

CEDAS STRATEGIC PLANNING RETREAT

APRIL 5, 2007

INTRODUCTION

The Connecticut Economic Development Association (CEDAS) Board, officers and members conducted a strategic planning retreat on April 5, 2007. The participants reaffirmed and refined the mission of the organization and identified strategic objectives and specific actions to pursue to achieve the mission. This report provides a summary of the proceedings and the strategic plan and priority objectives. Throughout the document commentary, advice, or issues for further discussion are presented in italics. There are still some important decisions to be made and priorities to be set. Items which need to be discussed further, or issues to be resolved, are presented in italics as well.

SUMMARY OF PROCEEDINGS

The CEDAS Board convened this retreat to develop a strategic action plan consistent with its mission. The action plan would identify and prioritize objectives and actions to fulfill members' needs and address the organizational development or management needs of CEDAS as well. The results of this retreat would be strategic objectives and actions which would form the basis for a work plan for the organization.

MISSION

Before discussing strategic objectives the group was asked to review and reaffirm CEDAS' mission in order to ensure that the objectives and actions developed at the retreat would reinforce the mission of the organization. Members were asked to complete the following sentence: "The mission of CEDAS is to..." The following are the responses:

- To promote the continuous improvement of the profession.
- To serve the professional needs of its 200 plus members.
- To assist with the improvement of the State's economy.
- To further the economic development profession.
- To develop educational programs or business practices for economic development.
- To provide educational opportunities, to promote the profession and economic development activities, and to create policies and strategies for State economic development.
- To promote economic development and the profession in the state of Connecticut.
- To provide a forum for economic development practitioners to network, share best practices and sharpen their skills.
- To represent the interest of the profession in the public policy process.
- To unify economic development work in the state of Connecticut by being the go to organization for business development, initiatives, and economic development issues.

The participants were asked to compare these mission statements with statements taken from the introduction to the organization from its website, and from the purpose statement from its bylaws. Those are as follows:

Web Page

CEDAS is committed to advancing the practice of economic development.

Bylaws

The mission of CEDAS is to coordinate economic development concerns.

The participants were asked to discuss the implications of the various mission statements and arrive at a single statement. During this discussion two distinct but related missions were identified: one to improve the state's economy and one to support and educate CEDAS members to advance economic development practice.

For some participants the primary mission should be to improve the State's economy, with CEDAS members contributing to that mission by networking, education, and involvement in public policy. For others, the primary mission should be to support CEDAS members with education, training and networking opportunities. The presumption is that by focusing on members and enhancing their knowledge and skills, CEDAS would be working to help improve the state's economy.

This is a subtle but important distinction insofar as the primary mission is what should inform the CEDAS Board's decisions on products, services, or organizational issues, on what actions or activities it will undertake and where to allocate limited resources.

There was also a discussion as to whether CEDAS should emphasize advancing the skills and practice of its members or more broadly advancing the profession. Again, the distinction here is whether it is primarily an organization for members, or an organization of professionals whose members wish to reach out to the broader array of allied organizations and practitioners both public and private who influence economic development.

As a result of these discussions the group agreed to the following mission statement:

The mission of CEDAS is to advance the practice and process of economic development in the State of Connecticut.

Neither the CEDAS website nor its bylaws specifically identify strategic objectives, at least not by that name. However, there are certain strategies or core activities that are identified in these two documents. They were also posted and discussed among members.

From the bylaws the following activities are identified:

- Provide a forum for the economic development community.
- Sponsor economic development educational programs and seminars.
- Facilitate communication and coordination among the Connecticut Department of Economic and Community Development, the Connecticut Economic Resource Center and CEDAS members.
- Stimulate networking and the exchange of information among economic development professionals, commissions, organizations, business and other interested individuals.
- Foster sustainable economic growth in Connecticut.
- Propose and support legislation necessary to improve the Connecticut economy.

From the web page the following activities are identified:

- Encourage communication among its members by providing a forum for discussion and information exchange.
- Sponsor or co-sponsor educational programs, workshops and seminars on best practices, new legislation, downtown development and issues pertaining to the State's economy.
- Lobby for legislation necessary to sustain and improve the State's economy.

The purpose statement in the bylaws is much broader than the mission statement drawn from the description of the organization on the web page, the latter being more focused on advancing the practice of economic development. There's also considerable overlap between the objectives or activities identified in the bylaws and the web page. There was general agreement that all of these statements of activities were accurate and valid.

