is a brand position.
- Leadership receives intelligence in a format that enables decisions, not just awareness.
- Agritourism messaging is always framed as a supplement to the county's agricultural heritage — never as a tourism expansion into farmland.
- Confidential business information is protected absolutely; aggregate findings are shared, individual business data is never disclosed without consent.
- All external-facing communication reflects Osceola County's brand voice: confident, welcoming, forward-looking, and practical.

Communication Channels by Audience

- Businesses — Personal visits, direct email follow-up, phone calls, and sector roundtable invitations.
- County Leadership — Weekly red flag alerts (as needed), monthly KPI dashboards, quarterly executive briefs.
- Partner Agencies — Issue-specific referral notes, action team updates, and quarterly coordination meetings.

- General Public / Business Community — Annual program report, press releases on major expansion wins, and agritourism trail promotion through Visit Kissimmee partnership.
-

X. Implementation Timeline — Year 1 Milestones

Quarter 1 (Months 1–3) — Foundation

- Finalize organizational commitment and secure budget approval.
- Hire or designate Sector Liaisons and Agritourism Navigator.
- Complete community assessment baseline for all three pillars.
- Build and test sector-specific survey instruments.
- Establish CRM/tracking system and documentation standards.
- Launch Advisory Council with inaugural meeting.

Quarter 2 (Months 4–6) — Visitation Launch

- Begin structured visits in all three sectors — target 30 visits by end of Q2.
- Conduct first red flag review session.
- Deliver first monthly KPI report to County leadership.
- Launch Agritourism discovery conversations (10 targeted contacts).
- Host first sector roundtable (Tourism / Hospitality).

Quarter 3 (Months 7–9) — Analysis and Action

- Complete 60 cumulative visits; begin coded analysis of early findings.
- Advance at least 3 Agritourism opportunities to formal action plans.
- Deliver first quarterly executive report.
- Hold second and third sector roundtables (Agriculture, then Manufacturing/Tech).
- Review and refine survey instrument based on field experience.

Quarter 4 (Months 10–12) — Evaluation and Reset

- Complete 85 total structured visits.
 - Conduct Year 1 program evaluation against SMART goals and logic model.
 - Deliver annual program report to County leadership and advisory council.
 - Present Agritourism findings to Visit Kissimmee with recommended next steps.
 - Build Year 2 plan of work using findings, stakeholder feedback, and evaluation results.
-

XI. Conclusion

Osceola County's three-pillar economy is not a limitation — it is a strategic asset. Tourism, Agriculture, and Semiconductor / Advanced Manufacturing each represent a distinct growth trajectory, and each requires a different kind of sustained attention from economic development professionals. A BR&E visitation program

designed with this complexity in mind will be more credible, more useful, and more impactful than a generic outreach effort.

The Agritourism integration described in this plan reflects the kind of strategic discipline that distinguishes elite economic development practice from reactive program management. Rather than allowing Agritourism to emerge as an unstructured fourth priority, this plan contains it within the Agriculture visitation track, defines its strategic boundary with clarity, and routes its findings through the same action team and evaluation structure that governs the rest of the program.

The result is a BR&E program that protects its three-pillar focus while using Agritourism as a tool to deepen agricultural retention and strengthen the county's broader visitor economy — without sacrificing the resources, relationships, or policy attention that semiconductor and advanced manufacturing require to thrive.

"Be first to what's next."

— Osceola County Economic Development

Response 6

1. The first step to developing a BR&E Program in Seabrook is to identify key challenges businesses are facing and develop a plan to address them.
 - a. Based on the data obtained from the business visits, identify the following to formulate a plan:
 - i. Outcomes
 1. Long-Term
 2. Medium-Term
 3. Short-Term
 - ii. Outputs
 1. Who do we reach (Participation)
 2. What we do (Activities)
 - iii. Inputs
 1. What we invest
2. Create a Taskforce to address priority or red flag and yellow flag issues that need immediate attention:
 - i. Assemble a team from the following departments:
 1. Police
 2. Public Works
 3. Community Development
 4. Permits

