Fundamentals Course Homework

Session 1

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

Due by the beginning of the October 22, 2026 session.

Response 1

Walton County, Georgia Industrial Business Retention and Expansion

The Development Authority of Walton County has been doing business retention and expansion work for more than a decade. As our area grows and we celebrate several recent industry announcements, we want to make sure our existing industries feel valued, too. They have already invested in Walton County, and we want them to know their continued success is a priority for us.

Outcomes: In the short term, we want industry leaders to feel comfortable sharing concerns and to know what help is available. Those conversations should lead to action, including workforce solutions, stronger education partnerships, and help with barriers to growth. Over the long term, we want our industries to stay, reinvest, and offer good jobs where residents can build careers.

Outputs: We already connect through a monthly industry-only newsletter, company visits, individual conversations, and industry events throughout the year. Employers participate in career exploration activities, job fairs, and other hiring events. Getting plant managers away from their facilities for planning meetings has been much harder. We need to respect their time and gather input in ways that work for them. What matters is that we listen, document needs, make useful connections, and follow through.

Inputs: This work takes staff time, consistent funding, leadership support, and partners we can count on. Walton Works, the Development Authority's nonprofit workforce development organization, connects employers, educators, and residents with career and training opportunities. We have strong support from our K–12 school systems and local governments. Being outside both Atlanta and Athens means we are not always a priority for regional training providers and workforce agencies. We often have to create programs that meet our industries' needs, bringing in outside resources where we can. Reliable information and a secure way to track company needs and follow-up are also essential.

We depend on employers being willing to share and partners being able to respond. We should regularly ask whether our efforts are helping and adjust as company needs and economic conditions change.

Response 2

Situation/Goal

- Strengthen and build new connections between the local economic development office and local businesses

Outcomes

- Short Term
    - Connect with local business owners via phone, email, or in person to gauge the biggest problems facing the business community
- Medium Term
    - Leverage current programs and resources to address these issues where possible
    - Consider process improvements tailored at addressing most commonly cited issues
- Long Term
    - Maintain a business-friendly environment that attracts new businesses and persuades current businesses to stay for years

Outputs

- Engagement through regular communication with local businesses (phone, email, in-person)
- Periodic digital/print surveys

Inputs

- Time on business visits, networking/chamber events, etc.
- Survey design and analysis of responses for data-driven decision making

Assumptions

- Good response rates and representative sample
- Cited problems are a result of economic conditions and are not company-specific
- Minimized bias in survey design and administration

External Factors

- Common issues may be company-specific (example: demand for a certain good or service is falling)
- High-interest rate environment may be an obstacle for local businesses
- Local economic development offices may not cause or have much control over these factors, but can provide support in other ways

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Response 3

BRE Plan Development for my Economic Development Organization

In considering a BRE plan for my EDO, I would place my focus primarily on the program's desired outcomes. I envision *long-term outcomes* to be strong relationships with local primary employers. This would look like *TRUST* and being among the first called when a need arises. I would help the business' leadership teams bond with the community, increasing social capital. I would have my BRE program become an invaluable resource to the business. An example of this type of relationship is that a business would feel comfortable contacting our team about possible expansions or relocations and leaning on us to help with real estate needs or contacts with city/county departments. This could result *in more jobs for the people of our city*.

Medium-term outcomes might look like repeat visits to local primary employers, which would help facilitate better relationships and create an ease in communications. This would include problem-solving, as well as sharing resources and knowledge. An example might look like a manufacturing company letting us know during the course of a visit that they are struggling to find employees with certain manufacturing certifications to hire. The jobs are open, but they are not getting qualified candidates. This is a fantastic opportunity for our EDO to engage in conversations with our local high schools, trade schools, and colleges about how to get their students certified and job-ready. We could take it a step further and engage the manufacturer in conversations about internships for these students.

Short-term outcomes would involve learning about our local primary employers. We could get to know them via visits and/or surveys. Back at the office, our team could evaluate our activities to see if they are effective uses of our time and resources. An example of a great way to "appreciate" our manufacturers is to celebrate "Manufacturing Week" by visiting their offices and bringing fun promotional items, box lunches, or dessert for their employees. A small token of appreciation goes a long way!