Business Scan

The participants then took a moment to conduct a brief business scan which involved identifying their members, their customers, and their products and services.

CEDAS members are primarily municipal economic development professionals or practitioners, including paid staff, some volunteers and some appointed officials. State economic development employees, regional economic development practitioners, private individuals involved in some aspects of economic development, some trade groups (such as the Workforce Alliance or the MetroHartford Alliance which are similar to regional practitioners), and some educators are also represented.

There was a discussion as to whether there were any customers for CEDAS products or services outside of its membership. This related to the previous discussion as to whether CEDAS should be primarily an organization for members or an organization providing services to all economic development practitioners and professionals. While it was recognized there are some possible clients or customers for some CEDAS products or services, such as local elected officials and State legislators, there was no agreement that CEDAS should be directing any particular products or services to anyone outside its membership. *(This discussion reinforced the importance of agreeing on the mission statement. For those participants who felt that there was*

a potential market for CEDAS services, the potential was both to engage non-members in CEDAS activities but perhaps more importantly for CEDAS to influence practitioners and in that way to help improve the State's economy.)

The discussion then moved on to the products and services provided by CEDAS. Participants agreed there were four categories as follows: communications, networking, education, and public policy. Some members identified the Rally/EDDY as a separate service, while others felt it should be included in the broader category of networking. For the purposes of identifying actions and priorities it was agreed to leave the rally under the general networking category.

Strategic Objectives

In order to identify actions and establish priorities, four stations were established in the room, one for each of the four products or services identified. Another station, a "parking lot", was established for any ideas which members generated that did not fit into any of the other categories. Participants were asked to write one idea on one sticky note for any actions which they felt should be considered under any of the products or service areas. Members were asked to post their ideas at the proper station, and these ideas were then quickly sorted in an attempt to create categories of activities within the product and service areas. In addition to the four originally identified categories, two categories emerged from the parking lot, one dealing with recruitment of members and the other dealing with management and administration of the organization.

These six categories became the strategic objectives identified by the participants. The participants were then asked to rank these categories in order of importance. The members were each given four votes, no more of two of which could be applied to any one category. The criteria for ranking was to assign priorities based on which of these strategic objectives should receive more resources or should be improved. In other words, the strongest activities would presumably receive the lower priorities while the weakest activities would receive the higher priorities. This was a way to identify areas in need of improvement.

The categories were ranked as follows: communications (23 votes), recruiting (16 votes), management (8 votes), education (6 votes), networking (5 votes) and public policy (4 votes).

CEDAS STRATEGIC PLAN

MISSION STATEMENT

CEDAS' mission is to advance the practice and process of economic development in Connecticut.

(Note: this statement does not match the purpose statement described in CEDAS bylaws, but is very similar to your self-description in the opening paragraph of your website. You may want to at least revise the opening of the website to reflect the statements made at the retreat.)

Core Responsibilities

- Provide a forum for the economic development community.
- Sponsor economic development educational programs and seminars.
- Facilitate communication and coordination among the Connecticut Department of Economic and Community Development, the Connecticut Economic Resource Center and CEDAS members.
- Stimulate networking and the exchange of information among economic development professionals, commissions, organizations, business and other interested individuals.
- Foster sustainable economic growth in Connecticut.
- Propose and support legislation necessary to improve the Connecticut economy.

(I have called the above items core responsibilities, but they are listed under the purpose statement of CEDAS in the bylaws.)

Strategic Objectives

1. To improve **communications** between the Board and the membership, among members, and with those outside the CEDAS membership.
 - a. increase or enhance the use of the internet as a primary medium for communication with and among members.
 - Establish links to and from the CEDAS website to the websites of allied organizations or economic development practitioners (e.g., chambers of commerce, CBIA, regional economic organizations, etc.)
 - Create a blog and/or list serve to facilitate real time interactive communications among members. *(Should this be a member's only service or an open enrollment?)*
 - Continue posting job openings, state, regional and national, on the website.