5. EDC Staff

3. Instill social capital in the BR&E Program by developing a Focus Group consisting of members from the following organizations, and get communitywide input on appointing other members to the group to address ongoing business challenges:
 - i. Rotary Club
 - ii. Clear Lake Area Chamber of Commerce
 - iii. The Bay Area Houston Economic Partnership
 - iv. EDC Board Members
 - v. City Elected Officials
 - vi. City Management
 - vii. Small Business Development Center
 - viii. University of Houston – Clear Lake
 - ix. Owners representing different business sectors
 4. Develop a report that analyzes trends and highlights business issues or concerns, and share those findings with the EDC Board on a monthly and quarterly basis.
 5. Set up a monthly goal of how many business visits should be conducted.
 6. Create a BR&E brochure that highlights the goals of the BR&E Program and why it's important to businesses in the community and distribute them during the business visits.
 7. Market the BR&E Program via the following channels and highlight program successes:
 - a. EDC website
 - b. Social Media
 - c. EDC Newsletter
 8. Evaluate the BR&E Program by doing the following:
 - a. Fine-tune surveys and questions
 - b. Look for better ways to present information to the EDC Board based on data and findings
 - c. Find ways to improve the time it takes to address red flag and yellow flag issues by the Taskforce
-

Response 7

Community Context and Need

For the purposes of this assignment, I will use Accelerate Jackson, the economic development agency supporting Jackson County, as the entity through which the BRE will be implemented. Ideally, Accelerate will house a dedicated BRE department with staff, and work with a volunteer Task Force. Additionally, Accelerate Jackson has a contract to provide economic development services for the City of Jackson. The research report will be published through a 3rd party.

Drive Jackson is a 20-year master plan released earlier this year which was spearheaded by Accelerate Jackson, Jackson County Chamber of Commerce, and the Jackson Community Foundation. Jackson County Commissioners and the City of Jackson have formal agreements with Accelerate Jackson. Major sectors identified: manufacturing, healthcare, utilities and energy, retail, and government and public administration. Drive Jackson implementation requires cross-sector engagement to move the goals forward.

Jackson needs to implement a BRE program because the current trajectory is not sustainable. Population decline, changing consumer patterns, and economic transitions have created challenges for the community. Business owners report concerns and feeling disconnected from the community decision making processes. Some long-standing businesses have closed, creating concerns about succession and long-term vitality.

Program Goals and Outcomes

The goals of implementing a BRE program in Jackson County are to:

- Strengthen relationships between businesses and community leaders,
- Improve business retention and expansion
- Identify systemic barriers affecting business growth
- Support healthy economic development
- Build long term social and civic capacity.

BRE Framework

BRE Model: This plan utilizes a Traditional “Blitz” integrating the University of Minnesota’s Extension’s specific CBC framework. Crafting a plan with this underlying structure could build community capacity and utilize volunteer efforts to initiate a plan. After the initial BRE plan has been implemented, the staff will continue relationship building and visitations within normal department operations.

Sector ID: Retail and Restaurants.

Retail and restaurants were selected because they play a crucial role in Jackson’s visitor experience, community identity, and economic vitality. Drive Jackson has brought the broader community together and affirmed these goals into the strategic plan. While the BRE program is implemented countywide through Accelerate Jackson, the initial visitation efforts focus on retail and restaurants because of their importance to tourism, community identity, and goals identified through Drive Jackson. A BRE program can help identify and address issues within its scope while connecting businesses to resources and partners. The community needs the tools to better understand and address the barriers businesses are facing around sustainability and growth.

Task Force

BRE success is dependent on community investment into the program. A robust task force should include members from business, economic development, government, education, and other key community leaders.

Business leaders help understand the specific problems expressed during interviews (owners/managers, local chamber representative, local utility manager, representatives from financial institutions).

