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***Strategic Plan***

**Strategic Priorities FY19 – FY20**

**Program Workplans and Goals FY19**

Final as Approved by the BSED Board of Directors

June 14th, 2018

***Be engaged…we’re building!***

**Mission—***Focused on sustaining and growing our region’s vibrant economy and outstanding quality of life, Big sky Economic Development provides leadership and resources for business creation, expansion, retention, new business recruitment, and community development.*

**Vision—***A vibrant, healthy economy!*

**Purpose—**the purpose of Big Sky Economic Development’s Strategic plan, as adopted by the BSED Board of Directors June 14, 2018, is to set the framework for the focus and goals of the organization. In addition to the FY 2019 work plans and goals for the core programs (one year), this Strategic Plan includes the Strategic Priorities of the organization for FY 2019 and FY 2020 (two years).

These priorities and goals we set after receiving input from the 2018 Stakeholder Survey, staff planning, and Board planning work sessions. A summary of the findings from the Stakeholder Survey are included in this Strategic Plan document for quick reference.

The Board and staff of BSED are dedicated to working within the context of our public/private partnership structure (EDC and EDA) to meet and exceed the goals and aspirations outlined in this Plan.

***Engagement--***We will work to engage our key partners and the entire community in the execution of this Plan.

You can connect/engage with BSED in this effort through:

1) Service on the EDA or EDC Board of Directors

2) EDC Member Investor Program

3) Small Business Development Center (SBDC) Advisory Council

4) BillingsWorks Workforce Council and Steering Committee

5) Career and Technical Education (CTE) Advisory Council

6) Big Sky Finance Loan Committee

7) Trailhead Hospitality Corridor Vision Steering Committee

8) Veterans Business Outreach Center Advisory Committee

9) BSED Recruitment Committee

10) Meet Up, Mentor Up, and Biz Up (entrepreneurship place/programming) Advisory Team

11) Better Off in Billings Talent Attraction Committee

12) BEAR Resource Team

13) Brownfields Steering Committee

14) Industry Sector Partnerships

15) TEDD Advisory Committee

16) Coulson Park Master Plan Steering Committee

Our work for the community is all about engagement. ***Engagement for maximum impact! Be engaged…we’re building!***

**Table of Contents**

Table of Contents

[Strategic Priorities FY 2019 through FY 2020 4](#_Toc524538731)

[PTAC Workplan and Goals FY2019 5](#_Toc524538732)

[Big Sky Finance Workplan and Goals FY2019 6](#_Toc524538733)

[SBDC Workplan and Goals FY2019 8](#_Toc524538734)

[B.E.A.R. Program Work Plan and Goals 10](#_Toc524538735)

[Entrepreneurship Space Program Workplan and Goals FY 2019 11](#_Toc524538736)

[Community Development Workplan and Goals FY2019 13](#_Toc524538737)

[BillingsWorks Workplan and Goals FY2019 15](#_Toc524538738)

[VBOC Workplan and Goals FY 2019 18](#_Toc524538739)

[Administrative Workplan and Goals FY2019 20](#_Toc524538740)

[Member Investor Program Workplan and Goals FY19 21](#_Toc524538741)

[Organizational Marketing/Communications WorkPlan and Goals FY19 24](#_Toc524538742)

[Recruitment Workplan and Goals FY2019 26](#_Toc524538743)

Executive Director Focus FY 2019 ………………………………………………………………………………………………………….30

# Strategic Priorities FY 2019 through FY 2020

1. **Strategic Priorities for the Community’s Economic Growth**
2. **Workforce Development** (via the BillingsWorks Partnership)

Continued Focus:

* CTE Partnership/Renewed Vision for the Career Center (Karen and Partnership)
* Talent Attraction (Better Off in Billings) (Karen, Chamber, other partners)
* Strengthening our higher education system’s impact in healthcare, technology, the trades, and business-related workforce (Karen, Steve)
1. **Strategic Placemaking (Building Remarkable Community Investments)**—

Continued Focus:

* Coulson Park Master Plan/Corette Site creating as vibrant rivers’-edge, park, entertainment/recreation experience for our citizens and visitors (Dianne, CD Team, Steve)
* Trailhead Hospitality Corridor urban renewal along Montana’s busiest thoroughfare (Metra Park Corridor Beautification Plan) (Dianne, CD Team)
* Ready-to-Go Industrial Space--Lockwood TEDD (Dianne, Allison, CD Team)
* Urban renewal project support—EBRD, SSBURA, Laurel Urban Renewal Agency, and Downtown Urban Renewal (DBP) (Dianne, CD Team)
* Enhanced Air Service and Airport Terminal Redevelopment (Allison, Steve)
* Trails and parks development throughout the community, including Skyline Trail project (HWY 3) (Dianne, CD Team)

Emerging Opportunities:

* One Big Sky District Development Planning for comprehensive downtown redevelopment (Steve, Allison, Strategy Partners)
* Space2Place Micro Placemaking Projects to kick-start placemaking endeavors throughout the community (Dianne and CD Team)
* Entryway Beautification Opportunities to re-set the Billings “first-impression” (Metra Park Corridor and others) (Dianne and CD Team)
1. **Economic Diversity/Innovation**
* *“Meet Up, Mentor Up, and Biz Up”* space and programming to support thriving entrepreneurship to drive new business creation and the success of our existing businesses (Dena, Steve, Founding Partners)
* Maintain Coal County Coalition Regional Partnership to drive regional economic diversification through partnerships and communication (Dianne, Steve, CD Team)
* Sector Partnerships to drive unique business growth and define workforce strategies (IT and others)
1. **Organizational Opportunities to Enhance our Ability to Execute our Mission**
2. Execute growth plan for Big Sky Finance *(Brandon, BSF Team, Melanie)*
3. Grow Member Investor Program Impact/Relationships/Resources *(Melanie, Steve, Board)*
4. Work, Thrive, Live initiative for retention, recruitment, and engagement of the BSED team *(Becky, Steve)*
5. Future Facilities for BSED and *Business-Up (Becky, Steve, Board)*
6. Build Program Awareness *(Melanie, BSED Team, and Board)*
7. *Enhance Business Expansion and Retention Outreach (Melanie, BEAR)*
8. *AEDO Reaccreditation*

