

FARMERSVILLE ECONOMIC DEVELOPMENT CORPORATION

Regular Agenda

6:30

September 16th, 2021

City Hall Council Chambers

205 S. Main

Farmersville, TX 75442

WATCH THE LIVE BROADCAST

This meeting will be broadcast live through the City's website and by telephone. Members of the public who wish to watch this meeting, and not speak or participate in the discussion, may watch the live broadcast by

1. Going to the City's website;
2. Clicking on "GOVERNMENT";
3. Clicking on "AGENDAS AND MINUTES";
4. Clicking on the "[click here](#)" link that is located to the right of "LIVE STREAMING."

I. PRELIMINARY MATTERS

- Call to order and roll call.
- Announcements

II. PUBLIC COMMENT ON AGENDA ITEMS (FOR NON-PUBLIC HEARING AGENDA ITEM)

If you wish to address the Farmersville Economic Development Board 4A on a posted item on this agenda, please fill out a "Speaker Sign-Up" card and present it to the City Staff before the meeting begins. Pursuant to Section 551.007 of the Texas Government Code, any person wishing to address the Farmersville Economic Development Board 4A for items listed as public hearings will be recognized when the public hearing is opened. Speakers wishing to address the Farmersville Economic Development Board 4A regarding any non-public hearing item on this agenda shall have a time limit of three (3) minutes per speaker, per agenda item. The Chair may reduce the speaker time limit uniformly to accommodate the number of speakers or improve meeting efficiency.

III. CONSENT AGENDA

Items in the Consent Agenda consist of non-controversial or "housekeeping" items required by law. Board members may request prior to a motion and vote on the Consent Agenda that one or more items be withdrawn from the Consent Agenda and considered individually. Following approval of the Consent Agenda, excepting the items requested to be removed, the Farmersville Economic Development Board will consider and act on each item so withdrawn individually.

- A. Meeting Minutes for July, 15th, 2021 and August 19th, 2021
- B. EDC Financial Report August 2021.

IV. REGULAR AGENDA

- A. Receive training from Greg Last - EDP Business Retention and Expansion.
- B. Consider, discuss and act upon changing meeting time.

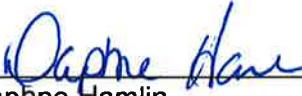
V. REQUESTS TO BE PLACED ON FUTURE AGENDAS

VI. ADJOURNMENT

The Farmersville Economic Development Board (4A) reserves the right to adjourn into Executive Session at any time during the course of this meeting to discuss any matters listed on the agenda, as authorized by the Texas Government Code, including, but not limited to, Sections 551.071 (Consultation with Attorney), 551.072 (Deliberations about Real Property), 551.073 (Deliberations about Gifts and Donations), 551.074 (Personnel Matters), 551.076 (Deliberations about Security Devices), 551.087 (Economic Development), 418.175-183 (Deliberations about Homeland Security Issues,) and as authorized by the Texas Tax Code, including, but not limited to, Section 321.3022 (Sales Tax Information)

Persons with disabilities who plan to attend this meeting and who may need assistance should contact the City Secretary at 972- 782-6151 or Fax 972-782-6604 at least two (2) working days prior to the meeting so that appropriate arrangements can be made. Handicap Parking is available in the front and rear parking lot of the building.

I, the undersigned authority, do hereby certify that this Notice of Meeting was posted in the regular posting place of the City Hall building for Farmersville, Texas, in a place and manner convenient and readily accessible to the general public at all times, and said notice was posted September 13th, 2021, by 5:00 P.M. and remained so posted continuously at least 72 hours proceeding the scheduled time of said meeting.



Daphne Hamlin
4A EDC Liaison

Agenda Section	Consent Agenda
Section Number	A.
Subject	<u>Consider, discuss, and act upon meeting minutes</u>
To	Farmersville Economic Development Board 4A
From	Daphne Hamlin
Date	September 16 th , 2021
Attachment(s)	July 15 th , and August 19 th 2021
Related Link(s)	
Consideration and Discussion	Approve or deny
Action	<ul style="list-style-type: none"> • Motion/second/vote <ul style="list-style-type: none"> <input type="checkbox"/> Approve <input type="checkbox"/> Approve with Updates <input type="checkbox"/> Disapprove • Motion/second/vote to continue to a later date. _____ <ul style="list-style-type: none"> <input type="checkbox"/> Approve <input type="checkbox"/> Disapprove • Move item to another agenda. _____ • No motion, no action



CITY OF FARMERSVILLE
FARMERSVILLE ECONOMIC DEVELOPMENT CORPORATION MINUTES
July 15th, 2021, 6:30 P.M.
COUNCIL CHAMBERS, CITY HALL
205 S. Main Street
Farmersville, TX 75442

CALL TO ORDER

The Farmersville EDC met in regular session on July 15th, 2021, at 6:30 p.m. in the City Hall Council Chambers with the following board members present: Matt Crowder, Jason Lane, and Randy Rice. Absent Elise Bobitt and Robbie Tedford.

RECOGNITION OF CITIZENS AND VISITORS

Special guest recognized Audrey Rubadue City Staff and Councilman Terry Williams.

CONSENT AGENDA:

CONSIDER, DISCUSS AND ACT UPON MEETING MINUTES FOR JUNE 17TH, 2021

- Motion to approve meeting minutes as submitted for June 17th, 2021 made by Mr. Rice
- Second by Mr. Crowder
- Motion passed unanimously.

CONSIDER, DISCUSS AND ACT UPON FINANCIAL STATEMENTS FOR JUNE 2021

- Motion to approve financials as submitted for June 2021 made by Mr. Crowder
- Second by Mr. Rice
- Motion passed unanimously.

REGULAR AGENDA:

CONSIDER, DISCUSS AND ACT UPON EDC BOARD TRAINING FROM MR. LAST

- Mr. Last began with his presentation with "Ramping up Your Economic Development Program"
- Topics to Cover: Organizational structures, coordination of Allies, Establishing a direction, Administration of an EDO, Existing business support, resource development, marketing and promotion, and incentives

- Formal Definition of Economic Development: The process of influencing and economic well-being of a jurisdiction through.
 - Creation or enhancement of employment opportunities
 - Increasing the economic base
 - Providing the goods and services desired by the stakeholder of the jurisdiction
- Mr. Last gave common acronyms we need to be familiar with, (attached)
- One thing this board needs to get clear on is what is your primary purpose. Whether it is to increase employment opportunities/increase sales tax/provide goods and services/community enhancement/infrastructure.
- Infrastructure is a real common item with 4A to help fund and existing business support.
- Mr. Lane stated the quantity and quality of jobs/property tax/ is important. I don't feel we do as much as we should do, we can do more. We do some items such as façade grants.
- Mr. Crowder stated he feels the boards' purpose is sales tax and property tax to generate funds to help support projects on what we need to do. The gap we need to fill is supporting existing businesses. Figure out how we start framing up to draw people to the city.
- Mr. Lane stated feels we need to start partnering with Schools, Collin College. We have opportunities there.
- Mr. Last stated you need these allies before you start any projects. Might think about what your purposes and goals are.
- Municipal Department: director of ED reports to the City Manager.
- Type A Economic Development Board Uses: Restricted, mostly primary jobs. Pros to ED Board is autonomy and confidentiality. Most Cities go to the ED board to help with infrastructure cost.
- Municipal Development District (MDD) can receive funds from the ETJ as well. They have broader programs.
- Mr. Crowder asked is there a situation where there is only MDD.
- Mr. Last stated they are new and rare, but they are increasing. Migration from EDC to MDD.
- Mr. Crowder stated we have a big ETJ. Maybe something to think about down the road.
- Mr. Last stated the legislation has changed the law regarding annexation. Some Cities have made agreements with businesses in the ETJ to annex into the city.
- Mr. Last stated you can change ED by an election that A can do B projects. Lots of options available.
- Mr. Crowder asked what is the preferred organization that a business would go to Either EDC or CDC. How do you streamline what we do and make it more effective? We struggle at what we do on EDC or CDC. Does a MDD make it more streamline.

