



# Proposal for Professional Services: Target Industry Analysis, Workforce Data, Lead Generation & Strategic Plan for McKinney Economic Development Corporation



# Tadzo

The Intersection of Site Selection & Economic Development

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## I. COVER LETTER

August 9, 2016

Mr. Darrell Auterson, President  
Ms. Abby Liu, Executive Vice President  
McKinney Economic Development Corporation  
5900 S. Lake Forest Drive, Suite 110  
McKinney, TX 75070

Dear Darrell and Abby,

It was a pleasure to work with you and McKinney EDC's Board of Directors during the May strategic planning workshop. Now, as you work to implement priorities identified during that workshop, you are reaching out for assistance from TadZo with the Target Industry Analysis and Workforce Data Study. It would be a privilege to work with you to advance these economic development efforts for McKinney EDC.

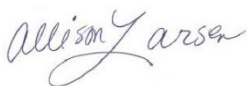
In this proposal I present the specific scope of services and corresponding deliverables for a Target Industry Analysis and Workforce Data Study. Lead generation has been additionally proposed to complement these research efforts so that you can "hit the ground running" in pursuit of target industries. All of this research will roll up into a strategic plan for McKinney EDC.

Teaming with TadZo to provide McKinney exceptional value are two firms – Applied Economics and Research Consultants International. Our team includes national leaders in economic development with exceptional skills and experience in:

- ▲ Evaluating community competitiveness from a site selector's point of view;
- ▲ Understanding business needs and industry trends;
- ▲ Organizing and presenting data for informed decision-making and making a compelling business case;
- ▲ Best practice strategic initiatives; and
- ▲ Effective global prospecting.

I'd be happy to arrange a call with you to review this proposal or call me with any questions.

Respectfully submitted,



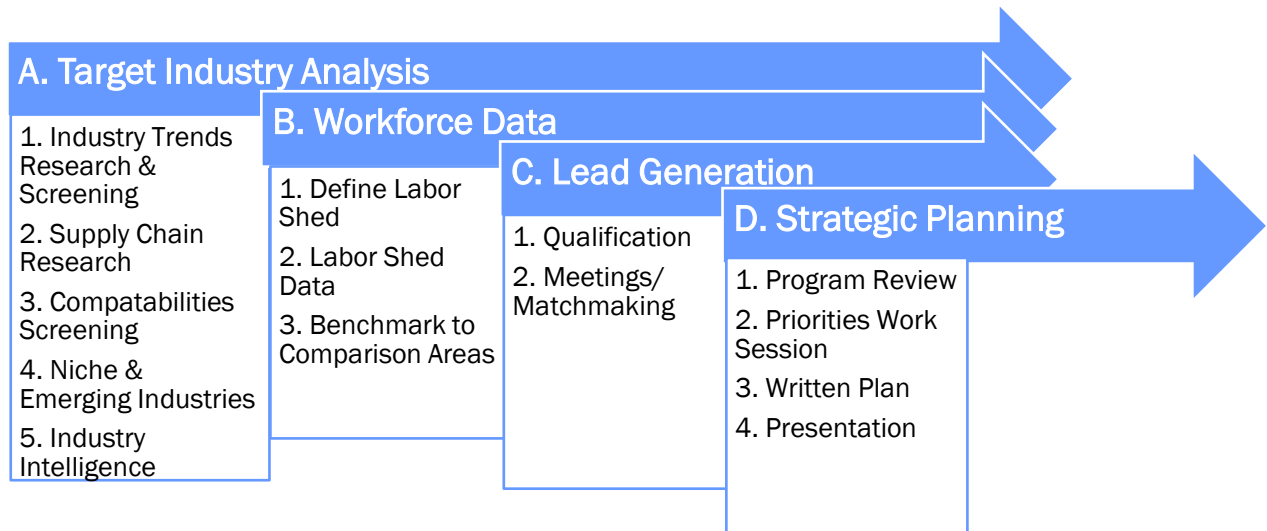
Allison Larsen, Principal  
TadZo



August 9, 2016  
Proposal for McKinney EDC

## II. PROPOSED SCOPE OF WORK

The proposed scope of work includes three related components, illustrated in the graphic below:



### A. Target Industry Analysis

A Target Industry Analysis identifies growth industries that are best fit with your community's assets and limitations. Target identification involves five steps of data and asset analysis to filter broad clusters down to specific sectors that are a good fit for McKinney, Texas.

