Fundamentals Course Assignment

Final Project

Throughout this course, we've talked about the different elements that are essential to develop a Business Retention and Expansion Visitation Course. For your final project, develop a concise narrative or outline that describes your plan of work for implementing this type of program in your organization. Be sure to provide some insight regarding the way that the elements that we've discussed throughout the course will be included in the program.

This outline is not meant to be definitive nor comprehensive, but it is meant to be an aid for you in developing the initial logic of the program. Please try to have this exercise completed and submitted by the end of business on April 14, 2022.

Response 1

Overview of Planning, Surveys, and BR&E Program Components

In past homework assignments, I have outlined procedures for in-person visits and regular communication with local businesses, hosting of networking events and business workshops, disseminating helpful information through regular newsletters, strengthening social capital, administering surveys, and other methods of BR&E. None of these programs would be successful without thoughtful planning and thorough consideration of the program's goals in advance. Before pursuing any of these options, I should solicit feedback from local businesses, citizens, economic development partners, and other stakeholders to clearly define the goals of the program in relation to the most pressing needs/wants in the current economic environment. This might mean tailoring programs to support certain sectors that require the most support, responding to shocks (like COVID), and ensuring programs will be impactful at all points throughout the business cycle. While businesses are central to the program's success, it is important that no stakeholders are excluded from the program's planning and administration.

Planning should begin by addressing the pros and cons of the current protocol, driven by reliable data, and improvements should be considered in accordance with all available data from quantitative and qualitative sources. Data collection should be as exhaustive as possible to ensure decisions are made with as much information on the community as possible. This information should be used to identify common obstacles, economic trends, and room for improvement. Establishing clear goals and measurable KPIs early through strategic planning will ensure the program remains focused and impactful.

Site Visits

For first interactions with a new business, in-person visits should be introductory. These meetings should be an introduction to the County and EDO - consider providing a bundle of brochures that highlight resources available through the County, provide contacts with the County and EDO partners, etc.

Future visits won't require as much introductory information - however, consider putting together a bundle to showcase recent developments in the County and changes to EDO resources. These visits provide an opportunity to discuss new challenges facing the businesses and consider effectiveness of past BR&E efforts.

First impressions are important, but BR&E should focus on supporting local business from beginning to end with regular and uninterrupted collaboration throughout the life of the business. Visits may result in action items - be sure to follow-up with any additional actions needed. Each visit should be well-documented in a CRM system or Excel Spreadsheet to track past and ongoing communications.

Hosting of regular networking events and business workshops provide good opportunities to make introductions/connections, though more touchpoints may be necessary. These efforts can also strengthen social capital by fostering new relationships and collaboration among businesses, community organizations, and economic development partners.

Finally, the success of the program should be evaluated regularly to determine whether its goals are being met and whether the services provided are making a meaningful impact. This could include tracking the number of businesses visited, logging problems identified, and other metrics. BR&E programs should be ever-evolving and adapt to current focuses.

Response 2

1. Program Context and Initial Review

Our city has previously initiated a BRE program, but due to staff transitions, it remained in its early stages. Fortunately, this foundation leaves us with a pre-existing timeline, a list of initial survey questions, a target list of local businesses, and established program goals and objectives. The first phase of our plan of work is to review these existing materials, update them for current economic conditions, and develop new collateral. This includes drafting a marketing flyer, a confidentiality agreement to build trust with local business owners, and an introductory letter outlining the program's value.

2. Infrastructure and Data Management (Inputs & Outputs)

To ensure our program has a strong structural foundation, the next step is to secure a Customer Relationship Management (CRM) platform. A CRM platform is essential for organizing visit data, tracking client interactions, and managing follow-up actions efficiently. Once the CRM is established and our visit materials are finalized, we will begin scheduling diagnostic visits with local businesses.

3. Stakeholder Engagement and Volunteer Training

To scale our outreach and accelerate data collection, the Economic Development Corporation (EDC) will partner with the Chamber of Commerce. Initially, I will conduct a few visits independently to master the process, understand the survey flow, and ensure comfort with the diagnostic approach. Once comfortable, I will meet with Chamber leadership to present an overview of the program, its goals, and objectives, and establishing volunteer support. We will host a dedicated training session for Chamber volunteers to ensure every representative is fully prepared, understands confidentiality, and executes visits professionally.

