Economic Development Roadmap

Prepared for:

City of Beaverton, Oregon

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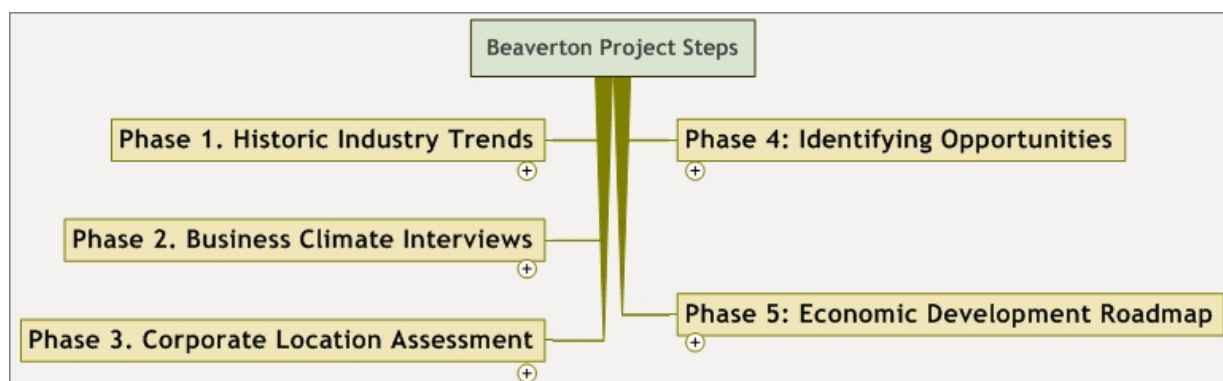# Beaverton Economic Development Roadmap

Strategic direction for Beaverton's Economic Development Program

I. Introduction

The City of Beaverton is retooling policies and programs to raise the priority of economic development. Mayor Denny Doyle was elected on a pro-business platform and council members are concerned about local businesses and jobs opportunities for Beaverton residents through the recent economic downturn. This plan is the action-oriented result of studying Beaverton's competitiveness for attracting jobs and investment as well as the City's success in satisfying the needs of local employers. The plan lays out a roadmap of how to strengthen Beaverton's assets, effectively support existing businesses, and recruit companies that are a good match for success in Beaverton.

Planning Process

A team consisting of Chabin Concepts, Austin Consulting, Applied Economics and Peake Consulting developed the plan with a 5-step planning process.

The following tasks were completed in the planning phases to gather information, analyze Beaverton's capabilities, strengths and weaknesses so that the plan developed could be realistically implemented.

- **Historic Industry Trends** – researched and analyzed the performance of industries in Beaverton and the Portland Metro Area.

- **Business Climate Interviews** – conducted forty interviews to gather perceptions of Beaverton businesses and external influencers to the site location decision process.

- **Corporate Location Assessment** – mock business recruitment exercise, including a Request for Proposal, evaluation of City's proposal and site visit, conducted by international site location consultant that mimics a real project to assess Beaverton and how the city works with clients.

- **Incentive Program Assessment** – interviewed seven City and State economic development professionals regarding incentives tools for Beaverton's Economic Development Program; researched limitations of local incentive programs.

- **Competitiveness Worksession** – presented analysis of Beaverton's competitiveness (results of Business Climate Interviews, Corporate Location Assessment and Incentive Program Assessment).

- **Identify Industry Opportunities** – further screening of Historic Industry Trends for compatibility with Beaverton's assets and limitations as well as investigate emerging and niche opportunities to develop a final list of industries for Beaverton to target.

- **Website Review** – reviewed the website for features, functionality and content desired by the City's target audiences.

- **Economic Development Primer** – wrote briefing document for Mayor and Council as a precursor to plan.

II. Assessment & Discovery

Beaverton is in the heart of the Portland Metro's technology business hub and enjoys global recognition for the sporting goods and apparel industry. Up until a few years ago, the City outsourced economic development programs to the Portland Development Commission. Now the City has developed a nationally recognized Economic Gardening Program and expanded economic development staffing.

As a leading business center for the region, it is important to recognize Beaverton's competitiveness and limitations so that a plan of action can address relevant issues.

Competitive Advantages

- **Talent Pool**: Employers are privy to a broad and deep pool of high-quality and highly-educated workers with strong technical skills and global business experience. Due to Beaverton's location and access, employers are able to attract workers from all over the region. Loyalty is exceptional, illustrated with low turnover. Wages for production and entry-level scientific occupations are significantly lower than technical markets of Seattle, San Francisco and other areas of California.

- **Lifestyle**: Amenities and a unique culture contribute positively to the ability to recruit talent to the area. Younger generations of workers want to live in Oregon. Beaverton has a small-town feel with good schools. It's safe and clean.

- **Transportation**: Beaverton is very accessible through highways, public transportation (bus and light rail) and international air service. Light rail is leveraged as a positive part of the community. Most commutes are 30-45 minutes, yet less stressful with public transportation.

- **Central location in Portland Metro Area**: Benefits of location are workforce draw, interaction with vendors, customers and resources throughout the region. Proximity to Portland for business and lifestyle amenities are of value.

- **Available space is diverse and located in quality business park settings**: Mix of office (Class A and B) , flex and some light industrial with many turnkey opportunities

- **Very attractive community appearance**: Streets, sidewalks, community buildings and public spaces in good condition; landscaping set-asides adds to appeal.

- **Green**: The Portland region is known for leading-edge sustainability. Strong state incentive programs for renewable energy. Recognized value that Oregonians have for the environment.

- **Nike**: A leading global company and Beaverton's most well-known business.

- **Community Visioning**: The process appears to be an excellent engagement of citizens.

Areas for Improvement

- **City historically not business-friendly**: Earlier annexation actions remain controversial and are negatively perceived. Permitting is perceived to be slow and bureaucratic, although there is an expectation this will improve in response to those perceptions.

- **Lack of City outreach to businesses**: Lacking city communication with business has led businesses to feel that the city does not appreciate business contributions to the city.

- **Lack of competitive incentives at state and local levels**

- **Limited Greenfield sites**

- **Economic development service**: Region not working together. *Unsure who to contact with lead for region or Beaverton.* Oregon, in general, places more emphasis on government's point of view than approaching businesses with customer service for their needs to be met.

- **Transportation constraints**: Employers aired concerns about traffic congestion and desire additional public transportation stops closer to employment centers. Freight movement is a limiting factor. Although there is one flight to Japan and one to Europe, international air service out of PDX has limitations for global companies.

This is a pivotal time for Beaverton to improve the local business climate. New leadership and a strong will to make Beaverton more competitive are in place. This plan addresses the areas for improvement and strategic approaches to take Beaverton to market.

III. Beaverton's Vision for Economic Development

The City aims to add value for businesses by fostering a business climate that supports job creation while generating revenues for the city to operate and provide services to businesses and residents.