#### Step 1 – Industry Trends Research & Screening

We will begin by looking at historic industry trends. This empirical analysis will set the stage for the target industry recommendations. We will look at industry growth at the six-digit NAICS level for Collin County and state-wide Texas data.

#### *Baseline data:*

- ▲ **Success and potential future growth** – We will analyze industry trends for employment, number of establishments and average regional wages by six-digit NAICS from 2009 to 2014 along with national projected output and employment growth. This data will allow us to determine what types of industries have been most successful in the local area in recent years, and which ones are likely to hold the best potential for future growth.
- ▲ **State-wide data** - In order to broaden the base of potential targets, we will investigate and compare similar data on industry growth trends for Texas.
- ▲ **Manufacturing capacity** - An indicator of expansion potential is national capacity utilization rates for manufacturing industries.
- ▲ **State and local comparison** - We will compare growth industries in Texas state-wide to local clusters to identify similarities and differences. We will use location quotients to identify industries that are particularly concentrated in the local area.

We will then screen the baseline data to identify a universe of potential target industries. The focus will be on **basic industries** – those industries that produce goods and services for export and bring new wealth into the local economy. We will employ a screening process to narrow the list of industries included in the economic trend information to those that have the best potential for future growth, and industries that represent appropriate targets for recruitment. Several guidelines for screening and prioritizing industries will be used.

### *Screening guidelines:*

- ▲ Growth industries locally and industries that are growing at a faster rate in the county than in the nation as a whole;
- ▲ Industries that have above average projected output and employment growth nationally over the next 10 to 15 years;
- ▲ Industries that have high manufacturing capacity utilization rates nationally and are likely to expand in the near term;
- ▲ Firms that increase wealth and provide above average wages; and
- ▲ Industries that will help to diversify the local economy.

Once the initial screening process is complete, the next step will be to identify specific target clusters. We will group interdependent industries together, including primary producers as well as related suppliers and other support industries. Clusters that have an established presence in Texas are important, even if they are not currently in McKinney because they may provide opportunities for expansion.

### **Step 2 – Supply Chain Research**

This research will be conducted with secondary and primary data. An analysis of purchases for McKinney's leading basic industries will be documented. We will supplement this secondary data with an online employer survey. MEDC will be asked to promote the survey to major employers. The findings of this research will expand the universe of potential target industries subject to the capabilities screening in the next step.

### **Step 3 – Capabilities Screening**

Results of Steps 1 and 2 will need to be further screened to take into account McKinney's capabilities to meet the needs of the potential target industries.

A competitiveness assessment will be completed to lay the groundwork for ascertaining target industries that McKinney can competitively accommodate. The key site location factors listed below will be evaluated to identify any limitations in your community's ability to meet the needs of potential target industries.

- ▲ **Market Access** – Location and quality of diverse transportation resources (truck, rail, seaport access, air, intermodal).
- ▲ **Sites and Buildings** - available for development.
- ▲ **Utilities** – capacity and costs for water, sewer, electricity, natural gas, telecommunications; reputation of service provider; quality of service; utility incentives.

- ▲ **Permitting and Regulatory** – speed, clarity and consistency.
- ▲ **Human Capital** – availability of specific skills; wages and fringe benefits; ability to recruit talent to community; major labor force competitors; management/labor relations; general work ethic; available training programs that support skill development for potential target industries.
- ▲ **Business Climate** – beyond incentives, the environment of working with jurisdictions and overall community tone for welcoming new businesses.
- ▲ **Innovation and R&D Resources** – available locally and at nearby institutions that would support specific industry growth.
- ▲ **Sustainability** - services and resources to support green business initiatives.
- ▲ **Incentives** - experience with accessing federal, state and local incentives for businesses.