Outputs regarding participation would primarily be local primary employers who are bringing new money to our city. Local educational institutions would be a secondary focus. High school Career and Technical Education and Trade Schools would be the best options for building up the local workforce in manufacturing industries. *Output activities* would include paid professional-led visitation to employers through the continuous approach with social capital. This is where relationship-building with our EDO and our community are center stage. We would be a valuable resource and link the companies to other people and resources in the community.

Inputs required for a successful program would include personnel, time, money in the budget, and creativity. Ideally, I would have at least two full-time staff members working on BRE since it is the primary pillar of economic development. I would dedicate marketing staff to help with promotions, a stellar website, one-pagers for valuable information (as needed), and other resources as they arise. I would budget considerable time and money to the BRE program. I would spend time evaluating the program consistently, searching for best practices and starting new initiatives that serve my individual community's needs.

Response 4

Situation: Build stronger relationships with existing businesses and identify their needs before challenges affect their operations or growth.

Outcomes

Long-term: Businesses continue to grow, invest, and remain in the community.

Medium-term: Businesses have access to resources and partnerships that support their workforce and operational needs.

Short-term: Identify business concerns, provide connections to resources, and follow up on requests for assistance.

Outputs

Who we reach: Existing businesses, company leaders, and key decision-makers.

What we do: Conduct business visits, gather feedback, identify challenges, and connect businesses with local resources and partners.

Inputs: Dedicated staff time, business information, leadership support, and partnerships with workforce organizations, educational institutions, and other community resources.

Response 5

BRE Program Planning Model

Outcomes

The desired outcome of a BRE program is to create an environment where existing businesses are known, connected, supported, and positioned to remain and grow within the community. At the same time, the program should provide the EDO with a better understanding of its existing business base and allow it to identify and respond to issues before they become barriers to retention or expansion.

One important outcome of a BRE program would be stronger relationships between the EDO and local employers. A successful BRE visit will help the EDO understand what a company does, but also what challenges it's experiencing, what opportunities it sees for growth, what types of employees and skills it requires, and whether it has future expansion or facility needs. Continued conversations should allow the EDO to become a trusted resource for the company rather than only contacting the business when there is a specific project or problem.

A second outcome is a stronger connection between local employers and the community's workforce. For example, an employer may report difficulty filling certain positions while local residents may have little awareness of the company, the types of jobs available there, or the skills required for those positions. A BRE program can identify this disconnect and create pathways between employers, residents, workforce agencies, community colleges, high schools and CTE programs.

The intent with a consistent conversation established under a BRE program is that over time, individual business conversations also reveal common or systemic issues. If several targeted employers identify the same workforce skill gap, infrastructure concern, regulatory issue, or training need, the EDO has evidence of a broader economic development issue rather than an isolated business complaint. For the EDO, being able to provide a strategic network of contacts and resources to the company is ideal, so that the EDO isn't always the primary respondent to every issue. I say this because creating roots in the community for the company is a primary driver of consistency and reliability that the company can invest and rely in, which if ever confronted with moving makes a target new location harder to compare to the existing community.

Ultimately, the desired long-term outcome is an economic environment where businesses have greater access to the workforce, resources, relationships and infrastructure they need to remain and expand locally, while residents have stronger pathways to employment with businesses already operating in their community.

Outputs

To produce those outcomes, the EDO can develop a consistent business visitation and intake process. The intake instrument should support a meaningful conversation with the employer while also allowing information to be organized into common categories such as workforce, training, infrastructure, expansion and site planning, community engagement, and other business-specific needs. A standardized process is important because the information collected from individual companies should eventually allow the EDO to identify trends across the broader business community.

Information collected through the visits moves through a defined response pathway. Immediate company-specific issues should be identified and, where appropriate, referred to the City or another partner without waiting for the entire visitation cycle to conclude. This may be particularly important when an issue threatens the retention or expansion of an employer that is significant to the community's workforce or tax base.