# PTAC Workplan and Goals FY2019

**Billings PTAC & Subrecipients across the state**

Montana Procurement Technical Assistance Centers (PTACs) offer personal, timely advice on contracting with the government. The majority of our services are free and available to businesses across Montana. Consulting, training and technical support are the key components of our program. [www.montanaptac.org](http://www.montanaptac.org)

1. **PTAC’s client focus:**
* Research and identify suitable government markets
* Determine eligibility and assist companies with applying for certifications such as HUBZone 8(a), Service-Disabled-Veteran-Owned (SDVOSB), Woman-Owned Small Business (WOSB)
* Research buying trends and contract histories
* Locate bid opportunities
* Understand government purchasing methods and contracting procedures
* Review and understand solicitations
* Respond to bids and proposals
* Complete required registrations
* Identify necessary industry codes
* Register in the System for Award Management (SAM)
* Navigate other web-based applications
* Facilitate training and “matchmaking: opportunities
1. **Meet or exceed all client counseling and training goals in all categories**

**Billings Center goals:**

* Annual Direct Client Service “Counseling & Preparation Time” – **547** hours
* Training/Outreach Events – **8**
* “Active” Clients – **272** Commercial Companies, of those, **66** “NEW” clients

**Expected outcome: Average annual awards realized by Billings PTAC clients - $17-$25 million**

**Statewide goals (all seven centers across the state including Billings)**

* Annual Direct Client Service “Counseling & Preparation Time” – **2608** hours
* Training/Outreach Events – **43**
* “Active” Clients – **1097** Commercial Companies – Of those, **210** “NEW” clients

**Expected outcome: Average annual awards realized by PTAC clients statewide - $80-$100 million**

**Continue** to build capacity and develop technical expertise among all PTAC advisors across the state. Four advisors have obtained their Certified Procurement Professional (CPP) certification through the Association Procurement Technical Assistance Center (APTAC) and two more will received CPP certification in November, 2018.

**Continue** to build awareness of program by outreach to the business community and federal/state agencies and **Continue** to develop high quality training workshops and expand the reach of the matchmaking event.

**Continue** to foster productive communication, collaboration and relationships among all key stakeholders for the benefit of Montana businesses. This includes staff, host agencies, resource partners and our Congressional Delegation

# Big Sky Finance Workplan and Goals FY2019

1. **Work Plan:**
* SBA 504 Loan Program (504) – The Business Finance team administers the SBA 504 Loan program throughout the entire state of Montana. This includes marketing, underwriting, closing and servicing SBA 504 loans. Big Sky EDC is a Certified Development Company through the U.S. Small Business Administration.
* Big EDC Revolving Loan Fund (RLF) – The Business Finance team administers the Big Sky EDC Revolving Loan Fund within Yellowstone County. This includes marketing, underwriting, closing and servicing the RLF loans.
* State Small Business Credit Initiative (SSBCI) – The Business Finance team administers the funds from the SSBCI program for Big Sky Economic Development. These funds may be lent to eligible businesses located in the state of Montana, for a variety of purposes.
1. **Finance Department Goals:**

SBA 504 Loan Program -

1. Achieve minimum of $8.5MM in SBA 504 Loan fundings.
* Marketing of program to increase growth
	+ Lender visits/trainings across state (10)
* Conferences/trade shows attendance (2)
* MIB (Montana Independent Bankers Annual event)
* MMEC Trade Show
* Media advertising – various periodicals and newsprint media
* Newsletter – BSF newsletter monthly to lenders and key partners
1. Finalize Big Sky Finance Merger
* Additional FTE – Loan Specialist hired during FY ’19
* Loan software upgrade complete and implemented
1. Maintain SBA Lender Portal rating of 1 (This rating measures our CDC up against our peers. Important to be at a 1 – demonstrates solid portfolio management and quality loan approvals).
* Portfolio Management
	+ Quality servicing of loan portfolio
	+ Monitor concentration levels – No industry to exceed 30% of total portfolio $’s
* Clean SBA audits
	+ CFR and QAR audits – pass grading for each

Follow up and finalize SMART review currently underway with SBA

1. Update SBA 504 Lending Policies and Procedures
* Update as part of merged entity and current processes and procedures
* Finalize loan rating policy
1. Complete annual Independent Loan Review
* No new findings from previous years

Revolving Loan Fund

* + - 1. Disburse $200,000 in new loans to local small businesses

SSBCI

1. Develop strategy for ongoing use of funds for lending purposes

During FYE 2018, Big Sky EDC initiated and officially completed the merger of MCFC with Big Sky EDC effective June 1, 2017, resulting in Big Sky Finance. The merger does continue to be a work in progress as we work toward formulating policies and procedures for the merged entity and establishing more defined roles amongst the new staff. We have gone through a conversion to a new loan software which we continue to learn and efficiently utilize in our day to day operations.