- Use the website as the primary medium for posting request for proposals, request for qualifications, or other economic development related solicitations.
 - Use the web to host online meetings, teleconferencing, etc. (*Was this intended to be a tool for use by the Board and executive committee, or the full membership, or for both?*)
- b. Increase the value of the CEDAS newsletter to members and as a vehicle to promote CEDAS as an organization.
- Seek out more stories on member activities.
 - Contact members from the distinct regions of the state and encourage them to report on activities in their area. (Possible contacts are those working in State agencies or in regional economic development agencies.)
 - Publish articles in the newsletter on local, state, and national economic development stories.
 - Provide links to key news stories and events reported in other media (*this is currently available by clicking on the news tab on the CEDAS website*).
- c. Strengthen the CEDAS brand outside of the membership.
- Establish stronger relationships with news media around the state by meeting quarterly with editorial boards to discuss economic development projects or issues.
 - Encourage Board members to write OP–ED pieces stating CEDAS’ position on important issues or topics affecting economic development.
 - Seek opportunities for CEDAS members to sit on panels, radio talk shows, and other venues to bring visibility to the association and establish CEDAS as an expert organization.
 - Arrange for periodic meetings with CEDAS Board members and policy makers or experts in state government in both the administrative and legislative branches to conduct briefings on important policy issues, emerging trends, or practice or process issues. (*This item will relate directly to some of the recommendations under the policy objective to the extent that CEDAS must decide how it will identify which concerns or emerging issues or trends it wishes to focus on and bring to the attention of state policy makers. This bullet under communication would focus on the mechanics of how to organize and arrange those small policy briefings, who should be invited, etc.*)

- Encourage more direct personal contact by Board members with new CEDAS members to welcome them, explain CEDAS' activities and committee structure, gauge why the new member joined and what services they would be interested in.
2. **Recruit** new members to CEDAS to increase the member base and to broaden the types of economic development practitioners in the organization.
 - a. Reach out to other groups or organizations for membership (e.g., local SBA offices, local economic development commissioners).
 - b. Identify communities that do not have a CEDAS member, identify the staff person responsible for economic development activities, and have a CEDAS member in their region contact them for recruiting purposes.
 - c. Explore creating an associate member category and market that category to professionals or practitioners to expand the membership base (e.g., commercial realtors).
 - d. Recruit new members at all CEDAS and non-CEDAS events.
 - e. Develop a marketing campaign, including marketing materials that describe CEDAS' mission, activities, and services and highlights the benefits of membership. *(This conversation occurred late in the session but it is essential to provide all "recruiters" with the recruiting campaign pitch and talking points. This exercise will also help to develop a CEDAS brand and as a prerequisite to any recruiting campaign activities identified above.)*
 - f. Establish a \$25.00 membership fee for economic development commission members, and as part of that membership a free or discounted participation fee to the Community Builders Institutes, to encourage participation from volunteer economic development commission members.
 - g. Arrange to have the commissioner of economic development to offer a "diploma" to graduates of the Community Builders Institute programs.
 - h. At the rally, educate attendees about the economic development successes and achievements of CEDAS members.
 3. Improve CEDAS' **management** capacity to provide more consistency and continuity in the maintenance and provision of CEDAS services and products, and general organizational management.
 - a. Investigate the possibility and feasibility of hiring an executive director. This would include defining the job description, comparing that job description to other services already being contracted for by CEDAS, and determining whether an executive director could be engaged by CEDAS based on current financial resources.

- b. Encourage CEDAS Board members, in particular committee chairs, to actively recruit CEDAS members and encourage them to join subcommittees to increase the resources available to carry out the subcommittees' responsibilities.
 - c. Examine the organization and structure of the committees as they apply to networking activities, educational programming, and the Rally/EDDY awards programs. Determine whether this organizational structure should remain as is, or be altered in some way to improve coordination and efficiency of operations.
4. Improve or expand **networking** events and opportunities for CEDAS members, and use networking as an opportunity to reach out to non-members.
- a. Establish more frequent regular membership meetings to provide networking opportunities and to better engage CEDAS members not on the Board on a more regular basis.
 - b. Establish a quarterly meeting schedule. Suggested topics for quarterly meeting include tours of successful businesses, region specific topics and best practices sessions. *(There were several suggestions regarding quarterly meetings, including making them purely social events, or providing programs which highlight activities in the regions which implies the quarterly meetings would be held in various locations around the state. Are these quarterly meetings intended to be member's only meetings?)*
 - c. Hold at least one or two social events per year (e.g., UCONN football game).
 - d. Arrange and host forums for members to hear from special interest or activist groups (e.g., One Thousand Friends, Face of Connecticut, Partnership for Balanced Growth, etc.) who are advocating policies or pursuing agendas which have a direct or even indirect affect on economic development in the state.
 - e. Arrange for networking events in various regions of the state which involve non-member economic development players as well as CEDAS members.
 - f. Invite representatives of the Department of Transportation, Department of Environmental Protection, and other State agencies whose activities influence economic development practice or processes to CEDAS programs either as participants or audience members. (This action could also be included in the educational objective.)
5. Increase the number of **educational** program offerings for CEDAS members.
- a. Establish a best practices program curriculum for each program year. (Suggestions for best program topics included workforce development, development incentives, and tours of successful projects.)

