Fundamentals Course Homework

Session 3

Part A
In this session, we've touched on the idea of the necessity of reports and presentations for a BR&E program using a volunteer visitor methodology with a "blitz" approach.

For this session, I'd like for you to think about the benefits (and perhaps challenges) in preparing reports and presentations for the BR&E visitation program that you are envisioning in your area. Please think about the following questions:

- To whom or what groups would the reports/presentations be delivered?
- How would this benefit the strength of the BR&E program?
- What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?
- How would you turn data into information for the audience(s)?

Part B
The following Excel file (Open Ended Survey Homework.xlsx) contains a number of responses from a COVID-19 business retention and expansion survey conducted in Mississippi. What topics would you use to categorize these responses?

Part A

Response 1

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

Target Audiences: Reports and presentations from BR&E would be delivered to several key groups:

- Employers and employee of visited companies
- Local municipalities and elected officials
- Tribal leadership
- Private investors and developers
- Site selectors and consultants
- Organizations considering locating or expanding into the area

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

Preparing reports and presentations would strengthen BR&E in several ways:

- Builds credibility and trust: Consistent, professional reporting demonstrates organized programming, a data-driven approach, and responsiveness to business needs.

- Provides context: Reports give stakeholders understanding of the region's size, population, workforce demographics, and average wages.
- Supports decision-making: Local leadership and investors can use this data to plan infrastructure, policy, and investment strategies.
- Enhances transparency: Demonstrates to businesses that their input is heard and acted upon.
- Promotes the region: Well-prepared materials can attract new businesses by showcasing economic strengths and opportunities.

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

Choctaw Nation offers extensive data resources including:

- Demographic information
- Economic and labor force trends
- Wage and employment data
- Regional economic conditions
- Breakdowns by all counties within the reservation

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

- Choctaw Nation data is found on www.growchoctaw.com: Annual Reports - Choctaw Nation Business and Economic Development
- We create professionally designed flyers and magazines and deliver to stakeholders digitally who may want to circulate, and hand deliver in branded folders, this:
    - Improves readability
    - Enables consistent visits, we show up annually with new data
    - Enhances professionalism
    - Tells a story
    - Creates a positive and long-lasting impression

**A final note on challenges of data: Data models are slow to accumulate and require a lot of labor. Choctaw Nation is fortunate to have marketing teams who build our materials and data analytics teams who crunch the numbers, not all Economic Development organizations are this fortunate. Also, not all businesses appreciate the data or have time to read it. We offer to prepare tailored reporting on things like labor market and wages for job titles in the area and not every employer has the time or attention to invest in reading reports.

Response 2

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

- Board
  - Complete summary of information collected. This could include a risk assessment of companies surveyed. This could guide priorities in the future.
- Mayor/Council/City Manager
  - Synopsis of overall findings. Reports could likely help with infrastructure planning and policy
- Utility Providers
  - Infrastructure Reports regarding issues companies are experiencing whether it be limitations with fiber or limited electric
- Colleges and High Schools
  - Workforce report to help employers obtain skilled workers straight out of high school or college

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

- Builds Trust among businesses and the EDC
- Allows the EDC to address issues earlier
  - Catches red flags in business that could possibly be leaving
- Establishes consistency leading to long-term historical knowledge
  - Improve partner collaboration between employer, edc, utilities, and schools

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

- An overview
  - Overall number of visits
  - Employer successes such as a company obtaining a contract with a major contractor or reaching a certain amount of sales
  - Employer concerns
  - Immediate items requiring action
- Visit Summary
  - Number of visits

    - Types of businesses
- Employer Successes
    - Possible new growth (Capital Investment)
    - New Hires
    - Partnerships with CTE or Workforce
- Red Flags
    - Business relocation
    - Governmental Interference
    - Tariffs
    - Looming layoff

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

- Focus the information for the audience intended
    - Ex: Board- Risks, Red flags, Action Items
- Share as spreadsheet, bar graph, or pie chart
- Share the challenges and the action to go along with the data
- Share reports with intended audience: Ex; The board would receive a more comprehensive report regarding risks, red flags and the action intended

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Response 3

I think one of the benefits of preparing reports and presentations for the BR&E Visitation Program would be to provide insights on small business trends in the Seabrook community and bring to light issues businesses are facing to the EDC Board. These reports and presentations could translate into long-term strategic goals for the EDC Board to embark on. Another benefit would be transparency of information on the BR&E Visitation Program so that the EDC Board is aware of the work the EDC is performing on a regular basis.

I think a couple of challenges in preparing the reports would be not having a CRM to track and analyze data and not being able to understand what's included in the reports.

Our main target group for these reports is our EDC Board, as they make decisions regarding economic development in Seabrook. This would strengthen the BR&E Program because it shows the EDC is coming up with valuable insights and information that can keep businesses in Seabrook thriving and address priority issues via a response team, along with having a focus group addressing long-term, ongoing issues.

The report should include monthly insights, such as how many visits were conducted, any priority issues that were identified and addressed, and general overall business trends.