- Mr. Last stated you want to make sure you don't lose focus. This is a whole lot to do when you start combining.
- Mr. Last stated he keeps a link on his website of all the statutes.
- Mr. Lane asked if you have a bed and breakfast does it fall in line as a hotel and collect hotel tax.
- Mr. Last stated there is a lot of guidelines to go thru. Typically, EDC is not over the Hotel Tax, City takes care of that.
- Mr. Last stated typically businesses go thru EDC to communicate with the County, Chamber, etc. Need to have county commissioner or judge come and talk about tax incentives. There are benefits for them to do this.
- Mr. Last talked about adopting plans. Comprehensive Plan, EDO Strategic Plan – more detailed analysis / research, 3–8-year horizon. EDO Action Plan – 1-to-3-year horizon, what do we do next? EDO Work Plan – Implementation of fiscal year project. My recommendation for this board is to develop Mission, Goals, and objectives. Mission is the purpose of an organization. Goal - an entity would like to achieve. Should be clear and concise and are reached through accomplishment of objectives. Objective- identifies actions necessary to accomplish the goals.
Typically, more detailed as to target, timing, ability to finish. Objectives should be realistic and obtainable, something you can complete. I have examples of mission statements on my website
- Example of Objectives – Develop a website – Develop a Site and Buildings Summary. Then take the objectives and establish a progress report.
- Talked about board administration: Appointments: need diversity in age, education, race, skills, training. Roles and Responsibilities, direction, policies, etc. Have a agenda development on my website. Staffing, director manages the day-to-day operation of the EDO. Administrative Secretary manages the administrative functions, BRE Specialist, focuses on engaging the existing business community. Marketing Specialist, programs to market the jurisdiction represented by the EDO. Need to establish roles and responsibilities when staff develops.
- There are a lot of policies the board should adopt. Public Fund investment policy, ethics policy, conflict of interest, code of conduct policy, finance management, confidentiality policy, operating guidelines, whistleblower. This list you are not ready for yet.
- Reporting- typically the Director reports to the board, Board reports to council.
- Business Retention and Expansion programs. Need a list of major employers use for communication, post to your website. Need a shopping and dining guide.
- Resources that you will need: website to me is the most important tool, available real estate, mapping, sewer maps etc. Demographics is important to the website. List taxes/school districts of surrounding Cities as well. Housing very few EDO address housing availabilities. List all different types of business, Data on utilities all the details. The profile EDC already has you may need to just update.
- Mr. Lane asked on the census info the 2020 numbers will be out next year. The council of government's has good population estimates. Would it be better to use

that data? Mr. Last stated the key is keeping it consistent but keep it up to date. I receive all my information from several websites. Just as long as it is consistent.

- Any mapping you can provide is a good tool and information
- Some of the conduits that are out there though you may not be ready yet. But attend closer to where you are at it is better instead of traveling outside your territory
- Mr. Lane stated a couple items very interesting to me. The project report it breaks it down into bite size pieces. We are struggling with data.
- Copy of presentation attached. (Exhibit A)

CONSIDER, DISCUSS AND ACT UPON PARKING AT WEST WATER TOWER ON TEDFORD DRIVE AND WELCH DRIVE

- Mr. White discussed people in the area are upset with traffic and parking near Welch Drive. Truck trailers are parking along the street. Now that the city has more residential traffic not commercial in this area. My thought is there is some land available around the west water tower. The driveway up to the tower could provide parking. If this board would invest in concrete in this area for parking and lease out to the companies in the area for parking. Might be something this board may be interested in.
- Mr. Lane asked if there are any numbers on this.
- Mr. White stated just wanted to see if this board is interested before I ran any numbers.
- Mr. Rice stated he is interested in looking at the numbers.
- Mr. Crowder stated he is interested in reviewing
- Mr. Lane not opposed to looking into the parking idea.

BUDGET WORKSHOP

- Motion made by Mr. Crowder to submit budget for approval.
- Second, by Mr. Rice
- All in favor

REQUEST TO BE PLACED ON FUTURE AGENDAS

Discuss future training

Update Water tower parking

Feedback on budget from Council

ADJOURNMENT

Mr. Lane adjourned the meeting at 8:34 p.m.

ATTEST:

Randy Rice, Secretary

APPROVE:

Jason Lane, Chairman

07-15-2021



CITY OF FARMERSVILLE
FARMERSVILLE ECONOMIC DEVELOPMENT CORPORATION MINUTES
August 19th, 2021, 6:30 P.M.
COUNCIL CHAMBERS, CITY HALL
205 S. Main Street
Farmersville, TX 75442

I. PRELIMINARY MATTERS

Jason Lane opened the meeting at 6:30 p.m. on August 19, 2021, in the City Hall Council Chambers with the following board members present: Matt Crowder, Jeff Sydney, Randy Rice and Robbie Tedford. Absent Elise Bobitt. City staff present, City Secretary Sandra Green and Councilman Terry Williams.

ELECTION OF OFFICERS

- Elect President
 - Robbie Tedford nominated and motioned for Matt Crowder to be President
 - Motion passed unanimously
- Elect Vice President
 - Randy Rice nominated and motioned Robbie Tedford
 - Motion passed unanimously
- Secretary
 - Robbie Tedford nominated and motioned for Randy Rice as Secretary
 - Motion passed unanimously

II. PUBLIC COMMENT ON AGENDA ITEMS (FOR NON-PUBLIC HEARING AGENDA ITEM)

- No one came forward to speak.

III. CONSENT AGENDA

A. CONSIDER, DISCUSS AND ACT UPON MEETING MINUTES FOR JUNE 17TH, 2021

- Sandra Green explained the minutes for July 15th could not be considered for approval since the agenda was posted for June 17th minutes. She indicated they would be on the next agenda.

B. CONSIDER, DISCUSS AND ACT UPON FINANCIAL REPORT JULY 2021

- Robbie Tedford asked staff to move \$100,00.00 from operating to now account.
 - Motion to approve the financial report and move \$100k from operating to now account made by Robbie Tedford
 - Second by Randy Rice
 - Motion passed unanimously.

IV. PUBLIC HEARING

A. CONSIDER, DISCUSS AND ACT UPON FICAL YEAR 2021-2022

PROPOSED BUDGET TO ALLOW PROONENTS AND OPPONENTS OF THE PROPOSED BUDGET TO PRESENT THEIR VIEWS.

