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

1. Benefits and Challenges

- **Benefits:**
    - The city would gain a better understanding of what needs to be done to help businesses grow, what challenges they are facing, and whether policy changes are needed.

- **Challenges:**
    - I would most likely be the only person making these visits, and there might be too many businesses for me to visit alone.
    - Some business owners may not cooperate or want to participate.

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

- Director of Community and Economic Development
- The Economic Development Board
- Chamber of Commerce
- Ad-hoc Response Teams and external stakeholders as needed during unexpected crisis scenarios.

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

- By collecting data, our team would be able to see exactly where our efforts are helping and provide concrete proof that this is a necessary program.
- It brings awareness to underlying issues in the business community, providing the necessary visibility because leadership cannot fix a problem if they don't know what it is
- Collecting and sharing this data empowers our local businesses, citizens, and staff, which in turn drives outside support from key stakeholders and strengthens the program overall

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

- Job creation metrics
- Retention and expansion updates
- Program effectiveness and success metrics

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

- **Visual Data Tools:** Utilize intuitive graphics such as bar graphs, pie charts, and visual dashboards to provide an immediate, clear representation of trends and key metrics.
- **Short Fact Sheets & Collateral:** Instead of relying solely on heavy, full-length written reports, distill complex findings into short, accessible fact sheets and visual summaries that non-experts can easily digest.
- **Contextual & Tailored Commentary:** Translate technical or complex economic data into accessible language with customized commentary tailored to the specific interests of policymakers, board members, and community stakeholders

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Response 5

For Los Alamos County, reports of the findings and presentations would be an important part of building trust with the business community and demonstrating the value of a Business Retention and Expansion (BR&E) program to County Leadership.

Who would receive the reports and presentations?

Reports would be shared with County leadership, the County Council, Economic Development staff, and community partners such as the Chamber of Commerce and Los Alamos MainStreet. A summary of

findings would also be shared with local businesses through our monthly economic development newsletter and posted on the County website.

How would reporting strengthen the BR&E program?
Regular reporting would identify common concerns among businesses and encourage collaboration between the County and ED organizations that provide business assistance. Regular reporting would demonstrate that the information businesses share is being used to guide decisions and identify resources. Following up on their concerns and communicating actions that might be taken help build trust and encourage continued participation.

What would be included in the reports?
Because I envision a continuous visitation program, information would be collected gradually rather than through a single visitation blitz. Reports could include the number and types of businesses visited, common challenges identified, requests for and the types of assistance, and referrals to available resources. The reports should highlight actions taken to address concerns.

Early reports might contain limited information, but as more businesses participate, we could begin identifying trends and changes in the local business environment.

How would data be turned into useful information?
Rather than just presenting survey results just as charts or graphs, reports explain what the findings mean for local businesses and the community. For example, if several businesses identify difficulties with hiring employees, the report identifies that problem, what the potential impact on business operations are, and point out any available partnerships.

Simple charts, summaries of similar concerns, and examples of successful assistance would make the information useful for all. Over time, comparing findings would help evaluate whether conditions are improving and where attention is needed.

In the end, reporting is a way to document program progress. It would provide accountability, help establish priorities, and create an ongoing conversation between the County and its business community. The challenge will be maintaining meaningful reporting when participation is limited.

Response 6

think the most important objective when reporting and presenting for a BR&E would be making sure the information collected from businesses is understood and used. Reports should do more than summarize survey responses. They should help businesses feel heard, increase community awareness, and provide useful information that supports discussions about local economic development priorities.

I would share reports and presentations with local elected officials, EDOs, chambers of commerce, workforce development partners, participating businesses, and community organizations. I would also provide a simplified summary for the public. Since these audiences have different interests, I would tailor the information accordingly. Local officials might be interested in infrastructure or regulatory concerns, while workforce organizations might focus on recruitment and training challenges. Residents could

benefit from understanding the challenges local businesses face and the role those businesses play in the community.

I believe regular reporting would strengthen the BR&E program by building trust and demonstrating that participation has value. Businesses would be more likely to remain engaged if they could see that their concerns were being acknowledged and considered. Reports and presentations could also build public appreciation for local businesses and encourage community support for addressing their needs. This is particularly important because a successful BR&E program depends not only on relationships with individual businesses but also on the broader community's willingness to support local economic development efforts.

The type and frequency of reporting would depend on the visitation approach. A volunteer visitation blitz could generate a substantial amount of information in a short period, which might make it easier to identify common themes and prepare a comprehensive report; however, organizing volunteers and ensuring consistency across interviews could be challenging. A continuous visitation model would allow more time to build relationships and follow up with businesses, but collecting enough information to identify broader trends would take longer.