I would turn data into information for our EDC Board by finding common denominators or key trends in the data sets, provide insights on those trends, and highlight business concerns.

Response 4

<u>A brief note about my work in this class: I relocated to Jackson in July of last year and have been studying the ecosystem by learning as much as I can and engaging in every opportunity possible with the people, places, and spaces here. I have had countless face to face meetings and have made interpretations based on those meetings and hours of my own research. I understand that my answers contain interpretations of the sum total of my current knowledge. I am not in any way trying to insinuate my understanding is 100% accurate or complete in its nature. I believe I have a solid foundational understanding but that would not in any way keep me from having an unbiased, curious conversation with all parties involved. My understanding continues to evolve as I engage.</u>

Blitz approaches have short-term project completion, whereas volunteer visitor methodology in the continuous model focuses on long term engagement and support through bridging social capital. A challenge in either approach is information confidentiality and keeping momentum. Certainly, the consistency of collection and reporting is always challenging when there are multiple people doing either or both tasks.

Reports provide comprehensive and detailed information, data, and analysis. Presentations break down complex data and findings into summary highlights and simple graphics. Reports provide the factual data for presentations.

Benefits of preparing reports and presentations: keep focus on work at hand, success comes with attention to the program. Challenges: manpower, engagement, time constraints.

For this assignment, I will use Accelerate Jackson, the economic development agency supporting all of Jackson Coounty, as the entity through the BRE is implemented. Drive Jackson is the 20-year master plan just released which was spearheaded by Accelerate Jackson, Jackson County Chamber of Commerce, and the Jackson Community Foundation. Jackson County Commissioners and the City of Jackson both use Accelerate Jackson. Major sectors identified: manufacturing, healthcare, utilities and energy, retail, and government and public administration.

- To whom or what groups would the reports/presentations be delivered?
  Various reports and presentations would be delivered to internal and external stakeholders, and the public over time. Reports and presentations support one another, providing different interactions with the program and data. Fundamentally, reports are the raw knowledge presentations are built upon.
  - An initial report identifying need and sector information should be provided to a funding agency for review and sector determination. Jackson: Accelerate Jackson would fund.
  - Early presentations are made to the media and larger community which garner support of the BRE program's goals. Jackson: Chamber events and media, JTV, Jackson

Magazine, social media sites, public meetings (County and City), sector associations, community organizations, etc.

- A research report should include program planning with sector specific data analysis providing background information and context for internal stakeholders and task force members. Jackson: Accelerate Jackson, County and City public officials, Chamber, Jackson Community Foundation, and sector associations.
- Presentations of survey data and analysis for task teams to identify priority projects made to internal stakeholders. Jackson: Accelerate Jackson, County and City public officials, Chamber, Jackson Community Foundation, and sector associations.
- A summary report is compiled with task force prioritized goals and supporting data for all stakeholders and larger community. Jackson: Chamber events and media, JTV, Jackson Magazine, social media sites, public meetings (County and City), sector associations, community organizations, etc.
- A final evaluation report is provided to distribute results for all stakeholders and larger community. Jackson: Chamber events and media, JTV, Jackson Magazine, social media sites, public meetings (County and City), sector associations, community organizations, etc.
- Community celebration presentation for all stakeholders and community. Jackson: Chamber events and media, JTV, Jackson Magazine, social media sites, public meetings (County and City), sector associations, community organizations, etc.
- Ongoing and frequent updates on the report should be provided to the community. Jackson: Chamber events and media, JTV, Jackson Magazine, social media sites, public meetings (County and City), sector associations, community organizations, etc.
- Quarterly progress presentations on project status should be provided to the community. Jackson: Chamber events and media, JTV, Jackson Magazine, social media sites, public meetings (County and City), sector associations, community organizations, etc.

The benefits of reporting and presentations are wide and varied. Not only do reports perform the heavy job of communicating complex and highly intricate data. A well-developed and published program and process increase the probability of success and establishes and maintains program legitimacy and support. Additionally, frequent updates and quarterly presentations keep internal priorities at the focus of the work and keep momentum and engagement by providing a “real time” picture of program progress.

Challenges in reporting and presentations can be mitigated with dedicated staff or contractors. It is important to keep the goals and priorities of each communication at the heart of publication. Providing data with anonymity and as factual without judgement is crucial. Analyzing the data and double, triple checking facts is time consuming but if not done well, this could discredit the process and damage chances for success and social capital gains.

If the question asks the benefits and challenges of integrating a blitz and continuous model, the challenge in this is the inherent time clash between “blitz” and the continuous model. Task force data collection and analysis in the blitz model happens very quickly but the continuous model focuses on relationship building and bridging social capital. Extensive planning becomes a key component in both. A possible benefit might be when simply integrating the "blitz" visitation timeframe into the continuous model.