As a result…

- Local employers will be advocates of Beaverton, offering referral leads to the City.

- There will be lower vacancy rates for office, industrial and commercial space.

- Beaverton will be a major regional player in economic development, positively perceived by the external market.

Plan Focus

Understanding that economic development is simply wealth generation, this plan focuses on traded-sector industries that bring new wealth to the Beaverton economy.

FIGURE 1 – HOW THE LOCAL ECONOMY GROWS

Why traded-sector industries? Traded sectors (a.k.a. basic industries) bring new wealth from outside the community by exporting goods or services outside of B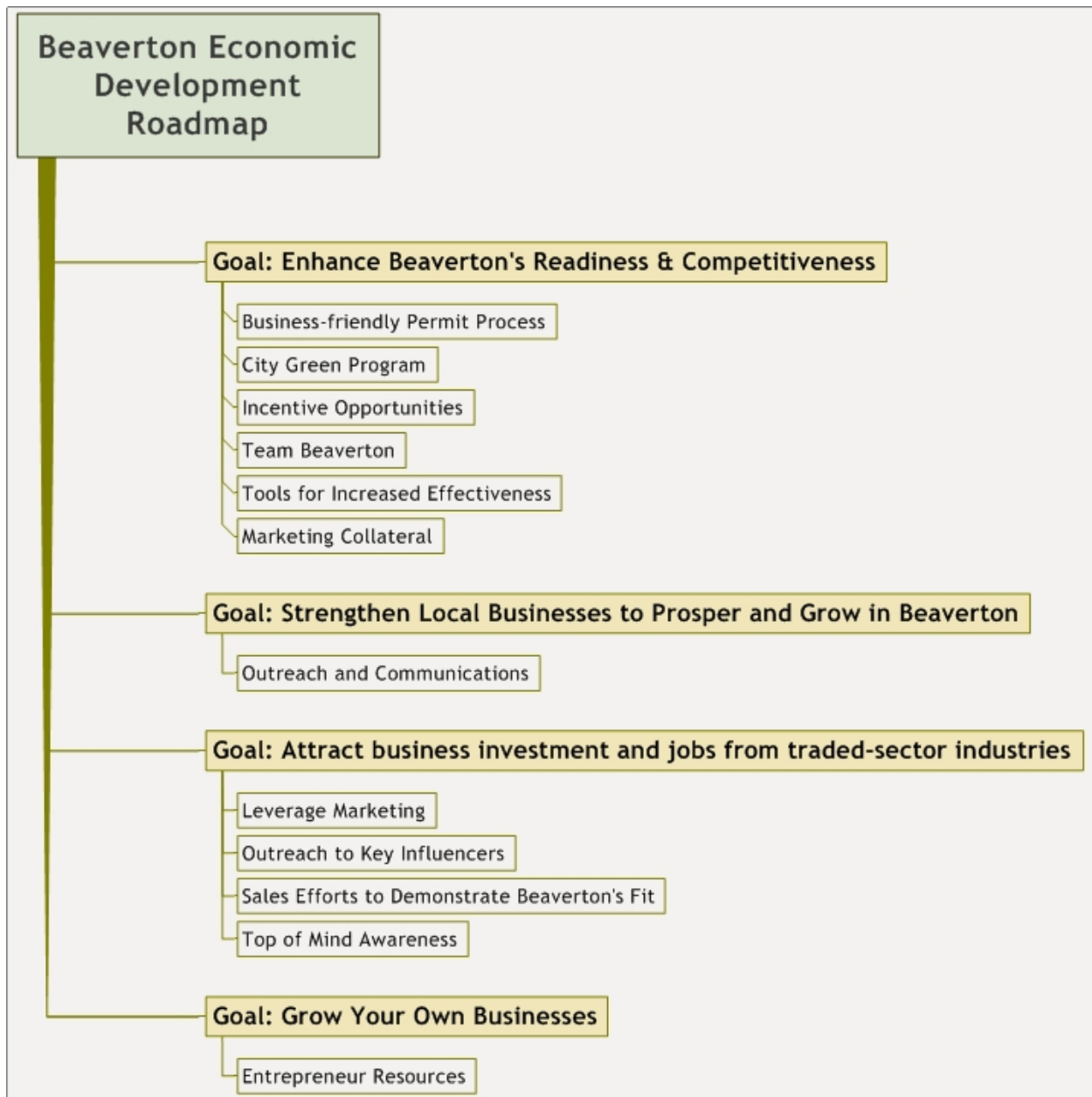eaverton. Payment for goods and services brings wealth into the community through company income and wages paid to employees. Traded-sector businesses grow the local economy as opposed to retailers and service businesses that circulate money within the community. Non-traded sectors help to retain wealth in the local economy and contribute to the local economy through the multiplier effect, but they do not necessarily generate new wealth.

Using the multiplier effect, new traded-sector businesses bring income and employment, leading to related generation of new traded-sector and non-traded sector income and employment. As a result, the economy grows more than the original traded sector growth. In turn, traded-sector industries provide an even greater positive impact to the local economy.

IV. Strategic Initiatives

This section of the plan lays out specific strategic initiatives and tactics to achieve the City's goals and realize the City's vision for economic development. An overview of the plan is presented below:

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Beaverton Economic
  Development
    Roadmap
    │
    ├── Goal: Enhance Beaverton's Readiness & Competitiveness
    │         ├─ Business-friendly Permit Process
    │         ├─ City Green Program
    │         ├─ Incentive Opportunities
    │         ├─ Team Beaverton
    │         ├─ Tools for Increased Effectiveness
    │         └─ Marketing Collateral
    │
    ├── Goal: Strengthen Local Businesses to Prosper and Grow in Beaverton
    │         └─ Outreach and Communications
    │
    ├── Goal: Attract business investment and jobs from traded-sector industries
    │         ├─ Leverage Marketing
    │         ├─ Outreach to Key Influencers
    │         ├─ Sales Efforts to Demonstrate Beaverton's Fit
    │         └─ Top of Mind Awareness
    │
    └── Goal: Grow Your Own Businesses
              └─ Entrepreneur Resources
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For each strategic initiative, details as to why this initiative is important, specific tactics, recommendation for lead responsibility and partners for the initiatives are presented.

Goal: Enhance Beaverton's Readiness & Competitiveness

Strategic Initiative: Business-friendly Permit Process

Why Important? Interviews with local businesses revealed negative experiences through the permit process while external audiences perceive Oregon's process to be arduous. During the site visit for the Corporate Location Assessment, Austin Consulting was overwhelmed with additions of fees instead of a clear straightforward answer for all fees, regardless if collected by the City. Understandably, Beaverton cannot change state land use regulations but there does exist an opportunity to stand out from the competition in a positive manner with improvements to customer service. If the Mayor was elected on making Beaverton more business-friendly, this strategic initiative is a critical first step.