4. Execution, Data Analysis, and Actionable Outcomes (Outcomes)

Volunteers will be assigned specific businesses to visit. Upon completion, the collected data will be fed directly into our CRM software. Rather than just storing information, the core logic of the program relies on analyzing this data systematically to identify patterns across multiple businesses rather than just isolated complaints. By taking a step back to analyze these trends, the EDC can formulate targeted solutions, remove barriers to growth, and deliver meaningful, community-wide support to keep businesses thriving.

Response 3

Program Overview and Purpose

If the Northeast Florida Regional Council (NEFRC) were to establish a Business Retention and Expansion (BR&E) visitation program, I would recommend developing a coordinated, regional approach that builds relationships with existing businesses, identifies challenges and opportunities, and connects businesses with resources that support their continued success.

The program would complement NEFRC's regional planning and economic development activities while recognizing the different economic conditions and priorities of Northeast Florida's communities. Rather than attempting to establish a comprehensive regional program immediately, I would begin with a manageable pilot that could be evaluated, refined, and expanded as resources and partnerships develop.

The following plan outlines how I would approach the program's initial development and implementation.

1. Establish Program Objectives and Organizational Structure

The first step would be to establish a clear purpose, measurable objectives, and an organizational structure. I would recommend organizing the program around three primary goals: demonstrating appreciation for existing businesses, identifying and addressing business concerns, and using information gathered through visitation to support longer-term economic development planning.

NEFRC could serve as the regional coordinator, working with participating local governments, economic development organizations, chambers of commerce, workforce development partners, and other stakeholders. I would establish a Management Team to provide oversight and direction, an Operations Team to coordinate visitation and manage information, and an Action Team consisting of organizations capable of addressing identified concerns. Response Team members could assist with urgent or business-specific issues. Clearly defining responsibilities, communication procedures, funding needs, and expectations would help prevent duplication of services and establish accountability.

2. Develop a Business Selection and Visitation Strategy

Before conducting visits, I would develop a community and regional economic profile using available demographic, employment, industry, and business establishment data. This information would help identify important industries, business concentrations, and potential gaps in existing economic development services.

For the initial pilot, I would favor a continuous visitation model involving a manageable number of businesses across participating communities. This would provide opportunities to establish relationships, respond to concerns, and improve the process before expanding the program. Business selection would consider industry representation, geographic distribution, employment significance, business size, and local economic priorities. I would also seek participation from smaller businesses that may not regularly interact with economic development organizations. Visits would be conducted by trained staff or qualified community partners using a consistent interview process. The objective would be to encourage open conversations rather than simply complete questionnaires.

3. Design and Implement the Business Survey

I would develop a standardized survey that collects information about business conditions, employment, workforce needs, expansion plans, infrastructure, regulatory concerns, and potential threats to continued operations. The survey would combine structured questions, which allow responses to be compared, with open-ended questions that provide businesses an opportunity to explain their experiences. Participating businesses would receive an explanation of the program's purpose, how their information would be used, and how confidentiality would be maintained.

I would also establish a system for identifying red, yellow, and green flags. Immediate concerns, such as potential closures or major layoffs, would require prompt attention. Less urgent issues could be referred to appropriate partners, while expansion opportunities could receive additional assistance. A consistent process for recording, reviewing, and following up on responses would be essential.

4. Establish Business Assistance and Follow-Up Procedures

I believe follow-up would be one of the most important measures of the program's effectiveness. Businesses should not feel that their participation ends when the interview is completed. The Operations Team would review visitation findings, identify concerns requiring attention, and coordinate referrals to appropriate Action Team or Response Team members. An asset map of regional organizations, technical assistance providers, financing resources, and workforce programs would help match business needs with available services.

Each actionable concern would be documented with an appropriate follow-up activity, responsible partner, and anticipated timeframe. Progress would be monitored, and businesses would receive updates when appropriate. This process would help demonstrate that the program is responsive while strengthening relationships between businesses and the organizations serving them.

5. Analyze Findings and Develop Strategic Recommendations

As information accumulates, I would organize survey responses into common themes and examine how they relate to regional economic conditions. For example, recurring workforce concerns could be compared with available employment and occupational data, while infrastructure or transportation concerns could be considered alongside existing regional planning priorities.