Jackson: I suppose the benefits and challenges for local implementation echo those discussed above. There is a lot of momentum in Jackson currently, with the recent Drive Jackson plan, County Commissioners recognizing the survey data that provided the basis for the plan, and the City of Jackson officials approving a new master plan contract to Planning Next, the same organization that performed the Drive Jackson survey, compiled the data, and subsequently wrote the goals contained within the plan. There is a real challenge in getting public officials to change course trajectory; however, it is an election year. Additionally, the county regulations tend to be longer term and as such, can provide additional consistency in taking action towards the goals. The visionaries seem to have a very large backing and if the community shows up to require change, it very well could happen. There is a fair amount of "attraction" action happening, but business retention seems to be flailing. If there are efforts put into the health of current ecosystem, it is a win for all.

- How would this benefit the strength of the BR&E program?
  Transparency in efforts, assignment reminders and accountability, celebrate wins, see activity, transparency brings respect and buy in. Frequent reporting and presentations give the program legitimacy in that clear communication regarding not only the amount of information but type as it relates to the community health is presented. It also opens up additional collaboration and creative problem solving not previously identified. When clear, factual data is presented, it allows bridging of social capital. Importantly, this frequent communication of transparent, factual data gives policymakers a neutral platform to deal with complex public policy. Success builds upon itself when a BR&E program is intentionally implemented. It strengthens the broader community and gives an example of a way forward when future problems arise.
  Jackson: Jackson is a shrinking city. The county population has declined 40% since 1960 and current projections forecast another 10% by 2050. We desperately need to address the community's health on many levels. Business retention and expansion need to be a current priority as we have legacy businesses closing, disgruntled downtown business owners, unfriendly business policies, and a downtown that closes at 5PM with safety concerns adding to the pot. The successful implementation of a BR&E program would provide a positive example for other shrinking cities. Some research shows Accelerate Jackson houses BR&E, however, I could not locate evidence of a current or past program.

- What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?
  The contents of a formal report depend on the point at which you are reporting.
  - An initial report would establish BR&E need. Presentation of 2-3 sectors with pertinent demographic data, business numbers, tax base collected, etc. should be included for review and sector focus determination made. Ideally, this information would include data offering historic comparison which further support the need for the program.
  - A highly detailed research report should include program planning with sector specific data analysis of survey results and relevant demographic data. All business and survey data that the task force needs for consideration.

- A summary report is released with prioritized goals as identified by the task force and the names of leaders responsible for moving them forward.
- A final evaluation report evaluates and distributes the results of the project.
- Ongoing and frequent updates report project progress.

Jackson: Should each report outline proposed, current, and historical data, a greater context can be woven into its success. Storytelling should be utilized when possible; this garners additional support.

- How would you turn data into information for the audience(s)?
  Data needs to be presented in raw and analytical form. This data needs to be communicated conveyed clearly and concisely in a way that explains it as information. Analysis amd understanding is intentionally explained, communicated, and presented in a way that promotes understanding for the intended audience. Reports will offer the data and analysis but presentations provide high level summaries and simple graphics supporting the data.
  Benefit: Community and stakeholders have a clear understanding of the program, goals and progress.
  Challenge: Disseminating complex information into chunks of digestible material for a larger audience that does not have background, experience, or in depth understanding of the sector, process, or terminology.

  Jackson: Obviously, following the information previously stated. However, the storytelling piece is incredibly important. There appears to be a deep distrust of public officials perceived intentions and union activity. Success needs to be exclaimed through real time snapshots of the community. Our current situation is not a secret; truthfully and transparently sharing information in a non-jargon, fact filled, neutral way could bring the community together and forge a path toward success.

Response 5

In a volunteer "blitz" BR&E program, reports and presentations are critical because they illustrate a short burst of business visits into credible, usable information for the community. They also showcase how businesses and volunteers matter to the overall success of the program.

The main audiences for these reports and presentations would be local elected officials and senior staff, the economic development board and chamber, participating businesses and volunteers, and key partners such as workforce agencies and educators. Sharing findings with these groups builds trust, encourages continued participation in future rounds of visits, and helps everyone work from the same set of facts.

Even though data in a continuous or early-stage model may come in slowly, reports can still include basic participation numbers, major themes that are emerging, and a few anonymized quotes or short examples. The goal is to focus on clear patterns, not precise statistics. Each report should also outline next steps, such as additional visits or specific follow-up actions.

To turn data into information, I would group responses into a few plain-language categories (such as workforce, finance, supply chain, regulations, and infrastructure) and use simple visuals or bullet points rather than complex tables. For policymakers, I would connect each theme to possible actions. For businesses and volunteers, I would emphasize what was heard and what will be done in response. This approach keeps the BR&E program transparent, action-oriented, and strong over time.

Response 6

Overview

Reports and presentations would be an important part of the BR&E visitation program I am envisioning for Osceola County. A volunteer visitor methodology with a blitz approach can help reach many businesses in a short period of time, but the value of the program depends on what happens after the visits. Reports and presentations would help organize what was learned, communicate major themes, and show businesses that their input is being taken seriously.