***Process:***

The assessment will occur via an on-site visit, including a city overview presentation, tour of available real estate and general community orientation, along with in-person meetings. The overview presentation and community tour should be handled by the McKinney EDC as if you are hosting a prospect for a site visit.

Meetings will be requested with:

- ▲ **City authorities:** vision for community; permitting and regulatory process; sustainability initiatives and resources.
- ▲ **Utility service providers**
- ▲ **Workforce service providers**
- ▲ **Education and training providers** – tour local facilities.
- ▲ **Innovation resource providers** – tour local facilities.
- ▲ **Local employers** will be interviewed confidentially for a deeper dive into workforce issues, regulatory environment, business climate, and any other limitations of the area. Speaking with employers provides the most authentic insights to operating a business in McKinney. What they have to say is critical to a comprehensive understanding of your community's capabilities to meet business needs.

Each factor will be scored on the following criteria:

- A = World-class competitive advantage
- B = Competitive, but missing key elements
- C = Neutral; found in many communities
- D = Fundamental assets are missing
- F = Disadvantages so great it could be a “deal killer”



With the findings of the competitive assessment, we will screen the potential target industries, identified in Steps 1 and 2, based on McKinney's strengths and weaknesses. This step ensures that the resulting targets are not only compatible based on industry trends, but are also a good fit with the competitive assets and limitations in McKinney, specifically.

#### **Step 4 – Niche & Emerging Industry Sectors**

Industry trend data does not fully capture emerging or underdeveloped industries that represent new opportunities for McKinney. Complimentary to unique assets and strengths discovered during the competitiveness assessment, we will augment our research with current location trends to identify any niche or emerging industry sectors that may not come up in our analysis of business trends data. This allows for a complimentary forward-thinking approach to the target industry study and leverages the current trends in site selection.

#### **Step 5 – Industry Intelligence**

Once all the targets have been identified, we will research additional industry intelligence including:

- ▲ **Typical Company Profile** – What does a company within the target industry look like? Employment, size of facility, capital investment, etc.
- ▲ **Priority Location Factors** – What drives their site location decisions?
- ▲ **Key Occupations** – For what occupations should local workforce agencies prepare talent and skill sets?
- ▲ **Industry Intelligence** – Industry overview, current issues, conversation starters for CEO, HR and CFO Executives.
- ▲ **Source Locations** – Where can you find these industries to recruit?

#### **Report & Presentation**

All steps for the Target Industry Analysis will be summarized into a final report, along with supporting data and documentation. This deliverable report presents all data and rationale for recommended target industry sectors, along with corresponding industry intelligence to support effective target marketing.

A presentation will be made that is educational and informative to explain research, screening and industry identification rationale.

## **B. Workforce Data**

Data will be researched and organized to better define McKinney's workforce competencies.

#### **Step 1 – Define Labor Shed**

Because workers typically reside beyond the boundaries of the community where they work, we will conduct primary research to document a sampling of labor sheds, based on occupation/wage levels. An online survey or phone request or employment by zip code, occupation and wage will be conducted. MEDC will be called upon to promote and distribute the survey to targeted local employers. We will focus on employers within target industries as much as possible in order to support MEDC's marketing for business recruitment.

## Step 2 – Labor Shed Data

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For the custom defined labor sheds (may be several based on occupation), document labor availability with:

- ▲ Percentile earnings
- ▲ Employment trends
- ▲ Demographics -gender, age, race/ethnicity
- ▲ Current job postings by occupation

Data will also be presented on programs and educational attainment, including:

- ▲ Regional completion/graduates per program
- ▲ Completion/graduates by institution
- ▲ Completion/graduates by award level
- ▲ Target occupation programs

A deep dive into job posting analytics will be presented:

- ▲ Total and deduplicated (unique) postings by job title, business, and region
- ▲ Average monthly hires by occupation
- ▲ Unique postings vs. hires
- ▲ Posting intensity: The ratio of total job postings to de-duplicated job postings
- ▲ Company job posting profile
- ▲ Top and unique skills
- ▲ Top certifications
- ▲ Top work environments

## Step 3 – Benchmark to Comparison Areas

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Together with MEDC we will identify five comparison areas to benchmark against McKinney's labor shed. The comparison areas may be competitors or U.S. source areas (i.e. for prospecting missions).