Jackson examples: Retail and Restaurants, Consumer’s Energy, True Community Credit Union, Amer1can One Credit Union, Southwestern Bank and Trust, Comerica Bank, etc. Chamber representatives of retail and restaurants

Economic development professionals provide the task force with critical knowledge regarding regional, state, or federal assistance programs that can solve business barriers (professional staff from chambers of commerce, regional development organizations, and other local development groups)

Jackson examples: Accelerate Jackson, Jackson County Chamber of Commerce staff, Irish Hills Regional Chamber of Commerce, Real Estate Agencies,

Government officials participation is vital to success as they will have a firsthand account of concerns regarding public service and infrastructure (local elected and appointed officials, such as city staff, department heads, and county commissioners)

Jackson examples: Jackson County Commissioners, City of Jackson Officials, Charter and Civil Townships, Region 2 Planning Commission, Jackson Downtown District Authority

Education officials are essential for forming school and business partnerships and reforming educational curricula to meet local workforce needs (school superintendents, vocational or charter school leaders, community college presidents, and cooperative extension educators)

Jackson examples: Jackson County Intermediate School Districts and those contained therein, Jackson College, Baker College, Spring Arbor University, Jackson Area College and Career Center, Michigan Works, Applicable Area Associations

Other Key Community Leaders provide diverse voices to ensure the program is a broad community enterprise rather than just a city or chamber effort, increasing the project's legitimacy and larger community buy in and support (influential leaders who may not fit in the other groups: religious leaders, nonprofit directors, emerging leaders, and reliable followers)

Jackson Examples: Jackson Community Foundation, Drive Jackson Council, Phil and Pat Willis Foundation, CNB Foundation, Consumers Energy Foundation, Rotary, Kiwanis, Lions Clubs, Nonprofits, Religious leaders (include Spanish speaking), possibly student volunteers

Social capital consists of the relationships, trust, and networks that allow people and organizations to effectively work together. Building social capital is at the center of a successful BRE program because building sustainable change depends on these relationships.

Social Capital in Jackson must be intentionally integrated throughout the BRE process. This underlying process is incredibly important to the local community; without the careful bridging and building of it, the chances for success decline drastically. Formally writing it into blueprint would allow various measurements before, during, and after to see how well it was integrated into the community fabric. Data could be tied to the number of organizations participating, cross-sector partnerships formed, project collaborations initiated, perception surveys, and overall network mapping. Furthermore, these measurements of the social capital could be additional success markers for Drive Jackson.

Phase Timeline and Details:

Overall implementation of timeline: 5 years, understanding flexibility is key for plan approval/implementation

Phase 1: Program Planning and Preparation (Months 1-4)

The primary goal of this phase is to inform the community and build the human relationship structure necessary to support the program.

Inform the community by holding initial stakeholder meetings and media releases to gain stakeholder and public support.

Organize and train an internal BRE Leadership Team within Accelerate Jackson.

- Designate a lead BRE Coordinator and supplemental coordinators for Visitations, Business Response, Milestone Meetings, and Communications.
- Ensure all Leadership Team Coordinators are BREC certified.
- Coordinate at least two practice sessions for the Leadership Team to effectively understand how to properly perform the survey.

Select an established BRE Survey/Diagnostic Tool which utilizes primarily scale results.

Identify and retain a 3rd party research analyst to perform the data analysis and research report. Hiring a 3rd party for this is crucial in ensuring unbiased interpretation and presentation of visitation results.

Task Force: The task force is the community leadership body for the BRE. Members help set goals, review data, participate in the strategic identification of and oversee the implementation of prioritized projects. The task force is the body responsible for actionable steps moving forward. The visitation volunteers are a group of people recruited by the task force members to conduct business interviews.

- Recruit and train a diverse group of stakeholders which represent leaders from the overall community. Approximately 20-25 volunteer leaders will form a task force of business, government, education, economic development, and other community members.
- Task force members are each responsible for recruiting one or two volunteers, from outside their organization, for a robust representation of, and increased engagement with, the community. For the purposes of this plan, roughly 25 volunteers will be recruited.
- Hold two practice sessions to properly train the task force and provide effective feedback.

Identify the target retail and restaurant businesses by utilizing Light Cast data for Jackson County. Narrow results to roughly 25 retail and 25 restaurants to interview. Fifty firms selected because this number is large enough to identify patterns and feasible for the visitation model.