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

The reports and presentations would be delivered to several groups, depending on the purpose of the information. County leadership and elected officials would need a high-level summary of business climate issues, major concerns, and recommended actions. Economic development staff would need more detailed information to manage follow-up, track business needs, and identify expansion or retention opportunities.

The information would also be useful for workforce and education partners, such as CareerSource Central Florida, technical education providers, colleges, and training organizations. If businesses identify hiring challenges or skill gaps, these partners would need to understand the issues so they can help develop solutions. County departments, utilities, transportation partners, and permitting staff may also need briefings if businesses identify infrastructure, regulatory, site, or expansion concerns.

Finally, a broader summary could be shared with the business community, chambers, civic partners, and other stakeholders. This version would not include confidential business information, but it could explain the major themes, highlight the value of existing businesses, and build support for the BR&E program.

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

Reports and presentations would strengthen the BR&E program by turning individual business visits into shared intelligence. Without a reporting process, each visit may produce useful information, but the larger patterns may be missed. A reporting process would help the county identify common issues, track follow-up actions, and make better decisions about workforce, infrastructure, permitting, site readiness, and business support.

- They would create accountability by showing which businesses were visited, what concerns were raised, and what follow-up actions were taken.
- They would help maintain credibility with businesses by showing that the visitation program is not just a survey, but a problem-solving and relationship-building effort.
- They would improve coordination among economic development, workforce, planning, utilities, transportation, and education partners.
- They would help volunteers understand the value of their role and keep them engaged in the program.
- They would help leadership understand where policy decisions, resources, or partnerships may be needed.
- They would provide a way to communicate the importance of existing businesses to the broader community.

What would be included in the report if data collection is relatively slow?

Because a continuous BR&E model may collect data slowly at first, the early reports should not overstate the findings or try to make broad conclusions from a small sample. Instead, the reports should be clear about the number of businesses visited and should focus on early indicators, themes, and follow-up actions. Even if the data set is small, the information can still be useful if it is organized carefully.

The report would include basic activity measures such as the number of businesses contacted, number of visits completed, industries represented, and geographic areas covered. It would also include common themes from the visits, such as workforce needs, expansion plans, permitting concerns, infrastructure issues, supply chain challenges, or business climate concerns. The report should include an issue-tracking section that shows what follow-up is needed, who is responsible, and whether the issue has been resolved.

The report could also include early wins, such as a business being connected to a workforce partner, a permitting question being resolved, or an expansion opportunity being identified. It should include limitations as well, such as the small sample size or sectors that have not yet been reached. This would keep the report honest while still showing progress.

How would you turn data into information for the audiences?

To turn data into information, I would first organize the raw visit data into clear categories. For example, comments from businesses could be grouped under workforce, infrastructure, permitting, expansion, financing, site needs, or business climate. This would make it easier to see patterns instead of only reading individual comments.

Next, I would translate those patterns into useful messages for each audience. County leadership would need to know the major issues and what decisions may be needed. Workforce partners would need to know the specific occupations, skills, and training needs businesses are identifying. County departments would need to know which infrastructure or permitting issues require follow-up. The broader community would need a simple explanation of why existing businesses matter and how the BR&E program supports local economic stability.

I would also use simple visuals, short summaries, and action tables. For example, if several businesses identify workforce shortages, the report should not simply say that workforce is a problem. It should explain what types of workers are needed, which industries are affected, what partners should be involved, and what follow-up action is recommended. This approach would turn raw survey responses and visit notes into information that can guide decisions.

Conclusion

Overall, reports and presentations would be necessary for making the BR&E visitation program useful and sustainable. They would help Osceola County move from business conversations to action. They would also help keep leadership, partners, volunteers, and the broader community informed about what existing businesses need and how the county can support them. Even when data collection is slow, careful reporting can still provide value by identifying early themes, documenting follow-up, and building trust with the business community.

Response 7

The BR&E course materials emphasize that reports and presentations are not simply about sharing survey results, but about turning business feedback into information that supports action within the community. In a volunteer visitor “blitz” approach, reporting is also important for building trust, maintaining momentum, and demonstrating accountability to businesses and stakeholders.

In the BR&E program I would envision for Pictou County, quarterly reports and presentations would be shared with the Partnership’s Board of Directors, our Liaison and Oversight Committee, the six municipal units and Pictou Landing First Nation, the Province of Nova Scotia, philanthropic community funding partners, and the broader community. Quarterly reporting would allow the program to identify and respond to emerging trends in a timely way while keeping stakeholders informed and engaged.

This type of reporting would strengthen the BR&E program by helping businesses and partners see that the information gathered through business visits is contributing to action. One challenge with BR&E work is that it is often quiet, relationship-based work that happens behind the scenes through conversations, referrals, issue escalation, and problem solving. Effective reporting helps demonstrate the value of economic development organizations by showing how business intelligence gathered through visits supports workforce planning, infrastructure advocacy, business retention, and long-term economic resilience.