- Matt Crowder opened the public hearing at 6:39 p.m. and asked if anyone wanted to speak regarding the budget.
- No one came forward so he closed the public hearing at 6:40 p.m.

B. CONSIDER, DISCUSS AND ACT UPON ADOPTING AND APPROVING FISCAL YEAR PROPOSED 2021-2022 BUDGET.

- Matt Crowder opened the public hearing at 6:40 p.m. and asked if anyone wanted to speak regarding the budget.
- No one came forward so he closed the public hearing at 6:40 p.m.
 - Motion to approve the budget and forward to City Council for approval made by Robbie Tedford
 - Second by Randy Rice
 - Motion passed unanimously.

V. REGULAR AGENDA

A. CONSIDER, DISCUSS AND ACT UPON PARKING AT THE WEST WATER TOWER ON TEDFORD DRIVE AND WELCH DRIVE. MR SHITE TO PROVIDE UPDATE.

- Board postponed discussions until Ben White could update the board on numbers and cost.

B. CONSIDER, DISCUSS, AND ACT UPON FUTURE EDC TRAINING.

- Matt Crowder said that Mr. Last did a great job on the training last time. He said there was a lot of information given and it was beneficial.
- Robbie Tedford asked if he had a recommendation of what the board should do next.
- Matt Crowder stated he did not give direction as what we should do next. He said we could ask Mr. Last his views on future training.
- Randy Rice said Mr. Last gave them a lot of things to think about. He said the board does need more training.
- Robbie Tedford asked if the board would like to have another session at the next board meeting. He asked Matt Crowder to contact him and find out if he would come and present at the next meeting.

C. CONSIDER, DISCUSS AND ACT UPON ITEMS FOR PAYMENT

- Motion made by Randy Rice to approve payments for (ED Best Practice Invoice 077-021-06-30 and 077-2021-08-11- \$1,120.00).
- Second made by Robbie Tedford
- Motion passed unanimously

VI. REQUESTS TO BE PLACED ON FUTURE AGENDAS

Parking at the West Water Tower

Training from Greg Last

VII. ADJOURNMENT

The meeting was adjourned at 6:51 p.m.

ATTEST:

Randy Rice, Secretary

APPROVE:

Matt Crowder, Chairman

Agenda Section	Consent Agenda
Section Number	B.
Subject	<u>Consider, discuss, and act upon August 2021 Financial Statement</u>
To	Farmersville Economic Development Board 4A
From	Daphne Hamlin
Date	September 16 th , 2021
Attachment(s)	August 2021 Financial Statement
Related Link(s)	
Consideration and Discussion	Approve or deny
Action	<ul style="list-style-type: none"> • Motion/second/vote <ul style="list-style-type: none"> <input type="checkbox"/> Approve <input type="checkbox"/> Approve with Updates <input type="checkbox"/> Disapprove • Motion/second/vote to continue to a later date. _____ <ul style="list-style-type: none"> <input type="checkbox"/> Approve <input type="checkbox"/> Disapprove • Move item to another agenda. _____ • No motion, no action

Farmersville Economic Development Corp. 4A
August 2021
Financial Report

Daphne Hamlin
d.hamlin@farmersvilletx.com

Farmersville Economic Development Corp 4A

August 2021

Statement Balance 08-02-2021	\$196,027.81
Deposits:	
Sales Tax:	\$30,606.14
Cking Int .30%	\$53.78
Loan repayment	\$2,622.04
Cleared Checks	
Transfer to now account	
Statement balance 08-31-2021	\$229,309.77

Outstanding Transactions

**Sales Tax
Transfer to Texpool
CD Interest
Oustanding checks**

Balance 9-8-2021 **\$229,309.77**

	FY 2020 Budget	October	November	December	January	February	March	April	May	June	July	August	September	YTD	
Beginning Bank Balance	\$253,314.84	\$274,628.59	\$274,467.67	\$276,467.67	\$298,994.48	\$326,680.93	\$360,411.94	\$80,859.23	\$103,044.20	\$137,509.35	\$166,572.06	\$196,027.81			
Deposits															
Sales Tax Collections	\$250,000.00	\$23,155.40	\$23,952.55	\$21,670.69	\$24,605.43	\$31,029.18	\$24,922.34	\$19,737.70	\$34,656.02	\$26,402.33	\$26,786.88	\$30,606.14	\$287,524.46		
Interest Income cking	\$68.39	\$71.08	\$73.16	\$81.57	\$79.89	\$75.51	\$59.32	\$52.09	\$32.09	\$38.34	\$47.03	\$53.78	\$646.07		
Now Account Interest	\$1,200.00	\$65.60	\$63.51	\$65.64	\$65.65	\$286.48	\$891.69	\$921.87	\$892.58	\$922.80	\$923.26	\$1,158.40	\$1,158.40		
Loan Repayment	\$31,464.00	\$2,622.04	\$2,622.04	\$2,622.04	\$2,622.04	\$2,622.04	\$2,622.04	\$2,622.04	\$2,622.04	\$2,622.04	\$2,622.04	\$2,622.04	\$28,842.44		
Transfer to now account															
Transfer to Texpool															
Texpool Interest	\$1,200.00	\$121.50	\$108.42	\$82.78	\$72.18	\$35.41	\$13.66	\$0.78	\$0.62	\$0.73	\$1.18	\$1.18	\$437.26		
CD Investment		\$377.08				\$377.31		\$127.40						\$881.79	
Total Revenue	\$283,964.00	\$ 279,537.75	\$ 303,113.34	\$ 298,994.48	\$ 326,680.83	\$ 360,411.94	\$ 88,159.23	\$ 103,044.20	\$ 140,354.35	\$ 166,572.06	\$ 196,027.81	\$ 229,309.77	\$ -	\$ 323,490.42	
Expenses:															
Administration Expenses															
Administration	\$1,000.00													\$-	
Meeting Expenses	\$1,000.00													\$70.08	
Dues/School/Travel	\$5,200.00													\$-	
TEX 21	\$2,500.00													\$2,500.00	
Office Supplies	\$200.00													\$194.72	
Legal Service	\$2,500.00													\$-	
Total Administration	\$12,400.00														
Marketing/Promotion Expenses															
Marketing/Promotion Expenses/Advertising	\$8,000.00													\$-	
Website update	\$6,000.00													\$-	
EDC Round Table	\$1,500.00													\$-	
Rotary Sponsorship	\$500.00													\$-	
Chamber Sponsorship	\$1,000.00													\$1,000.00	
Small Business Entrepreneurship Conf	\$500.00													\$-	
Collin College Sponsorship	\$7,500.00													\$7,500.00	
Total Expenditures	\$37,400.00	\$3,070.08	\$194.72	\$-											
Directive Business Incentives															
Edic Action Plan	\$20,000.00													\$1,845.00	
Collin College Road	\$244,000.00													\$-	
Facade Grant Program	\$56,000.00													\$25,000.00	
Expense Prior Year	\$3,290.00													\$3,290.00	
Total Development Cost	\$314,000.00													\$30,135.00	
Total Expenditures	\$351,400.00	\$3,070.08	\$28,290.00	\$-											
Revenue vs Expenditures	(\$67,436)														
From Reserves	\$214,710.00	\$3,070.08	\$28,484.72	\$-											
Total Expenditures															
Ending Bank Balance	\$276,487.67	\$274,628.62	\$288,984.48	\$326,680.83	\$360,411.94	\$80,859.23	\$103,044.20	\$137,509.35	\$166,572.06	\$196,027.81	\$22,909.77				
New Account	\$257,551.52	\$257,615.03	\$257,746.32	\$257,805.64	\$257,866.02	\$1,808,149.64	\$1,809,041.34	\$1,809,963.21	\$1,810,855.79	\$1,811,778.59	\$1,812,701.85				
CD Investment	\$250,000.00	\$250,000.00	\$250,000.00	\$250,000.00	\$250,000.00	\$-									
Texpool Balance	\$1,072,089.77	\$1,072,208.19	\$1,072,280.97	\$1,072,363.15	\$1,072,413.00	\$72,413.62	\$72,414.35	\$72,415.53	\$72,416.20	\$72,416.88	\$72,417.53				
Total Available Funds	\$1,856,118.96	\$1,596,836.81	\$1,621,285.45	\$1,906,790.30	\$1,940,616.14	\$1,941,221.10	\$1,944,498.54	\$2,049,842.20	\$2,079,951.93	\$1,908,027.15	\$-	\$1,908,027.15			