Findings from this analysis will help MEDC position McKinney's strengths against competitors' weaknesses. Where McKinney may be lacking against comparison areas, this may be helpful in developing alternative marketing approaches or incentives to mitigate weaknesses.

## Report & Presentation

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The deliverable for the Workforce Data will be a comprehensive report that documents all of the data, utilizing infographics to bring the data to life. Key findings will be summarized and highlighted in the report and presentation. All data will be sourced.

### C. Lead Generation & Qualified Prospect Meetings

In partnership with Research Consultants International (RCI), we will help you connect directly to qualified prospects within McKinney's newly researched target industries. This work involves targeting C-level executives of companies that match your criteria and have plans to expand. In addition to target industries, RCI will hone in on the function for the project's operation, i.e.:

- ▲ Manufacturing Facility
- ▲ Distribution / Warehousing Facility
- ▲ Assembly
- ▲ HQ Relocation
- ▲ Research & Development Center
- ▲ Software development office
- ▲ Sales and Marketing Office

Within RCI's lead generation process, they utilize state-of-the-art technology as well as social media and their internal proprietary database of companies that exceeds 1,000,000 contacts to identify leads. Not only do they analyze new business intelligence, they also comprehensively interview C-level executives in order to identify companies with expansion and relocation projects in site search mode. This lead generation work is foundational for meetings and matchmaking services.

You want to be face-to-face with prospective companies with active site search projects – that have high likelihood of coming to your community. RCI delivers effective meetings and matchmaking via many venues:

- ▲ Trade show meetings
- ▲ Economic development missions by targeted region
- ▲ Industry-specific meetings
- ▲ Monthly or annual meeting programs
- ▲ Phone meetings / online video meetings

Meeting/Matchmaking services are comprehensive and take care of all the necessary advanced planning, research, and agenda management. Here's how we put you in front of decision makers of companies:

- ▲ Cross referencing industry and regional targets with Research Consultants International's proprietary database.
- ▲ Meeting scheduling with qualified companies that match your organization's preferred criteria.
- ▲ Direct phone numbers of all contacts who have scheduled a meeting.
- ▲ Meeting confirmations 3-5 days prior to event.
- ▲ Lead/meeting summaries that include full project details.
- ▲ Weekly and monthly project updates.

- ▲ Follow-ups with previously identified leads when requested.
- ▲ Emails sent to decision makers in deriving information and promoting the region.
- ▲ All staff time and long distance charges.

Once RCI gives you the results of their comprehensive research, you can *choose to reject or accept* the lead.

Hands-on assistance is provided to manage your agenda so that both parties – the company and representatives from your organization – are confirmed for availability to meet.

- ▲ Update any new meetings or cancellations.
- ▲ Send the complete itinerary before the scheduled event.

Valuable details are provided for each meeting, including a complete meeting summary describing the project, meeting time, date and meeting location. RCI's all-inclusive service allows you to focus on a quality discussion about how your community is the best address for the company's new location.

## D. Strategic Planning

The final phase of this project is the development of a strategic plan for the McKinney EDC.

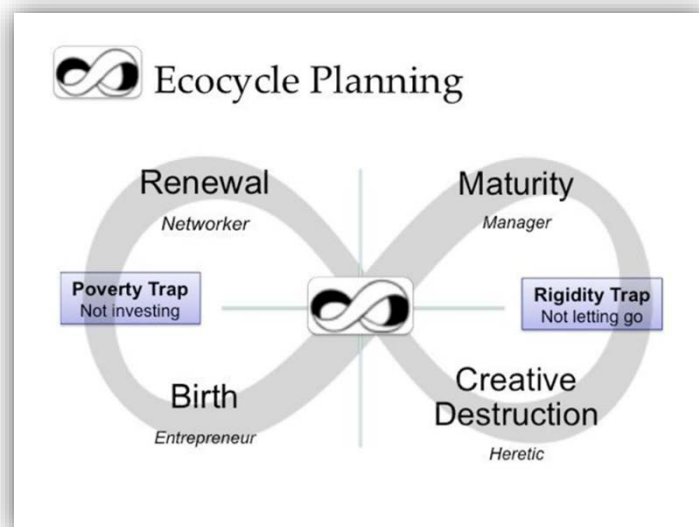
### Step 1 – Program Review

To fully understand the extent of MEDC's efforts, a review will be completed of:

- ▲ All available MEDC reports and past strategies or annual work plans;
- ▲ City of McKinney Comprehensive Plan;
- ▲ Tracked metrics of economic development accomplishments;
- ▲ MEDC Budget;
- ▲ And any other pertinent information.