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# SBDC Workplan and Goals FY2019

The Small Business Development Center at Big Sky Economic Development is the premier resource for business owners to thrive! **The center provides (free) consulting, training, technical assistance and strategies to startup, stabilize or expand a business.**

Services are offered to (new and existing) for-profit companies with 500 or fewer employees located in a 9-county region: *Yellowstone, Big Horn, Carbon, Golden Valley, Musselshell, Petroleum, Stillwater, Sweet Grass and Wheatland* (98% of Montana companies are considered small business). Drawing on a talented and experienced team of accredited business consultants, community partners, and stakeholders

**Business Planning/Strategic Planning**

* For new and existing businesses: we partner with you to define your vision, mission, values, strategy and how to achieve optimal results by developing a plan that encompasses clearly defined goals and directives for achieving optimal success. It must pencil to work.

**Financing (startup, stabilize or expand)**

* We partner with you and your lender throughout the process to develop your plan, projections, market research, and loan package to ensure an optimal result for financing the project.

**Market Research**

* We work with clients to access relevant market & industry data

**Business Management & Development**

* We work with you to fine tune, develop, or implement a management style, plan and system that will produce optimal results for your business

**Human Resources**

* Invest in your greatest asset! Find out why this will pay dividends for years to come! Human resources are scarce. We partner with your company to learn about resources and strategies to lower turnover, increase productivity and enhance training opportunities through the incumbent workforce training grant program.

**Buying & Selling a Business**

* Don’t know where to start? Don’t fully understand the process? How much is it worth? How much will a bank lend me? Meet with our team to learn more.

**Specialized Business Consulting, Training, Technical assistance and strategizing**

* We provide customized services to help your startup, stabilize & expand your business.

**SBDC PROGRAM GOALS** (Calendar Year)

1. **Seek Wisdom from the Executive Director, BSED Board and the SBDC Advisory Council**
* Keep semi-weekly meeting with ED to inform and seek guidance as needed
* Attend all Board meetings to inform and seek guidance/approval as needed
* Assemble the SBDC Advisory Council (semi-annually): their mission is to collaboratively offer guidance, market insight, and support for the enhancement of services that help small businesses start, grow, or expand their business.
1. **Direct & Manage a High-Performing Center**
* Exceed goals set as negotiated (by our team) and outlined in our contract with MDOC as the Lead Center under the SBA.
* Manage contract and grant administration duties for the regional center
* Assist clients in ascertaining $5.6MM Capital Infusion (loan, investor, owner equity, grants)
* 1200 (one-on-one) consulting hours with clients
* 40 long-term clients (a minimum of 5 hours of consulting)
* 160 lobs created/retained
* Quarterly Circuit rider to provide outreach to all counties served
* Attend required events:
	+ ASBDC conference - Tourism Conference
	+ Quarterly Meetings - Innovate Montana
* 22 hours (annually) of professional development per FTE
* Training/events (annual commitments)
	+ 12 pre-business client workshops held annually (1 per month)
	+ NxLevel (10-week entrepreneurship course) offered annually (Start date of September 19- December 5, 2018)
	+ Profit Mastery (offered online only)
	+ Buying and selling a business with Murphy Business Solutions (Tom Nelson)
	+ Trademarks, copyrights, and fundamental intellectual property considerations with WEBBER pllc (Jennifer Webber)
	+ Marketing (Allyn Hulteng)
	+ Accounting & Cash flow (Michael Morrison)
	+ Custom training (market demand & capacity)
	+ 1-parnter event with NADC & Native American Business Advisor
	+ Early-Stage Montana (place holder if program continues)
1. **Client attraction, community engagement & organizational partnership**
* Support 4 Women’s Business Uncorked (Women’s Business networking/training event)
* Sponsor Yellowstone Valley Woman’s enterprising woman (partnership with Melanie)
* 1 Match Making (government contracting) event partnership with PTAC & VBOC
* Support 1 Veteran’s partnership event with VBOC
* 12-15 lender meetings (lunches, coffee meetings, lender office visits)
* Partner with Big Sky Finance on annual lender appreciation breakfast
* Market success stories for the program and the client (with client permission) minimum of 2 that the lead center in Helena can utilize in overall marketing & branding efforts
* SBA Small Business Awards
	+ Lead nomination committee for BSED
		- Ask for nominations from Member Investors & Stakeholders
		- Staff nominations
		- BSED criteria & selection
		- Manage nomination process
		- Attend & support award ceremony & SBA lender training
	+ Serve on the Board of Trustees for Rocky Mountain College (Dena)
		- Guest lecture for entrepreneurship students
	+ Serve on the Board of Beartooth RC & D (Lorene)

# B.E.A.R. Program Work Plan and Goals

**Resource team providing private sector enhancement:**

**Sustain and grow the BEAR resource team** **/enhance the expertise offered to clients**

* Meet with all prospective volunteers
* Recruit members to fill identified gaps in expertise on the team
* Volunteer appreciation (in-kind Member Investor levels)

**Mentor companies**:gather information, assess and refer small business owners to experts (private sector volunteers)

* Active Think-Tank: 12 meetings per year with a minimum of 25 referrals
	+ Hold think tank meetings and on-site tours to evaluate company needs
	+ BEAR volunteers meet with clients by appointment
	+ Follow-up surveys/interview with volunteers & companies post referral

**Attract Clients & promote the program:**

* + Work in partnership with the BEAR team, Melanie & Karen (BEAR Chair) to develop a competition that will create awareness and grow a client pipeline. The target market is the business owner who is working in their business every day (doing well) but not working on their business. They are not struggling but they are also not growing. We want to find them and launch them higher than they knew was possible.
	+ Partner with the Director of Recruitment & Outreach (Allison) on efforts to connect with the existing business community
	+ Support rural BEAR and outreach efforts within the SBDC 9 county region
	+ Sponsor PTAC Match Making event
	+ Sponsor or Support local events and organizations

**Write and manage** applications for business owners in need of the Big Sky Economic Development Trust Fund (Job Creation Grant) and partner with clients on the Workforce Training Grant process.