Tactics:

1. Establish a City of Beaverton Fast-Track Processing Team to cut through "red tape" and address perceptions of difficulty through the permitting process.

    a. The Fast-Track Processing Team is composed of department heads or representatives with decision-making authority to "fast-track" the permitting process of commercial and industrial projects including provisions for weekend inspections during the construction and/or tenant improvement installation process for qualified projects.

    b. Establish criteria for projects to be fast-tracked.

2. Strengthen internal communications for enhanced client service:

    a. Economic Development staff explains their roles and responsibilities with clients.

        ▪ "Brown Bag with Economic Development" – monthly informal meeting for Council Members, the Administration and other city staff, to learn about economic development resources. The objective is for all city personnel to better understand economic development and make referrals to economic development staff as they come across relevant businesses with needs.

    b. Seek intersections between Community Development and Economic Development on projects to better communicate and work together to provide clear information to clients prior to and through the development process.

    c. Referrals to Economic Development when traded-sector businesses approach the Community Development Department.

3. Present summary of all relevant project fees for development (including those beyond City) into a pro forma for each client. Use in proposals and site visits.

4. Develop a Critical Path Timeline for distribution via website, proposals, site visits and at the Community Development Department front counter.

5. Promote and highlight pre-development meetings with educational approach to helping businesses though the process.

6. Appoint a Project Ombudsman for major projects to be THE point of contact for the business through the process.

7. Work closely with local and state jurisdictions to coordinate consistency and clarify for companies pursuing permits, assistance in working with regional agencies such as Oregon EPA, county air pollution control district, flood control, etc. Facilitate efforts to overcome any and all bureaucratic situations.

8. Using case studies, communicate successes that dispel negative perceptions.

9. Market case studies and "Fast-Track Processing Team" services to prospects and expanding local companies.

Lead: Fast-Track Processing Team
Partners for Initiative: Mayor, Economic Development Department, Community Development Department

Strategic Initiative: City Green Program

Why Important? Companies are increasingly seeking communities that align to their mission for reducing their carbon footprint. Although Oregon has a reputation for sustainable practices, through the assessment process there is little evidence for preference given to green developments or installation of renewable energy equipment. The Mayor's 10 Point Plan includes several green initiatives, which is a good step. Despite being known for "green" in Oregon it will be important build on the 10 Point Plan to demonstrate proactive support for sustainable practices.

Tactics:

1. Expand "Sustainable Beaverton" Program.

   a. The program should go beyond recycling and fast-track LEED building efforts, support installation of renewable energy equipment, encourage energy efficiency and conservation programs, to name a few priorities. Review and formulate plan.

   b. Adopt at City Council.

   c. News release to announce program.

2. Post to City websites and maintain updates about green program activities.

3. Document LEED and Energy Star buildings in Beaverton.

4. Host informational meetings for local and prospective businesses to enhance existing buildings to LEED standards. Offer as service in local business outreach meetings and in marketing collateral.

Lead: Sustainability Program
Partners for Initiative: Community Development Department, Economic Development Department

Strategic Initiative: Incentive Opportunities

Why Important? A compelling incentive program should be developed to position Beaverton as a more aggressive and competitive community. Incentives must be innovative and creative and to be most effective, must be used to set a community apart. As an example, using workforce development incentives, a community is adding more of the same to the state's initiative and thus not distinguishing itself from others as opposed to providing an incentive different or not elsewhere provided. To be very simplistic, think of a bowl of apples with one orange in it. One obviously sees and pays more attention to the orange over the apples…in fact, it says: "Pick me over the others."

Incentives should focus on traded-sector businesses because they generate a positive economic impact on the local economy, bringing new wealth into the community. In addition to focusing incentives on prospective companies, the City should also include incentives for existing industry. Business attraction only creates 20-25% of the new jobs created whereas, existing industry accounts for 75-80%. Unfortunately, business attraction is often seen as more appealing and gets the vast majority of press. However, the return on investment of taking care of existing industry is much greater as it is less costly than trying to attract new investment. Beaverton's local companies are another community's business attraction target and these competitors may be willing to offer them anything to move. Since one of the biggest challenges is access to capital to grow businesses, this is an excellent way to assist existing businesses.

As an added thought, when being questioned about the using valuable tax dollars toward incentives to entice new jobs and investment to the community, keep in mind that 90% of something (new) is better than 100% of nothing (if you aren't successful in the expansion or location of new jobs).

Tactics:

1. Develop incentive package for traded-sector existing and new businesses.

    a. Assemble incentive resources.

       ▪ Inventory incentives offered by economic development partners (Team Beaverton). Assemble incentives into a comprehensive package. It is likely that your competitors are not providing a complete package. Often, a company is happier to see contributions from a broad array of partners working together than a large sum incentive from one source. Multiple sources demonstrate well-rounded support for the project and appreciation of the company locating in your community. Include Federal, state, utility, workforce resources, green programs, and even the City's approach to Fast-Track Permitting.

       ▪ Develop a list of local incentives that can be provided by local businesses such as banks providing reduced-rate home loans or closing costs, florists providing flowers for grand opening, etc. The items on the list may not ultimately add up to a lot of money but they are certainly impressive when presented to a potential client.

       ▪ Work with the Beaverton Chamber to package discounts from local businesses for relocation and business services. Not only will this package provide an incentive for the

new business, it will foster business-to-business opportunities for the new business to shop local.

- In proposals, prepare customized package of incentives – those only relevant to company and project.
- Determine estimated value of incentives offered for project. Summarize into one page overview with support documentation following on each incentive.

b. Establish revolving loan and grant funds that can be used for any traded-sector industry with an emphasis on target industries. These funds can be used as low interest loans, loan guarantees or to buy down interest rates. Lack of investment capital has potential to undermine all business including high-tech start-ups, small and minority businesses.

- Establish micro-lending funds.
- Utilize existing Community Development Block Grant (CDBG) loan funds.
- Utilize Building Opportunities for Oregon's Small Business today (BOOST) Loans and Grants.

c. Establish flexibility in Service Deliver Charge (SDC) fee rationale and include in incentive policy developed so that there are clear criteria for incentive use.

d. Use time and materials rational rather than standard building inspection fees being based on the value of equipment. This can reduce a company's cost if they are installing many of the same pieces of machinery.

e. Determine appetite for property tax phase-in on an as-needed basis and establish criteria for incentive use.

2. Develop a formal, clear and transparent incentive policy with a tiered approach based on job creation and/or investment that can justify each and every incentive utilized. An incentive policy will provide clear and consistent expectations for the City and client as to qualifications for incentive award and responsibilities of client.

a. Draft incentive policy. Solidify the application process, programs and incentive criteria and include in the policy, filing applications, "but for" clauses and compliance documents.

b. Formally adopt by City Council.

c. Post to Business Beaverton website with incentive program information.