Because data collection in a continuous BR&E model happens gradually over time, reports would focus less on large statistical analysis and more on recurring themes, emerging concerns, and opportunities identified during visits. Reports could include:

- key trends and business concerns,
- red flag issues requiring follow-up,
- workforce and infrastructure challenges,
- business expansion opportunities,
- and examples of actions already taken in response to business feedback.

Instead of sharing data, we will share information the resulting action and innovation within the community. To support this, reports and presentations will focus on the issues that "jump out" most clearly and explain why they matter to the region. Rather than overwhelming audiences with raw data, the information will be practical, concise, and connected to possible responses. For example, if workforce shortages consistently emerge across sectors, reporting should not only identify the issue, but also highlight possible responses such as workforce partnerships, immigration pathways, training initiatives, or retention strategies. This helps ensure the BR&E process remains action-oriented and responsive to the needs of local businesses.

Response 8

Reporting for a BR&E Program

A successful BR&E visitation program depends not only on collecting information from businesses, but also on effectively communicating the findings to stakeholders who can help address identified issues and opportunities. As the course materials emphasize, the BR&E process is ultimately about moving from data to information, information to knowledge, and knowledge to innovation and action.

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

  Reports and presentations should be tailored to multiple audiences. These may include local elected officials, economic development organizations, the chamber of commerce, workforce development partners, educational institutions, utility providers, community organizations, and especially the participating businesses. Presentations to community stakeholders are especially important because they help build awareness of local business needs while demonstrating the value of existing businesses to the local economy and community.

  Because different audiences have different interests, it may be necessary to create multiple versions of reports or presentations that focus on the information most relevant to each group.

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

Regular reporting strengthens the BR&E program by demonstrating that business feedback is being taken seriously and transformed into action. Reports help build credibility for the EDC's BR&E program, and they are a valuable tool to inform leadership, build community support, increase transparency, and create accountability among stakeholders responsible for addressing identified challenges.

Presentations also provide opportunities to encourage discussion, develop partnerships, and generate innovative solutions. When stakeholders see common themes emerging from business visits, they are more likely to collaborate on workforce development, infrastructure improvements, business assistance programs, and other initiatives that support business growth and retention.

Most importantly, reporting helps businesses see that the EDC and the community value their contributions and are committed to helping them succeed.

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

  In a continuous visitation model, reports should focus on emerging trends by industry sectors or defined regions rather than waiting until a large number of visits have been completed. The report would likely include:

  - An executive summary of key findings
  - Background information on the community and the BR&E program
  - Survey methods and visitation procedures
  - Number and types of businesses visited
  - Common business concerns and opportunities
  - Workforce, infrastructure, and expansion-related issues
  - Immediate follow-up actions taken
  - Success stories and examples of problem resolution
  - SWOT analysis identifying strengths, weaknesses, opportunities, and threats
  - Preliminary recommendations and potential action items

  As additional visits are completed, future reports can identify trends and compare findings over time.

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

  The course emphasized that survey responses are simply data until they are analyzed and interpreted. To turn data into information, I would focus on identifying patterns, trends, and actionable insights rather than simply reporting numbers.

  For example, instead of reporting that several businesses identified workforce challenges, I would analyze what occupations are most difficult to fill, whether the issue is training, recruitment, or retention, and what community partners might help address those concerns. Open-ended responses would be categorized into themes so that frequencies and trends could be identified.

Visual tools such as simple charts, graphs, and summary tables would help communicate findings clearly. Presentations would focus on the most relevant findings for each audience and emphasize implications and possible solutions. The goal is not simply to present data, but to increase stakeholder knowledge and stimulate action that improves the local business climate.

In summary, reports and presentations are essential communication tools within a BR&E program. They transform business feedback into useful information that can guide decision-making, strengthen community partnerships, and support long-term economic development efforts.

Response 9

In this session, we've touched on the necessity of reports and presentations for a BR&E program using a volunteer-visitor methodology with a "blitz" approach.

1. To whom or what groups would the reports/presentations be delivered?
    - Municipal Leadership
    - County Leadership
    - Dallas County Chamber of Commerce
    - Local Business Community
    - Local School District
    - Funding Agencies
    - Community Members at Large
2. How would this benefit the strength of the BR&E program?
    - Led by Extension, this helps to establish and build trust and supports the development of social capital. Also, by bringing together the important stakeholders, there is support for grants (letters of recommendation, co-PIs, subawards, etc.), as the BR&E ecosystem offers opportunities for collaboration. I would also create a dashboard that would not only show the one-time data, but as data is continuously collected, the public and stakeholders can have the most up-to-date information.
3. What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?
    - The number of visits
    - Concerns of stakeholders
    - Information about the key industries
        - Businesses that support tourism.
            - Food Businesses
            - Retail and lodging Businesses
            - Heritage businesses (tour guides, bus operators, etc.)
    - Video or testimonials could be used to provide rich qualitative data.
4. How would you turn data into information for the audience(s)?
    - Live Dashboards created by Extension

- Quarterly updates to stakeholders both in-person and live
- Using technology to automate and schedule information sharing
- Incorporating feedback so that continuous improvement can be made to reporting practice and processes.