Agenda Section	Regular Agenda
Section Number	A.
Subject	<u>Receive training from Greg Last – EDP Business Retention and Expansion</u>
To	Farmersville Economic Development Board 4A
From	Daphne Hamlin
Date	September 16 th , 2021
Attachment(s)	Training handouts
Related Link(s)	
Consideration and Discussion	Approve or deny
Action	<ul style="list-style-type: none"> • Motion/second/vote <ul style="list-style-type: none"> <input type="checkbox"/> Approve <input type="checkbox"/> Approve with Updates <input type="checkbox"/> Disapprove • Motion/second/vote to continue to a later date. _____ <ul style="list-style-type: none"> <input type="checkbox"/> Approve <input type="checkbox"/> Disapprove • Move item to another agenda. _____ • No motion, no action

Business Retention & Expansion

- Understand what a BRE program is
- Learn why it is important
- Learn multiple tools for implementation
- Understand business visitation programs
- Gain some immediate takeaways
- Confidently implement a BRE Program!



Objectives

Why is BRE Important?

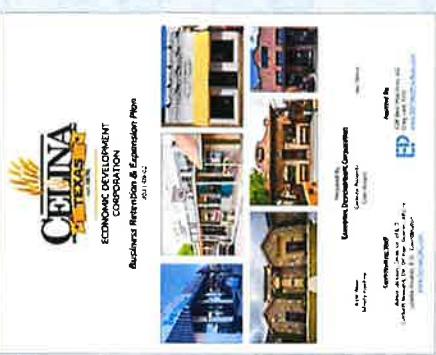
- Keep them from relocating to other areas
- Help them survive economic difficulties
- Assists them with expansions
- Increase competitiveness in the wider marketplace
- Most importantly, it shows care and appreciation

Presentation Overview

- Discuss a variety of programs for all types of businesses
 - Retail, office, industry, corporate
- Examples from real easy to complex
- Generally sequenced with business cycle
- Discuss questions as we go

BRE Plans

- SWOT Analysis
- Resource identification
- Goals / Objectives
- Determine Programs



Business Retention & Expansion - Planning

New Business Guide

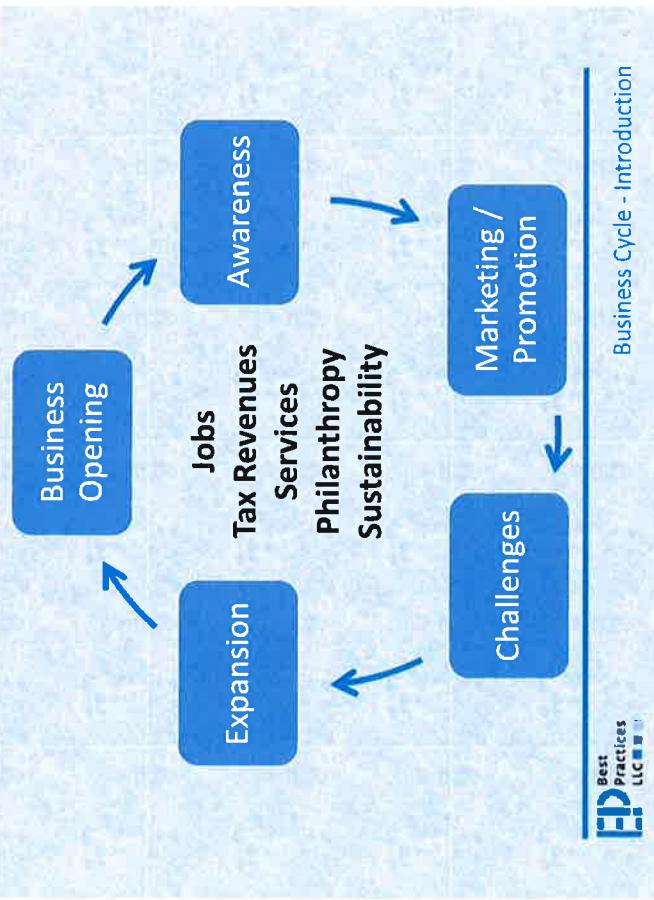
- Important contacts
 - Inspections
 - Utilities
 - Health Dept.
 - State Regulators
 - Fire Marshal
- Marketing opps
- Signage
- Rules & Regulations



Business Retention & Expansion – Business Opening



Business Retention & Expansion - Planning



Business Cycle - Introduction

Best Practices
LLC

BRE on Website - Converse

What is a Business Retention and Expansion (BRE) Program and why does it matter to you?

The **Converse EDC BRE** program focuses on ensuring that our existing businesses are successful and will stay in business in Converse. Our program also helps us know when you are ready to expand and how to help you get what you need. We do this through a number of ways:

- Confidential Formal and Informal Site Visits
- Networking and Learning Events
 - Business Appreciation Events ("Converse All-Stars")
 - Annual Converse Business Directory
 - Small Business Saturday
 - Other resources and customized means of support

In short, we are here to get you what you need. Whether it is workforce recruitment, job fairs or job training, utility rebates or financial management seminars, security concerns or getting building permits, we're here for you. Let us help.

CHANCES ARE, WHAT YOU NEED IS ONLY A PHONE CALL AWAY.



Business Retention & Expansion - Planning

News Release Assistance

- Writing
- Formatting w contact
- Timing after soft open
- Distribution to media

How to Write a Press Release for a New Business

From the Smart Marketing Playbook Article Series:
Using Press Releases to Market Your Small Business

SMBmarketeer.com

Business Retention & Expansion – Business Opening

ED Best Practices LLC

Hiring Assistance

- Signage
- Job fairs
- Workforce Commission
- Local Job Banks

NOW Hiring!