3. Establish a reputation for business-oriented customer solutions. Dispel the perception that the Pacific Northwest is not considered a favorable region for business by improving "Speed to Market" through "Speed to Development"

a. Establish Fast-Track Permitting and Review (part of Fast-Track Processing Team in previous Strategic Initiative). Implement comprehensive restructuring of processing, procedures and requirements to reduce costs, simplify permitting and eliminate construction delays and reduce permit time to two-thirds of current issuance time. Speed to Development must be citywide and does not only include the economic development personnel. All city employees must realize they are part of the Fast-Track Processing Team.

b. Implement a Priority Plan Review, Permit and Inspections for all qualified green building projects so they receive building permits in two-thirds the time as regular projects. This priority plan review should be part of the City's Green Program.

d. Develop case studies of past projects, including timeline of the project going through the process to present to potential clients.

e. Make clients aware (verbally and in marketing materials) that the Beaverton ED Department is available to provide extensive assistance in state incentive applications, be involved in the process and accompany them on all trips for the approval process.

4. Include information on all new and improved incentives in marketing materials outlining cash and non-cash and include case studies of success stories.

5. What's Worked Elsewhere?

   a. Review incentives in other areas that have been successful. Beaverton may choose to recreate.

      ▪ In 2009, Kentucky passed the Kentucky Reinvestment Act for existing manufacturers that requires (1) a minimum expansion cost of $2.5 million; and (2) retain employment base of at least 85% employment and provides 100% income tax credit to cover 50% of the eligible equipment costs or 100% of the job skills upgrade training costs. This is one of the few incentives in the country focused on existing industry. This incentive is also unique in that it addresses the changing economic environment and companies need to continue doing more with less.

      ▪ A city moved its state investment pool money into six community-based banks with the understanding there would be increased capital to new and/or expanding local businesses.

      ▪ Developed incentives for target industries with a focus on their highest-cost location factors in mind.

      ▪ Developed incentives for companies instituting green practices.
         http://www.scottsdaleaz.gov/greenbuilding/incentives

6. What Hasn't Worked (What not to do)

   a. Fail to recognize that claw-backs are acceptable. Clawbacks can come in the form of repayments or refunds and can involve a penalty for not meeting committed job and/or investment numbers.

   b. Fail to have written agreements or memorandums of understanding of what the city will do as well as what the company will do.

   c. Fail to recognize and market the importance of your existing industry in Beaverton.

7. Consider in the future:

   a. Apply for an Enterprise Zone to allow for an e-Commerce Enterprise Zone in the next round in 2012.

   b. Develop a plan for major projects where the city can buy the land or building and sell it to the company for less than market value with some assistance from the state.

c. Consider becoming a "first adopter" for products developed in Beaverton as was done in Portland.

Lead: Economic Development staff
Partners for Initiative: Mayor, City Council, Economic Development Partners

Strategic Initiative: Team Beaverton

Why Important? City staff relies on many external organizations and individuals to satisfy the needs of local employers and clients. Coordinated delivery of promised services, despite the City not being the actual provider of all services, guarantees satisfied clients. Being that the City is relatively new in economic development, it is important to build a strong team to synchronize the delivery of services.

Tactics:

1. Establish Team Beaverton (or whatever you choose to name it) and coordinate communications for better teamwork and client services.

    a. Who is involved? All service providers involved in a client project (typically on a site visit), such as Mayor, utilities, workforce, education/training and Beaverton's Fast-Track Processing Team.

    b. Hold regular team meetings (quarterly, monthly) for team members to share information on resources and the City to provide project updates.

    c. Establish protocols for

    - Confidentiality;
    - Using the shared contact management system; and
    - Site Visits.

    d. Inventory business resources for use on website and other marketing materials.

    e. Assist in collecting case study information.

Lead: Economic Development Department
Partners for Initiative: WorkSystem, Portland Community College, all utility providers, City Development Department, etc.

Strategic Initiative: Tools for Increased Effectiveness

Why Important? As Beaverton gets more involved in economic development, there will be an increasing demand on staff time to meet with local and prospective businesses. To be effective, staff must operate more efficiently to meet the specific needs of clients while rising above the competition in new and aggressive ways. These tools will help staff and elected officials make more informed policy decisions, improve communications, and provide more valuable resources and service to local businesses and prospects.

Tactics:

1. **Industry Intelligence** – It is important to speak the industry's language (acronyms, terms, etc) and understand industry trends when working with clients. As well, each cluster has different drivers for site location and expansion. Knowing the differences will help you to better customize your responses and set Beaverton apart from your competition. Conduct research to understand the industry drivers, issues and opportunities.

    a. Review industry intelligence data in the Target Industry Study.

    b. Visit, even "bookmark" or "favorite", websites listed in the First Research Reports.

    c. Subscribe to First Research, www.firstresearch.com, for quarterly updates or purchase individual reports from Chabin.

    d. Customize *Google* for target industry research - Finance, news alerts (via email) and RSS feeds on companies and industry topics, *Google* News page.

    e. Join industry-related *LinkedIn* groups.

    f. As budget allows, join industry associations relevant to target industries.

2. **Data** – Ammunition to prove Beaverton's value proposition is critical to a competitive economic development program. The old "wining and dining" approach is irrelevant to global business location decisions.

    a. Site Selection Data – Comprehensive data is presented on Business Beaverton website. Maintain with current updates.

    b. Laborshed Maps – Enhance data with realistic picture of Beaverton's laborshed. This data will put Beaverton ahead of the competition since this piece of information is highly-valued by site selectors and businesses in site search mode. Working through relationships developed with local HR Managers, gather zip code data for employees working at local companies; segment by occupation and wage levels. Commute distances are relative to wage levels. Map laborsheds for respective occupational clusters/wage levels. Load to website and use laborshed maps for relevant occupations in proposals.

    c. Economic Gardening Data – maintain subscriptions:
       - LexisNexis
       - MarketPlace Gold

- BizMiner
- Selectory
- InfoUSA

    d. Co-Star – maintain subscription to track real estate and monitor local businesses' lease expiration dates (risk in losing local companies).

3. Assemble Business Resources Tool Kit – Working in partnership with Team Beaverton, gather information on available business resources. Some are already on BusinessBeaverton.com. More resources from economic development partners can be added, such as financing tools, workforce programs for employers, information for upgrading existing buildings to LEED standards, international trade programs, etc.

4. Business Beaverton Website – The City has recently launched a new website for economic development. The site is easy to navigate and comparatively comprehensive. Part of the planning process was a website review, based on expectations of Beaverton's target audiences.

    a. Since the new website has a content management system, suggested improvements can likely be completed in-house.

    b. Augment website with the *EDsuite Online Proposal System* for generating proposals. This tool is the leading innovation in client proposals because it enables City staff to easily create a customized website of information for each client while being able to track when the client reviews the proposal. The proposal tool can also be used to deliver follow-up information to local businesses after a meeting. Implementation steps involve training, preparation of draft content, and customization of proposals for each client.