Other issues will require longer-term analysis. Workforce and training needs, for example, should be accumulated across interviews so the EDO can determine whether multiple

employers are identifying similar needs. Existing resources through workforce agencies, community colleges, school districts or other partners should first be explored. Where existing programs do not adequately address an important industry need, the EDO can serve as a convener by bringing employers and appropriate partners together to develop a more customized response.

If the need is significant to one of the Board's targeted sectors, they may consider investing resources in developing a training or workforce initiative. Employer participation should be an important component of such an effort so that the initiative responds to demonstrated industry demand and provides a broader economic benefit rather than appearing to provide a special benefit to a single company. As a point of reference in Tx Local Government Code 501, a particular business can't be given a direct benefit from an EDO, but rather through a performance agreement.

Outputs would therefore include more than completed business visits. They would include referrals, partner introductions, follow-up conversations, identification of common issues, development of workforce and training responses, and continued communication with participating businesses. This reflects the course's emphasis on building follow-up into the BRE process and responding to weaknesses and threats identified through business conversations. section-2-bre-introduction

Inputs

A successful program first requires a strong foundation of information about the community and its existing business base. Census and demographic information, industry and workforce data, and tools such as ESRI Business Analyst can provide a baseline for understanding the community before individual business interviews begin. In Texas, I often utilize the Texas Demographers Office, because their data is probably the closest and most recent to the local community. This baseline also allows information gathered through the BRE process to be evaluated within the larger economic context.

Institutional support is equally important. The EDO Board should establish the program's priorities, identify strategic sectors where appropriate, and be prepared to support responses that emerge from the process. City staff should also understand the purpose and structure of the BR&E program before visits begin. Establishing that understanding in advance is important so that a business issue referred through the program is recognized as part of an established economic development process rather than an attempt to provide preferential treatment to an individual company. This also addresses the course's emphasis on feasibility, including the resources and political environment that can affect implementation. section-3-intro-program-planning

The EDO will also need strong external partnerships. Workforce agencies, community colleges, school districts and CTE programs, the Chamber, municipal departments, and other economic development partners should be made aware of the initiative and invited to participate as needs emerge. The EDO cannot successfully respond to every issue on its own. Particularly with workforce development, partners need to have the willingness and flexibility to respond to actual industry needs rather than relying exclusively on existing programs. If an important need cannot be addressed through existing resources, the EDO should have the organizational and financial capacity to consider developing or supporting an alternative solution.

Finally, the program needs a communications component. A public launch can explain the purpose of the initiative to businesses, partners, City staff and the broader community and demonstrate the Board's commitment to its existing employers. The program also needs sufficient staff capacity to conduct meaningful interviews, manage the information collected, coordinate referrals, analyze common issues and—most importantly—follow up with businesses after the initial visit.

Taken together, these inputs create the infrastructure for a BRE program that does more than collect information. They allow the EDO to convert business intelligence into action. The program's success would therefore not be measured solely by how many businesses were visited, but by whether those conversations resulted in stronger relationships, better-informed economic development decisions, responsive workforce and training initiatives, resolved barriers, and greater opportunities for local businesses and residents.