Applications Now Being Accepted

GameStop

WE'RE HIRING

Warehouse Associates

Contact: Recruitment@redm.sysco.ca
Phone: 306-643-8843

ED Best Practices LLC

Business Retention & Expansion – Business Opening

ED Best Practices LLC

Congratulations Certificate (Lake Worth – Colleyville)

- Congratulations Proclamation signed by Mayor

CELINA

Proclamation

Whereas, the City of Celina, Texas, is a vibrant community that values its residents and businesses; and

Whereas, the City of Celina is committed to supporting local businesses and recognizing their contributions to the community; and

Whereas, the City of Celina is pleased to honor [Business Name] for their significant contributions to the local economy and community; and

Whereas, the City of Celina is grateful for the hard work and dedication of [Business Owner's Name]; and

Whereas, the City of Celina is proud to recognize [Business Name] as a valuable member of our community; and

Whereas, the City of Celina is committed to fostering a positive business environment and supporting local businesses;

Now, therefore, be it resolved, that the City of Celina, Texas, hereby congratulates [Business Name] on their achievement and recognizes their contribution to the local economy and community.

Witnessed at Celina, Texas, this [Date].

[Signature]

[Signature]

ED Best Practices LLC

Business Retention & Expansion – Business Opening

ED Best Practices LLC

Collecting Business Information

Dear Business Owner / Manager:

The Economic Development Corporation (EDC) for the City of Celina City Services is seeking the hiring needs of the businesses in the community. This is an effort to keep companies informed on hiring, business needs, so that we can support the businesses through providing resources or other promotional materials, programs, information and/or services to help them succeed. Please feel free to share this form with your employees if they are interested in being interviewed.

We would greatly appreciate your time in providing the information below to allow us to start in making recommendations for your business needs. Please feel free to contact us at any time if you have any questions.

1. E D C BUSINESS:	<input type="checkbox"/> Homebased	<input type="checkbox"/> Franchise	<input type="checkbox"/> Retail	<input type="checkbox"/> Manufacturing	<input type="checkbox"/> Service	<input type="checkbox"/> Other
2. INDUSTRY:	<input type="checkbox"/> Agriculture	<input type="checkbox"/> Manufacturing	<input type="checkbox"/> Construction	<input type="checkbox"/> Retail	<input type="checkbox"/> Service	<input type="checkbox"/> Other
3. CONTACT INFORMATION (Call to be used in case of emergency):	<input type="checkbox"/> Contact #1	<input type="checkbox"/> Contact #2	<input type="checkbox"/> Contact #3	<input type="checkbox"/> Contact #4	<input type="checkbox"/> Contact #5	<input type="checkbox"/> Contact #6
4. WEBSITE:	<input type="checkbox"/> Yes	<input type="checkbox"/> No				
5. EMAIL:	<input type="checkbox"/> Yes	<input type="checkbox"/> No				
6. FAX:	<input type="checkbox"/> Yes	<input type="checkbox"/> No				
7. BUSINESS ADDRESS:	<input type="checkbox"/> Street Address	<input type="checkbox"/> P.O. Box	<input type="checkbox"/> Post Office Box	<input type="checkbox"/> Other	<input type="checkbox"/> Number of Employees	
8. BUSINESS PHONE NUMBER:	<input type="checkbox"/> Daytime	<input type="checkbox"/> Evening	<input type="checkbox"/> Cell	<input type="checkbox"/> Fax	<input type="checkbox"/> Other	
9. BUSINESS FAX NUMBER:	<input type="checkbox"/> Daytime	<input type="checkbox"/> Evening	<input type="checkbox"/> Cell	<input type="checkbox"/> Fax	<input type="checkbox"/> Other	
10. BUSINESS MOBILE NUMBER:	<input type="checkbox"/> Daytime	<input type="checkbox"/> Evening	<input type="checkbox"/> Cell	<input type="checkbox"/> Fax	<input type="checkbox"/> Other	
11. BUSINESS FAX NUMBER:	<input type="checkbox"/> Daytime	<input type="checkbox"/> Evening	<input type="checkbox"/> Cell	<input type="checkbox"/> Fax	<input type="checkbox"/> Other	
12. BUSINESS MOBILE NUMBER:	<input type="checkbox"/> Daytime	<input type="checkbox"/> Evening	<input type="checkbox"/> Cell	<input type="checkbox"/> Fax	<input type="checkbox"/> Other	
13. BUSINESS E-MAIL:	<input type="checkbox"/> Yes	<input type="checkbox"/> No				
14. BUSINESS WEBSITE:	<input type="checkbox"/> Yes	<input type="checkbox"/> No				
15. BUSINESS FAX:	<input type="checkbox"/> Yes	<input type="checkbox"/> No				
16. BUSINESS MOBILE:	<input type="checkbox"/> Yes	<input type="checkbox"/> No				
17. BUSINESS OTHER:	<input type="checkbox"/> Yes	<input type="checkbox"/> No				
18. BUSINESS COMMENTS:						
19. SIGNATURE:						

The information collected will be used for the benefit of all businesses in the community and the City of Celina services. Please feel free to contact the following if you have any questions regarding this request for information.

Specialist, San Jacinto Administration Department
1200 S. Main Street, Suite 100
(281) 275-4426
(281) 275-4422
Business Retention & Expansion Corporation
1200 S. Main Street, Suite 100
(281) 275-4423
www.edcelina.org

ED Best Practices LLC

Business Retention & Expansion – Awareness

ED Best Practices LLC

Excel Business List – Runaway Bay

Runaway Bay, Texas

Existing Business List

Business	Address	Phone	Website
Grace C. S. Ann Denton	644 Half Moon Way	817-733-3444	www.citrusbuttercreekcustomhomes.com
City of Runaway Bay	102 Port O Call Dr	940-575-2855	www.usd-wire-co.com
First State Bank	1055 US Highway 380 W	940-575-2800	www.legacytexas.com
Legacy Texas Bank	560 US Highway 800 W	940-575-2292	
Logue Condominiums	601 US Highway 380 W		
One Stop of Texas			www.constructionfranchise.com
Parker Properties			
Runaway Bay Marina	1003 Runaway Bay Driv	940-575-2755	
Shell	262 US Highway 380 W	940-575-2857	www.shellus.com
Smokehouse Grill			
Storage Units			
Screamin' Elie's RV			
Studio Fone Salon	400 Half Moon Way	940-575-2346	www.habundantlifeinternational.com
Team Clean	Beth & Susan Davis	940-389-7747	
The Bay A Community Church			
The Club at Runaway Bay	800-381-0734		www.runawaybay.com
Toms Electrical & A/C (Tom Fry)	940-351-1833		
Uviniti Security Systems Supplier	940-237-2957		www.uviniti.com
Westwind Manor	400 Half Moon Way	940-575-2235	www.westwindmanor.com

Best Practices LLC

Business Retention & Expansion – Awareness

Web Business List – Elgin, Parker

Elgin, Parker Businesses

Businesses

Category: All Categories

Name:

Search >>

Search Results

1 - 10 of 248 Listings

A & B Sheet Metal & Roofing

Charlene Albert
1331 Hwy 79
P.O. Box 386
Taylor, TX 76574
Phone: (512) 235-27970
Email: Email

A & R Power Washing

Refugee Missions III
P.O. Box 386
Elgin, TX 78611
Phone: (512) 296-4257
Fax: (512) 281-2678
Email: Email

SouthlakeBusinesses.com

SouthlakeBusinesses.com is a free listing service for Southlake, TX, businesses. You can add or remove a business from our database by clicking on the "Edit Profile" button.