The Operations Team would work with the Action Team to distinguish immediate business needs from broader issues requiring coordinated solutions. Recommendations would be supported by the available evidence and prioritized according to urgency, feasibility, potential impact, and available resources. For larger issues, the team could develop action plans identifying specific tasks, participating organizations, timelines, and measurable objectives. Recommendations requiring additional resources or policy decisions would be presented to the Management Team and relevant stakeholders for consideration.

6. Communicate Findings and Build Community Support

I would develop a reporting process that keeps participating businesses, community partners, elected officials, and residents informed about the program's activities and findings. Because a continuous visitation model produces information gradually, I would begin with concise periodic updates highlighting businesses visited, emerging concerns, assistance provided, and follow-up activities. More comprehensive reports could be developed once sufficient information becomes available.

Reports and presentations would be tailored to their audiences and would distinguish preliminary observations from findings supported by broader participation. Public communication would also be important for building community appreciation for existing businesses. Sharing appropriate findings, recognizing business contributions, and demonstrating program accomplishments could strengthen public support and encourage additional participation.

7. Evaluate Program Performance and Outcomes

I would establish an evaluation framework before implementing the pilot so that its effectiveness could be assessed consistently. Using a logic model, I would connect program resources and activities with anticipated short-, medium-, and long-term outcomes. Initial performance measures could include the number of businesses visited, participation across industries and communities, concerns identified, referrals completed, and response times.

Short-term outcomes would include identifying feasible solutions and developing recommendations for business concerns. Medium-term outcomes would focus on actions businesses or partner organizations take in response to those recommendations. Long-term outcomes could include measurable changes in business retention, employment, investment, or other economic conditions, where sufficient evidence exists to evaluate the program's contribution.

For an initial pilot, I would propose measurable benchmarks such as completing 25 business visits during the first six months, documenting follow-up needs for all participating businesses, and reviewing actionable concerns within five business days. These would be proposed planning targets rather than existing NEFRC commitments. Periodic evaluations would examine whether the program is meeting its objectives, using resources effectively, and producing information that stakeholders find valuable. Results would inform adjustments to the visitation process, partnerships, and future program priorities.

Conclusion

I would approach the development of a NEFRC BR&E visitation program as a gradual, collaborative process that places equal importance on building relationships, collecting useful information, and responding to business needs. A successful program would require more than conducting visits or producing reports. It would depend on clearly defined responsibilities, consistent follow-up, meaningful community participation, and the ability to translate business concerns into practical actions. By beginning with a manageable pilot, establishing measurable objectives, and incorporating ongoing evaluation, NEFRC could determine how a coordinated BR&E visitation program might strengthen regional economic development efforts while remaining responsive to the needs of Northeast Florida's businesses and communities.

Response 4

Walton County BR&E Plan of Work

The Development Authority of Walton County has supported existing employers for more than a decade. As our area grows and we welcome new companies, we want those already invested here to know their continued success is a priority. This plan focuses on three sectors—construction, manufacturing, and healthcare —because of the large number of people they employ in our community. We will strengthen our existing work through consistent visits, follow-up, community engagement, and evaluation.

Program approach and resources. We would use a continuous, staff-led visitation program. The president and development authority would approve priorities and resources, and I would coordinate with our economic development and workforce staff. Walton Works, the Development Authority's nonprofit workforce development organization, would help address workforce needs. Our inputs are staff, funding, and partner expertise. Visits and referrals are outputs; reduced barriers and public understanding are outcomes.

Assessment and visits. During the first 90 days, we would update our employer list across the four sectors, review local economic and workforce data, and confirm available training with providers. We would reach employers of different sizes and sectors, including less-connected organizations. A short conversation guide, piloted with three employers, would include common questions on workforce, business outlook, growth, infrastructure, and other priorities, with additional questions tailored to each sector. Individual visits and calls would give employer representatives a confidential way to share concerns.

Follow-up and partnerships. We would explain how information will be used and obtain permission before sharing employer details. Staff would document concerns, assign a contact and next step, and check whether assistance helped. Urgent issues such as potential closure or layoffs would receive prompt attention. Our strong school and local government relationships provide a foundation; utilities, training providers, and other partners would join issue-specific teams as needed. When regional resources do not meet local needs, we would work with employers and partners to develop local solutions.

