

# Getting Ready for Heartland 2024

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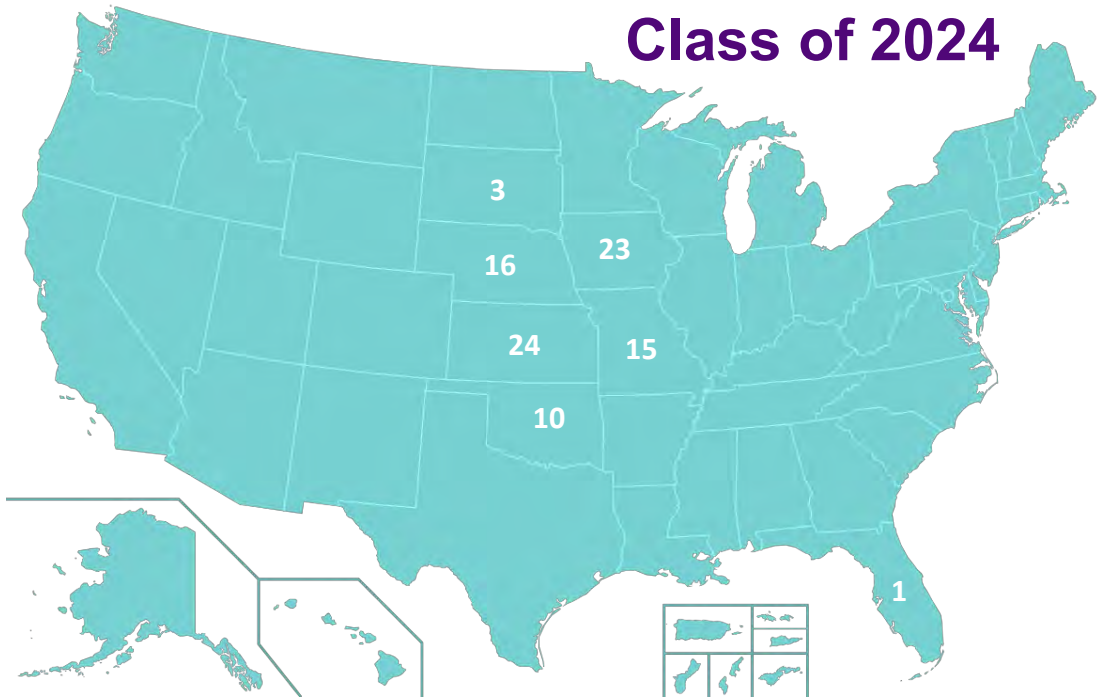


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Economic Development Course  
2024

**idm** Institute for  
Decision  
Making  
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**UNI** / University of Northern Iowa  
Business & Community Services

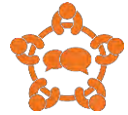
## Class of 2024





## Our Promise: Diverse Learning Opportunities

- Interactive Lectures · Best Practices · Real World Examples · Panels · Developer Discussions
- Connection with nationally recognized faculty
- Heartland Board Members – a wealth of experience
- State Connections – Bring Business Cards!
- A Course - not a Conference – IEDC assigned modules
- Check the Course Materials Webpage!

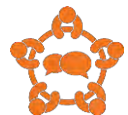


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## Our Promise: Diverse Learning Opportunities

- Responsible for own comfort – casual, coats, walking shoes, umbrellas
- Monday evening reception - optional
- Dinners planned Tuesday & Wednesday evening (Thursday is State Night – you plan on your own/together)
- Tours – Wednesday & Thursday (Tour Bus vs. Driving)
- Dietary Restrictions – Email James: [James.Hoelscher@uni.edu](mailto:James.Hoelscher@uni.edu)



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Monday, April 22, 2024 - Onsite

Welcome to Heartland!	
3:00 pm	Courtyard by Marriott – Check-in opens
4:00 – 6:00 pm	Course Registration Begins (Note: Registration is also open 7:00-7:45 a.m. Monday) Adams Pointe Conference Center – attached to hotel
4:00 – 7:00 pm	Welcome Reception (Informal/optional) Adams Pointe Conference Center – attached to hotel <i>(Reception includes hearty apps and two drink tickets)</i>

Tuesday, April 23, 2024

Schedule	
7:00 – 7:55 am	<b>Full Breakfast</b>
7:00 – 7:45 am	Registration (Note: registrations should be completed by 7:45 am)
8:00 – 8:30 am	<b>Welcome and Heartland Introduction</b> James Hoelscher, CEcD, Director, Heartland EDIC
8:30 – 9:30 am	<b>Managing an EDO – Rising to the Challenge</b> <ul style="list-style-type: none"> <li>Kiley Miller, Senior Communications &amp; Economic Development Mgr., Alliant Energy, IA</li> <li>Jim Gossett, CEO, Raccoon Valley Electric Cooperative, IA</li> </ul>
9:30 – 9:45 am	<b>Break</b>
9:45 – 10:45 am	<b>Managing an EDO (continued) – Strategic Relationships</b>
10:45 – 11:45 am	<b>Ethics in Economic Development - What's Keeping You Up at Night?</b> <ul style="list-style-type: none"> <li>James Hoelscher, CEcD, UNI Institute for Decision Making</li> <li>Debra Teufel, CEcD, President/CEO Hutchinson/Reno Chamber of Commerce, KS</li> <li>Mark Dawson, CEcD, Greater Clinton Area Chamber of Commerce, MO</li> </ul>
11:45 – 12:45 pm	<b>Lunch</b>
12:45-1:30 pm	<b>Bridging the Gap: Equity, Inclusion &amp; Welcoming</b> <ul style="list-style-type: none"> <li>Jonathan Long, Vice President of Diversity, Equity &amp; Inclusion, Tulsa Regional Chamber, OK</li> </ul>
1:30 – 2:00 pm	<b>Workforce Development &amp; Talent Retention/Attraction</b> <ul style="list-style-type: none"> <li>Rue Ramsey, Vice President, Workforce &amp; Talent Strategies, Economic Development, Tulsa Regional Chamber, OK</li> </ul>
2:00 – 2:20 pm	<b>Break</b>
2:20 – 3:45 pm	<b>Workforce Development &amp; Talent Retention/Attraction (Continued)</b>
3:45 – 4:00 pm	<b>Break</b>
4:00 – 4:45 pm	<b>Workforce Development &amp; Talent Retention/Attraction (Continued)</b>
5:30 pm	<b>Networking Fiesta – Adams Point Golf Course Club House</b> <i>(Fiesta includes buffet supper and non-alcoholic beverages, cash bar available)</i>