Businesses

Business Type

By Keyword

Search

Business List – On Website

Business Retention & Expansion – Awareness

Best Practices LLC

Business Retention & Expansion – Awareness

Business List - Database

SouthlakeBusinesses.com

Businesses

Business Type

By Keyword

Search

Business List – On Website

Business Retention & Expansion – Awareness

Best Practices LLC

Business Retention & Expansion – Awareness

Business List – On Website

SouthlakeBusinesses.com

SouthlakeBusinesses.com is a free listing service for Southlake, TX, businesses. You can add or remove a business from our database by clicking on the "Edit Profile" button.

Businesses

Business Type

By Keyword

Search

Business List – On Website

Business Retention & Expansion – Awareness

Best Practices LLC

Business Retention & Expansion – Awareness

Best Practices LLC

Business Retention & Expansion – Awareness

Business Retention & Expansion – Awareness

Best Practices LLC

Business Retention & Expansion – Awareness

Add / Update on Website

- Allow businesses to enter their data
- Selects from pre-established options
- Verify before posting

Category	Business Name	Description
Local Businesses	Southlake Chamber of Commerce	Businesses in Southlake
Professional Services	Holiday Inn Express Hotel	Businesses in Southlake
Real Estate	Southlake Real Estate	Businesses in Southlake
Business Support Services	Coldwell Banker Residential Solutions	Businesses in Southlake
Retail	Coldwell Banker Residential Solutions	Businesses in Southlake
Food & Beverage	Coldwell Banker Residential Solutions	Businesses in Southlake
Transportation	Coldwell Banker Residential Solutions	Businesses in Southlake

EP Best Practices LLC

Business Retention & Expansion – Awareness

New Biz List

- Recently opened or coming soon
- Info, location, web
- Used by media, realtors, business development
- Distribute via email, sign up on website
- Use C.O. permits

Source: SoCo

Source: Southlake Economic Development
Source: Southlake Economic Development

Source: SoCo

EP Best Practices LLC

Business Retention & Expansion – Awareness

Guide to Marketing Your Business

- ED programs, newspapers, magazines, non-profit groups, networking events, festivals, schools, sports groups, calendar of events

Southlake Magazine	redaction@southlakemagazine.com www.southlakemagazine.com	Distributed to every home and business in Southlake every month
Southlake Style	Melanie Tezonaro 817-416-5000 melanie@southlakestyle.com www.southlakestyle.com	A social media print product Business publications, news, features, discourses & more Gain valuable exposure for your business by reaching every home and business in Southlake
Southlake Times	redaction@southlaketimes.com www.southlaketimes.com	Monthly, full color lifestyle magazine directed to celebrating all things Southlake Thursdays publication: Friday delivery Distributed to 8,200 households / residents Target area is Southlake
Star Telegram – Alliance Regional News	www.star-telegram.com	Largest circulation distributed in Southlake Target areas include: Southlake, Granbury, Colleyville, Keller, Rowlett, Trophy Club, Flower Mound, Westlake and Justin
The Colleyville Counter	www.thecolleyleecounter.com	Official newspaper of Granbury / Colleyville ISD Circulation over 7,300 Alliance news circulation of 127,000

EP Best Practices LLC

Business Retention & Expansion – Marketing & Promotion

Meeting Accommodations

- Every business that has a meeting room
- Size, AV equipment, limitations, contact
- Requirements (e.g. food)

Size	Accommodations	Address / Use Limitations / Fees	Contact
			1400 Plaza Place
1-10 people	Two ballrooms, one can be broken down into three different rooms, and the other can be broken down into six rooms	• Southlake, TX 76092 • www.southlakemc.com	• Vincent PH (817)422-9800, x7109 EM vincent@vthome.com
11-50 people	One ballroom	• One ballroom	
51-100 people	Five meeting rooms	• Conference room	
101+ people	Catering vases per setup	• 1800 East Hwy 114 State 102	TEXAS EPICЕНFER
		• Southlake, TX 76092	Contact Helen Hulse PH (817)522-5587 EM hulse@vthome.com

EP Best Practices LLC

Business Retention & Expansion – Marketing & Promotion

Shop Local Programs

- www.ColleyvilleCloseBuy.com
- www.KeepItInKeller.com
- www.ShopBedfordFirst.com



Eat Shop Find Play Promos About lunch specials Contact Us Live in Keller

Best Practices
Llc ■ ■ ■

Business Retention & Expansion – Marketing & Promotion

Tourism / Events

- Festival vendors
- Ticket booths
- Hotel concierge



Best Practices
Llc ■ ■ ■

Business Retention & Expansion – Marketing & Promotion

Awards & Recognitions

- Weatherford Industrial Manufacturer appreciation luncheon

6th Annual
2011 Industrial Manufacturer Appreciation Luncheon

Small Business of the Year
Large Business of the Year
Weatherford Recyclers & Supply
A Division of GARTC, Inc.
Marshall Ray, Owner

WEATHERFORD INDUSTRIAL MANUFACTURER APPRECIATION LUNCHEON
The Weatherford Economic Development Authority, Inc. (WEDA) and the Weatherford Chamber of Commerce co-hosted the 6th Annual Industrial Manufacturer Appreciation Luncheon on February 25, 2011 at the Doss Heritage & Culture Center with over 100 attendees.

WEATHERFORD CHAMBER OF COMMERCE
President by
Theresa Gazzola, President
Weatherford Chamber of Commerce

WEATHERFORD INDUSTRIAL MANUFACTURER APPRECIATION LUNCHEON
Sponsored by the Brazeau Equipment Center
Jerry & Vicki Durant, Owners

WEATHERFORD INDUSTRIAL MANUFACTURER APPRECIATION LUNCHEON
WEATHERFORD INDUSTRIAL MANUFACTURER APPRECIATION LUNCHEON

Best Practices
Llc ■ ■ ■

Business Retention & Expansion – Marketing & Promotion

Social Media

- Tweet events
- Get Facebook friends to support business communications
- Send out business highlight each day / week - Keller
- Top 15 sites



Best Practices
Llc ■ ■ ■

Business Retention & Expansion – Marketing & Promotion

Google My Business

- <https://www.google.com/business/>
- Help businesses get found on Google
- Apparently 45 +/- places you can list business

The screenshot shows the Google My Business homepage. It includes a navigation bar with links for Home, How it Works, FAQs & Support, and Success Stories. A prominent 'Best Practices' logo is visible at the bottom left. The page also features a 'Business Retention & Expansion – Marketing & Promotion' section.

Local Business Report

- 1 slide only
- Owner/Mgr
- 2-3 minute presentation
- at City Council
- Catering for meeting



The screenshot shows the 'Business Retention & Expansion – Marketing & Promotion' section of the Best Practices LLC website. It includes a 'LOCAL BUSINESS REPORT' section and a 'Best Practices LLC' logo.