5. Purchase e-news software for preparing professional and legal electronic communications. Recommended programs are *Vertical Response* and *Constant Contact*.

6. Operating Cost Analysis Program – The Economic Development Department has information to prepare operating cost analysis but is time consuming and does not include comparative operational costs to other communities. *MetroComp*, populated with cost data for operating in Beaverton and competitive areas you determine, is a tool to quickly generate customized reports useful to local and prospective businesses. Use this tool to customize information for clients and demonstrate Beaverton's operational cost structure for specific projects. Additionally, where Beaverton is not competitive on a cost basis, you will be able to understand the gap, which may be addressed with incentives. Select source and competitive areas to be included in the program; order; install; training.

7. Impact Model – Purchase *Community Prospect Assessment System* (CPAS) for use as an internal tool to evaluate the economic and fiscal impact of projects. Applied Economics researches and populates the impact model with the city's finance structure for relevant analysis. Output from the model can be used for incentive due diligence and determine the value of the company's impact (including industry-specific multipliers). This tool will also be useful in the development of the City's Incentive Policy as a variety of scenarios can be evaluated.

8. Contact Management System – The City is currently using ProActive's version of ACT for economic development. To enhance communication within the City and among economic development partners, *Executive Pulse* is recommended for Beaverton's contact management system to track all external client activity as well as local business interactions.

   a. Purchase the *Executive Pulse* basic program (retention focused) and the Prospect Tracking Module (business attraction focused).

   b. Participate in on-line training webinars.

   c. Populate the database with local business lists and business attraction portfolio. Exported lists from ACT can be uploaded instead of individual entries.

   d. Instill habits for maintaining contact information current and tracking all interactions.

   e. Train and invite users from Team Beaverton and Mayor's Office so that you can avoid duplication in communication and business visits.

Lead: Economic Development Department
Partners for Initiative: Mayor's office, Team Beaverton

Strategic Initiative: Marketing Collateral

Why Important? In order to promote Beaverton's value proposition, city services and partner business resources must be marketed in a cohesive manner. Since the City does not have the budget of Nike or another major commercial retailer, all marketing efforts must be strategically developed to deliver consistent and relevant messages to target audiences. The following tactics frame Beaverton's fundamental message for business and create communication tools to support work with local and external audiences. This strategic initiative should dovetail into the City's broader branding project.

Tactics:

1. Key Message Platform for Beaverton's economic development target audiences.

   a. A Key Message Platform guides all economic development marketing and sales communications, in order to develop a clear and consistent market position.

   b. Verify and add to the list of proof points on the draft key messages – first internally as a staff and then as a group with Team Beaverton.

   c. Create a binder and electronic file to accumulate examples, graphics, etc to further articulate the key messages.

   d. Hold citywide staff meetings to expand understanding of key messages and practice elevator pitches.

   e. Consistently reinforce messages and integrate in all marketing materials.

2. Collateral

   a. Develop map of Beaverton specifically for economic development.

   b. Develop business resource brochure for local businesses, including services and incentives.

   c. Develop business cases for each target industry cluster.

   d. Develop Beaverton brochure for business recruitment (not industry-specific), including services and incentives.

   e. Develop case studies to enhance marketing collateral and website content.

   f. Design and print branded postcards for customized messages.

Lead: Economic Development Department
Partners for Initiative: Mayor, Council Members, Team Beaverton, Fast-Track Processing Team, City Branding Project

Goal: Strengthen Local Businesses to Prosper and Grow in Beaverton

Strategic Initiative: Outreach & Communications

Why Important? Existing businesses in Beaverton account for the largest portion of job growth and could have the greatest negative impact on Beaverton's economy if they were to close or relocate. Local business expansions account for 75 to 80% of all new jobs in the United States. It is vital that the City build relationships with local businesses in light of the fact that Beaverton's businesses may be another community's business attraction target. Now more than ever a strong business retention and expansion program is critical to demonstrate the City wants and appreciates existing businesses. If they feel that the attraction of new businesses has a higher priority than local businesses, when they have an opportunity to relocate outside of Beaverton, they will.

The City's Economic Gardening Program is a top-notch resource for business. Regardless of the quality of this program, it may not be a resource of interest to all businesses. The tactics in this strategic initiative are positioned to elevate the attention on local traded-sector businesses and expand connections to resources for all traded-sector businesses.

Tactics:

1. Track local companies for changes that could affect their growth in Beaverton, such as lease expirations, mergers and acquisitions of local and parent company, changes in CEO or company leadership (local or outside the area), and new product development.

   a. Record events and changes in contacts database (*Executive Pulse*).

   b. As appropriate, send letter/note card of congratulations from Mayor and economic development staff working with company.

2. Tracking industry trends to enhance outreach meetings.

   a. Utilizing industry resources, develop an understanding of industry trends and challenges to local companies within these industries.

   b. Use research findings for topics of discussion in outreach meetings.

3. Meetings with local companies.

   a. Segment lists of local companies in *Executive Pulse* by size of company, industry sector and contact (CEO, CFO, and HR Local Manager). Prioritize list of major employers for scheduling meetings to include the Mayor or other council members.

   b. Based on the findings of the Business Climate Interviews, a number of companies are still in a "wait and see" position to form their opinion of the new Mayor (and correspondingly the City's new pro-business attitude). A way to call more attention to the actions the City will be taking to elevate business through the implementation of this plan is an outreach meeting blitz.

- Identify a week where all economic development staff, the Mayor, Council President and possibly other council members are available to meet with businesses.
- Aim to schedule five appointments per day per team. Each appointment should include an elected official (if available) and economic development staff member as there may be follow up to the meeting that should be completed by economic development staff.
- Hold internal briefing meeting on approach to business outreach meetings and confidentiality.
- Issue news release about meetings and City's efforts to meet with local businesses. Actively post social media messages about the blitz efforts (not confidential meetings). Direct companies to Business Beaverton to schedule an appointment (in case they were not already contacted).
- At the end of the week, hold a debriefing and update *Executive Pulse* with meeting results.
- Send thank you letters signed by people on the visit.

c. Following on the blitz, regularly schedule meetings at least two times per year with major employers and meet at least once per year with traded-sector employers with 100 or more employees. Smaller employers should be visited at least every other year.

d. The approach to business visits should be on building relationships, identifying any needs (research will contribute to insightful questions), and connecting businesses to resource solutions. An executive should never be asked a question about their company that is available through research, unless it is for confirmation.

e. Update meeting and follow-on tasks in *Executive Pulse*.

f. Coordinate business resources/follow-up delivery of services with Team Beaverton, pertinent to visit discussions.

g. If economic development staff or elected officials are traveling, be sure to schedule visits to headquarter locations of local businesses. Ask local manager for assistance in setting up the meeting.