By organizing a task force during this initial period, the Jackson community will be bridging social capital. Importantly, it brings together organizations, people, and individuals who might not otherwise collaborate. The Drive Jackson process has started bridging a broader community, and these relationships provide a foundation to start from.

Phase 2: Business Visitation and Immediate Response (Months 5-9)

The goal of this phase is building community trust and gathering “business intelligence”. These visits provide a better understanding of business needs.

Conduct Volunteer Visitor Training: To ensure data quality, a two-hour orientation session over the business interview techniques and active listening. A mock interview may be shown or performed for the group with time allocated for clarification.

Match visitation teams and businesses: Two member teams should consist of a public official and private sector volunteer. The BRE leadership team should also participate in the interviews.

Special Considerations:

- Larger firms should be paired with Leadership Team members.
- Allow teams a choice of the remaining companies.
- All visitation team members must participate in mandatory training.
- Every effort needs to be made to ensure there are no conflicts of interests between team members or the visitation teams and businesses.
- With 25 visitation teams, each team will be assigned two businesses to visit.

Mail introductory letters and surveys: Approximately 3-5 business days ahead of the training so business owners are expecting contact.

Schedule and Conduct Visit: Visitation teams are responsible for scheduling the visit with the business owner in a quiet, private location for the best experience. The visits take approximately 60 to 90 minutes each.

Formal Thank You: The BRE Coordinator will formally acknowledge and thank the firms / business owners for their economic contribution. This is an important step in building social capital.

Red or Green Flags: Red (urgent crisis) or Green (expansion opportunities)

- The BRE Leadership Team should review immediately after the visit and respond if necessary.
- An immediate Action Team including the BRE Coordinator, representatives from the City or Chamber, and relevant partners should meet as needed to address any urgent red flag concerns or expansion opportunities.

Return Completed Surveys: Surveys need to be returned to the Visitation Coordinator as soon as possible following the team's visitations. The Visitation Coordinator tabulates responses.

During this time, the Jackson social capital continues to build trust and community appreciation by conducting visits with intentionally paired teams, including a public official and community member.

Phase 3: Data Analysis and Strategic Planning (Months 10-16)

The goal of this phase is to take the raw data and transform it into base knowledge from which the task force will create a strategic plan.

Survey Data: Raw data is tabulated and given to 3rd party research analysts for report preparation.

Urgent Concerns: The Leadership Team will identify urgent concerns. Task Force meetings will be held to review these concerns and to assign members to follow up on individual business needs.

Analysis and Report: While the research report is being prepared by a 3rd party, the Leadership Team should also analyze the raw data to internally understand common themes or systemic issues. A research report which summarizes the survey results within a strategic themes framework is prepared (SWOT analysis).

Task Force Retreat: This is a four-to-five-hour continuous session held to set priorities for four to six major community projects that are identified based on the data. The Task Force will vote for priority projects using a consensus building method, like applying a sticky dot, and assign leadership for each project. As the action plan is developed, shared priorities emerge.

Summary Report: A 10-12 page summary report is prepared which lists the adopted projects and the names of leaders responsible for implementation. The social capital data captured to date is compiled into a supplemental report.

During this period, the task force builds consensus at the Task Force Retreat; this creates a shared future and collective identity.

Phase 4: Feedback and Improvement (Years 1-5)

The goal of the final phase is acting on the strategic plan and the beginning of local change.

Community Commencement Meeting: A public presentation of survey highlights and project roadmaps. This is an opportunity to share stories of the process and learning along the way. To

showcase the community's social capital in a way that energizes and creates momentum for the continued work.

Participating Business Partners: The BRE Leadership will mail thank you letters and resource guides to businesses within two weeks of the visitation.

Priority Projects: Supporting the projects means supporting the leaders and small teams who take on the work with additional resources. Involving community members ensures their buy in and sustains projects long term.

The Task Force should meet quarterly for at least a year to prevent the program from losing relevance, to monitor projects, and provide status updates. These meetings also ensure momentum continues toward the integration of projects but also continues building social capital and creates a supportive and healthy community as issues arise.

