Fundamentals Course Homework

Session 3

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

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

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

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

Part A

Response 1

Reports and presentations are important to a Business Retention and Expansion (BR&E) program because they help identify the needs of existing businesses and opportunities to strengthen the local economy. Reports could be shared with local government officials, economic development organizations, chambers of commerce, workforce development partners, educational institutions, and other community stakeholders. An anonymous summary of the findings could also be shared with the community to help residents understand the challenges local businesses face and how they can support them.

These reports would strengthen the BR&E program by identifying common business concerns, guiding future initiatives, and demonstrating the program's value. They could also help build stronger relationships among businesses, community organizations, and local leaders. When businesses see that their feedback is being used to address concerns while their identities remain confidential, they may be more willing to participate in future visits.

Since data collection through ongoing BR&E visits would happen gradually, I would focus on reporting trends and recurring themes rather than waiting until a large amount of data has been collected. Reports could include the number of businesses visited, common workforce challenges, expansion

concerns, infrastructure needs, and requests for assistance. Individual businesses would remain anonymous, with information grouped into general categories to protect confidentiality.

To turn the data into useful information, I would organize responses into categories, identify patterns, and use simple charts or summaries to highlight the most common needs. For example, if several businesses identify workforce recruitment as a challenge, that finding could be shared with workforce development partners and educational institutions to explore potential solutions.

I would also involve the community by sharing an anonymous, public-facing summary through newsletters, community presentations, or other local communication channels. This could highlight general business challenges, showcase economic trends, and encourage residents to support local businesses. By sharing information without identifying individual companies, a BR&E program can increase community awareness, maintain business confidentiality, and encourage collaboration to strengthen the local economy.

Response 2

The Development Authority of Walton County has supported existing industries for more than a decade. Our ongoing relationships fit a continuous BR&E approach. Reports should help us explain what we are learning, decide where to focus, and show employers that their input leads to action. As our area grows, reporting also gives us a way to reinforce the value of companies already invested here.

Audiences and purpose. I would provide quarterly summaries to our board and leadership, with findings relevant to local governments and funding partners. Workforce findings would go to our K–12 school systems and appropriate training and workforce partners. Walton Works, the Development Authority's nonprofit workforce development organization, would use the findings to guide career exploration, hiring assistance, and locally developed training. Industries would receive a brief update through our monthly industry-only newsletter. A public annual summary and presentations to civic groups would explain why we support existing industries, their contribution to local jobs, and progress on shared concerns. Residents could ask questions and share their perspectives.

Benefits and challenges. Reporting would give partners a common basis for setting priorities and help us make the case for resources. Sharing what we heard, what we did, and what still needs attention can build public understanding and support for decisions affecting industry. The main challenges are limited staff time, uneven participation, and confidentiality. With a small industrial community, removing a company's name may not protect its identity. We should combine or withhold sensitive findings and obtain permission before sharing an identifiable company story. Urgent concerns should receive immediate attention rather than wait for a report.

Reporting while information accumulates. Each quarterly report would identify the reporting period, number of distinct companies contacted, company characteristics where confidentiality permits, recurring concerns, referrals, and unresolved needs. We would distinguish new findings from older information and avoid counting repeat visits as additional companies. A rolling annual view would provide more context, but early findings would describe participating firms rather than all Walton County industries. Relevant economic data could add context without substituting for employer input.

Turning data into useful information. We would group responses into consistent topics, show counts with clear denominators, and explain the implications for each audience. Repeated concerns about industrial maintenance or CNC skills, for instance, would prompt follow-up about occupations, shifts, and training access before recommending a program. For public audiences, we would connect a finding to local jobs or a community concern, explain the proposed response and tradeoffs, and invite questions. Each priority would identify a responsible partner, next step, and review date. Visits and referrals are outputs. Employer-confirmed improvements are outcomes. As a proposed first-year goal, at least 75% of firms receiving assistance would report within 90 days that it improved their access to a needed resource or reduced an identified barrier. We would report the number responding and distinguish those two results.

Response 3

- To whom or what groups would the reports/presentations be delivered?
    - **The business community, general public, internal reporting for department, reporting for County leadership and collaboration with other departments**
- How would this benefit the strength of the BR&E program?
    - **Data-driven reporting allows BR&E program administrators to create and redefine program features in a fact-based way according to relevant KPIs and feedback from survey respondents.**
- What would be included in the report given that the collection of data in a continuous model is likely to be relatively slow?
    - **If data collection is relatively slow, the report could outline the survey methodology used, purpose, and expected timelines of the data collection.**
- How would you turn data into information for the audience(s)?
    - **I would explore creative ways of presenting the data to illustrate current economic conditions and problems facing the business community. For example, I would create a word cloud of the most commonly cited obstacles facing the business community to show business leaders and the general public what difficulties others are experiencing. I would also use publicly available data from FRED, BLS, BEA, etc. to depict current trends in interest rates, unemployment, inflation, and other factors that affect economic conditions.**

Response 4

Response 5

Response 6

Response 7

Response 8

Response 9

Response 10

Response 11

Response 12

Response 13

Part B

Response 1

- Financial Assistance and Funding
- Workforce and Employee Support
- Government Policies and Business Restrictions
- Business Operations and Infrastructure
- Marketing, Customer Support, and Business Recovery

Response 2

Financial assistance, taxes, and operating costs. Grants, PPP, loans, credit, tax relief, rent, utilities, payroll assistance, and help applying for or qualifying for programs.

Workforce and family supports. Hiring and retention, layoffs, unemployment benefit concerns, paid leave, childcare, and employee or family financial support. Employer views about hiring would be reported as perceptions.

Health and workplace safety. PPE, testing, vaccines, healthcare, masks, sanitation, safety guidance, and changes to facilities such as partitions or drive-throughs.

Business reopening and government restrictions. Closure orders, reopening, restrictions on operations, and concerns about consistency, fairness, or government intervention.

Supplies, infrastructure, and technology. Supply chain disruptions, essential supplies, internet speed and reliability, and online business tools.

Customers, sales, and marketing. Customer demand, buying locally, customer service, signs, social media, and consumer confidence.

Communication, leadership, and general assistance. Accurate pandemic information, webinars, business guidance, government leadership, and requests for local or government support that are not more specific.

I would enter 1 for each topic mentioned and 0 otherwise, counting each topic once per response. Requests for both PPE and PPP would receive safety and financial codes. Topic totals could exceed 100 because responses can address multiple issues.

I would separately flag no assistance needed, uncertainty, unclear or off-topic responses, and general recovery comments. A closure-risk flag would capture the planned closure at lease expiration and warrant confidential follow-up in a live program. A coding guide and review of ambiguous responses would support consistency.

Response 3

- **Uncertainty** – presence of responses like “I don’t know” or “?” indicates many businesses may need some more inspection to identify business supports – consider 1-on-1 communication to uncover what needs there may be
- **Funding/financing** – Although many responses reference federal support and stimulus checks, the locality may still provide support through a covid relief grant program
- **Employment/workforce** – Strengthen partnership with local and regional workforce organizations, including local education institutions – host a career fair
- **Communication/dissemination of information** – In resources referenced in previous assignments (newsletter, survey, networking events, etc.), provide COVID updates and information on other trending issues
- **Marketing/Sales** – For businesses experiencing difficulty with marketing or decreased sales, offer these services through EDO newsletter, social media, and networking events
- **Health and Safety** – Tailor an upcoming business workshop on health and safety precautions to implement in the workplace – round up medical professionals for a panel

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Response 4

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