Wednesday, April 24, 2024

Schedule	
7:00 – 7:55 am	<b>Full Breakfast</b>
8:00 – 9:45 am	<b>Entrepreneurship – Ecosystem Evolution for New and Small Business</b> Rebecca Gubbels, Director – Growth & Mentoring Services, Enterprise Center Johnson County, MO
9:45 – 10:00 am	<b>Break (15 min.)</b>
10:00 – 11:00 am	<b>Financing for Economic Development – In Practice from the Trenches</b> <ul style="list-style-type: none"> <li>Mark Stombaugh, Director, Regional Engagement Division, Missouri Department of Economic Development, MO</li> <li>Tracy Brantner, CEcD, EDFP, MoCED, Executive Director, Johnson County Economic Development Corporation, MO</li> <li>Andrea Sitzes, EDFP, Market Executive/VP, Arvest Bank, Christian County, MO</li> </ul>
11:00 – 11:10 am	<b>Break (10 min.)</b>
11:10 – 12:15 pm	<b>Finance (continued)</b>
12:15 – 1:30 pm	<b>Lunch</b>
1:30 – 2:00 pm	<b>Bus ride from Adams Pointe to BridgeSpace, Downtown Lee's Summit</b>
2:00 – 4:15 pm	<b>Neighborhood/Community Development/Main Street – The Heart of the Matter Bus Tour &amp; Presentations</b> <ul style="list-style-type: none"> <li>BridgeSpace – Creation &amp; Tours</li> <li>Jim Thompson, Downtown Economic Development Specialist, Iowa Economic Development Authority, IA</li> <li>Carol Lilly, Downtown Economic Development Specialist, Iowa Economic Development Authority, IA</li> <li>Donnie Rogers, Jr., Executive Director, Downtown Lee's Summit, MO</li> </ul>
4:15 – 5:30 pm	<b>Neighborhood/Community Development – Self-Guided Tours, Lee's Summit, MO</b>
5:30 – 7:30 pm	<b>KC BBQ Dinner &amp; Networking</b> <i>(Dinner includes non-alcoholic beverages, cash bar available)</i>
7:15 pm	<b>Buses lead to depart for Adams Pointe</b>

Thursday, April 25, 2024

Schedule	
7:00 – 7:55 am	<b>Full Breakfast</b>
7:00 – 7:50 am	<b>Optional Professional Development Path and Options Breakfast Discussion</b> <ul style="list-style-type: none"> <li>Drew Conrad, CEcD, CERP, Director, UNI Institute for Decision Making, IA</li> </ul>
8:00 – 9:00 am	<b>Real Estate Development – Understanding the Land to Land the Project</b> <ul style="list-style-type: none"> <li>Courtney Dunbar CEcD, EDFP, AICP, Site Selection and Economic Development Leader, Burns &amp; McDonnell, NE</li> </ul>
9:00 – 9:10 am	<b>Break</b>
9:10 – 10:10 am	<b>Real Estate (continued)</b>
10:10 – 10:30 am	<b>Break</b>
10:30 – 11:30 pm	<b>Ethics in Economic Development - Continued</b>
11:30 – 12:30 pm	<b>Lunch</b>
12:30 – 5:00 pm	<b>Business Retention &amp; Expansion – Bus Tour, Tactics &amp; Tips</b> <ul style="list-style-type: none"> <li>Nick Glew, Vice President, Community Savings Bank, IA</li> <li>Danielle DuPree, Executive Director, Innovation Center, MO</li> <li>VanDoll Tour</li> </ul>
5:00 pm	<b>State Networking Dinners on your own – Kansas City Area</b>

Friday, April 26, 2024

Schedule	
7:00 – 7:55 am	<b>Full Breakfast</b>
8:00 – 9:30 am	<b>Understanding Site Selection – Conversation with the Experts</b> <ul style="list-style-type: none"> <li>Shannon Landauer, CEcD, President &amp; CEO, Iowa Lakes Corridor Development Corporation</li> <li>Beth Johnson, CEcD, Business Recruitment Project Manager, East Coast Region</li> <li>Lisa Franklin, CEcD, EDFP, Advisor, Global Location Strategies</li> </ul>
9:30 – 9:50 am	<b>Break</b>
9:50 – 11:00 am	<b>Preparing the Perfect Proposal – Responding to an RFP</b> <ul style="list-style-type: none"> <li>Beth Johnson, CEcD, Business Recruitment Project Manager, East Coast Region</li> </ul>
11:00 – 11:30 am	<b>Ready to Move Forward</b> <ul style="list-style-type: none"> <li>Karla Organist, CEcD &amp; James Hoelscher, CEcD University of Northern Iowa Institute for Decision Making</li> <li>Heartland Board of Directors &amp; Faculty</li> </ul>
11:30 am	<b>Adjourn</b>

2024 Heartland Economic Development Course

<https://heartland.uni.edu/2024-course-materials>

## Meet some classmates!

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- Introduce yourself and where you are from.
- Tell your group what your organization does and who it serves.
- Share the story about how or why you got into economic development.



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**Let's Start the Leap!**



# Strategic Planning: Essential Planning for ED Success



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Karla Organist, CEcD  
Institute for Decision Making  
University of Northern Iowa

## Today we will answer:

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- What exactly is strategic planning?
- Why should we plan?
- What are the critical steps in strategic planning?
- How can we keep our plan alive?