A work session with MEDC staff will be facilitated to review program effectiveness and where there may be interest or need to creatively destruct programs and initiatives to make way for new approaches. We will use the Ecocycle Planning chart (shown at right) for this assessment exercise.

This program review also helps to gauge potential for realistic implementation, including a



clear understanding of resources – existing and potential.

### Step 2 - Priorities Work Session

Although the MEDC Board of Directors completed a Strategic Planning Workshop in May of this year, the results of the Competitiveness Assessment, Target Industry Analysis, Workforce Data Study and Program Review will review new opportunities and challenges that need to be addressed in future years. Timing for this phase of the project will also come at the completion of the City's Comprehensive Plan so it will be the perfect time to take all of this new information into consideration to set priorities for the new MEDC Strategic Plan.

In this highly interactive work session, the findings from all previous work will come together to help the MEDC Board of Directors, and other stakeholders you would like to include, to define priorities for McKinney EDC' Strategic Plan.

### Step 3 - Written Plan

With the results of the Priority Strategic Initiatives defined, TadZo will write the actual plan. Each Strategic Initiative in the plan will be developed using the following questions as guides:

- ▲ Why is the initiative important to the strategy (context)?
- ▲ What will the initiative accomplish (objective)?
- ▲ What specific tactics must occur for the initiative to be successful?
- ▲ What are the resources necessary for effective implementation?
- ▲ What metrics will be defined for each strategic initiative to measure outcomes as well as monitor progress through implementation?

A draft version of the plan will be presented to MEDC for review. Together we will discuss feedback of the draft plan as a means to further enhance the content and ownership of the plan before a formal presentation to the MEDC Board.

### Step 4 - Presentation

The finalized plan will be formally presented to the MEDC Board of Directors. On the same visit will be an Implementation Work Session with staff to discuss who does what by when, as a means to foster immediate implementation upon board approval.

## E. Project Deliverables

Following is a summary of project deliverables:

### Target Industry Analysis

- ✓ Recommended Best Fit Target Industries for McKinney Texas, including niche and emerging opportunities.
- ✓ Methodology and supporting data, including documentation of competitiveness assessment for key site selection factors and corresponding competitiveness "grade".
- ✓ Industry Intelligence – typical company profile, key occupations, priority location factors, source areas, industry resources and information.

**• Workforce Data**

- ✓ Report of McKinney's Labor Shed data.
- ✓ Benchmark data to five comparison areas.

**• Lead Generation & Qualified Prospect Meetings**

- ✓ Depending on location and type of meeting, a range of 8 to 11 meetings will be scheduled for MEDC staff.



























**• MEDC Strategic Plan**





- ✓ Strategic initiatives, including importance, objectives, performance metrics and key tactics.
- ✓ Executive Summary.

### III. PROJECT LOGISTICS

#### A. Proposed Timeline

The following table presents an estimated timeline for this project. During the Project Kick-off Call we can further detail the project timeline. We will accelerate the project as possible.

Scope of Work	Month						
	Sept	Oct	Nov	Dec	Jan	Feb	Mar
Project Kick-off Call							
Target Industry Analysis	 		 				
Workforce Data				 			
Lead Generation & Qualified Prospect Meetings							
Strategic Planning					 		 
Project Update Calls							

 Consultants on-site visit   
  Consultants off-site work  
 Conference calls   
  Deliverable

#### B. Price Proposal

Following is the price proposal for the proposed scope of services described in this proposal.

