



**Assisting Municipalities and  
 Economic Development Organizations (EDO)  
 with policies, programs and plans**

**Marketing & Promotion**

**Sites-Buildings Summary:** A document showing available land sites and / or buildings on a map with brief facts and contacts

**Site-Building Flyers:** A single-page marketing flyer highlighting aspects of an available property or building and contact info

**Site Documentation:** A detailed summary / due diligence report on significant available sites, business parks, etc.

**RFP Response Template:** Allows for a quick, comprehensive and professional response to Prospect RFP's / RFI's

**Excel Data Summary:** An Excel file using multiple worksheets to summarize marketing and due-diligence data in legible tables and providing charts / graphs where beneficial

**Traffic Count Report:** A report that identifies traffic counts on major roads as a resource for retail attraction

**E.D.O. Website Enhancements:** Develop efficient website content organization, mock-up pages, assist with content development

**Marketing Plan:** Develop a formal Plan to market the jurisdiction including goals-objectives, calendar, budget, resources needed

**Residential Development Summary:** Prepare a report that locates all active residential developments and provides data

**Management & Reporting**

**Best Practices Assessment:** Comprehensive evaluation of the EDO including recommendations for enhancing operations

**Performance Dashboard:** A Dashboard that provides for efficient management and / or reporting to the Board

**Contacts Database:** Create a customized Access database for efficient contact management

**Common File Directory:** Organize the file directory structure of the EDO and establish efficient file naming nomenclature

**Incentives**

**Incentives Policy:** A comprehensive Incentives Policy, resolution and application tailored to Agency needs

**Negotiations-Analysis-Proposals-Agreements:** Assist negotiations, analysis, Agreement in Principle, and final agreements

**Property Enhancement Incentives Policy:** A Policy to enhance commercial properties (e.g. façades, signs, landscaping)

**Hotel Occupancy Tax Policy:** Resolution, Policy, application

**Training - Incentives, Agreements, Policies:** See Training

**Board Engagement**

**Action Plan:** An Action Plan establishing prioritized goals and objectives, can serve as an Annual Report to Council

**Retreat Facilitation:** Facilitate Board discussions regarding issues, goals and objectives, and provide a summary report

**Business Retention & Expansion**

**BRE Plan:** A comprehensive BRE Plan identifying potential programs, setting objectives and implementation schedule

**BRE Program Development:** Develop a Business Retention & Expansion Program emphasizing practical efforts and programs

**Training - BRE Programs Overview:** See Training

**Planning & Economic Analysis**

**Planning & Economic Analysis:** Unique planning studies that analyze specific areas for opportunities to enhance the economic base (e.g. Redevelopment Plan, Opportunities Plan, Visual Improvement Plan, Property Enhancements)

**Wayfinding Plan:** Develop a signage Wayfinding Plan guiding visitors to desirable destinations

**Training**

**Training - Intro to Economic Development:** An overview of all aspects of implementing an efficient and productive Economic Development program for any size jurisdiction

**Training - BRE Programs Overview:** An overview on the many ways to support your existing local businesses

**Training - Local Incentives Overview:** An overview of potential local incentives (e.g. infrastructure, financial, employment)

**Training - Incentive Policies-Analysis-Agreements:** An overview of issues related to granting incentives