# Entrepreneurship Space Program Workplan and Goals FY 2019

*FY 2019 is a ramp up year – Program Goals directly related to building a solid foundation from which we can build*

1. **Formalize the plan and set phasing goals to execute**
* Budget
	+ Revenue model
		- Identify and apply for grants
		- Member Investors
		- Phases & goals
	+ Operations budget
	+ Sustainability
* Programming
* Staffing
* Marketing & Branding
1. **Codify roles/responsibilities of the strategy partners (who else, if anyone, needs to be at the table?)**
* Leadership
* Guidance
* Support
* Funding
* Education
1. **Identify staffing needs and management structure** (utilize recommendations from our consultant’s work as a guide)
2. **Recruit & train a Program Manager**
* Integrate new manager into the team at BSED
* Develop a solid work plan & goals (including training needed)
* Program manager to receive Business Incubation Management Certificate (online) & other identified & necessary training
* Program manager to build and grow relationships with strategy partners, entrepreneurs and the community
* **InBia – membership and attendance at annual conference** (program manager and Director to attend)
1. **Formalize operations plan for the space and the programming**
* Client intake, orientation & approval process
* Training/Education
* Data
* Mentors
* Resources
* Space (Physical & Virtual)
	+ Work with Operations Director and task force to design and program the space
* Technology
	+ Work with Operations Director and Strategy partners to identify and implement
* Access to capital
	+ Pathway to commercialization
1. **Build the hype & keep it going:**
* 3 Events designed to build the community and the pipeline (Early-Stage Montana, Reverse Pitch with Elation, Expert trainer/speaker event)
* Execute Marketing plan
* Identify and connect with innovators
* Build understanding of relevant market problems (connect with private sector companies)

# Community Development Workplan and Goals FY2019

**Community Development Program**

We provide leadership and resources to plan and initiate programs, projects, and partnerships that stimulate public and private investment, provide a better quality of place, and enhance the community’s economic wellbeing, providing the foundation for economic development and a vibrant economy.

**Community Development Work Plan:**

* Programs and Projects:
	+ Deliver project management and leadership for key planning, redevelopment, quality of place, and infrastructure projects from concept to completion
	+ Develop the Lockwood TEDD Industrial Park
	+ Cultivate and manage the Yellowstone County Inter-Local Agreement proposals
	+ Lead Brownfields Grant Program
	+ Manage Tax Abatement Applications
	+ Manage Yellowstone County Wildland Fire Fuels Reduction
* Partnerships and Placemaking:
	+ Build and maintain strategic regional partnerships
	+ Foster strategic placemaking, economic resilience, and quality of life investments
	+ Direct the Coal Country Coalition implementation strategies

**Community Development Program Goals**

* Fulfill 100% of the Interlocal Agreement and Emergency Services Agreement
* Foster development of Lockwood TEDD Industrial Park (And Strategic Priority)
	+ Manage Advisory Board for Yellowstone County
	+ Development annual work plan
	+ Expand the Zoning Jurisdictional Boundary and TEDD Boundary
	+ Secure infrastructure funding
	+ Build and maintain partnerships with property owners
* Strategic Placemaking
	+ Support three Space2Place Micro Placemaking Projects
	+ Administer Brownfields Assessment grant
		- Complete the Quality Assurance Project Plan
		- Complete 8 Phase I or Phase II Assessments
	+ Support Urban Renewal Districts (EBURD, SBBURA, LURA, Expo Gateway, DB)
		- Attend District Meetings
		- Provide expertise and assistance on redevelopment and growth projects
		- Support Trailhead Hospitality Corridor redevelopment
		- Support Convention Center development options
	+ Promote Parks and Trails
		- Advocate for development and maintenance of Heritage Trail System
		- Participate and support the Lockwood Pedestrian Safety District, TrailNet, and Chamber Trails Committee
	+ Coulson Park (And Strategic Priority)
		- Complete Master Plan
		- Secure funding for implementation of the Master Plan
		- Support Corette site mixed-use development options
	+ Coal Country Coalition (And Strategic Priority)
		- Lead annual Power Summit
		- Coordinate meetings of the Coalition
		- Recruit Affiliate Members
	+ Entryway Beatification (And Strategic Priority)
		- Entryways off Interstate
			* Partner with community groups to develop projects
		- Hwy 87 and Main MetraPark
			* Seek funding for Concept Plan
			* Develop Scope of Work
			* Secure Consultant
			* Complete Concept Plan
	+ Tax Abatements
		- Administer property owner/business requests
		- Assess property owner/business owner eligibility
		- Guide the property owner/business through the process

# BillingsWorks Workplan and Goals FY2019

BillingsWorks is a local workforce development collaboration hosted by Big Sky Economic Development and supported by members of a Steering Committee and over 80 public and private businesses. Workforce Development continues to be a strategic priority for Big Sky Economic Development and its many partners for our community and region.

The 2018 State of the Workforce Report confirmed again the strategic goals set for BillingsWorks, including BillingsWorks as a community and employer resource, training and education alignment with the jobs available in our market, being the business hub for work and learn opportunities, and helping businesses find qualified workers through talent attraction.

**BillingsWorks’ Strategic Priorities and Workplan for 2018-2019**

*GOAL 1: Partnership Accountability. As a workforce council will commit to continual collaboration and follow through to move the needle on workforce development in the Yellowstone County.*

**State of the Workforce Focus Groups and Event**

* + Conduct Industry, Education, NextGen and Workforce focus groups.
	+ Hold a State of the Workforce Event in Spring of 2019.