McKinney EDC Price Proposal	
Scope of Work	Budget
Target Industry Analysis	\$39,915
Workforce Data	16,545
Lead Generation & Qualified Prospect Meetings	10,143
Strategic Planning	13,397
<b>Total</b>	<b>\$80,000</b>

The price proposal encompasses all expenses, including travel expenses for four trips as noted on the proposed project timeline:

- **Trip 1** – On-site for competitiveness assessment tours, meetings and employer interviews.
- **Trip 2** – Presentation of Target Industry Analysis, including results of competitiveness assessment; and Workforce Data.
- **Trip 3** – Program Review Staff Work Session & Priorities Work Session.
- **Trip 4** – Strategic Plan Presentation & Implementation Work Session.

### C. Project Management

TadZo's approach to project management is to communicate throughout the project. This involvement ensures that project outcomes are aligned to the needs and wants of your team and will involve:

- ▲ **Project Kick-off Call** to review scope of work, plan specific dates for on-site visits and subsequent calls.
- ▲ **Project Update Calls** - Regularly-scheduled conference calls to report progress, request additional information, ask questions, etc.
- ▲ **Share draft deliverables** for input and feedback.

A private workspace on the internet (a.k.a. *TadZo Teamwork* <https://tadzo.teamworkpm.net/>) will be made available for MEDC staff (and any others you would like) to share documents and project progress.



## IV. EXPERIENCE AND QUALIFICATIONS

### A. About TadZo

TadZo is an economic development and site selection consulting firm, led by Allison Larsen with over 14 years of consulting experience, 19 years of economic development experience and more than 10 years in international business sales and management. With experience working in over 74 communities across 23 states/provinces, TadZo tracks best practices – *what works and what doesn't* – to draw upon for potential solutions in each unique situation facing a community.

TadZo's goal is to help communities stand out as *the* location of choice for their target audiences. Success is accomplished using proven techniques for uncovering unique community offerings and arming economic developers to align those assets with business needs through industry research and effective questioning.

Primary economic development services include:

- ▲ **Competitiveness Assessments** – What assets set your community apart from the competition? Where is your community falling behind the competition and stalling economic growth? What can you do to enhance your competitive position? Find out how your community stacks up to your competitors and economic development best practices. TadZo provides detailed feedback with specific recommendations to improve your community's value proposition.
- ▲ **Action-oriented Strategic Planning** – A plan is only good if it is implemented. Are you looking for new ways to make a positive impact with best practice solutions? You can count on TadZo to work in partnership with you for a strategy that delivers results of priority to community stakeholders, within your means, yet a stretch to achieve more than you can imagine today.
- ▲ **Workforce Development Strategies** – Talent is the leading driver for business competitiveness today. Is your community investing in training and skill development to meet industry's rapidly changing needs? Are you doing everything possible to attract and retain talent to your community? TadZo provides innovative approaches to enhance your labor pool.
- ▲ **Target Industry Research and Analysis** – Are your targets current? Have your assets changed and created a new value proposition? Are you curious about current industry trends in order to be more effective in your local business outreach and recruitment efforts? TadZo not only researches industry trends but also matches industries to your community's capabilities and emerging opportunities.
- ▲ **Business Marketing** – Are you looking for tried and true approaches to market your community – but with a fresh twist? Do you want to know what can bring more positive attention and serious looks at your community? TadZo focuses marketing strategies and resources on messaging and channels most relevant to your target audiences.

- ▲ **Facilitation** – Are you tired of “Death by PowerPoint” meetings? Are you seeking more effective ways to innovate and strategize as a team? Are you worried about how you will handle challenging community input meetings with many diverse and opposing views? Utilizing specialized skills and facilitation techniques such as graphic facilitation, TadZo fosters engagement and commitment while advancing conversations for big-picture thinking and creativity.

The TadZo Principal, Allison Larsen, has extensive experience working with corporations and partner site consultants in evaluating communities for business locations. This perspective adds value to TadZo’s economic development clients because realistic insights about community assets can be shared.

### Allison Larsen, CECD - Principal

With over 14 years of consulting experience, 19 years in economic development and more than 10 years in international business management and sales, Allison Larsen’s core competencies include competitiveness assessments, site selection screening, action-oriented strategic planning, target industry analysis, workforce development, marketing, graphic facilitation; and teaching through engagement.