## What is strategic planning?

- Strategic planning is a process in which a community **looks at its current situation** and compares that situation to where it would like to be within a certain period of time. (From your manual)
- A quick Google search:
  - Strategic planning is a process in which an organization's leaders **define their vision for the future** and identify their organization's **goals and objectives**.
  - A process that **outlines the direction** of an organization.
  - When business leaders **map out their vision** for the organization's growth and how they're going to get there.
  - Strategic planning is an organization's process of **defining its strategy or direction**, and making decisions on allocating its resources to attain **strategic goals**.

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## What is strategic planning?

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The process is really about getting your ducks in a row.



## Planning in a Nut Eggshell:

- Decide on the scope, perspective and approach:
  - Is it community-wide?
  - For economic development?
  - For your organization?
  - Who is going to implement?
- Determine what's most important for your organization or community to do.
- Figure out the best way to get it done.
- Write it down.
- Do it and keep track.



## Sounds great – then why do plans fail?

- No buy-in from stakeholders or implementers
- Not realistic or feasible
- Not enough short term “wins” to keep up momentum
- No one is monitoring implementation to address issues or make adjustments to strategy
- No one is measuring success

**Ducks don't  
stay in a row!**



## Quick Quiz

What percent of strategies fail due to poor implementation?

43%

67%

92%

What is the percent of leaders who spend less than one day a month reviewing strategy?

45%

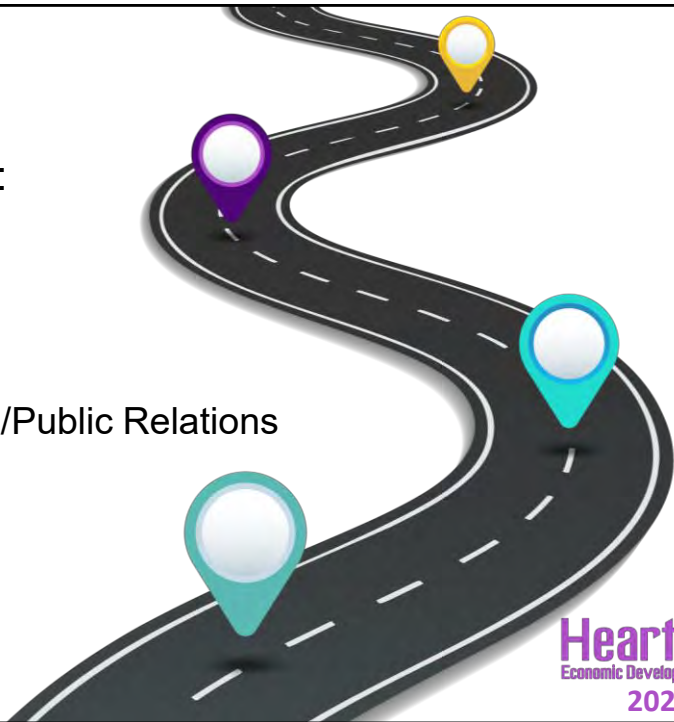
70%

95%

## Why Plan?

Planning is critical for:

- Focus
  - When to say “yes”
  - When to say “no”
- Efficiency
- Fundraising/Marketing/Public Relations
- Celebrations
- Succession/Transition



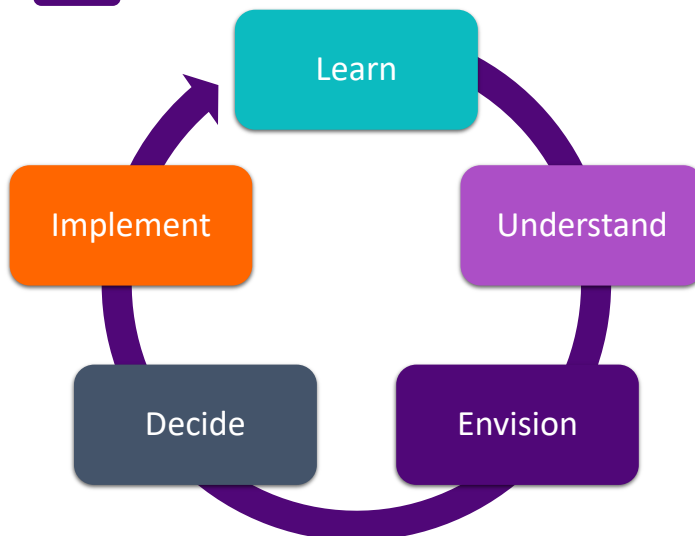


## Steps you Can't Skip

- Recruit a strong planning team
- Do your Research
  - Understand your needs and assets
  - Get input (a.k.a. buy-in) from key stakeholders
- Ensure a shared vision and agreement of the end result
- Must have commitment from implementers



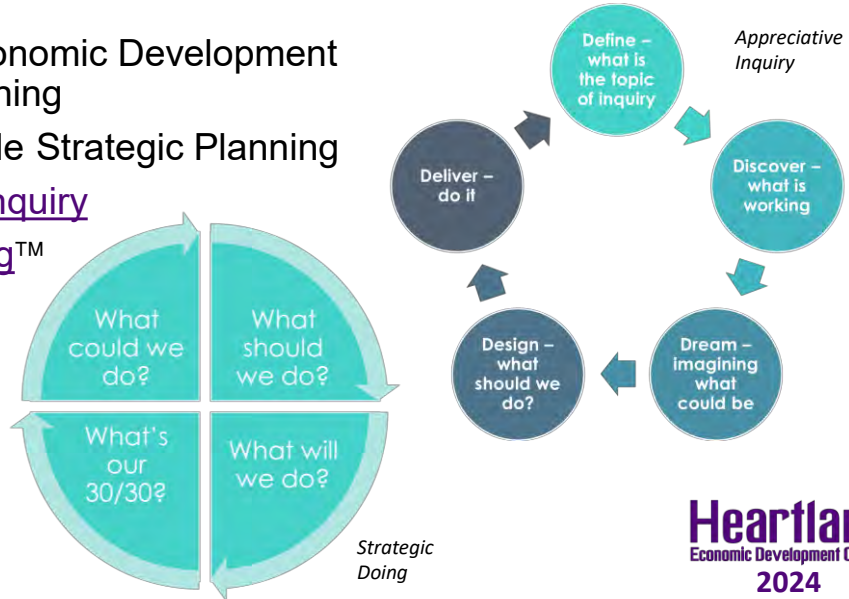
## Planning as a Process



Today the focus  
is planning for  
economic  
development

# There are Multiple Process Approaches

- Traditional Economic Development Strategic Planning
- Communitywide Strategic Planning
- Appreciative Inquiry
- Strategic Doing™