4. Attend local HR meetings to gain insights as to workforce challenges local employers experience.

a. The Portland Human Resources Management Association (PHRMA) includes membership of Beaverton companies, http://www.portlandhrma.org/.

5. Host Mayor's "Eggs & Issues" Breakfast for local employers

a. Being that the Mayor is new yet not available to meet with every business, host a regular event for dialogue between city leadership and the business community.

b. Target traded-sector businesses with personal invitations from the Mayor.

c. Keep the presentation short and instead encourage businesses to ask questions and raise issues. The agenda should focus on learning from the businesses in order to develop solutions that make Beaverton more business-friendly.

d. Hold quarterly or monthly, depending on Mayor's availability. Set time and day of the month for regularly scheduled meetings.

e. Economic development staff should call invitees personally for RSVP. Then, even if the business contact is not able to attend the breakfast, a relationship can still be cultivated.

6. Social Networking

   a. All Economic Development staff should establish a *LinkedIn* account.

   b. Create a group for Beaverton businesses.

   c. Search for contacts from *Executive Pulse* on *LinkedIn* and invite to the group. Personal messages are better than a generic invitation. Draft a message that is compelling and piques interest. Only allow Beaverton businesses to join the group.

   d. Mail letter to local traded-sector businesses explaining the City's new *LinkedIn* Group and invite participation.

   e. Promote at "Eggs & Issues" events.

   f. Encourage B2B communications among group members through your group messages and discussions.

   g. Post upcoming events, resources and even questions that will help the City provide better service to local businesses.

   h. Monitor for opportune topics and resources to bring to local businesses.

7. E-newsletter

   a. Newsletters can be time consuming for staff and not read if they are too lengthy. This e-newsletter should be short (read without scrolling down the page) and have relevant topics and resources to local businesses.

   b. Develop content for newsletter that is brief and link it to more comprehensive content on the Beaverton Business website.

   c. Utilize E-news software in order to meet all spam laws.

   d. Send out no more often than monthly.

   e. Add sign-up tool to local business section of Beaverton Business website.

8. Recognize Local Businesses

   a. At least annually, recognize local businesses at City Council Meeting, "Eggs & Issues" or special event.

   b. Recognize for job growth, sales growth, new product launch, new employee program, etc. Find unique ways of recognizing local companies.

   c. Issue news release on companies recognized.

   d. Develop case study on each company recognized.

Lead: Economic Development Department
Partners for Initiative: Mayor, Council Members, Team Beaverton, local media

Goal: Attract Business Investment and Jobs from Traded-Sector Industries

Business attraction will only succeed with a strong business retention and expansion program, complete and accurate data and transparent government through the entitlement process. The strategic initiatives for business attraction rely on everything else working effectively.

Starting with target audiences, Beaverton's targets can be classified into two major categories: (1) businesses or end- users; and (2) influencers to the site search process.

- Business owners and decisions-makers involved in the target industries of:
  - Electrical Equipment
  - Research and Development
  - Scientific and Medical Instruments
  - Software and Information Services
  - Sporting Equipment and Apparel
  - Solar Industry as it relates to Research & Development and Electrical Equipment
- Key influencers hired by companies to advise on site location decisions, such as:
  - Site location consultants
  - Real estate brokers
  - Real estate developers
  - Incentive consultants
  - Tax advisors

Strategic Initiative: Leverage Marketing

Why Important? Since Beaverton is one city within a more recognized region, it will be important to leverage marketing to make the greatest impact with limited resources. Beaverton's target audiences will pursue state and regional contacts first far more often than a lead comes directly to the City because (1) they want to conduct a time efficient search; and (2) they may have never heard of Beaverton. It is unrealistic and wasteful for Beaverton to launch an awareness campaign to standout above the region. Delivering competitive proposals and quality service consistently will garner positive attention to Beaverton.

Greenlight Greater Portland, Westside Economic Alliance and the Regional Partners Council for Economic Development all appear to be regional marketing groups representing Beaverton. Yet, during the Corporate Location Assessment, Austin Consulting raised the concern that they do not know the person or group to contact in the Portland Region to send an RFP. There exists a major gap in effective regional marketing for the Portland Region. Since this is such an important priority to Beaverton's business attraction efforts, it must be addressed as an opportunity for improvement.

Tactics:

1. Work with existing groups to develop a strong public-private partnership for business attraction in the Portland Region.

    a. Contact best-practice regional economic development organizations throughout the United States. Speak with President/CEO to learn about organization structure, mission, focus and involvement of communities within the region.

    b. Share results among communities within the region and members of regional groups.

    c. Work with regional organizations and regional communities to refine current regional organization to upgrade business attraction efforts or possibly create a new organization dedicate solely to business attraction.

    d. Hire staff. This step is important to address who external contacts can contact and work with on a project – not just have the leads shared among the communities. A point person is an absolute necessity for competitive business attraction and equitable lead generation in a region.

2. Participate in regional marketing for lead generation.

    a. Industry-specific tradeshows relevant to Beaverton's target industry sectors.

    b. Hire firm to generate leads for regional group, such as Research on Investment, www.ROIVision.com. Beaverton could hire ROI but the results per dollar will be greater for regional leads.

    c. Link Business Beaverton website to/from regional website.

3. Participate in state marketing opportunities. Oregon Business Development Department is a good source of leads for the City. Continue to foster relationship with state.

a. Share Target Industry Report with OBBD.

b. When completed, share business cases and case studies with OBBD.

c. If allowed, join state on industry-specific tradeshows relevant to Beaverton's target industry sectors. We do not advise participation for Industrial Asset Management Council and CoreNet Global as the state has developed good relationships to represent Beaverton and has invested for the long-term in these organizations. Leads only come from IAMC and CNG with consistent, long-term participation.

Lead: Mayor for regional organization leadership; Economic Development Staff for marketing activities with state and regional groups
Partners for Initiative: Regional communities, regional organizations, OBBD

Strategic Initiative: Outreach to Key Influencers

Why Important? Building relationships with key influencers in the region and leading site selection consultants is important for long-term results in positioning Beaverton as a community of choice in the Portland region. These individuals may not have a project for Beaverton presently but increasing their awareness of Beaverton's unique assets and distinct service will make a positive impression for future projects that could be a good fit in Beaverton. Additionally, through the process of cultivating these relationships you will be able to gather insights on perceptions of Beaverton and learn about industry trends.

Tactics:

1. Meetings with Regional Brokers and Site Consultants.

    a. Develop and maintain a list of key industrial and office brokers/site consultants in the Portland region. Load to contacts database.

    b. Monthly, schedule at least one one-on-one meeting with a regional key influencer. Present updates on Beaverton and inquire about their perceptions of Beaverton's business climate and ways to provide better service.

    c. Send follow-up thank you notes and relevant case studies to address any of their concerns.