Chart Summary to Follow

Planning Component	BRE Vision	IMPLEMENTATION
OUTCOMES	**What changes as a result of the program?**	
	Stronger relationships with existing businesses	Businesses view the EDO as a trusted resource and maintain an ongoing relationship rather than hearing from the EDO only when there is a problem or project.
	Better understanding of the existing business base	The EDO understands employers' workforce needs, expansion plans, infrastructure concerns, training needs and other barriers to growth.
	Earlier identification of retention and expansion opportunities	Regular conversations allow the EDO to learn about potential expansions, facility needs or threats to retention early enough to respond.
	Stronger local workforce pipeline	Local residents become more aware of employment opportunities and the skills required by local employers. Employers develop stronger connections with workforce agencies, community colleges, high schools and CTE programs.
	Identification of systemic issues	Information from multiple businesses allows the EDO to distinguish an individual company's problem from a broader workforce, infrastructure, regulatory or training issue affecting a sector.
	Improved business retention and growth environment	Existing businesses have better access to the workforce, resources, relationships and infrastructure needed to remain and expand locally.
OUTOUTS:	**PROGRAMS PURPOSE**	
	Conduct structured visits with targeted businesses or industries	Use a consistent intake/interview tool while allowing enough flexibility for a genuine conversation with the employer.
	Categorize information from visits	Organize needs into areas such as workforce, training, infrastructure, expansion/site planning, community engagement and other business-specific issues.
	Respond to immediate business issues	Refer appropriate issues to City departments or other partners as they arise rather than waiting until the entire visitation cycle is complete.
	Aggregate common needs	Stockpile and analyze information across interviews to identify recurring needs among employers or within targeted sectors.
	Connect businesses with existing resources	Make introductions and referrals to workforce agencies, educational institutions, the Chamber, municipal departments and other partners.
	Develop customized responses when necessary	When existing programs cannot address a significant industry need, convene employers and partners to develop a solution. The EDO may participate financially where there is a broader economic benefit and meaningful employer participation.

	Follow up	Track referrals, continue conversations with employers and determine whether identified issues were addressed.
INPUTS :	**What must be in place?**	
	DATA! Lots of Data	Census, demographic, workforce and industry information, supplemented by tools such as ESRI Business Analyst, provide a foundation for understanding the business base.
	Board leadership and commitment	The EDO Board establishes priorities and targeted sectors, supports the BRE program and is prepared to act on significant findings. Board must be able to evaluate findings with a SMART approach.
	Professional staff capacity	Staff must have the time and ability to conduct interviews, manage information, coordinate referrals, analyze trends and maintain business relationships. Prepare findings report with reco's or case study that could be applicable in the local environment.
	Intake and data-management process	A consistent system is needed to capture, categorize, protect, analyze and follow up on information gathered from businesses.
	City coordination	City staff should understand the BR&E program and its referral process so that responding to a business issue is recognized as part of an established program rather than preferential treatment.
	Workforce and education partnerships	Workforce agencies, community colleges, school districts and CTE programs should understand the initiative and be prepared to respond when employer needs are identified.
	Other community partnerships	The Chamber and other organizations can help connect businesses more fully with the community and increase awareness of local employers.
	Financial capacity and flexibility	The EDO should be capable of supporting strategic responses when existing workforce, training or other programs cannot adequately meet an identified need. Planning needs to be made to add as a line item and work outcomes to include program development, grant applications funds so there is no lag in a response and implementation.
	Communications support	A public launch establishes the legitimacy and purpose of the program and communicates the Board's commitment to existing businesses.

Response 6

Outcomes			Outputs		Input
Long Term	**Medium Term**	**Short Term**	**Participation**	**Activities**	
• Increase the region's taxable commercial property assessment base by 2% over the 2026 level through completed business expansion, new commercial development, and property improvements by 2031.Y5	• New development and investment take place by businesses (Feasibility, financing, site selection, approvals etc.) Y2-5	• Businesses understand the potential for expansion and have the connections and plan to proceed. YR1 *This is where our accountability ends*	• 200 business owners annually. • 40 business owners connected each year who have the potential for growth and expansion, annually. • Local land developers • Financial services • Municipal partners	• 200 business conversations annually, to better understand the potential for growth. • BRE deep dive with 40 businesses with the most potential for expansion and growth, annually. • Build connections and relationships with financial services, municipal partners, and commercial real estate. • Navigate business owners to financial services, municipalities, available lands etc.	• 4- Staff salaries • Travel fund • Computer • Office location • Professional development • Tracking system or software

				• Connect businesses to programs and services. • Host 2 events: Planning and permitting; for example: Financing expansion, annually. • Tracked list of potential property expansion and development projects	

*Numbers, percentages, and timeframes used above are for this exercise only. The numbers/percentages/timeframes are not rooted in data or analyzes of data over time. We do not yet know the baseline of commercial property tax, have not analyzed the historical data over time to understand the increase, or do we know if the municipal units can break out new development and property improvements from market-value increases – there is still work to do on defining our goal to be SMART. We do know that increasing the tax base is a goal for at least some of the municipal units that we serve.