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# More Process Approaches

- Design Thinking
- OKR - Objective and Key Result
- EOS –Entrepreneurial Operating System®
- 4 Disciplines of Execution (4DX)®



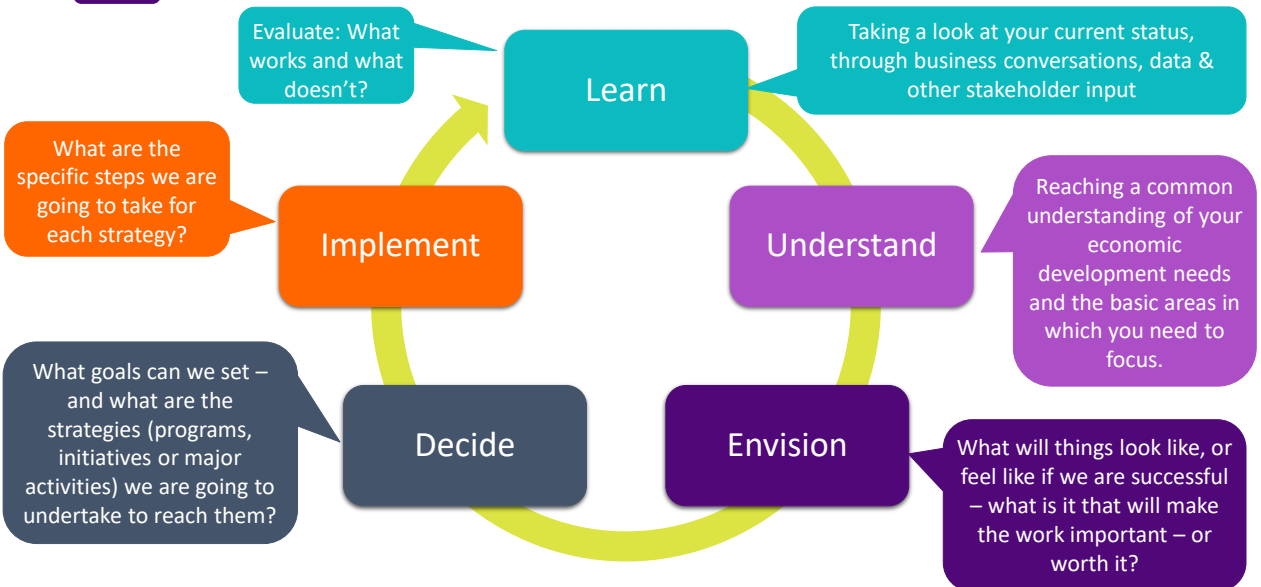
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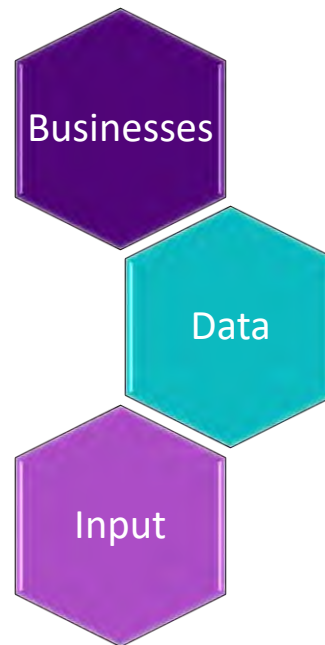
# Method Decision Factors

- What is your scope?
- How many different implementing organizations?
- How much time do you have?
- How much can you do on your own?
- Do you want to hire a consultant?
  - How much money can you spend?



# Back to the Process





# Learning!

What do we have going for us, what are we good at? And not so good at...

## Learning from Businesses

(these are covered in the course!)

### Business Retention and Expansion (BRE) Programming

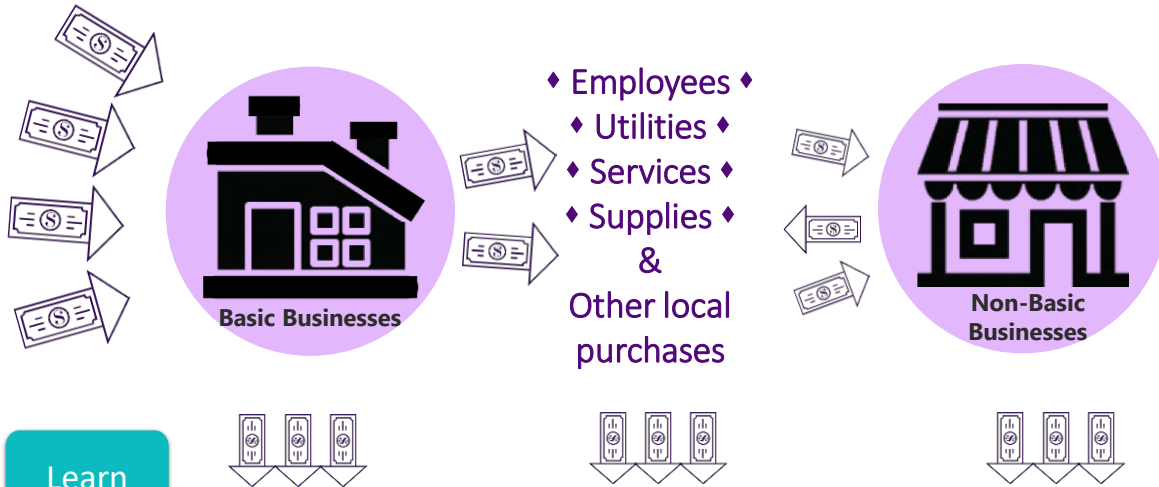
- It's a must-do for EVERY ECONOMIC DEVELOPER!
- You can learn from your interviews about what businesses need

### Business Attraction Efforts

- It's a must-do for EVERY ECONOMIC DEVELOPER with empty buildings and lots!
- You can learn from RFPs and Site Selectors about what businesses need

Learn

# Who do you ask? Who do you serve?



# Learning from Data

- How is your community doing?
  - Population
  - Age Groups
  - Education Levels
- How are your businesses doing?
  - Jobs – types, growing, declining...
  - Businesses – types (primary/basic/export or non-basic)
- What about quality of life aspects?
  - Housing
  - Cost of Living

**What do you need to know?**



**Learn**

## The Free Stuff

[Link to 2024 Course Materials Page](#)

- Sites & Building Databases
- U.S. Census Bureau
- U.S. Bureau of Labor Statistics (BLS)
- U.S. Bureau of Economic Analysis (BEA)
- U.S. Department of Agriculture (USDA)
- Check out [StatsAmerica](#) too – which serves as a portal to several data sets and tools.