Community engagement and reporting. Our monthly industry newsletter, The Wire, is shared on the first Wednesday of each month and, along with industry events, helps keep employers connected. Public updates and civic presentations would highlight the value of existing employers, connect employer needs to local jobs, and invite residents to share their perspectives. Quarterly board reports would summarize employer participation, common themes, assistance provided, and progress. We would protect confidential information, clearly explain the time periods and number of employers represented, and avoid presenting early findings as reflective of every sector. Each shared priority would have a responsible partner, a next step, and a date for reviewing progress.

Measuring our progress. During the first 90 days, we would establish a starting point and make sure our goals are realistic for our staff and resources. By the end of six months, we would aim for at least 80% of employers who complete a follow-up check to know whom to contact when they need assistance. By the end of the first year, our goal would be for at least 60% of assistance cases that have had 90 days for follow-up to show progress on the issue identified by the employer. We would ask employers whether the assistance helped, document what changed, and include cases we could not confirm in the total.

We also want our community to understand why this work matters. By the end of the first year, we would aim to increase by 15 percentage points the share of participating residents who can explain the program's purpose. We would ask the same people at the beginning and again at follow-up, noting those we were unable to reach. Their responses would help us assess our outreach, while recognizing they may not reflect the views of all residents.

Each year, we would review employer and community feedback and look at our progress. We would also track employer retention and reinvestment, keeping in mind that many factors outside our control influence those decisions.

Response 5

Program Goals and Objectives
The goal of the Business Retention and Expansion (BRE) program is to support the long-term success of existing businesses by building relationships, identifying challenges, and connecting businesses with resources that encourage continued investment and job growth. The program will focus on proactive outreach, relationship building, and early identification of business needs.

Business Selection and Prioritization
The program will prioritize major employers while expanding outreach to smaller businesses, manufacturers, and industrial suppliers. This approach will help develop a better understanding of the needs of businesses across different industries and sizes. Businesses will generally be contacted annually, with additional outreach as needed based on identified concerns or changes in operations.

Business Visitation Process
Business visits will provide an opportunity to learn about company operations, discuss future plans, and identify challenges or opportunities. Visits will be conversational rather than overly structured, allowing business representatives to share information openly. A standard set of questions will guide each visit, with additional questions tailored to the size, industry, and specific needs of each business.

For businesses unable to schedule an in-person visit, a survey will be offered as an alternative to gather information about their operations and potential needs.

Relationship Building and Social Capital
Building trust and strengthening relationships will be essential to the program's success. The program will encourage connections between businesses, educational institutions, workforce development organizations, local government, and other community partners. Strengthening these relationships can improve communication, encourage collaboration, and help businesses access resources that support their success.

Data Collection, Confidentiality, Analysis
Information collected during visits and surveys will be documented in a centralized system to maintain consistent records of business needs, concerns, and follow-up activities. Responses will be reviewed to identify common challenges, workforce needs, supplier gaps, and potential opportunities for growth. Sensitive business information will be handled confidentially and shared only when authorized and appropriate.

Aggregated findings can help identify broader economic development trends and determine where additional resources or partnerships may be beneficial.

Follow-Up and Resource Coordination
Following each visit, key takeaways and appropriate next steps will be documented. When a business identifies a challenge, program representatives will work to connect the company with relevant resources, whether related to workforce development, infrastructure, permitting, financing, or other operational needs. Consistent follow-up will help ensure the program provides meaningful assistance rather than simply collecting information.

Program Evaluation and Continuous Improvement
Program effectiveness will be evaluated by tracking the number of visits completed, businesses contacted, needs identified, referrals made, and follow-up activities completed. An initial goal will be to conduct approximately 100 business visits annually. Feedback from businesses and lessons learned during implementation will help improve the visitation process and ensure the program continues to meet the needs of the business community.

The BRE visitation program will focus on proactive engagement, relationship building, and meaningful follow-up. By combining structured data collection with personalized business visits, the program can better understand the needs of existing businesses, strengthen community partnerships, and support long-term economic growth.

Response 6

Program Purpose and Organization

The Business Retention and Expansion (BRE) Visitation Program will strengthen relationships with existing businesses, understand their needs, address challenges, and identify growth opportunities, showing that our organization values existing employers and wants them to remain competitive and successful in our community. It will begin as a structured visitation initiative and grow into an ongoing part of our economic development efforts, focused on building relationships, gathering useful information, responding to concerns, and turning what we learn into action.