Project results are measured and evaluated for their progress tied to specific outputs and outcomes. Measuring performance needs to include detailed and specific data regarding, at least:

- number of businesses visited
- number of red flags resolved, and green flags supported
- volunteer participation rates
- number of priority projects with specific details
- business satisfaction with the BRE program
- retention rates
- net business opening and closures

Results of the projects are shared and celebrated with the community.

Sustain the BRE cycle with social capital, community updates, and celebrations.

After implementing the priority projects, a community impact and ripple mapping should be performed. This would be conducted to identify the intended and unintended impacts, serve as a resource for further learning and collaboration, capture growth and non-traditional performance measurements.

Jackson's social capital performs long term structure building by engaging in quarterly meetings and project teamwork. Measurements of the social capital continue.

Response 8

Background

The City of Selma, Alabama, will implement a structured Business Retention and Expansion (BR&E) program to strengthen businesses connected to heritage tourism, including lodging establishments, restaurants, cultural enterprises, and tour-based services. Guided by the Alabama Cooperative Extension System, the program will leverage Selma's historic assets, strong civic leadership, and recent grant momentum to identify opportunities for retention and expansion and build long-term economic resilience. The program will emphasize relationship-building, structured visitation, and data-driven decision-making to meet the needs of the business community in Selma.

II. Organizational Structure

The program will begin with the formation of a BR&E Advisory Committee composed of key stakeholders including:

- Mayor of Selma or representative
- City Council member or appointee
- Dallas County Commission member or appointee
- Chamber of Commerce
- Tourism Board or appointee
- Alabama A&M University State Specialist for Community and Economic Development,
- Auburn University State Tourism Specialist
- The County Extension Director
- Business Leader
- Community Leader.

The advisory committee will provide oversight, strategic direction, and community alignment. After the advisory committee is formed, the BR&E Team will be established, comprising Extension staff, trained volunteers, business interviewers, and data coordinators, who will be responsible for program implementation.

III. Program Activities

The program will conduct structured business visitations using a standardized survey instrument delivered via tablets or digital forms. Visits will focus on identifying key challenges, including workforce shortages, marketing gaps, access to capital, and business continuity needs. Data collected will feed into a live dashboard system that tracks trends in real-time. In addition, Extension will provide technical assistance and programs to address identified needs. Quarterly reports and presentations will be delivered to stakeholders to ensure transparency and alignment.

IV. Technology and Data Strategy

Alabama Extension will incorporate modern technology into its BR&E efforts by implementing a live online dashboard hosted on the city and Extension websites. This dashboard will update automatically as visitation data is entered, allowing stakeholders to monitor progress in real time. A centralized database or CRM will track business interactions and referrals. Data will be reviewed and refreshed quarterly to ensure insights remain relevant and actionable.

V. One-Year Implementation Timeline

- Month 1–2: Establish BR&E Advisory Committee and define program goals.
- Month 2–3: Recruit and train BR&E Team and finalize survey tools.

- Month 4: Launch program and begin scheduling visits.
- Months 4–9: Conduct business visitations and collect data.
- Month 6: Conduct first quarterly review and stakeholder presentation.
- Months 7–10: Provide follow-up assistance and expand partnerships.
- Month 9: Conduct second quarterly review and update dashboard.
- Months 11–12: Prepare final report and develop Year 2 strategy.

VI. Expected Outcomes

Short-term outcomes include increased engagement between businesses and Extension, improved understanding of business needs, and stronger coordination among stakeholders. Intermediate outcomes include improved business practices, increased collaboration among tourism businesses, and enhanced tourism offerings. Long-term outcomes include higher business retention rates, increased tourism-related revenue, job creation, and a stronger overall economy in Selma.

Response 9

Our organization is changing our approach to business support, and over the past year, we have developed stronger working relationships with our partner organizations. A big part of this exercise has been to ‘define our lanes’ and not duplicate efforts. Another important factor is to stop what I refer to as ‘activity box-checking’. Reporting to our stakeholders that we had 200+ connections with businesses last year without sharing any of the results is not demonstrating our value.