Learn

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## Learning from Input

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### What do you need to know?

- Varies by scope of the plan
- Be intentional about who you engage and how (use the right “tools”)
- Ask questions that gauge the current situation
  - SWOT
- And questions that look ahead



“What if, and I know this sounds kooky,  
We asked somebody.”

Learn

# Tools for Gathering Input

- Online questionnaires
- Focus groups/small group interviews
- Community Think Tanks, Open Houses, Summits, Forums, Charrettes
- Tables/displays at community events
- World Café™ – a format for hosting large group dialog for gathering input
- Liberating Structures – a set of over 30 structures for facilitating meetings and conversations














Learn

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# A Quick Glance at Liberating Structures

- Each links to specific instructions
- Think beyond strategic planning here - there is likely a structure for any ideating you might be undertaking

LS Menu 	Wicked questions 	What? debrief 	Min specs 	Heard, seen respected 	What I need from you 	Integrated autonomy 
Design elements 	Appreciative interviews 	Discovery and action dialog 	Improv prototyping 	Drawing together 	Open space 	Critical uncertainties 
1-2-4-All 	TRIZ 	Shift & share 	Helping heuristics 	Design storyboards 	Generative relationships 	Ecocycle 
Impromptu networking 	15% solutions 	25 : 10 crowdsourcing 	Conversation cafe 	Celebrity interview 	Agree/certainty matrix 	Panarchy 
9-whys 	Troika consulting 	Wise crowds 	User experience fishbowl 	Social network webbing 	Simple ethnography 	Purpose to practice 

# How do you do it?

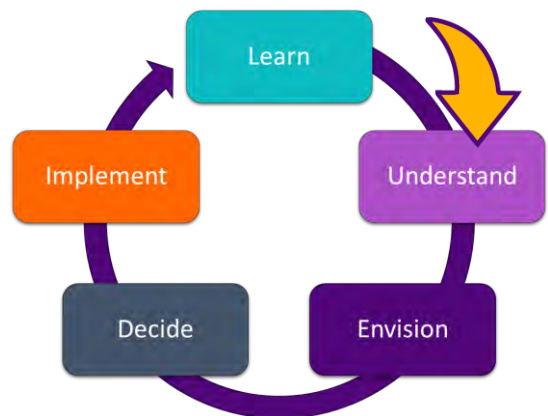
Meet Gretchen Reichter  
Marketing & Development Coordinator  
City of Emmetsburg

Planning completed in  
August 2021



# Reaching a Common Understanding

Taking what we've learned and coming to consensus on our economic development priorities, and where we fit into the picture.





# Reaching a Common Understanding

- Using what you've learned to:
  - Determine Areas of Activity
  - Validate your Mission

Your areas of activity should reflect what you do to carry out your mission.

Understand



# Getting Specific: Areas of Activity

- How to decide? Who do you serve and what do they need?
- 4 main areas activity for economic developers:
  - Activities that develop, keep and attract people
  - Activities that develop space for business
  - Activities that directly assist businesses
  - All your other "duties as assigned"

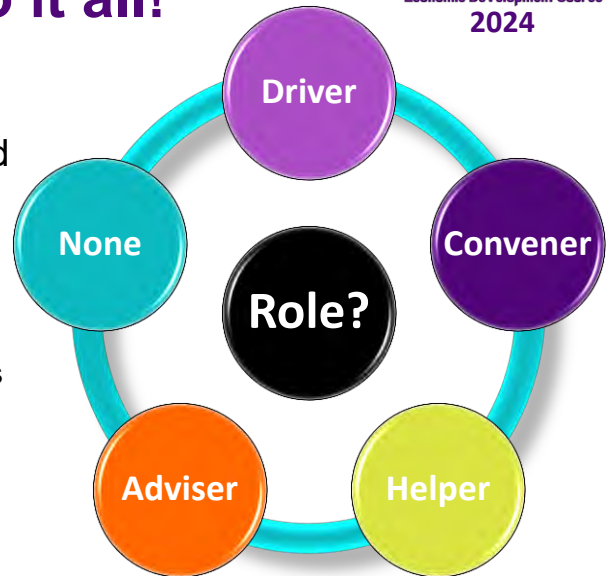
Understand



## You don't have to do it all!

Keep in mind...

- Your capacity – both human and financial
- Focus on Addressing Business or Community Needs
  - Improve or sustain your strengths
  - Fix or address issues or problems
  - Fill a gap that no one else is!



Understand

## What are we here to do? Everyone needs to be realistic!



Don't let this be you!!  
Narrowing in on your areas of activity help clarify your organization's mission – what it **does** and **does not** do.

Understand

## Writing a Mission Statement

- Lets people know:
  - Why your organization exists. What its purpose is.
  - Who it serves – directly or indirectly.
  - What it does.
- Think about who is going to care what your mission is.
- Do not get hung up on length!