Allison is keen that the client always sets the direction for where they want to go with a project. She believes her role is to ask insightful questions to explore what’s possible, what’s of greatest interest and, ultimately, what stakeholders find most important to commit resources for action. She employs well thought-out questions and astute listening to get to the core of issues and solutions. Her extensive experience with business leaders, community stakeholders and hard-working professionals contributes to her recognition of what is true excitement and commitment, enabling her to facilitate positive change for clients.

Her diverse background – from growing up in a small rural community (less than 4,000 population) in Northern California to a national award-winning salesperson at a Fortune 100 “Most Admired” Company (Merck & Co.) has influenced her perspective to learn from every situation. Allison’s entrepreneurship endeavors did not start with TadZo. She established an international distribution network for a venture capitalist, and even put herself through college by raising a herd of registered sheep.

Working in front-line business recruitment at the Madera Industrial Development Corporation and the EDC serving Fresno County (both in California), she sited companies yielding more than 9,000 jobs. Allison worked 11 years as Principal at Chabin Concepts, consulting local communities, regional and state economic development organizations. Allison helped to create CompetitiveReady, a community certification program.

She is a sought-after speaker and trainer for economic development best practices. She has spoken at conferences and special training events for the International Economic Development Council (IEDC), British Columbia EDA, Economic Developers of Alberta, California Academy for Economic Development, Mid-America EDC, Nebraska Public Power District,

Northwest Economic Development Course, Oregon EDA, Pacific Northwest EDC, Public Service of Oklahoma, South Carolina EDA, Texas Economic Development Council, Team Texas, Washington EDA and Wisconsin EDA.

Allison is a graduate of the University of California, Davis; the University of Oklahoma Economic Development Institute; and a Fellow of the California Agricultural Leadership Program. Allison earned the certified economic developer (CEcD) professional designation from IEDC and serves on the IEDC Board of Directors.

Allison's complete resume is presented in the appendix.

## B. Work References

A sampling of diverse TadZo projects are described on the following pages. Several of the example projects represent elements of the proposed scope of work for McKinney EDC.

### Muskogee City-County Port Authority - Oklahoma



<b>Reference Name:</b>	Eric Miller, Director of Business & Economic Development Muskogee City-County Port Authority
<b>Phone Number:</b>	(918) 682-7887
<b>Email:</b>	eric@muskogeeport.com

#### “Economic Development 101”

- ▲ Facilitated session for economic development training with elected officials, board members, partners and community business leaders.
- ▲ This interactive learning and input session brought the community into the fold for teamwork in economic development. The interest of community stakeholders laid the foundation for additional funding to the Port for a Target Industry Analysis and strategic planning project.

#### Competitiveness Assessment & Target Industry Analysis

- ▲ Assessment of key site location factors as to current state of competitiveness producing a “Report Card” for Muskogee.
- ▲ Industry trends research and screening to identify potential target industries.
- ▲ Capabilities screening of industries based on current competitiveness,
- ▲ Niche and emerging industry sector identified to augment screen of industry targets.
- ▲ Industry intelligence research.

#### Economic Development Strategy and Marketing Plan (project in-process)

- ▲ Stakeholder interviews and Priorities Work Session.
- ▲ Key Message Work Sessions.

- ▲ Plan Development – draft, review, enhance, approval.
- ▲ Implementation Guide and Work Session.
- ▲ Coaching for development of Marketing Plan and materials.