**Maintain MOUS Partnership and Collaboration**

* + Maintain the BillingsWorks Steering Committee
	+ Maintain Steering Committee and Workforce Council meetings.

**Continue updates to** [**www.billingsworks.org**](http://www.billingsworks.org) **so that it provides easy access to resources for employers, job seekers, and the workforce council**

* + Links to other resources from government agencies and programs such as the Billings Job Service, Department of Labor and Industry, Billings 365, etc.
	+ Serve as the educational/resource platform for Employers seeking an intern linking to RMC and MSU-B’s Career Link.
	+ Provide “quick data” sheets containing information about workforce issues, updated quarterly

**Build our MOU Partnerships and expand communication to provide timely information to current Workforce Council Members and to reach potential new members in the community.**

* + Add MOU partners that represent key sectors such as manufacturing and diverse perspectives such as NADC.
* Monthly BillingsWorks newsletter serving as a communication tool to the entire Workforce Council.
* BillingsWorks Workforce Council and Steering Committee will meet quarterly each year, with the State of the Workforce Event counting as one Council meeting
* Expand the social media presence of BillingsWorks through LinkedIn.

**Actions specifically determined by the Steering Committee:**

* Continue to support the Yellowstone IT Sector Partnership and build additional Industry Sector Partnerships. Possibly launching partnerships in Hospitality and Healthcare.
* Expand collaborations that elevate STEM understanding in our students by working on STEM Billings and Girls in Science initiatives.
* Improve communication plan to share successes/wins of BillingsWorks.
* BillingsWorks will serve as a pilot program for other Montana counties to learn from in hopes to support the creation of other local workforce councils/programs.
* *GOAL 2: Employer ToolKit. BillingsWorks will serve local employers in town by providing resources and counseling when needed*

**Update the Employer Toolkit website as a resource for businesses to address their immediate workforce needs.**

* + Include additional information on recruiting, hiring, HR, training and retention topics and publish as data sheets and on the website
* Provide links to other resources published by partner organizations and experts

**Complete at least 4 presentations or workshops for employers on recruiting, hiring, HR, training and retention issues.s**

* Partner with NextGen and the Billings Chamber for continued presentations on workforce development.
* Partner with SHRM, JSEC, SBDC, NextGen, staffing companies, and others to present workshops for employers
* Explore options for webinars or record presentations so they can be accessed on the BillingsWorks.org website as a resource

**Actions specifically determined by Steering Committee:**

* Adjust BillingsWorks Workforce Council meetings to serve as work sessions for industry and education partners rather than report outs.
* Add resources to online toolkit including links to resources specific to industry and other partner’s links.
* Continue to build work-based learning (internships, job shadowing, mentorships) connections for industries. Possibly partnering with UM and MSU on summer intern cohorts.
* *GOAL 3: Ensure the alignment of education and training systems with current and future workforce demand.*
* Develop soft skills/employability training and curriculum that is supported by our local industry. (Launch the Jobs for Montana Graduates/Sales and Customer Service program as well as the Yellowstone Strengths Academy and utilize both as pilot programs to learn and adapt from)
* Engage more businesses in CTE helping to create more business/education partners in the development of future-focused programs.
* Continue the growth of the mentorship/internship/apprenticeship programs.
* Work with CTE Director to support Career Cruising and Inspire programs for SD2 and beyond by implementing more work-based learning opportunities for students in local businesses/industries.
* Support the development of new CTE programs and enhance outdated programs
* Play an integral role in exploring facility and infrastructure needs for the implementation of innovative and successful CTE programs specifically focusing on the Career Center.

**Actions specifically determined by Steering Committee:**

* + Continue to provide businesses with apprenticeship options and information, connecting them with MTDLI.
	+ BillingsWorks in coalescence with the Chamber’s NextGEN Inspire group will continue to support the mentorship program with RMC and MSUB students.
	+ BillingsWorks will connect students not only with NextGEN mentors but help build a sustainable process for the colleges/universities to ensure mentorships are included in a student’s experience.
* *GOAL 4: Develop a talent attraction campaign that promotes the benefits of living and working in Billings and Yellowstone County.*

**College Career Fair Recruitment**

* Continue to support MSUB and RMC’s career fairs.

**Co-Promotion with Community Partners**

* Work with the Chamber to develop materials that co-promote Next Gen and Better off in Billings.
* Promote Billings “outdoor recreation” activities in materials for the college career fairs and connect students with resources on the betteroffinbillings.com site.

**Actions specifically determined by Steering Committee**

* Continue to work on and keep expanding the Better off in Billings message/campaign to reach a point where it can be successfully utilized by our local businesses for talent attraction/recruitment purposes.
* Create an online assessment utilizing statistics and data to illustrate to outside markets why people are Better off in Billings.
* Get more regional and state placement of this message (Airline magazines, trade magazines).
* Create Geo-Targeting digital media campaign to pin-point job seekers, Montana natives, etc. to consider Billings as a great place to move to.
* Create a method in which we can create a database of website users who have shown interest in Billings via the Better off in Billings online assessment and utilize this database to support ambassador groups with information about newcomers.

# VBOC Workplan and Goals FY 2019

The Veterans Business Outreach Center (VBOC) provides entrepreneurial development services for veterans, active duty, Guard, Reserve components and their spouses who are exploring, starting, growing or expanding a small business. The Center’s mission is to:  grow the number of businesses owned by veterans and members of the U.S. military community; increase the number of jobs created and retained by those businesses; and to maximize the growth rate, profitability and value of each business. Our center covers Montana, Utah, and Wyoming. The Center is fully funded under a Cooperative Agreement with the U.S. Small Business Administration.