Shopping & Dining Guide

- Restaurants and retail
- Distribute to residences, businesses, hotels, airports
- Used by HR Depts for hiring



Corporate Welcome

- Establish early relationship
- Work with HR or relocation company on key areas of interest to employees (schools, housing, daycare, activities, etc.)
- Create a single ombudsman
- Introduce Fire / Police leadership
- Introduce City leadership



The screenshot shows the 'Business Retention & Expansion – Corporate Support' section of the Best Practices LLC website. It includes a 'Best Practices LLC' logo.

Business Retention & Expansion – Marketing & Promotion

Business Retention & Expansion – Corporate Support

73

Local & Regional Profile

- Resource for HR
- Area housing
- Schools
- Hotels
- Police / Fire
- Amenities
- Website links



Website Resources

- List all websites and what is available

www.CivtoSouthlake.com (817) 748-8400	www.SouthlakeBusinesses.com (817) 748-8039
• Southlake's primary website	• Access to all businesses in Southlake
• Meetings of City Council / Boards	• Searchable by keywords or business type
• Access to all City Departments	• Restaurants / Shopping & Dining Guide
	• Catering and private room accommodations
www.MsSouthlakeNews.com (817) 748-8006	www.VisitSouthlakeTexas.com (817) 748-8652
• Current news for Southlake and Carroll ISD	• Visitors calendar – local and regional
• News releases and briefings	• Destination videos / photo gallery
• Emergency notices / closings	• Accommodations / dining / shopping info
• Construction alerts	• Visitor resources – maps / Visitor Guide
www.SouthlakeParksandRec.com (817) 748-8039	www.SouthlakeSites.com (817) 748-8037
• Online registration for programs	• All commercial real estate in Southlake
• City & Association athletic programs	• Office / Retail / Industrial / Land
• Southlake Scene	• Lease / Purchase
• Customer Satisfaction Survey	• Custom query capabilities
• Special Events	

Property Manager Engagement

- Maintain list of property managers
- Attend tenant mtgs
- Upcoming marketing programs
- Police / fire briefings
- Emergency contacts
- Maintain relationships



Signs of Trouble

- Layoffs over time
- Less cars in the parking lot
- Withdrawning from networking events
- Reductions in philanthropy
- Declining appointments / commitments
- Out of state visitors

Business Visitation Programs

- **Purpose:**
 - Establish relationship with business leaders
 - Identify issues challenging to a business
 - Hopefully resolve any challenges
 - **Overview:**
 - Typically major employers
 - Organize an official visit at the business
 - Document findings and needed follow-ups



Business Retention & Expansion – Business Visitations

The visit

What it is	What it is NOT
• About your community	• About your organization
• A conversation / thank you	• A survey / questionnaire
• Company driven	• About us
• Employee driven	• Volunteer enhanced
• Relationship building	• A one-time meeting



Business Retention & Expansion – Business Visitations

The Visit

- Who makes the visit?
 - Company executive sets the date
 - Issues discussed during scheduling call
 - Request 1 hour
 - Short tour
 - The first meeting is easy
 - It will determine whether or not there will ever be a second one



Business Protection & Expansion - Business Visitations

Visitation Programs - Traditional

- Traditional / Volunteer
 - Focus on information gathering & “red-flag” assistance
 - Approach
 - Trained Community Leaders / Volunteers implement the program
 - You act as Coach / GM



Business Retention & Expansion - Business Visitations

Volunteer-Based Programs

Advantages	Disadvantages
• Can visit more businesses	• Typically a one-shot survey, not continuous process
• Work load split w volunteers	• Difficult to coordinate
• Media coverage easier	• Businesses hesitant to share with volunteers
• Generally lower cost	• Analysis a challenge due to various types of collection
	• Harder to maintain accuracy of information



Business Retention & Expansion – Business Visitations



Business Retention & Expansion – Business Visitations

Visitation Programs - Continuous

- **Continuous / Staff**
 - Professional Driven
 - Partnership Centered
 - Focus on Opportunities
- **Approach**
 - Team of Economic Development Professionals
 - You act as Quarterback



Business Retention & Expansion – Business Visitations

Staff-Based Programs

Advantages	Disadvantages
• Monitoring of businesses	• Limited number of business visits in a short time
• can be continuous	
• Easier to organize / execute	• Media attention harder
• No “salesman” included	• Paid staff increases costs
• Easier to maintain confidentiality	
• Consistent message	
• Less training needed	



Business Retention & Expansion – Business Visitations



Business Retention & Expansion – Business Visitations

Execution – Traditional / Historic

- Prepare lengthy written survey
- Lots of in-depth questions
- Little initial input from business
- They would fill out survey and return to you



Business Retention & Expansion – Business Visitations



Business Retention & Expansion – Business Visitations

Execution - Recommended

- Prepare form to write on
- List attendees
- List major topics
- Identify follow-up actions
- Send out summary
- Follow up!

The template is titled "Business Visit Report" and includes sections for "Business Visit Report Summary", "Business Visit Details", "Business Visit Objectives", "Discussion Notes", and "Action Items". It features a grid for tracking progress across various categories like Business, Finance, Marketing, etc., with columns for "Completed", "In Progress", and "Not Started".

[BP] Best Practices LLC Business Retention & Expansion – Business Visits

After Visit

- After Visit – to Company
 - Thank you note
 - Visit summary with rapid response needs
 - Communicate results
 - After Visit – Visitation Team
 - Meet regularly to discuss visits
 - Identify next steps and follow up
 - Discuss upcoming visits, opportunities / threats
- Send out summary
- Follow up!

[BP] Best Practices LLC Business Retention & Expansion – Business Visits

Bad & Best Practices

Bad Practices

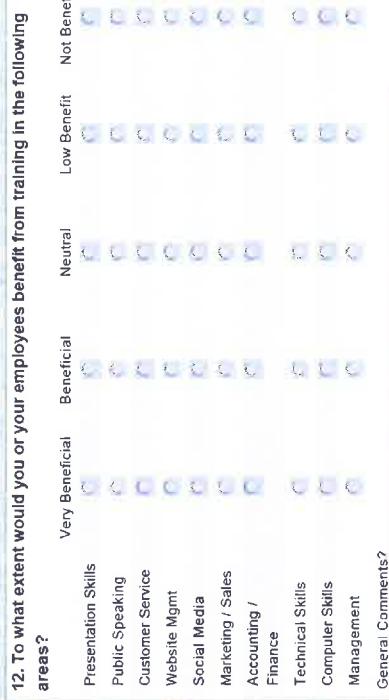
- Including Code Enforcement officer in a visitation
- Soliciting donations
- Walking into business cold
- Asking basic questions
- Don't return calls about issues identified
- Disclose issues discussed by business

"Best Practices"

- Include Mayor / Council / City Manager
- Stick to business issues
- Prep everybody on what and what not to say
- Research before a visit
- Return calls and try to resolve issues
- Maintain confidentiality