Response 7

This week is Small Business Week in our County. It starts with listening. Our Team focuses on outreach to as many businesses as possible to create a 'buzz' and grow connections with founders in our business community. It is a concentrated 'blitz' to businesses. We have developed a quick leave behind 'Insight Survey' for businesses to fill out. It tells us the challenges and barriers that they are facing day-to-day in the short term. Some immediate navigation may be needed to support businesses who identify specific concerns.

Once Small Business Week is complete and the data is analyzed, we will relay the findings, gaps, and trends to businesses and our stakeholders.

For the longer term we need to look at a concise BRE plan for our County to start at the WHY.

Our Strategic Plan and funding agreements with Municipalities, the Provincial, and the Federal government are focusing on economic development along with data for 3 specific sectors.

- Blue Economy (fisheries, coastal resources, marine transportation)
- Manufacturing
- Green Economy (clean energy-wind, solar, eco-innovation)

This is not to say that any business who falls outside of those categories is not a part of our upcoming BRE work. All are included as these priority sectors can employ many different businesses to function effectively from trucking to eateries.

Outcomes- Relationship building with 'cold call' outreach

Outputs- Set priority sectors, target specific businesses with the question- "Do you see your business contributing to the Blue Economy, Manufacturing sector, or Green Economy"

Inputs- investing time to outreach, develop Insight surveys, printing of materials and 'leave behind' survey through QR code, 4-staff salaries, travel expenses, tracking system, staff training

By leveraging Small Business Week visits, the Partnership can develop relationships and contacts to conduct a broader and more concise BRE program.

Response 8

- Outcomes
    - Long term
        - Strengthen local business growth and retention
        - Strengthen the city’s economic foundation
        - Secure sustained economic growth through informed policy changes, incentive programs, or business development initiatives.
    - Medium term

        - Partner with the chamber and workforce agencies to plan one small workshop or roundtable within 3 months addressing a common need
        - Businesses engage in mentorship programs and targeted training programs in areas such as technology and management.
        - Streamlined permitting process (in progress)
    - Short term
        - Connect businesses with relevant resources and support programs
        - Increase business awareness of immediate assistance for challenges such as infrastructure improvements or workforce training programs.
- Outputs
    - Participation
        - Local businesses
        - Educational institutions
        - Regional and state agencies
    - Activities
        - Schedule and conduct visits to local businesses prioritizing those identified as being at risk or having high growth potential
        - During visits, representatives will:
            - Introduce themselves and their organization.
            - Express the City's commitment to supporting local businesses.
            - Administer the business survey (if not completed).
            - Discuss any challenges or concerns the business may have.
            - Provide information about relevant resources and support programs.
            - Document key findings and follow-up items.
- Inputs
    - Personnel (staff time, training).
    - Materials (survey printing, postage, marketing materials).
    - Technology (database management, online survey platform).
    - Program development and implementation.
    - Contingency fund: backup time and flexible funds set aside to handle unexpected costs or busy periods

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Response 9

When thinking about what makes a BR&E program successful, I believe it starts with understanding the businesses already operating in a community. Before developing a program, it's important to know what challenges those businesses face, what opportunities exist for growth, and whether they are getting the support they need. The goal shouldn't simply be to collect information, but to use that information to make a difference.

Outcomes

In the long term, I would want to see a business environment where companies feel confident staying, growing, and investing in their communities. Medium-term outcomes would involve businesses taking steps to address challenges, explore expansion opportunities, and make better use of available resources. In the short term, the focus should be on learning what businesses need and helping them understand

what assistance is available, or some type of community-based educational component. I think these outcomes are connected because understanding the problems is what provides a platform for exploration.