So, as we’ve been going through this process of self-discovery, we’ve recognized that our lane is with established businesses using a continuous engagement model. The timing of this BR&E course was therefore very beneficial—it validated our intuition and gave us a formal framework to set the ball in motion.

As we move through Stage I (Preparation), we have to be realistic. We are a very rural community (approximately 43,650 residents over 1,100 square miles) and we have exactly 1.5 FTEs dedicated to BR&E, who will act as our program coordinators. Because we only have the capacity to serve a small number of businesses with in-depth support, we are focusing on priority sectors that overlap between our provincial and federal governments. For example, Canada recently announced it will purchase submarines from Germany for our Nova Scotia naval base. Our region must prepare infrastructure and supply chain to in preparation for this program. Historically our region has excelled in manufacturing (fun fact: the first pouring of steel in Canada took place here in 1883), so we are prioritizing the Defence and Manufacturing supply chains. There’s a mentality that these opportunities are out of reach that needs to be addressed!

We are currently customizing provincial diagnostic tools to reflect our region and these specific sectors. However, before we start conducting interviews, we are establishing a strict Data Control Agreement. Confidentiality is everything; if businesses think their raw survey responses are going to be shared openly, they will put their guard up. We need them to know their data is secure in our CRM and only aggregated or masked information will be shared with partners. For the moment we will use MS Access, as I have experience in that software. We have been given several recommendations of specialized software that we will investigate and choose over the next several months with hopes to implement next year.

As we transition into Stage II (Data Collection and Visitation), we want to lead with value. In October, we are hosting a sector supply chain briefing where procurement specialists can share upcoming opportunities. We will personally invite businesses that are best positioned to take advantage of this and use the event to introduce our BR&E program. Following this, we will begin our continuous visitation. Our local municipal administration is very enthusiastic about this approach. We've established an escalation protocol with them so that if we encounter a "red light" (like a business facing imminent closure) or a "green light" (an immediate expansion opportunity), we can bypass standard timelines and mobilize them immediately as a localized Response Team.

For the standard challenges we uncover, we move into Stage III (Action Plan Development). The remaining support organizations in our area—Invest NS, ACOA, BDC, CBDC NOBL, Ignite, and Coastal NS—have agreed to meet bi-weekly to form our formal Action Team. We will confidentially review what we've learned from our interviews and work together to build customized action plans. We will triage these needs, focusing on quick wins first to build trust. I've also made it clear that we can ask specific questions during our visits to help these partners with their own programming. For instance, my philosophy is that regional economic agility requires a strong chamber of commerce. Since local membership is at an all-time low, we will be asking businesses if they are a member, and if not, why. We will also integrate our internal capacity into these action plans, pulling in our immigration workstream, our LMS platform with over 60 virtual courses, and our community impact team to help with indirect barriers like grant writing or other projects that might contribute to our local vitality.

Finally, in Stage IV (Implementation and Monitoring), our hope is to return to these businesses with an action plan that includes SMART goals and scheduled check-ins on their progress. Recalling prior assignments, we will report this work to our stakeholders based on the KPIs that actually matter to them. Municipal units will want to know about building permits and changes in valuations to see the impact on their 1% deed transfer tax. Provincial and federal funders will be focused on job retention, job creation, and overall profitability. And, of course, businesses will want to know about external dollars accessed or time saved.

Because we are so rural, our sample sizes will be very small at first. Assuming a 50-75% participation rate in our first year, we're looking at a tiny dataset. Since information gathering in a continuous model can be relatively slow, we can't rely on broad statistical trends right away. Instead, we will rely heavily on storytelling—reporting on works in progress, applications submitted, and project charters—to demonstrate the program's momentum and potential until we can definitively report on the quantitative results.

The Pictou County Partnership was established in 2018 and we already have a great reputation for supporting our community and settling newcomers. My goal is to leverage that existing bonding social capital we've built locally and translate it into bridging social capital within our business community, which is exactly where we were always intended to be. Maintaining and strengthening our reputation is incredibly important to us. As we build our credibility and establish ourselves as the trusted first point of contact for established businesses in Pictou County, we will continue to expand our reach into new sectors.

Response 10

Response 11