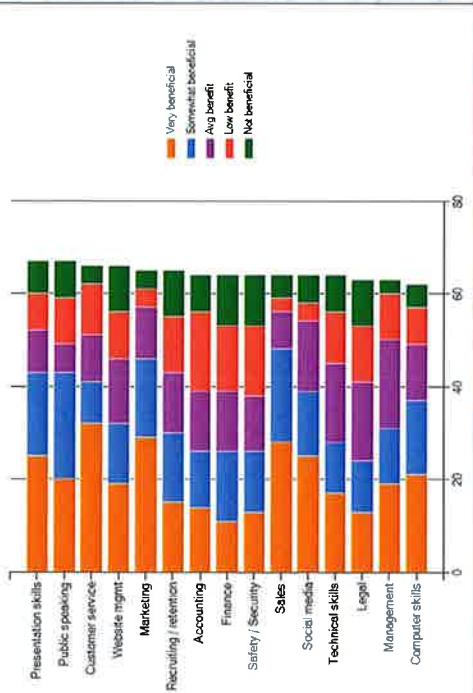
[BP] Best Practices LLC Business Retention & Expansion – Business Visits

On-Line Business Surveys

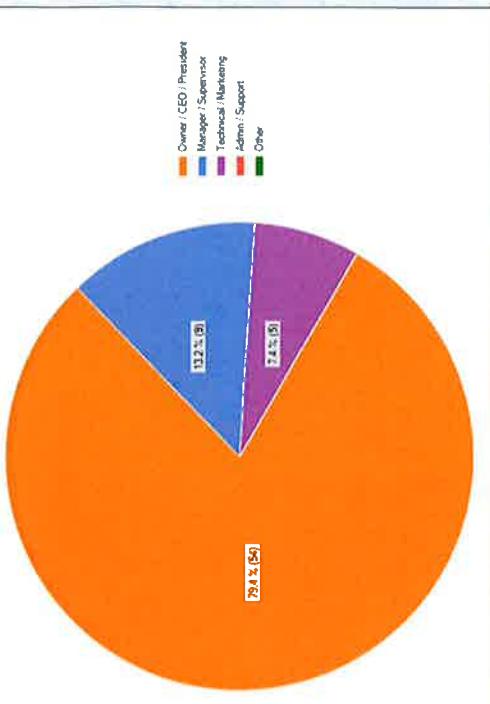


[BP] Best Practices LLC Business Retention & Expansion – Business Surveys

To what extent would you or your employees benefit from training in the following areas?



Please check the role of the person filling out this survey.



Business Retention & Expansion – Business Surveys



Property Enhancement Grants

- Adopt a Policy
 - Identify qualifying improvements
 - Desired geography and types of businesses
 - Formal process / Council approval
 - Always a “Matching Grant”



Business Retention & Expansion – Expansion

Business Retention & Expansion – Expansion



Expansion Grants

- Purchase of equipment
 - Relocation costs
 - Building improvements



Workforce Issues

- Workforce almost always an issue
- Must know local workforce contact, or bring
- Engage HR Directors / roundtables
- Provide workforce / training resources

Center for Workforce & Economic Development (CWED)
www.collin.edu/cwed
Natalie Greenwell Director (972) 995-3768
nateenwell@collin.edu

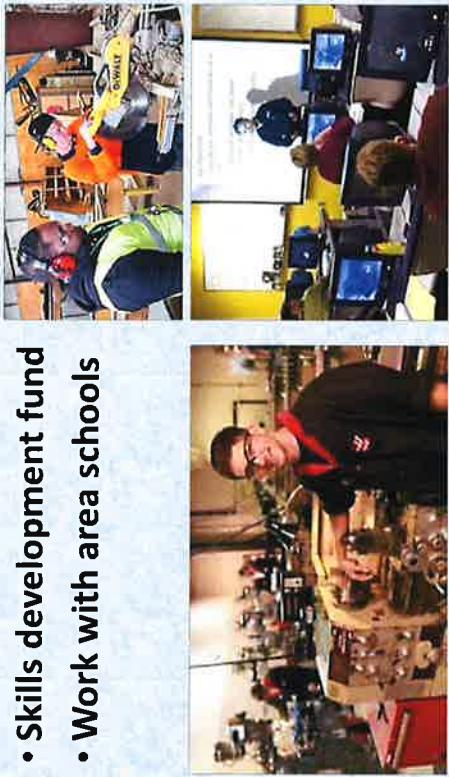
The business resource branch of Collin College created to consult directly with company executives to customize training specific to meet the needs of today's changing industry and workforce trends.

Best Practices LLC
Business Retention & Expansion – Expansion

Best Practices LLC
Business Retention & Expansion – Expansion

Job Training Grants

- Skills development fund
- Work with area schools



Relationships!

- Businesses
- HR Executives
- Property Managers
- Area banks
- Chamber of Commerce
- Governor's Office
- CVB
- Workforce Board
- Community College
- Dallas Reg. COC
- SBDC
- Health Dept.
- Fire Marshall
- Building Official
- BREI – Intl. - www.BREI.org



- Resources at www.EDPBestPractices.com

- BRE Strategic Plans
- BRE Interview / Survey Examples
- BRE Guides
- BREI – Intl. - www.BREI.org



Thank You! – Greg Last

Best Practices LLC
Business Retention & Expansion – Closing Comments

Best Practices LLC
Business Retention & Expansion – Expansion

Resource Links

(817) 992-6156
www.EDPBestPractices.com



Training Presentation: Business Retention & Expansion

Date: September 16, 2021

Location: Farmersville

Presenter: Greg Last, CEO, EDP Best Practices, LLC

Excellent Poor

— — — — —	Presentation Content	— — — — —	Presentation Content
— — — — —	Presentation Style	— — — — —	Presentation Style
— — — — —	Response to Questions	— — — — —	Response to Questions
— — — — —	Attendee Engagement	— — — — —	Attendee Engagement
— — — — —	Takeaway Benefits	— — — — —	Takeaway Benefits
— — — — —	Overall Value to Me	— — — — —	Overall Value to Me

Need more on these topics:

Need less on these topics:

Other comments / suggestions for improvement?

Suggestions for other training modules?

www.EDPBestPractices.com

Training Presentation: Business Retention & Expansion

Date: September 16, 2021

Location: Farmersville

Presenter: Greg Last, CEO, EDP Best Practices, LLC

Excellent Poor

— — — — —	Presentation Content	— — — — —	Presentation Content
— — — — —	Presentation Style	— — — — —	Presentation Style
— — — — —	Response to Questions	— — — — —	Response to Questions
— — — — —	Attendee Engagement	— — — — —	Attendee Engagement
— — — — —	Takeaway Benefits	— — — — —	Takeaway Benefits
— — — — —	Overall Value to Me	— — — — —	Overall Value to Me

Need more on these topics:

Need less on these topics:

Other comments / suggestions for improvement?

Suggestions for other training modules?

www.EDPBestPractices.com



Agenda Section	Regular Agenda
Section Number	B.
Subject	<u>Consider, discuss and act upon changing meeting time</u>
To	Farmersville Economic Development Board 4A
From	Daphne Hamlin
Date	September 16 th , 2021
Attachment(s)	
Related Link(s)	
Consideration and Discussion	Approve or deny
Action	<ul style="list-style-type: none"> • Motion/second/vote <ul style="list-style-type: none"> <input type="checkbox"/> Approve <input type="checkbox"/> Approve with Updates <input type="checkbox"/> Disapprove • Motion/second/vote to continue to a later date. _____ <input type="checkbox"/> Approve <input type="checkbox"/> Disapprove • Move item to another agenda. _____ • No motion, no action