Understand

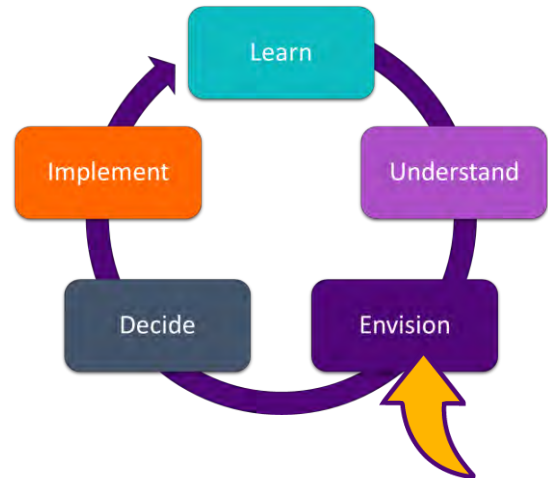
## Critiquing Your Own Mission Statements

Breakout groups!

- Share your organization's (or department's) mission statement
- Discuss in the group:
  - Is it clear what the areas of activities are?
  - Is it clear who is being served?
  - Does it help your organization or department say "yes" or "no" to new ideas/activities/projects?
- When we come back – be prepared to share the one mission statement that your group either:
  - Thought was already great
  - Tweaked it a little to make it great

# Envisioning Success

Why are we doing what we do?  
If we are doing our job, what do we expect to be experiencing in the future?



## Envisioning Success

# WHAT IS YOUR WHY?

- What will things look like, or feel like if we are successful?
- What is it that makes the work important – or worth it?
- Think about who you serve indirectly and elevate that!

Envision



## Writing a Vision Statement

- “If you don't know where you want to go, then it doesn't matter which path you take.” Cheshire Cat, Alice in Wonderland
- Don't be afraid to be a “Big Thinker” at first
- Use framing questions, “What would it look like if...”
- Collect ideas and then decide if anything you can do would affect the outcomes you've listed (get realistic)
- Say it in a way that will be inspiring, differentiating, identifiable!



Envision

## Do These Paint a Picture of Future Success?

- Amazon: To be Earth's most customer-centric company, where customers can find and discover anything they might want to buy online.
- Southwest Airlines: To become the world's most loved, most flown, and most profitable airline. - *Hmmm???*
- Google: To organize the world's information and make it universally accessible and useful.

You might be small – but you can be just as mighty!

Envision

## A word about VALUES

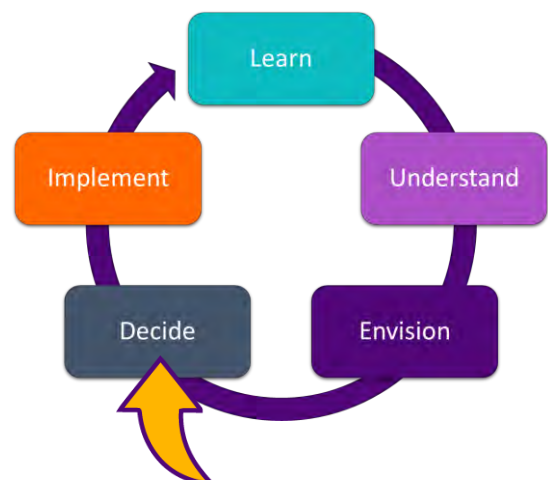
- Work hand in hand with Vision and Mission
- Think of it this way:
  - Your Mission clarifies WHAT you do and WHO you serve
  - Your Vision clarifies WHY you do your work
  - Your Values illustrate the WAY you carry out your work
- Values drive your organizational ethics!



Envision

## Deciding what to do

Setting goals and identifying strategies



## Deciding – where the rubber hits the road

- What goals can we set?
- What are the strategies (programs, initiatives or major activities) we are going to undertake to reach them?
- Let's start with goals...if we want to achieve our vision, what do we need to accomplish?



Decide

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## Framing Goals – People have strong opinions!

- Can be written as SMART (specific, measurable, achievable, realistic, time-bound)
- Can be written as aspirational
- Overall, use goals to:
  - Share your intentions
  - Summarize the effort
  - Articulate priorities
  - Help with resource allocation
  - Demonstrate progress

### In reality, 3 types of goals:

- Process Goals (100% in your control)
- Performance Goals (mostly controllable)
- Outcome Goals (difficult to control)

Decide

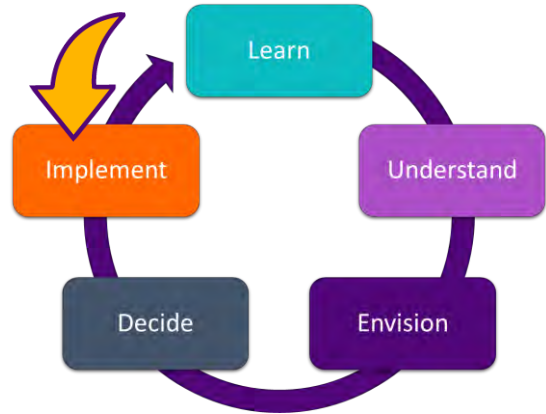
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# Implement

Fleshing out strategies through action steps and making sure you actually do stuff



## Actions: The Details

- Specific steps for each strategy
- Assigned to someone
- Given a timetable
- Could also have:
  - Success Indicators
  - Resource Requirements

Implement



## Keeping your plan alive!

- Implement
- Monitor
- Measure
- Adjust
- Repeat...



Implement

# How do you do it?

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Meet Stacy Doughan, President & CEO

