

November 5, 2007

To: Matt Mikolajewski and Peggy Yessa
EDC

From: Tom Ticknor

Re: External Interviews

Prior to the Interviews

1. We will retest the format and establish a benchmark by interviewing the City of Madison (Matt first, then Mark).
2. We will send a letter/e-mail over Mark Olinger's signature to request the interview with an offer to provide reciprocal information and requests to provide the city's economic development organizational chart and ED strategy to Tom Ticknor.
3. Tom Ticknor will examine each city's website for key ED information (Steven Landau has begun this regarding tools).
4. Peggy Yessa will schedule interviews and ask again whether they would please share a copy of their economic development plan if we do not have it yet, sending it to Tom, and she e-mail the survey to each participant ahead of time for their review & preparation.
5. In most cases, Tom will also conduct a short interview of the City's leading ED business ally.

Final Draft

**Person
Place**

This is Tom Ticknor, the economic development consultant to the City of Madison. Thank you for agreeing to talk with me about your city's economic development programs on behalf of the City of Madison, Wisconsin. We appreciate your help. The interview will take approximately 60 to 90 minutes, and we will provide you with a brief executive summary early next year after project completion.

We are stressing economic development rather than planning and community development. Unless otherwise specified, questions take a City government perspective. If you have outsourced this economic development function to a private or public/private economic development entity, tell us about that too.

Thank you for participating. We will send a brief executive summary of our findings once the project is done, probably in late January.

Introduction & Priorities

1. Does your city have an Economic Development mission statement and/or a definition of economic development? (Please describe and send.) (Note whether it stresses quality job creation.)

2. Does the City see the economic development function as separate from the community development and planning functions?

3. Are there any economic problems or emerging challenges that reinforce the City's need to conduct proactive local economic development?

Is the city land-locked?

What percentage is the city built-out?

Have any major employers closed or drastically downsized? If so, what has been the approximate job impact?

Have any major employers moved to or expanded in your suburbs? If so, what has been the approximate job impact?

4. What is the proudest economic development achievement in which the City has played a major role?

5. Has the City won any state or national awards or garnered any outside recognition for its economic development efforts?

6. Has your city enjoyed any major business attraction successes in the past few years? What role has the City played in this regard?

7. Please answer the extent to which you agree or disagree with the following statements, not in your personal beliefs, but as they describe your city’s policy environment.

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
We have such a strong economy we do not need to worry about proactive economic development.					
Community development is more important than economic development for our city.					
Neighborhood development is our strongest priority.					
Our electorate supports economic development.					
Our Mayor “gets” economic development.					
Our City Council “gets” economic development.					
Our City Manager (if applicable) “gets” economic development.					
It is easy for business to understand our economic development services and to find the right person to help them from our website.					
The City understands customer service.					
The City is a one-stop business assistance organization.					
We proactively seek to understand business needs.					
City staff is proactive and empowered in terms of ED.					
We effectively help our employers meet City regulatory standards.					
We effectively cooperate with our University in terms of local ED.					
We effectively cooperate with state government in terms of local ED.					
We effectively help our developers meet our regulations.					
We effectively help neighborhood retail development.					
We effectively help small business development.					
We effectively help minority business development.					
We effectively help high-potential technology small businesses.					

Discuss extremes.

Programs & Staff

8. What is the size and composition of the City's economic development team?

Total size		
Number/Position	Salary	Comment

9. Is this team within the Planning Department or elsewhere (where)?

10. To whom does the Economic Development Director report?

11. How many professionals on City staff are devoted predominantly to the following areas?

Function	# Direct	Indirect City Funded	Comment
Economic Development/ Business Assistance			
Real Estate			
Downtown Development			
Community & Neighborhood Development			
Inspection & Regulation			
Planning			

Do these numbers increase if we also count individuals in outside organizations funded to great degree through City grants.

12. Approximately how much does the City spend in programs and grants (beyond staff) in the following areas in a typical year? Are the funds local, state, or federal?

	Amount	Funding Source		
		Local	State	Federal
Tax Increment Financing				
Industrial or Business Park Development				
Brownfield Redevelopment				
Downtown Development				
Business Incubators				
Small Business Development				
Minority Business Development				
Business Retention & Expansion				

Business attraction				
Workforce development				
Business location/expansion incentives				
Tax Abatement				
Contributions to other ED functions				
Other				
Other				

13. Which of these programs/efforts are most important? What are your most important accomplishments in these areas?

	Most Important	<u>Accomplishments</u>
Tax Increment Financing		
Industrial or Business Park Development		
Brownfield Redevelopment		
Downtown Development		
Business Incubators		
Small Business Development		
Extensive Retention & expansion programming		
Business attraction		
Workforce development/ Job training		
Cooperation w/ County/Regional ED Group		
Other		
Other		

14. How do you set these priorities? Is there an economic development strategic plan? (Ask for.)

Employer Outreach/Business Climate

15. What if anything does the City do to try to create a positive attitude toward quality job creation?

Within City government

Among the general public

16. Does the City participate directly in business retention and expansion outreach efforts? Please describe.

17. Do you have key account relationships with major employers (where one person from the City is their chief contact and go-to person)?

18. Do you have one-stop permitting and business assistance centers?

19. Do you monitor customer service in terms of regulation, permitting, and business assistance? If yes, how, and how do you report results?

20. Who is the lead regional economic development group in your area?

Who serves on its Board from the City and who staffs this from the City?

How much does the City contribute annually?