With continuous visitation, I would focus on shorter, periodic updates that communicate what is being learned without overstating the findings. These reports could include the number and types of businesses visited, emerging concerns, recurring issues, assistance or referrals provided, and any follow-up activities. I would also highlight potential opportunities for collaboration and identify concerns that require additional investigation. Because the number of responses would initially be limited, I would clearly explain that the findings represent participating in businesses rather than the entire business community.

To turn data into information, I would look for common themes and examine what the responses suggest about the challenges businesses are experiencing. For example, if several businesses reported difficulties hiring employees, I would not stop at reporting the number of responses. I would explore whether those challenges involved wages, transportation, childcare, skills, or other factors. That additional context could help workforce partners better understand the concern and determine whether further investigation or coordinated action would be appropriate.

I see this as the difference between collecting data and developing useful knowledge. Individual responses provide the starting point, but analysis helps explain their significance. Presentations, charts, and concise summaries could then communicate the findings in ways that encourage discussion and inform decisions.

Ultimately, I believe effective reporting would help a BR&E program maintain business participation, strengthen relationships between businesses and the community, and build public support. More importantly, it would help turn the information collected during business visits into a foundation for practical actions that support local businesses and the broader economy.

Response 7

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

The Pictou County Partnership will present reports and presentations to the seven local municipal units and the First Nation community, who are all funders of the organization. Additionally, the report needs to be shared back to the businesses who gave the information, the wider business community, and the Pictou County community.

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

Reporting back the information that was collected will do several things:

- Increase the relationship with the businesses that you collected the information from, letting them know what was said, how it will be used, and thanking them for their time.
- Show the benefit of the program to our municipal and First Nation partners for continued funding of the program.
- Provide our municipal units, First Nation community, and ecosystem partners with data to action and respond to, better informing their program and services.
- Build awareness and positive relationships among the wider community and businesses.
- Build trust with the business community showing them that you can action their concerns or opportunities.

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

I would first define who my audiences are and build a plan for sharing back the data that is relevant in topic and frequency for that audience to make change. For instance, please see below some of the audiences that we will share this information with.

I would include topics or themes that are mentioned most frequently in the report, as well as areas that are most relevant to that audience.

AUDIENCE:

Municipal Partners and funders

- Share quarterly in an electronic report
- Share quarterly at the Liaison and Oversight Committee meetings, which are councillors.
- Share once a year during the Mayors and Warden meeting, a group of all the mayors and the warden in the region.

Businesses and wider community:

- After the 4-week Small Business Week campaign to collect information, which is the largest amount of surveys completed at once.

- Throughout the year, through our social media and newsletter, to highlight actions taken from the data and highlight the importance of a program, service, or change that took place because of the data.

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

How the data gets transformed into information depends on the audience and the purpose of sharing the data. Methods that I would consider include:

- Graphs and charts indicating change, etc., or identifying an area of need.
- A story about a business or collection of businesses and then backed by the data.

A story about a business backed by data would be my preferred method. It is easy to remember a story and easy to share it again with someone else. Of course, stories that include real business names and information would be shared only if permission from the business was given, also for this purpose only x indicates an actual number.

For instance: For one local business, finding skilled workers has become a growing challenge. Despite having opportunities to expand, the business has had to turn down new contracts because it doesn't have enough employees to take on the work.

This experience reflects a broader challenge across Pictou County. According to the Partnership's Business Insights Survey, x% of businesses report difficulty recruiting or retaining employees, while x% say labour shortages are limiting their ability to grow.

Or,

A local manufacturing business was ready to expand but struggled to find the skilled workers it needed. After connecting with the Pictou County Partnership and accessing workforce supports, the business was able to fill key positions, increase production, and take on new contracts.

That success is part of a bigger picture. Over the past year, x businesses across Pictou County have accessed workforce supports, x have reported business growth, and x new jobs have been created or retained.

I would also consider the method in which the information will be shared. For instance, we need to ask whether it will be shared in a newsletter, on a social media post, or in a presentation.

Response 8

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

I would create written reports to organize, analyze, and verify the data collected during business visits. These reports would then be used to develop targeted PowerPoint presentations and concise one-pagers (ideally one or two pages max) for specific audiences.

The audiences would include:

- Businesses and Manufacturers: Share industry trends, common challenges, available resources, and growth opportunities.
- Governmental Groups: Communicate business concerns related to infrastructure, permitting, regulations, and community needs.
- Nonprofit Organizations: Identify opportunities for partnerships involving workforce, childcare, housing, and other community needs.
- Educators and Workforce Partners: Share current and future workforce needs to help align educational programs with local jobs.
- Developers and Site Consultants: Provide real-world business data, community strengths, and growth opportunities to support business attraction.
- EDO Leadership and Board: Present findings, strategic priorities, potential projects, and recommended actions.