Outputs

A successful program should reach businesses of all sizes and industries, including smaller businesses that may not normally interact with economic development organizations. It should also involve local governments, workforce agencies, chambers of commerce, and other groups that can provide assistance. Activities might include business visits, surveys, conversations with owners, and connecting businesses with resources. However, I think one of the most important parts is following up. Asking businesses about their challenges means very little if nothing happens afterward.

Inputs

The program would need people who understand economic development, reliable information, funding, and strong relationships with community partners. It would also require enough time and resources to maintain regular communication with businesses. Having clear responsibilities would help ensure that concerns are directed to the right people.

Assumptions

Economic conditions, workforce shortages, and changing business costs are all factors that could affect results. Assume businesses will be willing to share their concerns (and data especially at a grassroots level) and that participating organizations can help address them.

Ultimately, I believe a good BR&E program is about building relationships, listening to businesses, and following through. Success isn't just about how many businesses are contacted, but whether those conversations lead to positive changes.

Response 10

Planning component	A Los Alamos County BR&E Program
Situation	Understand the unique conditions and challenges facing local businesses in Los Alamos County.
Short-term outcomes	Build trust, identify business needs, and increase awareness of available and immediate resources
Medium-term outcomes	Help businesses implement solutions by connecting them to resources and address recurring challenges
Long-term outcomes	Improve business retention, expansion of thriving businesses, long term resilience, and economic vitality for the community
Outputs	Participation Businesses in Los Alamos and White Rock in Los Alamos County

Outputs - Activities	Conduct Business Health Checks, develop Action Plans with a business, and provide follow-ups on a continued basis
Inputs	Invest in staff time, partnerships with other EDOs, technology, good current data, and program resources
Assumptions/external factors	Recognize the importance of trust in our entity, understanding of current economic conditions, workforce availability and training, and available commercial space

Success would not be measured by how many businesses we contact, but by whether those interactions lead to meaningful assistance, stronger businesses, better economic development decisions, and greater confidence in the local business environment.

Response 11

1. Strategic Situation and Purpose

The objective is to strengthen business retention, support sustainable growth, and pursue economic development opportunities throughout Cumberland County, Nova Scotia.

2. Desired Outcomes

Long-Term Outcomes: Business Sustainability and Regional Growth

- Improve business retention and stimulate growth by identifying challenges early and helping businesses navigate barriers to continued operation.
- Support existing businesses in achieving their next stage of growth through expansion planning, increased capacity, new markets, and strategic development.
- Attract new businesses, investors, and entrepreneurs to Cumberland County by promoting the region's economic advantages, workforce, infrastructure, and business opportunities.
- Encourage business succession planning, investment, innovation, and long-term sustainability.

Medium-Term Outcomes: Resource Access and Business Development

- Connect businesses with relevant funding programs, advisory services, training, mentorship, and other business support resources.
- Help business owners identify and take advantage of current programs and initiatives available within their respective sectors.
- Identify opportunities for collaboration, partnerships, supply-chain development, and access to new markets.

Short-Term Outcomes: Engagement, Assessment, and Action

- Conduct in-person business visits and structured fact-finding discussions.

- Identify current business concerns, operational challenges, emerging risks, and potential growth opportunities.
- Establish follow-up actions to monitor progress, address outstanding concerns, and maintain ongoing relationships.

3. Target Audience

The initiative will focus on three primary business groups:

Established Growing Businesses, New Businesses and Entrepreneurs

4. Key Inputs and Strategic Partnerships

Successful implementation will depend on leveraging existing relationships, expertise, and resources.

Internal Resources

- Internal business intelligence, research, and program information.

External Partnerships

- Local Chambers of Commerce and business associations.
- Business Development Bank of Canada (BDC) and other business advisory organizations.
- Provincial and federal economic development programs.

Response 12

1. Strategic Situation and Purpose

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2. Desired Outcomes

Long-Term Outcomes: Business Sustainability and Regional Growth

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- Conduct in-person business visits and structured fact-finding discussions.
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- Internal business intelligence, research, and program information.

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- Business Development Bank of Canada (BDC) and other business advisory organizations.
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Response 13