What is its total annual budget?

How big of an area does it serve?

Is the City a lead ally or a reactive support player to this organization? If lead ally, how?

21. Does the Mayor (or City administrator) have an economic development sub-cabinet or lead development team? If yes, who is on it and what is its role?

22. Is there a City Economic Development Commission? If yes:

What is its role? (Get a copy of its mission statement.)

Does it have a budget?

How is it appointed and what types of people sit on it?

How often does it meet and who staffs it?

23. Is there a separate Employer or Business Advisory Council to the City and/or the Mayor? If yes, what is its role?

24. How does the city monitor and report on its economic development track record? (Ask for results, annual report, etc.)

How often do you report your results and to whom?

25. **Thank you so much.** Is there anything else we should cover to have a true flavor of your city's ED efforts?

Post Interview: Top Take-Home Lessons

Advertising Plan for ED Workshops 11/7/07 ---DRAFT

1. **Press Release**-City press release system
2. **Email**

Email a letter to:

- OBR staff contacts
- EDC
- Chamber of Commerce
- DMI
- Business Associations
- AABBA
- Latino Chamber of Commerce
- Business incubators and tenants
- Plan Commission
- Urban Design Commission
- Engineering
- Comptroller
- SBAC
- BID Board
- SMART Growth
- GMCVB
- MAGNET
- MNBC
- Noel Radomski's Suggested Interview list (Noel Radomski's list and other EDC member's lists that did not get interviews)

Also ask these organizations to post the meeting in their newsletters and on their websites and to forward to any interested business or group.

3. Website

Develop a website for the plan including meeting information.
List meetings on City of Madison website's main page.

4. City Offices

- Common Council Office-Alders mailboxes
- Clerk's Office-post on meeting board
- City Cable 12-

Regular Mail -

Economic Development Workshops

DRAFT



The City of Madison is in the process of developing an Economic Development Strategic Implementation Plan to guide our efforts over the next 3-5 years. The plan can only be as good as the ideas provided by Madison's business community. Please take an opportunity to meet with our consultant, Mr. Tom Ticknor, to discuss your thoughts on the future of the Madison economy.

*Support by
Madison Gas and
Electric made
these workshops
possible.*

- *What role should the City of Madison play in promoting business development over the next 3-5 years?*
- *Based on your experiences, are there programs, policies and projects that should be added, modified, or removed from the City's economic development toolbox?*
- *What positive business experiences have you had while working in communities elsewhere that we could/should consider for the City of Madison?*

Workshop #1- Targeted toward small businesses Thursday, November 29, 2007, 8-10 am, Overture Center, 201 State Street

Workshop #2-Targeted toward medium and large businesses Thursday, November 29, 2007, 2-4 pm, Warner Park Community Recreation Center, 1625 Northport Drive.

Workshop #3- Targeted toward "any" business and the general public Wednesday, November 28, 2007, 6-8 pm, Alliant Energy Center, Exhibition Hall, Monona Room

Workshop #4-Targeted toward "high tech" businesses of all sizes Thursday, December 6, 2007, 1:30-3:30 pm at MGE Innovation Center, 510 Charmany Dr., Conf. Room 50

If you need an interpreter, translator, materials in alternate formats or other

Accommodations to access this workshop, please call 267-8721 at least three business days prior to the meeting.

Although each workshop will have a different focus, please do not feel that one or the other is "right or wrong" for your business. If you cannot attend the workshop that is targeted toward your business please attend the session that is most convenient for your schedule. All questions concerning the workshops can be forwarded to Ms. Peggy Yessa at 267-8721.

As an alternative to participating at a workshop you can email your thoughts regarding the questions noted above to obr@cityofmadison.com

A draft of the plan will be available for review by the business community in January of 2008, with additional opportunities for business community input at that time. Please email us at obr@cityofmadison.com if you would like to receive a draft copy of the plan. The plan will also be posted on the City's business website at www.cityofmadison.com/business

A quorum of the Economic Development Commission members may be present and in attendance at these workshops.

A quorum of the Common Council may be present and in attendance at these workshops.

EDC Discussion Issues
Economic Development Strategic Plan
November 7, 2007

Project Update

- Eata
- Interviews
- Listening Sessions
- Survey
- Retreat on December 12

Data Issues & Preview

- What is the Comparison Set for Defining Success?
- Smoking Guns: Any Reasons not to be Complacent?

Discussion

- What are Madison's Greatest ED Successes?
 - Did City Policies/Programs matter in these successes?
- Have City ED shortcomings cost Madison economically?
- Where Should the City be more Proactive in ED?

The Critical Issue of Definitions

- Planning
- Community Development
- Economic Development

Preliminary Observations (A Work in Progress)

1. Allied ED Players beyond the City
2. Issues Areas critical to the City
 - a. The Desired Future is Unclear, especially in Economic Terms
 - b. The City lacks an ED tradition/culture
 - c. Customer Service & Business Climate issues
 - Proactive business retention & expansion
 - Website/intake process
 - Regulatory customer feedback
 - Unclear priorities for business assistance staff
 - d. Policy Priorities
 - Basic vs. non-basic jobs
 - How much to support allies
 - TIF
 - e. How much to support others
 - f. City ED Organizational Issues
 - EDC role/mandate/clout
 - Fractionalized City approach
 - A reactive or a proactive ally
 - Communication & symbols
 - Resources
 - g. Other Issues/Concerns
 - h. Thinking Outside the Box