* + - * 1. **Goal #1:** Boots to Business (B2B) Training. This two-day, eight-module standardized entrepreneurial development training curriculum is the product of the U.S. SBA’s partnership with the Institute for Veterans and Military Families provided by IVMF Syracuse and Mississippi State Universities.

***Measure:* 12 B2B training sessions on 6 military installations**

***Target:* 180 transitioning Service members**

* + - * 1. **Goal #2:** Boots to Business Reboot and Other Entrepreneurial Development Training. The Boots to Business Reboot standardized curriculum is like the B2B program and is targeted toward members of the military community who have already separated or retired from Service. This one-day training is taught in collaboration with resource partners.

***Measure:* 6 Reboot training sessions in 8 communities**

***Target:* 50 veterans**

Other entrepreneurial development training services address a spectrum of topics related to small business ownership for all members of the U.S. military community. These services are provided in collaboration with resource partners and include pre-business workshops, government contracting matchmaking events, industry and market research methods, and trainings tailored to meet specific needs.

***Measure:* 12 entrepreneurial development trainings in 8 communities**

***Target:*  160 active duty and veterans**

* + - * 1. **Goal #3:** Counseling, Consulting and Mentoring. In collaboration with our resources partners throughout MT, UT, and WY services to include concept assessments, business plan preparation assistance, comprehensive feasibility analysis and other individualized sessions tailored to members of the U.S. military community. To included referral to local resources’. Mentorship includes visits with clients to connect new business owners with their local score chapter.

***Measure:* 100 - 250 hours of counseling**

* + - * 1. **Goal #4:** Outreach, Education, Professional Collaboration, Network Formation. These activities further VBOC’s mission by providing education and outreach concerning key programs and services, and by building, promoting and maintaining effective public-private partnerships that support veteran entrepreneurship. Conducting outreach events in Bozeman, MT, Kalispell, MT and Missoula, MT in support of ensuring full coverage and collaboration of our network formations throughout the servicing area.
* ***Continue building the Center’s organizational infrastructure***
* ***Maintain standalone veteran-facing website for online service delivery***
* ***Continue interfacing to grow Military points of contact***

# Administrative Workplan and Goals FY2019

The administrative department is represented by the Controller and Director of Operations whose roles and responsibilities are to ensure the smooth and uninterrupted Financial, Human Resource, and day-to-day processes of BSED. The following areas offer opportunities to enhance organizational structure.

1. **Strengthen Budget Management and A/P Processing**
2. Onboard new A/P management system (Concur)
3. Automate credit card receipt tracking (Concur)
4. Outsource the paying of invoices
5. **Enhance Financial Reporting**
6. Restructure Budget to reflect GAAP accounting principles to more easily process and report end-of-month financial statements
7. Create a yearly cash flow projection for cash flow management
8. **Strengthen the Planning and Budgeting Process for FY2019**
9. Re-sequence the chain of events for Board and Staff Planning
10. Re-sequence the chain of events for the Budgeting Process
11. **Secure the Future Facility of BSED**
12. Administer the RFP process and bring final selection to the Board for consideration
13. Create a timeline for renovations and plan for moving into a new facility
14. Transition to new facility before July 1, 2019
15. **Enhance Organizational Structure**
16. Adopt updated handbook
17. Make all policies and office procedural information accessible to staff through shared drive reorganization
18. Cross-train key financial and administrative functions (SOP and succession plan)
19. Identify other successional needs within the organization
20. Evaluate the Salary Review Process and Compensation Structure
21. Create an asset management system
22. Update procurement policy
23. **Continue Work, Thrive, Live Initiatives**
24. Update the performance evaluation process
25. Continue work with the WTL committee to attract and retain BSED talent

# Member Investor Program Workplan and Goals FY19

Big Sky Economic Development’s Member Investor program is the direct conduit to private sector businesses in Yellowstone County. Through this program we have over 150 of the top companies providing expertise, financial support and a platform for economic development. Member Investors are our partners in delivering our mission and helping us to better understand what the private sector needs to grow and improve their businesses.

**Goal 1: Member Investor Program Retention**

* Maintain a minimum of 150 Member Investors
* Increase retention to 95% during the fiscal year
* Provide Executive Director monthly list of MI’s for personal call/visit
* Continue to improve billing and accounts receivable
	+ Add administrative assistance
	+ Bill first Friday of each quarter
	+ 30/60 day email notices & personal phone call at 90 days
* Increase the Membership Committee to 10 (5 board/5MI) and meet once per quarter to glean new ideas and prospects
* Cultivate prospect list
* Guidance on achieving program goals
* Provide retention suggestions
* Continue Member Investor awareness through BSED electronic communications including website, e-newsletter, social media
* Provide Executive Director a list of MI’s when invoice paid for personal thank you

**Goal 2: Member Investor Program Growth of $100,000 for FY 19\***

***\*Includes $50,000 for Biz Up in Founding Partners***

* Engage the boards to assist in growth of Member Investor program
	+ - 97% of Board companies as Member Investor
		- Make recommendations through email request
		- Ask board member to join in MI Visit
		- Provide board with Member Investor information to give to prospects and to better understand the benefits
		- Increased communication with board members
* One Ask from BSED If you are a BSED Member Investor we will only ask for funds one time per year\*

\*Exception for grant matching funds

* + All revenue from private sector into MI program
	+ Includes option for restricted funds to workforce, Biz-Up, special event
* Build new levels for Member Investors
* New names of levels
* Move minimum level to $1500
* Keep $2500, $5000, $7500,
* $10,000 Building Remarkable (Event Focus)
* Add $25,000 Level (Business Growth level)
* Biz-Up Founding Partners
* Up to 10 partners with three year specific focus on Biz-Up and Entrepreneur services
* Specific industry focus on growth in agriculture related businesses
* Confirm membership from the top 100 employers in Yellowstone County
* Proactively work with SBA504, PTAC, SBDC, VBOC, Community Development and Recruitment for Member Investor prospects