First, we will set clear program goals and secure leadership support, then conduct a basic community assessment using economic, workforce, industry, and demographic data to identify priority industries, challenges, and growth opportunities.

A program manager will oversee the program, supported by a team coordinating daily activities: business identification, scheduling, communications, survey development, data management, and follow-up. Each member will have assigned duties and deadlines.

Building Partnerships and Engaging the Community

A BRE action team of representatives from local government, business leadership, workforce development, education, utilities, financial institutions, non-profits, and other community organizations will help identify business needs, provide resources, and address issues outside our organization's direct control. For example, workforce partners may assist with recruitment and training, while local government may address infrastructure or permitting concerns. This will provide a broad scope of professional experience along with good social capital. Once the program is established and trust and buy-in are built, the EDO may take over with less partner input for efficiency.

We will develop a community asset list of resources, partner organizations, and individuals who can help businesses solve problems; action team members should have authority to direct requests within their organizations.

We will introduce the program through personal outreach, business organizations, community meetings, and targeted communications, emphasizing that we will listen to businesses, provide assistance, and strengthen the local economy. Community partners will help promote participation.

Selecting Businesses and Preparing for Visits

Because the program is new, visits will begin with a prioritized, manageable group of businesses. The BRE manager and action team will identify target industries and select businesses based on employment, economic impact, growth potential, industry representation, and retention concerns. We will build a contact list from internal records, business directories, partner referrals, and industry data, with an initial goal of about 20–30 visits to gain experience, evaluate the process, and improve before expanding.

A standardized BRE survey will guide conversations and ensure consistent data, covering operations, workforce, expansion plans, facilities, infrastructure, supply chains, business climate, and community satisfaction. Open-ended questions will capture concerns and opportunities the standard questions miss. Companies will be researched prior to visits which might guide the questions.

Staff and volunteer visitors will be trained in interview techniques, confidentiality, documentation, and follow-up, with practice visits and role-playing. Businesses will receive an introductory email, then a personal contact to schedule a visit. Visits will be conducted by two-person teams, one leading and one recording. Businesses will be told how their information will be used, and responses will remain confidential unless permission is given to share.

Conducting Visits and Responding to Business Needs

During visits, our primary role is to listen. We will ask about current conditions, future plans, challenges, and opportunities while letting business leaders guide the conversation. Afterward,

contacts and responses will be entered into Salesforce (CRM), and we will identify red flags needing immediate attention, along with less urgent issues, assistance opportunities, and potential expansion projects.

Red flags may include possible closures, relocations, major workforce shortages, or infrastructure problems. They will be reviewed promptly and assigned to a responsible person with a defined next step and follow-up date. Every business requesting assistance should receive a timely response, even without a solution yet, through referrals, partner coordination, and progress updates, all documented in the CRM. Success depends on moving beyond data collection to show that business feedback leads to information, knowledge, action, and innovation.

Analyzing Results and Developing Recommendations

After the initial visits, we will review survey responses for common themes, trends, concerns, and growth opportunities, organized into categories such as workforce, infrastructure, expansion, education, finances, and community resources. We will turn business data into information and knowledge for better decisions, distinguishing individual company issues from broader challenges needing a coordinated community response.

The EDO team will prepare concise written reports, adaptable into one-pagers and PowerPoint presentations for leadership, the EDO board, community partners, and participating businesses, using simple charts, key findings, and clear recommendations.

The action team will review findings, set priorities, and develop an action plan identifying the responsible party, resources, timeline, and expected results for each recommendation. A stakeholder meeting will share findings, gather input, and build support, with the appropriate groups participating and individual business information kept confidential.

Implementation, Evaluation, and Long-Term Success

The final stage focuses on implementing recommendations and evaluating effectiveness. The EDO will address priority issues, support expansion, and improve resources for existing businesses. We will track completed visits, participation, issues identified, referrals, concerns resolved, expansion projects supported, and jobs or investment from assisted businesses (after verification). We will also evaluate the process itself, including survey effectiveness, team participation, response times, and business feedback, to improve future visits and set realistic goals.

Our long-term objective is to make BRE an ongoing engagement strategy that maintains relationships, responds to business needs, and involves community partners to strengthen existing employers, encourage investment, and support the local economy

---

Response 7

Response 8

Response 9

Response 10

Response 11

Response 12

Response 13