Clear Lake Area Chamber of Commerce

Planning completed in  
April 2022



# Tips for Keeping the Plan Alive

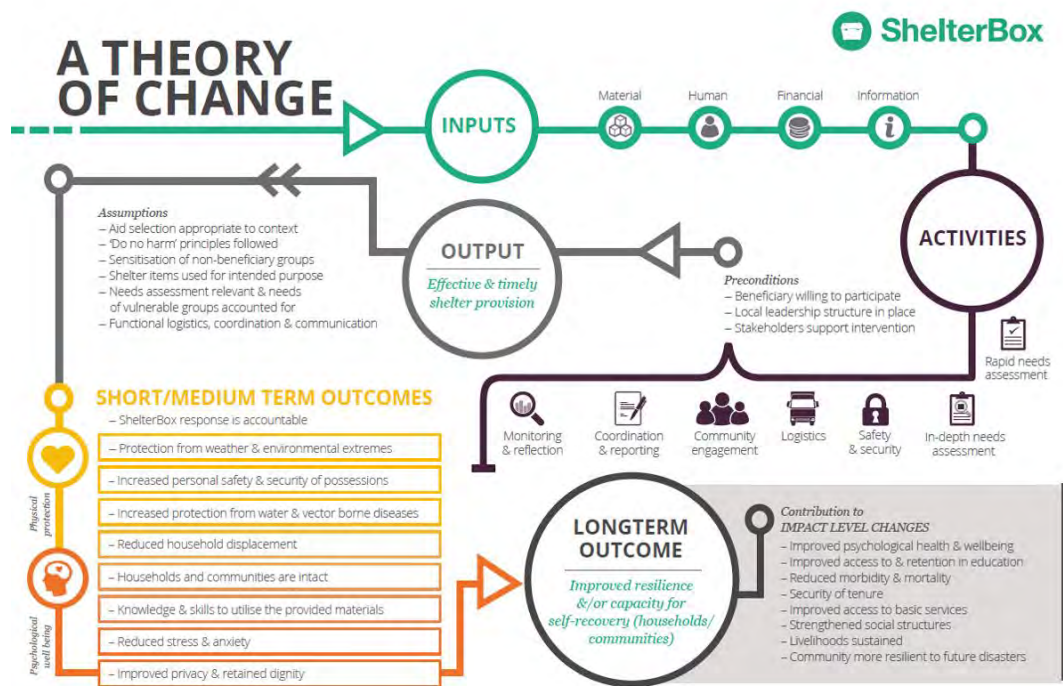
- Keep the goals or strategies visible
- Align meetings around strategies or actions
- Keep the essential components of the plan visible
- Share the essential components with investors
- Align budgets to the goals or priorities.
- Accept that there is no “perfect plan”
- Host/conduct regular check-ins and reports
- Use a shared scorecard to track progress
- Present the plan in a formal, public way
- Keep stakeholders informed of progress
- Celebrate your successes
- Share the plan with new board/council/staff members.

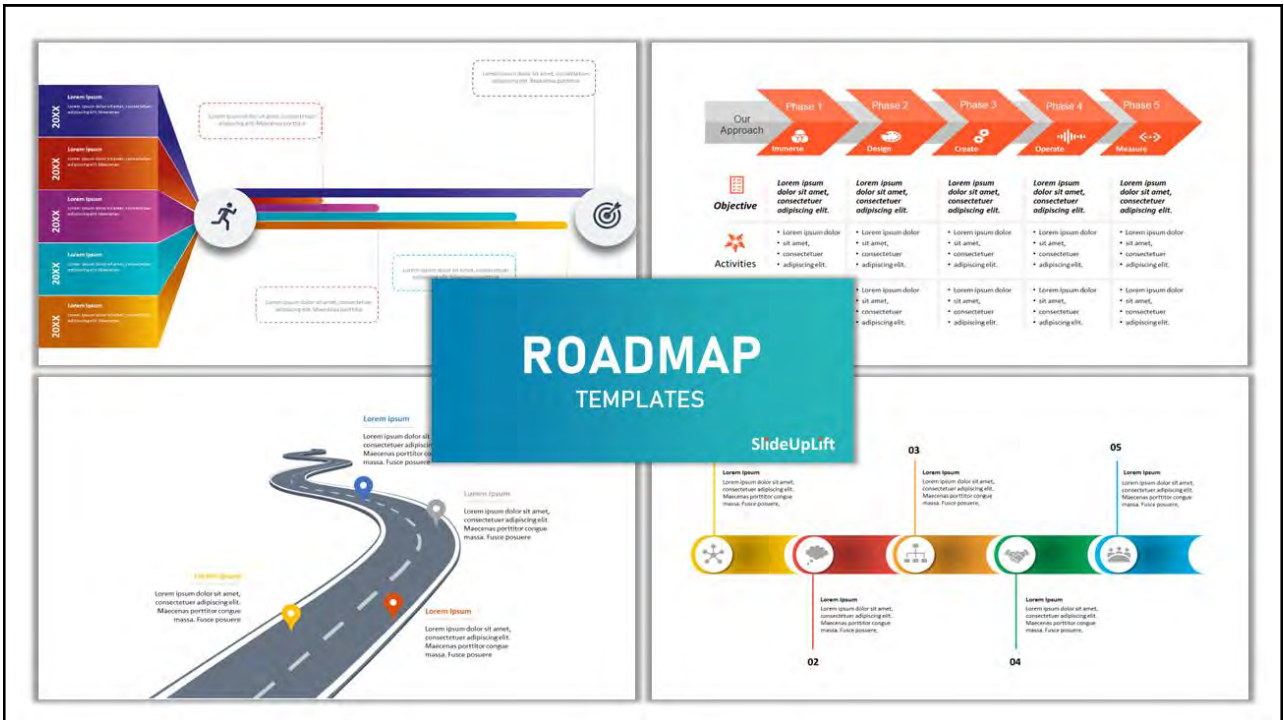
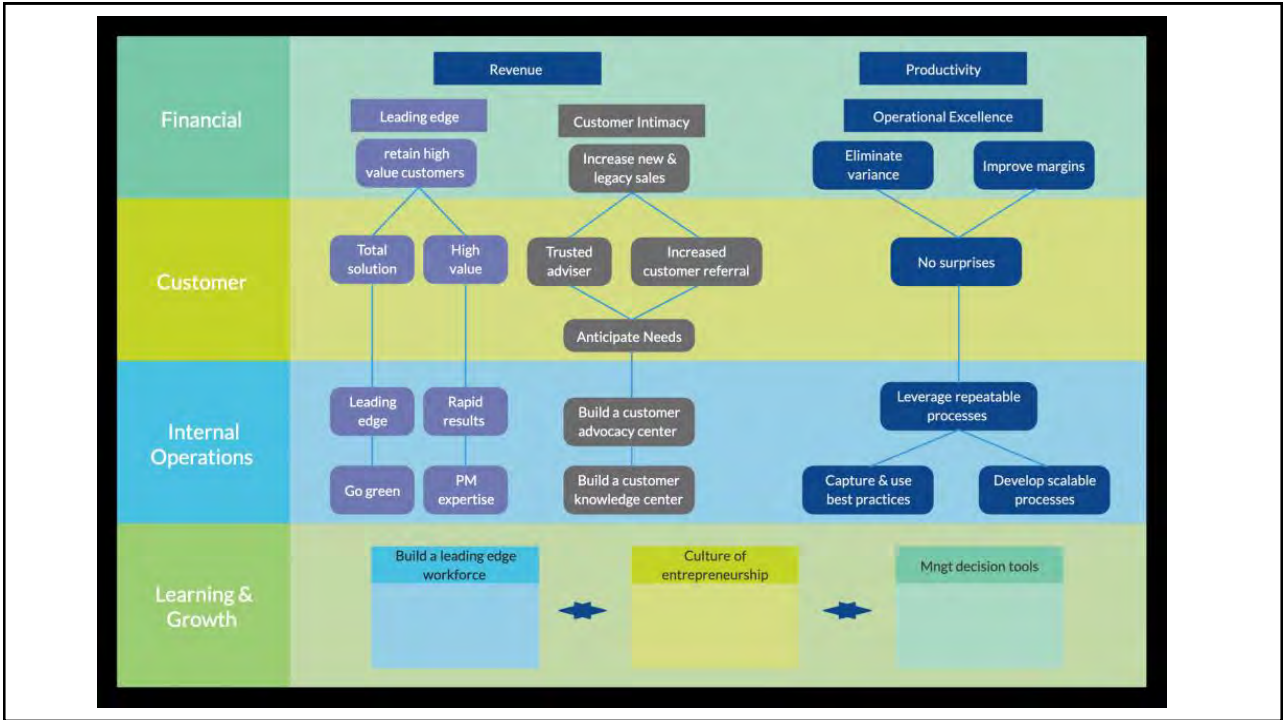