Response 10

My organization is what used to be known as a REN in Nova Scotia. Though our funding model has changed and the province is no longer a core funder, they very much would like us to deliver a comprehensive BRE program. This is consistent with our core mandate defined in our municipal agreement between the five towns, county, and First Nation that remain as our core funders.

So – there are really two groups that we should make presentations to. The first being those who fund us. We need to deliver value to them so they continue to fund us and therefore we must report metrics that demonstrate reasonable ROI to them. They should ask themselves: "could I have achieved this result or better in my community with the same contribution made somewhere else?". In order to answer this question, they will want to understand any change in tax revenue they can collect; building permits and changes to assessed land values as well as deed transfers (we have a 1% transfer tax here) will help them to quantify the impact our program is making. Similarly, our province will benefit from both corporate and personal income tax collection. Communicating results in terms of increased profits and jobs created will help them to do the same.

From a qualitative perspective, both funders will be interested to see that progress has been made in priority sectors. Our provincial and federal governments have outlined their priorities and funding an organization that supports businesses in these industries or sectors will be important to report on.

We also have a team dedicated to community impact work. They support local not for profits in grant writing, ai adoption, governance, etc. We will include a member of that team as we debrief on our BRE meetings with local business and include a section that asks about community vitality and opportunities that if pursued will lead to happier residents, and employees. A great example is childcare. While we do not provide it, we can partner with organizations that can. If an employer expresses challenges with childcare for employees who do shiftwork, our community impact team can incorporate that into the action plan; if achieved there may be no immediate impact to the business other than employee retention and morale.

The other group we need to report to are the businesses we support. One of the challenges we spoke about during our workshops was developing the relationship with local businesses and that sometimes there is a wall or guard up. One classmate shared an example that the business was asking what he was selling and wasn't making time for him. We must ensure our report includes metrics that will be meaningful to the businesses we support but more importantly, the ones we've not supported yet but want to. In this case the focus is less on how much tax revenue they are going to be handing over to our funders and more about what problems did we solve, or opportunities did we have helped them take advantage of. We often hear about federal or provincial funding opportunities for businesses and that they sometimes have difficulty disbursing funds because businesses either do not apply or they didn't qualify. Our action plans will include navigation and support to ensure businesses are eligible and they have strong applications for these funding opportunities. Therefore, expressing our success in terms of dollars accessed will be important to showcase.

Examples such as this will strengthen our program because both groups will see positive results that they will either continue to fund, continue to participate, or encourage others to participate. This strengthens our credibility in our community and working with partner organizations will be come more coordinated and efficient so that in future, similar results should be expected in a timelier manner. As we build our program and reputation, investment attraction will also improve, as some businesses would like to settle where they know they will be best supported.

My largest concern with all of this is how rural we are. When talking about sample sizes to make inferences on trends in our area we will most certainly have to take the entire population of a specific sector. Assuming we have a 50-75% participation rate in our first year, we're looking at very very small numbers of businesses. Since we're using a continuous model and information gathering may be slow, the first reports may have the opposite effect. "why have you spend time with so few businesses with no results" is obviously the biggest fear. In these cases we must leverage story-telling, and reporting on works in progress. How many applications are outstanding, dollars applied for, project charters written, etc. Until we can report on results, we'll be forced to report on potential.

Response 11

Part B

Response 1

Categories/Topics:

- Financial assistance and funding support (most dominant that I noticed)
- Issues in workforce and labor
- Government policy/regulations and leadership
- COVID response (medical/business/government)
- Technology and business infrastructure support
- Communication and marketing

Response 2

- Funding
- N/A-Customers were not sure, needed no help
- Additional PPE
- Adult/Child Daycare
- Government Interference
- Unemployment benefits (a negative)

Response 3

- Emergency Grants & Funding for Businesses
- Robust Online Resources
- High-Speed Internet Access
- Supply Chain Restructuring & Efficiency
- Unemployment Benefit Guidelines
- Office/Store Safety Modifications
- Government Restrictions on Businesses