Each report and presentation would be tailored to the audience, emphasizing information most relevant to their interests and responsibilities.

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

Reports and presentations would strengthen the BRE program by providing clear strategic direction based on real-world challenges and opportunities identified by local businesses.

They would help the EDO team identify recurring issues, prioritize resources, develop action plans, and measure results. More importantly, they would build trusting relationships with businesses by demonstrating that the EDO listens to their concerns and follows through with potential solutions.

Sharing information with community partners would also encourage collaboration. For example, educators could develop training programs based on workforce needs, nonprofits could address childcare challenges, and governmental agencies could improve services that affect businesses.

The reports would also build community awareness and support for the BRE program by demonstrating its value. Stronger businesses create a stronger community.

The greatest challenges would be maintaining current data as well as having sufficient staff time and funding to analyze, update, and communicate findings consistently.

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

Because data collection would be ongoing, I would focus on program activity, emerging trends, business concerns, and actionable findings rather than waiting for a large volume of survey responses.

The written report would include:

- Executive Summary: Key findings, emerging trends, and recommended actions.

- Community Profile: Relevant economic, workforce, and business statistics. Graphs and charts here.
- Program Activity: Number of business visits, industries represented, and follow-up activities. Good place for “by the numbers” presentation style.
- Survey Methodology: How information was collected, recorded, and analyzed, including any limitations.
- Business Challenges: Workforce, childcare, infrastructure, utilities, permitting, traffic, and other local concerns.
- Growth Opportunities: Potential expansions, job creation, capital investment, and new projects.
- SWOT Analysis (maybe): Community and business strengths, weaknesses, opportunities, and threats.
- Action Plan: Recommended solutions, community partnerships, responsible parties, and follow-up activities.

I would report on the frequency of recurring issues, use simple graphs and charts, and include examples that illustrate business concerns. With limited data, I would avoid drawing broad conclusions too early.

Reports could be updated quarterly, with more comprehensive annual summaries as additional information becomes available. Reports would be the basis for my one-pagers and power point presentations.

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

I would turn data into information by identifying the most important findings for each audience and presenting them in small, easily understood pieces that lead to action. I would focus primarily on creating one-pagers and power point presentations.

First, I would organize the survey responses into categories, identify recurring themes, and determine which issues affect the greatest number of businesses. I would use simple statistics, frequencies, charts, and examples to communicate findings without overwhelming the audience.

Next, I would tailor the information to each audience. For example, businesses might want information about permitting challenges or workforce availability, while educators would be more interested in future job opportunities and training needs. Governmental agencies would benefit from understanding community issues they have the ability to address.

Presentations would include objectives, key findings, simple visuals, potential solutions, and a summary of implications. I would encourage discussion to help identify opportunities for collaboration and action.

My goal would be to follow this progression:

Data (Business survey responses) *leads to* **Information** (Organized findings and trends) *leads to* **Knowledge** (Audience understands the issues) *leads to* **Innovation** (New solutions and community improvements).

The most important measure of success is not how much data we collect or how impressive the statistics look, but whether the audience can absorb the information and use it to make improvements. When business feedback becomes knowledge that drives innovation, the BRE program can strengthen the local economy and create lasting opportunities for community growth.

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

- Financial
- Infrastructure & Utilities
- Medical
- Human Capital
- Communications/ Social
- Political Capital
- Uncertain/ Unsure/ other

Response 5

Financial Assistance and Access to Capital

Communication, Leadership, and Technical Assistance

Business Restrictions

Government Regulations

Health and Workplace Safety

Workforce and Employment

Marketing

Customer support

Supply Chain

Business Operations

Technology and Digital Resources

Response 6

Small Businesses & Self-Employed

Community Organizations and Nonprofits

Retail, Hospitality and Customer Service

Manufacturing, Construction and Industry

Professional and Business Services

Workforce and Employment Groups

Healthcare, Education and Social Services

Response 7

- Navigation of business programs, services, and resources
- Access to financial assistance, grants, and funding
- Government restrictions and business operating conditions
- Access to health information, safety supplies, and COVID-19 guidance

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Response 8

1. Financial Assistance & Access to Capital
2. Government Regulations & Business Restrictions
3. Workforce & Employee Support
4. Health, Safety, & COVID-19 Protocols
5. Supply Chain & Business Operations
6. Technology, Marketing, & Customer Support
7. Business Recovery, Government Communication, & Resources
8. No Identified Need/No Response (for responses such as *None, Not Sure, or N/A—indicates that additional contact might be required to work out potential needs*)

Response 9

Response 10

Response 11

Response 12

Response 13