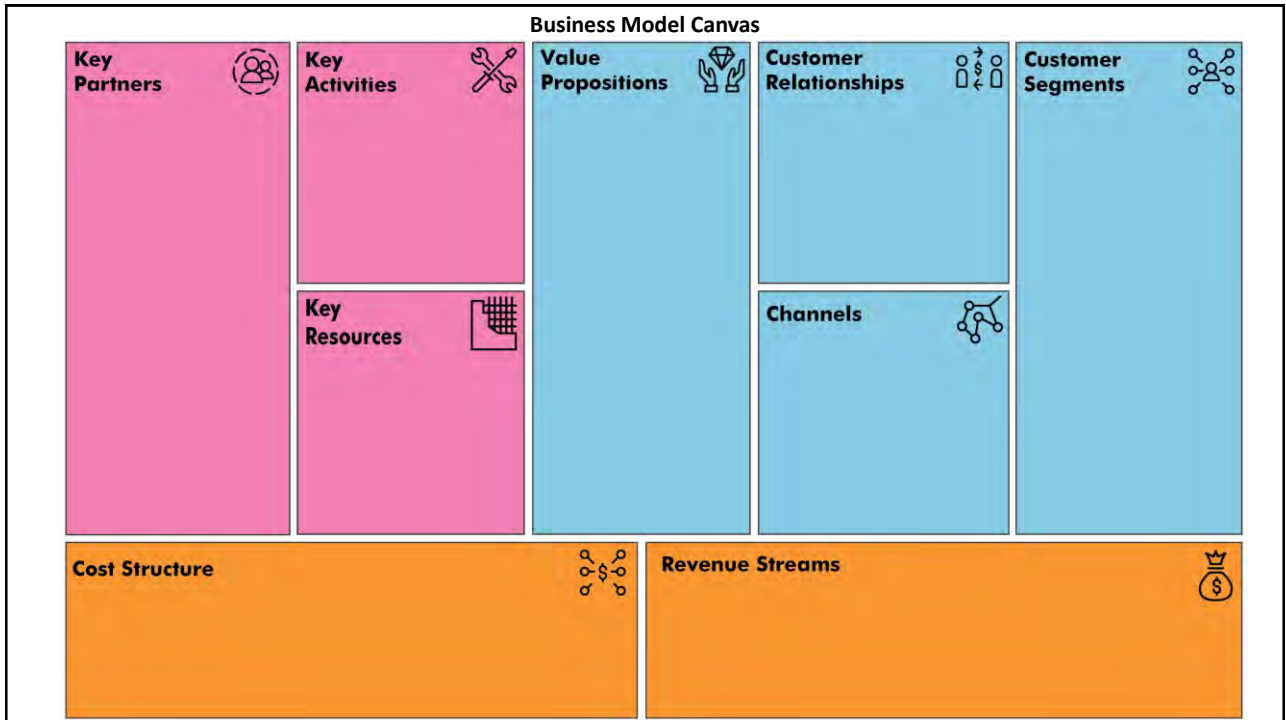
# Tools for Sharing/Displaying

- Theory of Change – a visual tool for strategic planning
- Strategy Map – a tool to visually represent overall goals and strategies
- Strategy Roadmap - a tool to visually represent the timeline of strategic plan implementation
- Business Model Canvas – a tool for organizing goals, strategies and actions
- Pyramid of Purpose – a tool for describing strategy, where one level explains why – your vision, values and mission; the next level describes the what – your goals and/or objectives; another level shares the how – strategies and actions, and the bottom level covers the “who” – who is implementing

Implement







# Tying it all together

Learn

- **Pre-planning** - Learning from businesses, data and others to inform the process

Understand

- **Mission & Areas of Activity:** Who we serve, and what we do

Envision

- **Vision & Values:** Our aspirational “why” - what success looks like in the future, and the way we carry out our work and conduct business

Decide

- **Goals/Objectives:** Major accomplishments that get us to the vision
  - **Strategies:** Specific programs, initiatives, and major activities, that together propel us towards our goal

Implement

- **Actions:** Who is doing what, when and with what resources & keeping on track

Learn

- **Evaluate** – What worked and what didn't

# Questions? See you in a few weeks!

Thank you!

Karla Organist

Karla.organist@uni.edu