2. Expansion Management's Roundtable.

    a. Attend one Roundtable event by Expansions Management per year. Roundtable offers a unique opportunity to network with site location professionals and truly build relationships. Additionally, the site location consultants present cutting-edge industry trends and expectations for service and data from economic developers.

    b. Send follow-up thank you letter/email, including something learned specifically from each site consultant during the Roundtable event and a summary of Beaverton's value proposition.

    c. Add new contacts to *Executive Pulse*; record interactions.

Lead: Economic Development business recruitment staff
Partners for Initiative: None

Strategic Initiative: Sales Efforts to Demonstrate Beaverton's Fit

Why Important? The City is new in the business attraction arena. It is important to be prepared to make a good first impression when interest is shown for a Beaverton location, otherwise Beaverton will be eliminated from the search and possibly even hinder future opportunities.

Tactics:

1. Prepare competitive and customized proposals that demonstrate that the project and company would be successful in Beaverton.

    a. For a comprehensive proposal, start with the business case data (if company is a target industry sector) so that your proposal will be industry-specific. Build upon that data and transform it to be not only industry-specific but also company and project-specific.

    b. Keep in mind that all proposals will need to be customized to the priority location factors of each client. To anticipate some of these needs, you can review the list of priority location factors of the Target Industry Study.

    c. Understand the business drivers for each company. What may be the most important factors for a location decision for one company may not be the same for another company. Ask questions to learn why the company needs this facility and their vision for the facility.

    d. When you receive and RFI/RFP or meet with a company (not all proposals are developed as a result of an RFI/FP) ask questions about what the site location decision is based upon. Speak with company or project representative (state, site selector) to gather more insights on company and project, if possible. For example:

        ▪ What's most important to the company?
        ▪ What is the company trying to achieve with this location?
        ▪ What is the largest cost for development and ongoing operations?

    e. If you know the company, research online.

    f. Customize data to project priorities. If the project priorities are unknown, customize to industry priority location factors. Provide exactly the data requested in the RFP and make it easy to find in the proposal the information they are seeking.

    g. Write a compelling cover letter that summarizes Beaverton's value proposition for this project. The cover letter should make the case, with the content in the rest of proposal serving as supportive documentation.

    h. There will be instances when you will not be asked for a comprehensive proposal because the lead may only want specific answers or the project is being handled by the state, for example. In these instances, answer the requested information and be sure to not only give facts but also translate the benefits for the company/project, based on your understanding of industry needs and Beaverton's corresponding business case. If possible, include a cover letter. At minimum, the cover letter may help your marketing partners (state and [future] regional group) to better articulate Beaverton's value proposition for the project.

2. Plan and execute winning Site Visits.

   a. To maintain consistency and quality, visits should be conducted as follows:

      - Identify partners to be part of site visit team. Who has knowledge and expertise for the client? Who will the client work with after the decision is made for Beaverton? Who best represents the community and the client's industry?
      - Preparing for a site visit – pre-meetings, communications, preparing materials and information as a team.
      - Develop and plan site visit itinerary – Plan A. Focus on what the client needs to make a decision.
      - Drive all routes prior to visit. Do you notice anything that does not present the community well? Can you fix it? How much time does it take to drive the route?
      - Develop a back-up plan: Site visit itinerary – Plan B.

   b. Tips & Hints:

      - Get to know the client before they arrive. "Google" them and their company (if you know the name).
      - Provide a folder with itinerary including contact information for each person on the itinerary, maps and a business card holder sleeve. For an extra touch include photos so that the client can put a name with each person's face.
      - All community participants wear name badges. Do not ask visitors to wear name badges.
      - Plan for breaks so that the client can check messages or make phone calls – give them privacy.
      - In between meetings and tours, question if the client is getting what they need.
      - Be flexible – add to the agenda if a new relevant topic surfaces.
      - Stay on time. Honor your team's schedule, unless the client requests a schedule change. Then change, but do so quietly and behind the scenes. Appear to be a "solution for the client" organization.
      - Update *Executive Pulse* with site visit itinerary, questions, feedback and follow-up to be completed.
      - Verify the list of all requests, who will provide information, and when the client expects this follow-up information. Economic Development staff should gather all follow-up information from partners and package response to client. Utilize the *EDsuite Online Proposals System* to share large electronic files. Remember you have the added benefit when using the *EDsuite Online Proposal System* to see when they read your follow-up information.
      - Send thank you gift. If client is flying, do not give to them during the visit because they will have difficulty carrying it home. Note: Small consumable gifts as a welcome package in their hotel room is appropriate.

3. Prospecting and Follow-up.

    a. Economic development business attraction (a.k.a. sales) is a process. Competitive communities continue to communicate how much the community wants to satisfy the needs of the prospective company. The process does not end at the conclusion of the site visit.

    b. Be proactive – not an "order-taker".

    c. Call to follow-up on project status and offer information. Keep calling on a regular basis (i.e. monthly or when determined by client). Most site searches takes 18-36 months at minimum.

    d. Feed information to client; use data, announcements and article reprints as marketing tools. Also share industry trend information from news clipping service.

    e. Understand timelines and what pressures the decision makers are under. Offer to prepare the information they need for the boardroom.

4. Client Meetings.

    a. Pursue an opportunity to meet with the company, even before a site visit, at their facility. Not only will this outreach demonstrate that you are seriously interested in bringing them to Beaverton, you also have the opportunity to observe their company in operation. Suggested factors to evaluate:

        ▪ What is happening at their current facilities?
        ▪ What workforce skills are being utilized?
        ▪ How are workers treated? Is there a good rapport with managers and general workforce?
        ▪ What is the lay-out of their manufacturing or distribution lines?
        ▪ Are there a lot of trucks coming and going? What impact may be felt at a Beaverton location for this level of traffic?
        ▪ Are there any odors or sounds that may not be desirable at a Beaverton location?
        ▪ What are the issues they are facing at the current facility that could be solved with a Beaverton location?

    b. Note: Be sure to handle confidentiality appropriately. The workers in the plant may not know that the company is considering relocation of the facility. If discovered, they may fear losing their job and retaliate with their employer.

5. Closing the Deal – Incentives.

    a. Research competitors on project.

    b. Understand if/where Beaverton falls behind on overall start-up costs and operating costs. Run *MetroComp* analysis to determine differences in operating costs.

    c. Develop incentives package that aligns to priority location factors and leading costs factors. Make the package relevant. Follow incentive policy. For any City-funded incentive run the *Community Prospect Assessment System* to determine return on investment to City.

    d. Draw up agreement.

    e. With signed agreement, deliver on promises.