**Goal 3: Provide Member Investors with ongoing communications, events and educational opportunities**

* + Meeting one on one with each Member Investors during the fiscal year
		- Calendar blocked with room for five MI visits per week (30 weeks)
	+ Send organizational newsletter (Take Three) to all Member Investors on a weekly basis
	+ Increase to five deep contact list for each Member Investor company
	+ Host eight MI breakfasts/lunch with a goal of 10 member investor companies per event.
		- Have four of these events at MI Companies for expanded exposure
	+ Provide two industry specific forums targeted directly to Member Investors
		- Re-activate Healthcare committee for forums
	+ Annual Meeting focused with a minimum of 75% attendance of MI companies
	+ Invite to all BSED organizational and programmatic events

**Goal 4: Provide Accountability for the Resources Provided by the Member Investors**

* Increase real-time communications with MI’s using a standard email format and updated email templates
	+ Community recognitions
	+ New staff
* Provide a “Member Investors only” report once per year with contact information and resource allocation update – January 2019
* Provide updates about our member investors via email and using our partner’s communications avenues when appropriate
* Attend events hosted by our Member Investors to show our support for their work in the community
* Improve internal team communication about Member Investor company activities

**Goal 5: Business Outreach – Be the Resource for What is Happening in our Community**

* Research and build a comprehensive BRE plan as outlined in best practices from IEDC
* Have specific days for business canvassing
	+ One in September pre Annual Meeting
	+ One during Economic Development Week (May)
* Identify one business per month for outreach visit (non – Member Investor companies)
	+ Focus in areas of interest to recruitment
	+ Program Clients
* Plan BSED team outreach once per month for site visits and report out at staff meeting. Required to have each department represented
* Engage BEAR team in outreach planning and activities
	+ Site Visits
	+ Canvassing days
	+ One on one (with gift card as thank you for business)
* Gather information about potential projects through media, commercial realtors, contractors, site visits, city personnel, building permits and internal program clients.

**Goal 6: Implement and fully use MI Relationship Management(MIRM) Software**

* Update all data for Member Investor contacts
* Track event, committee, and mission engagement
* Train Executive Director and Program Directors in MIRM
* Encourage MI events hosted by MI, supported by BSED
* Brand events as “BSED Member Investor Event”
* Provide each MI with a branded item for their office with BSED Investor and level (window cling, plaque, desk item)
* Improve MI Web presence through featured MI news and stories on Social Media sites in real time
* Increase awareness of MI companies with internal staff

**Goal 7: Continue to develop BillingsWorks as the lead organization in Yellowstone County and State for Workforce Development**

* Provide leadership and support BillingsWorks Director in implementing Steering Committee work plan and organizational budgets
* Actively participate in BillingsWorks Steering Committee by attending meetings and provide direct input/manpower for work plan
* Provide information to MI’s to engage with the BillingsWorks program and provide information from MI events about workforce challenges or needs to BillingsWorks Director

# Organizational Marketing/Communications WorkPlan and Goals FY19

Organizational marketing and communications will oversee the external messaging for Big Sky Economic Development. This includes brand standards, public relations, media relations and online and social media. All communications and marketing will directly support the mission of Big Sky Economic Development.

**Goal 1: Streamline Organizational Marketing to Focus on three mission focuses (Community Development, New Business Recruitment, Business Growth Services)**

* Maintain brand standards
* Update organizational and programmatic photo library
* Provide organizational collateral for use by all departments
* Provide organizational library of photos and logos for staff use
* Provide organizational marketing calendar showing all marketing opportunities available for programs
* Complete redesign of business cards for organization
* Maintain marketing closet for BSED team use to include promotional items, organizational documents, folders
* Build BSED PowerPoint deck for staff use

**Goal 2: Deliver quality organizational events**

* Annual Meeting
* Lender Appreciation Breakfasts (Billings – January, Helena – TBD)
* PTAC Matchmaking
* Veteran’s Symposium (November
* State of the Workforce Event – Better Off in Billings – Space2Place
	+ Community Development & BillingsWorks
* SBDC Event
* Member Investor Forums x2

**Goal 3: Increase focus on PR opportunities for the organization**

* Continue using Building Remarkable tagline for all PR & community related activities through this fiscal year
* Gather success stories monthly from each department and write 400 word articles w/photos to create library for PR pitches to media (regional & national) and for use on social media and website
* Use staff meetings, social media, traditional media, and networking to find real time news to send to constituent groups through electronic media
* Pitch BSED story monthly to regional media to keep business news front and center
* Continue 2x per month Community Seven
* Attend community and business events for awareness and knowledge
* Use organizational PowerPoint for community presentations by BSED team
	+ Neighborhood Task Forces
	+ Service Clubs
	+ MI Boards
	+ Non-Profit/Community Organizations

**Goal 4: Design & Deliver quality communication documents relevant to the organization**

* Annual Report (Fall)
* Community Report (Winter)
* Progress Report (February)
* Commissioners & Board Budget Report
* FY 19-20 Strategic Plan Document (August)

**Goal 5: Programmatic Marketing**

* Marketing Plan for Biz-Up
* Complete two-year strategy for Big Sky Finance
* Develop Member Investor Icon and incorporate tagline Building Remarkable into all MI materials
* Provide marketing plan template for each program
* Meet quarterly with each program team to address upcoming needs
* Business Growth Services Marketing Focus