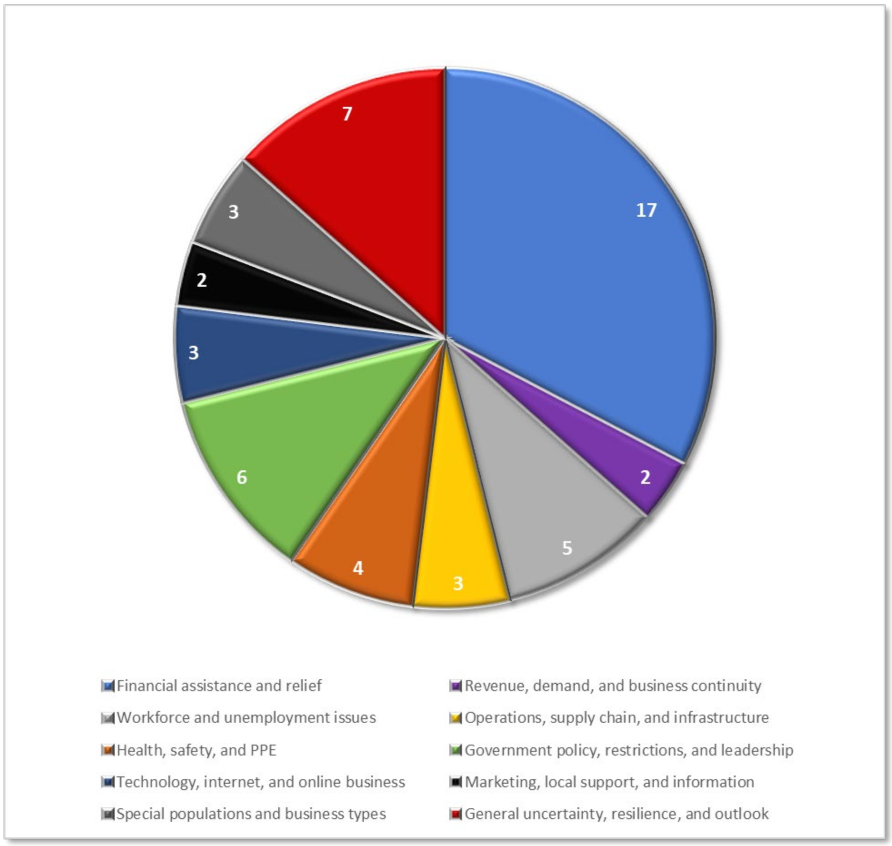
Response 4

FUNDING & FINANCIAL RESOURCES
REOPEN & BUSINESS RECOVERY SUPPORT
PUBLIC HEALTH GUIDANCE & RESOURCES
WORKFORCE & EMPLOYEE SUPPORT
SUPPLY CHAIN & OPERATING SUPPLIES

GOVERNMENT POLICY & LEGISLATIVE ISSUES
UNKNOWN / UNCLEAR / NO RESPONSE
OUTLIERS

Response 5

- Financial assistance and relief
- Revenue demand, and business continuity
- Workforce and unemployment issues.
- Operations, supply chain, and infrastructure
- Health, Safety, and PPE
- Government Policy, restrictions, and leadership
- Technology, the internet, and online business.
- Marketing, local support, and information.
- Special populations and business types
- General uncertainty, resilience, and outlook.



Response 6

After reviewing the open-ended survey responses, I would use a set of practical topic categories that reflect what businesses were really asking for during COVID-19. The responses were not all written in the same way. Some were very specific, such as requests for PPP, grants, PPE, faster internet, or help with utilities. Others were more emotional and focused on frustration with shutdowns, government leadership, or uncertainty. Because of that, I would not try to force every response into only one category. In many cases, I would allow a response to be coded under more than one topic.

For example, a business asking for PPP and help keeping employees paid could fit under both financial assistance and employee/payroll support. A business asking for clear reopening rules and PPE could fit under both health guidance and operating restrictions. Using flexible categories would make the survey more useful because it would capture the full meaning of the responses instead of oversimplifying them.

Topics I Would Use to Categorize the Responses

Topic Category	What I Would Include	Examples of Responses That Fit
Financial assistance and access to capital	Requests for grants, PPP, SBA loans, lines of credit, stimulus support, tax relief, rent assistance, utility assistance, or relief that is not additional debt.	Responses mentioning PPP, grants, SBA loans, utility help, rent, taxes, payroll support, or capital to keep operating.
Reopening rules and business restrictions	Comments about shutdowns, reopening, keeping businesses open, reducing restrictions, or allowing businesses to make their own operating decisions.	Responses such as "not shutting down," "open 100%," "less restrictions on service businesses," or concerns about government interference.
Health, safety, PPE, and COVID guidance	Needs related to masks, social distancing, PPE, testing, workplace safety, health requirements, vaccines, and consistent COVID guidance.	Responses asking for PPE, standard guidelines, best practices for office work, testing, health care access, or clear safety rules.
Workforce, payroll, and employee support	Issues connected to hiring, unemployment benefits, payroll support, employee illness, childcare, and keeping workers attached to the business.	Responses mentioning difficulty hiring because of unemployment supplements, payroll protection, COVID infection pay, or childcare allowance.
Supply chain and business inputs	Concerns about getting supplies, food service inputs, construction materials, PPE, or	Responses mentioning needing supplies, broken supply chains, food service supply issues, or