6. Debriefing – Win or lose, you should maximize the experience to learn what went well and where improvements can occur.

   a. Contact the company or their representative (site selector, broker, etc) and request an exit interview. Conduct a phone interview. It is not preferred to have the questions answered via email as you may want to follow-on to their answers for more explanation.

   b. Share the findings confidentially with your team.

   c. Create and implement an improvement plan for dealing with future clients.

   d. For wins, utilize feedback as appropriate, for celebrations and news releases.

Lead: Economic Development staff
Partners for Initiative: Team Beaverton, land/building owners, real estate brokers representing local properties and buildings

Strategic Initiative: Top of Mind Awareness

Why Important? In order to keep Beaverton in the forefront it will be important to send marketing materials that continue to demonstrate Beaverton's value proposition and opportunity for business growth.

Tactics:

1. Create mailing list from contacts database for regional key influencers, national site selectors, and site consultants met at Roundtable events, and business attraction clients in portfolio.

2. Develop customized messages for branded postcards including such topics as announcements for local business expansions and new business locations, new programs and incentives, case studies of local companies.

3. Mail at least quarterly or more frequently as announcements occur.

4. Since some of these targets prefer electronic mail, issue brief e-news with similar content to postcard mailings that links to more in-depth information on Business Beaverton website.

Lead: Economic Development Department
Partners for Initiative: Team Beaverton, local companies and others with relevant content

Goal: Grow Your Own Businesses

Strategic Initiative: Entrepreneur Resources

Why Important? Communities where companies start up have the greatest opportunity to be their home for the long term. Start-up traded-sector companies also bring a very positive impact to the local community because their innovation curve can be very high. A comprehensive economic development program should include entrepreneurship initiatives, as long as there is an understanding that investment in entrepreneurship is for the long-term. Results may not be measurable within an election cycle. If entrepreneurial resources are not available in other parts of the community or region, cities may decide to fund such a venture to round out economic development offerings.

The Oregon Technology Business Center (OTBC), sponsored by the City of Beaverton, has recently downsized into a smaller location, focusing on virtual incubator services. From the OTBC website, it appears that pertinent entrepreneur resources are currently being offered. However, there are questions as to the long-term support for the OTBC. The following tactics will help the City make an informed decision about allocation of resources to the OTBC.

Tactics:

1. Conduct a formal Return on Investment Study. The most effective ROI studies are completed by an independent third-party.

   a. Document uptake of services.

   b. Interview companies who participate in the incubator and utilized services. Document if they are located in Beaverton and their growth since involvement in OTBC.

   c. Review OTBC mission, goals, and budget.

   d. Prepare economic impact study with data to analyze results to budget.

   e. Craft recommendations.

2. Communicate results to OTBC investors.

3. Council meeting to review findings. Confirm City's desired outcomes for OTBC and compare to results of study. Determine if OTBC can realistically meet City's desired outcomes. Decide on funding or purse alternative model for OTBC.

4. Annually measure results of the OTBC using the *Community Prospect Assessment System*.

Lead: Economic Development Department
Partners for Initiative: Mayor, Council Members

V. Measuring Results

The implementation of this plan should be monitored to stay on track and document results. Business locations and expansions are dependant on many factors outside the City's control. Monitoring progress on the completion of tactics is a means to measure what you can control, regardless of the state and national economic trends. Outcomes can be measured on jobs, investment and client activity. It will be important to communicate results and use measurements to adjust implementation as needed.

Tactics:

1. Strategic Initiatives Benchmarks – document the completion of tasks.

2. Conduct customers service surveys with companies and their development advisors on the permitting process upon final occupancy. The results will help to document changes in perceptions of the city's permit process.

3. Job Growth & Client Activity Benchmarks – *Executive Pulse* reports can be customized to generate most of the data quickly.

Indicator	Measurements
Located Companies	❑ Number of companies ❑ Number of jobs ❑ Average wage ❑ Capital investment ❑ Square feet leased ❑ Square feet constructed
Expanded Companies	❑ Number of companies ❑ Number of jobs ❑ Average wage ❑ Capital investment ❑ Square feet leased ❑ Square feet constructed
Vacancy Rates	❑ Annual change in vacancy rates ❑ Compare to other communities in region
Retained Companies. (if threat of leaving)	❑ Number of companies ❑ Jobs saved ❑ Economic impact if company lost

Client Activity	❑ Pipeline – total number of clients in pipeline (and jobs, capital investment, square feet they represent)
	❑ Number of outbound meetings with
	  • Companies
	  • Key influencers
	❑ Number of site visits
	❑ Exit interviews – win or lose
	❑ Number of local company outreach meetings

Confidence in City of Beaverton	❑ Referral clients from local employers and residents ❑ Referral clients from regional key influencers

Marketing	❑ Results per lead source (regional group, state)
	  • Leads
	  • Wins
	❑ Results by event (i.e. tradeshows)
	  • Leads
	  • Wins
	❑ Average marketing investment per lead in pipeline

4. Communications.

   a. Internal – within City.

      ▪ Generate and distribute one-page summary of outcomes and % complete report monthly.

b. General Public/Community.

- Regularly issue news releases on new locations and expansions, new programs and services.
- Issue annual report of accomplishments summarizing Job Growth & Client Activity Benchmarks, including Economic and Fiscal Impacts (from the *Community Prospect Assessment System*) as well as what activities the City completed for local businesses, entrepreneurs and marketing for new business attraction. Work with local media to do a feature article or insert. Mayor to include highlights in State of the City speech.

5. Although a comprehensive planning process is not necessary every year, the documented results should be used to evaluate what worked and what needs to adjust the following year.

Lead: Economic Development Department
Partners for Initiative: Mayor, local media

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About the Consulting Team

Chabin Concepts' core competency is in realistic, achievable and measurable actions:

- strategic thinking,
- creative marketing, and
- economic development program implementation.

Our goal is to position cities, counties and states to win new jobs and investment by creating a Roadmap supplemented with a Toolbox to achieve their goals and objectives – delivering strategic solutions, tactics and tools to accomplish the mission.

We are more than a consulting group – we are your solutions network. We use our network to bring our clients the best practices of renowned experts in urban and rural economic development, site location analysis and hands-on experience in implementing and managing competitive and results-oriented economic development programs.

We value every client and project, respecting the characteristics, heritage and goals of each community, their stakeholders and their economic development team. We commit to integrating our values, integrity and philosophy to create success:

- Involvement of the community and all partner organizations.
- Research that is tailored to your specific areas of interest and industry focus.
- An experienced and diverse team of professionals to bring you expertise, specialized knowledge and techniques.
- Innovative strategies and creative economic development tools.
- Tactical plans designed for implementation.

We provide effective and successful economic development roadmaps – integrating resources, innovative tools and creative marketing – for communities to accomplish their goals consistent with their values.