- Survey members to determine what specific educational topics they would like to see offered by CEDAS as a best practices program. (The recent CEDAS member survey included open-ended questions where there were some specific topics identified by respondents, which could be used for reference and compared to suggestions by participants at the CEDAS retreat.)
 - Bring national educational certification preparatory programs to Connecticut.
 - Encourage at least one joint NEDA/CEDAS best practices session in Connecticut each year.
 - Continue the Community Builders Institute.
 - Develop programs that are relevant to and located in various regions in the state.
- b. Partner with other organizations to bring economic development programs to Connecticut.
- Seek strategic partnerships with similar membership organizations such as Connecticut Chapter of the America Planning Association, CBIA, the Connecticut Bar Association, etc. to provide joint training programs or conferences on topics of mutual interest.
- c. Provide more scholarships to educational events (it is unclear whether this idea is for scholarships for members to attend CEDAS sessions, to attend national programs, etc.).
6. Develop and enhance the **public policy** capacity of CEDAS.
- a. Identify one or two critical issues each year about which CEDAS wishes to provide position statements and make policy suggestions on, and prepare white papers on those policy issues to be provided to legislators and to CEDAS members.
- b. Convene a summit between economic development professionals and state agency heads at DECD, DOT, and DEP and OPM to discuss barriers to development.
- c. Increase the CEDAS presence during the legislative sessions to provide expert testimony and opinions on bills that would have any effect on the practice or process of economic development.
- Ensure that CEDAS has the volunteers who will be willing and able to testify on bills before key legislative committees on key legislation.
 - Encourage member contact with legislators on CEDAS' public policy agenda and on specific bills of interest to CEDAS.

- Use the CEDAS web page to better inform members of proposed legislation of interest to CEDAS and provide easy access to ways to contact legislators, track public hearings and track bills online, etc.
- Hire a firm to track pending legislation and inform the membership of progress on key legislative activities.

(As a prerequisite to this activity, CEDAS must establish the parameters and the criteria it will use to decide which pieces of legislation it wishes to advocate and/or testify on. It was suggested that CEDAS should focus its legislative activities on any bills which will somehow affect the way economic development is practiced, the tools available for economic development (such as tax incentives, development zones, brownfields programs, etc., or the structure of economic development programs inside state government administrative agencies, for example.)

Next Steps

The above strategic objectives are listed in order of priority as it was established at the CEDAS retreat. At the retreat only the strategic objectives themselves were prioritized. The individual suggested actions under each strategic objective were not prioritized. This is the next significant action step for the CEDAS Board and those members who participated in the retreat.

The strategic planning group should reconvene to first review the strategic plan and summary of proceedings and agree they are acceptable to all members and an accurate representation of what transpired at the retreat.

Next, this group should focus on the priority objectives. For instance, the first priority dealt with communications. The CEDAS strategic planning group should review and if necessary clarify the action steps that were recommended at the retreat. Then a ranking exercise should prioritize each action and establish which actions are your first one or two priorities. After these priority activities are identified, the strategic planning group should assign individuals to be responsible for carrying out those actions.

The strategic planning group should not attempt to begin working on the activity at this meeting, but instead should assign individuals or committees who will be responsible for developing work programs and doing whatever is necessary to accomplish the task. The strategic planning group and the executive committee should, however, establish a start and finish date for each activity.

Depending upon the time available to the strategic planning group, it may be possible to work through the first two or three priority objectives – communications, recruiting, and management.

One reminder about the strategic objectives and their priorities: retreat participants agreed they would rank the relative importance of each of the above strategic objectives according to which of the strategic objectives need more emphasis. In other words, the higher the strategic objective priority, the more it needs to be enhanced. The lower priority objectives, in particular

networking and education, are generally considered to be good or very good services by the members must be maintained at least at their current level. The one exception is the public policy area which was ranked last, but this may have been because it is not a fully developed activity or service of CEDAS at this time but may be one whose importance to certain aspects of CEDAS' mission is rising.