# Recruitment Workplan and Goals FY2019

**Targeted In-House Lead Generation**

1. Ag Processing
2. Research supply chain in the region to determine opportunities
3. Identify central businesses within the industry
4. Meet with processors in other communities regarding process, challenges and opportunities
5. Develop the business case for the types of agricultural processing that best fits area assets
6. Meet with companies in the industry in other communities to begin looking for synergies and opportunities
7. Work with existing Ag group to determine if there is a need for a sector partnership or existing infrastructure we can connect with
8. Utilize website optimization and targeted marketing to engage leaders in the industry regarding the opportunity in Billings
9. Tech
10. Continue to enhance and support the Tech Sector Partnership
11. Work with key board members and area CEOs to develop a list of technology companies that would enhance/complement the existing businesses
12. Utilize website optimization and targeted marketing to engage leaders in the industry regarding the opportunity in Billings
13. TEDD
14. Support the marketing of the TEDD for business relocation and expansion
15. Continue attend the TEDD committee meetings

**General Recruitment Prospecting**

1. Site Selectors
	1. Maintain relationships with site selectors through outbound visits (2), engaging community news emails, and holiday gifts
2. Commercial Realtors
	1. Continue to work to add value to BSED’s relationship with the commercial realtor community including a minimum of 4 BSED hosted lunch updates/roundtables
3. World Trade Center Partnership
4. Work with the Montana World Trade center to develop prospects in international markets that fit within our community
5. Support Zoot Job Creation and site utilization

**Special Projects**

1. One Big Sky District Project Management
	1. Continue to provide project management for the analysis in coordination with the Strategy partners
	2. Facilitate the invoicing and submittal processes
2. Air Service
	1. Continued support and participation on the Chamber’s Air Service Committee
	2. Participation by Director of Recruitment or Executive Director on outreach visits to site planners and participation in the Mead Hunt Conference
3. Economic Pulse
	1. Provide the 2019 economic pulse piece in January of 2019
4. Downtown Retail Support
	1. Support the DBA in recruiting through data, collateral pieces,

and identifying retail and downtown prospects

1. Update and refine Think Billings website, and collateral in partnership with the Marketing Department

Business Outreach Workplan and Goals FY 2019

Business Outreach (Business Retention &Expansion (BRE)) is the organizational plan to be engaged with all businesses in our community. The goal is to learn what existing businesses are doing and what their needs are for growth, as well as, attracting and helping new businesses come to Yellowstone County. This will be achieved with the entire team at Big Sky Economic Development continuously outreaching to private businesses and community organizations providing education and resources while gleaning a clear understanding of our business landscape. The Business Outreach Project Manager(BOPM) will maintain this program and provide quarterly updates.

**GOAL 1: BSED team**(Director preferred/one staff member required) will attend one site visit per month to a business in Yellowstone county.

* Businesses will be selected based upon current projects, new to the community or companies we do not have direct contact with through our current programs.
* Business Outreach Project Manager(BOPM) will schedule these visits and businesses will come from referrals during staff meetings or Directors meetings

**GOAL 2: Program Teams**Each program will conduct one outreach visit per month with their team to a business or community organization specific to a client or project currently involved with the program.

* The team will report out under the Outreach section of the Staff Meeting agenda and provide a written update to the BOPM
* The Business Outreach Project Manager will maintain a database for these visits

**GOAL 3: Strategic Priority Leads**
Based on the strategic plan identify key businesses for strategic priority outreach visits or engagement

* In each key area identify one business per priority(workforce, strategic placemaking, economic diversity & innovation) per quarter for a total of 12 projects/businesses per year directly related to strategic priorities.
* BOPM will work with team leads to identify and arrange those visits

**GOAL 4: BEAR Team**

* BEAR team will continue to meet once per month to help specific businesses identified by the volunteers of BEAR as needing additional business assistance or expertise.
* The BEAR coordinator will provide updates to the BOPM for record keeping of the BEAR teams efforts
* Twice per year (Sept/May) the BEAR team will sponsor a Community Outreach Day or Business Appreciation Day. In small teams the BEAR team will blanket the county with information about BSED and a thank you gift to share our appreciation for their business. Community Outreach teams will also involve the BSED staff and board of directors.

**GOAL 5:** **Executive Director and Director of Member Investors**
4 visits per month with key senior business leadership in our community for a high level view of the business climate.

* These visits will be determined per quarter and a written summary will be provided to the BOPM at the end of each month.
* These visits will also involve a board member if available to increase engagement with the board through the outreach program.

Executive Director Focus FY 2019

**Strategic Priorities**

1. Strategic Placemaking Initiatives (lead/support role)
2. One Big Sky District Development Planning Project (lead role w/ partners)
3. Entrepreneurship Model Launch (support role)
4. Workforce Development (support role)

**Community Leadership**

1. Community Vision Leadership—(strategic placemaking initiatives, workforce development)
2. Key Partnerships Stewardship and Development
* Engage new MSU-B Chancellor
* Engage new SD2 Superintendent
* Engage new City Administrator and team
* Maintain partnerships—Billings Chamber, RMC, Yellowstone County, DBP/Alliance, City of Billings, City of Laurel (includes service on Chamber Board and DBP Board)

**Organization Leadership/Duties**

1. Work, Thrive, Live/ Staff Development (lead/support role)
2. Strategic Planning
* Future Facilities (support/lead)
* Opportunity Fund Strategy
1. Program Support
* Business Finance Growth Plan (support role)
* VBOC Transition
* Enhance Business Recruitment (support role)
* Member Investor Relationships (support role)
* Others--ongoing
1. Board Engagement (lead/support)

**Economic Development Leadership**

1. MEDA Board President
2. Economic Development Policy Advocacy (2019 Session) (MEDA, MT Chamber, MT Infrastructure Coalition)
3. 2019 Legislative Priorities (w/ Ad hoc Legislative Committee)