	other goods needed to keep the business operating.	dependency on outside suppliers.
Internet, technology, and online presence	Needs related to broadband, online information, internet speed, online resources, social media, digital marketing, and the ability to conduct business online.	Responses asking for better internet, stronger online resources, help with social media marketing, or support for doing business online.
Marketing, sales, and customer demand	Comments about getting customers back, buying local, increasing sales, customer service, signage, and helping businesses reconnect with consumers.	Responses mentioning buy local efforts, sales, signage, customer support, or the need for consumers to return.
Government communication and leadership	Comments focused on accurate information, consistent messaging, political leadership, media frustration, and the need for a unified position.	Responses asking for accurate communication, steady governmental leadership, consistent rules, or clearer information from officials.
Support for specific business types	Needs of self-employed people, nonprofits, 501(c)(6) organizations, minority-owned businesses, adult day cares, restaurants, startups, and very small businesses.	Responses asking for help for self-employed businesses, minority-owned businesses, nonprofits, restaurants, small startups, and adult day cares.
Facility modifications and operational adaptation	Physical changes businesses needed to operate safely, such as drive-thru expansion, glass partitions, workspace modifications, or other building adjustments.	Responses asking for funding for a second drive-thru, glass partitions, or grants to modify workspaces and retail shops.
No assistance needed, unsure, or not applicable	Responses where the business did not identify a need, was unsure, said none, or did not understand the question.	Responses such as “none,” “not sure,” “don’t know,” “NA,” or “my business is self sufficient.”

How I Would Use These Categories

I would use these categories to turn the open-ended answers into information that could be summarized for a BR&E report or presentation. The categories would make it easier to see which issues were coming up repeatedly, such as financial relief, reopening concerns, workforce problems, or the need for better guidance. They would also help separate immediate crisis needs from longer-term business support needs.

I would also keep an “other” or “unclear” option available, because open-ended survey responses can be messy. Some responses are short, emotional, or hard to interpret, and it would be better to flag those honestly than to force them into the wrong category. Over time, if enough similar “other” responses appeared, I could create a new category.

Conclusion

The main topics I would use are financial assistance, reopening restrictions, health and safety guidance, workforce support, supply chain needs, internet and technology, marketing and customer demand, government communication, support for specific business types, facility modifications, and no assistance or unsure responses. These categories feel practical because they match the way businesses actually answered the question. They would also help a BR&E team move from a long list of individual comments to a clearer picture of what businesses needed during the crisis.

Response 7

Categories	# of occurrence
Business Guidance & Communication	10
Health, Safety & PPE Supports	6
Financial & Capital Supports	30
Supply Chain & Operational Stability	4
Digital & Technology Supports	5
Workforce & Labour Challenges	5
Policy, Restrictions & Community Sentiment	40

Response 8

nses could fit into more than one category.

1. Financial & Economic Support
    - Financial Assistance & Grants
    - Business Operating Costs
    - Business Expansion & Incentives
2. Workforce & Human Resources
    - Workforce & Employment Challenges
    - Workforce Support Services
3. Government Policy, Regulation & Leadership
    - Government Policies & Regulations
    - Communication & Leadership
4. Health, Safety & Healthcare

    - COVID-19 Health & Safety Measures
    - Healthcare Access
5. Technology & Infrastructure
    - Technology & Broadband Infrastructure
    - Capital Improvements & Facility Modifications
6. Operations & Supply Chain
    - Supply Chain & Inventory Issues
    - Business Continuity
7. Market Development & Business Growth
    - Marketing & Customer Development
    - Business Recovery & Economic Development
8. Community & Small Business Support
    - Small Business Support
    - Local Community Support
9. No Need / No Response
    - Not applicable or no assistance needed
    - No opinion or don't know/unsure

Response 9

- Capital Access
- Navigating Federal COVID Relief Programs for Businesses
- Best Practices for Doing Business Online
- Managing the Headaches, Hassles, and Hangups of the Global Pandemic
- Employee Recruitment and Retention

Response 10

I think I need to step back and ask myself why I did the survey. If I'm preparing a report to relay information about what people are thinking I might categorize them in buckets like 'wants business support', 'wants stronger COVID response', etc.

However, I feel like the intention was to understand how internal resources should be focused on delivering support in this new environment. I therefore would triage the responses in two buckets: "I can help with this" and "I can't help with this".

From there I would focus on the group that I can contribute to and continue to split it up into four groups ranging from 'easy to achieve, high value if achieved' to 'hard to achieve, low value if achieved'. This may be too subjective and will require inputs from internal team and external support organizations who we typically collaborate with in our BRE program. Creating these categories would help define priorities – we should shoot for quick wins first and then focus on the more challenging responses that also deliver high value to the business community.

I would also be sure to share the responses that were out of reach for my organization but perhaps plausible for others to address and they can do a similar exercise.

Ultimately, the survey is in response to an extraordinary event and the purpose is likely to pivot into some actional items that will support businesses and help them adapt and survive.

Of course, the great thing about data is that it can be retained. If after the fact we wanted to look back and wonder what people were thinking we could absolutely create new categories and say that they were ‘communications, ‘health policy’, ‘safety measures’, ‘financial support’, ‘access to supplies’. Etc with an element of traffic light system for critical issues; e.g. one business indicated they will close in a few months when the lease runs out.

Response 11