*“I was excited about the prospects of undertaking this endeavor and the benefits that I believed it would yield for our organization and the community, alike. The past 3 days have only served to heighten my excitement about the outcomes. Your [Alison’s] intellect, intuition and broad base of experiences, as well as your well-honed ability to pose the tough question, in a non-threatening/off-putting manner, was wonderful to behold. There is no doubt that you [Allison] were the right choice for this undertaking in Muskogee. Thank you for the great effort that you have invested in this very important undertaking, in furtherance of the economic development growth and prosperity of Muskogee. I could not be more pleased.”*

Eric Miller, Director of Business & Economic Development  
Muskogee City-County Port Authority

### Ada Jobs Foundation - Oklahoma



**Reference Name:** Michael Southard, President & CEO  
Ada Jobs Foundation

**Phone Number:** (580) 235-0070

**Email:** msouthard@adaworks.org

### Strategic Plan; Target Industry Analysis & Branding

- ▲ Identification of target industries that fit with Ada’s assets:
  - » Competitiveness assessment and work session;
  - » Industry trends research and screening;
  - » Compatibility screening based on Ada’s assets and liabilities;
  - » Niche and emerging opportunities; and
  - » Industry intelligence research.
- ▲ Development of a unified community brand for Ada Jobs Foundation, City and Chamber:
  - » Facilitated four large focus groups to identify core values and differentiators that could be distilled into succinct and compelling key messages to drive a community-wide brand. Allison had everyone on their feet and working actively in small groups. Several props were utilized to help participants generate creative, yet provable, messages about their community. Not only did the process give every participant a voice, but also built strong consensus

for key messages and the new community brand.

- » Brand images and tag line developed and tweaked with steering committee input.
- » Brand guidelines for communitywide use.
- ▲ Economic Development Strategy:
  - » Stakeholder engagement and setting priorities.
  - » Capacity assessment of available resources for implementation.
  - » Plan draft, review, enhancement.
  - » Implementation Work Session and supporting materials.
  - » On-going implementation coaching.

*"TadZo was a tremendous help to Ada in our efforts to implement the economic development elements of our community visioning process. Allison facilitated several processes that explored different ideas which ultimately ended with agreed upon concepts. The overall marketing plan laid out a series of steps with details down to an estimated budget as to who would be responsible for what element. The community branding effort included nearly 200 people in the process and the community logo is used by the Chamber, EDO, and the City."*

Michael Southard, President & CEO  
Ada Jobs Foundation

### Martinsville-Henry County Economic Development Corporation - Virginia



**Reference Name:** Mark Henry, President & CEO  
Lisa Lyle, Director of Recruiting & Marketing  
Martinsville-Henry County EDC

**Phone Number:** (276) 403-5940

**Email:** mheath@yesmartinsville.com  
LLyle@yesmartinsville.com

### Best Practices Assessment & Recommendations

- ▲ Familiarization Tour, feedback on observations and recommendations.

### Target Industry Analysis & Business Case Research

- ▲ Competitiveness assessment.
- ▲ Industry trends research and screening.
- ▲ Compatibility screening based on Henry County's assets and liabilities.

- ▲ Niche and emerging opportunities.
- ▲ Industry intelligence research.
- ▲ Assembly of data and copywriting of businesses cases for each target industry.

#### Website Advisory Services

- ▲ Site Map Outline.
- ▲ Content defined for each webpage.
- ▲ Copywriting of key landing pages.

*"In our early conversations and throughout the process, we were impressed with Allison's industry knowledge and her unique perspective in understanding the site selection process and community evaluation methods used by companies for expansion and/or relocation decisions.*

*With Allison's research and guidance, we were able to better define our target industries and improve our marketing methods. Allison has an exceptional gift in marketing. The Target Industry Analysis not only contained in-depth research and recommendations, but she also provided detailed plans, outlines, and examples to help us take the next steps in effectively marketing to our newly defined targets.*

*Allison also assisted us on the re-design of our website. Allison developed our new site map, recommended page content, and provided copywriting for some of our key landing pages. Her assistance and recommendations with our new website were so helpful in organizing and clarifying a task that can easily be overwhelming.*

*It's been a pleasure working with Allison and we would highly recommend her work to other economic development organizations."*

Lisa Lyle, Director of Recruiting & Marketing  
Martinsville-Henry County EDC

## C. Subcontractors

To enhance the project deliverables for McKinney EDC, TadZo will engage subcontractors for industry research and lead generation. All of this work and data are included in the Price Proposal shown in Section III. B. of this proposal. TadZo will pay subcontractors directly and monitor the quality of their work. Subcontractors will carry appropriate insurance.

The following pages present information on Applied Economics, TadZo's economist on the project, and Research Consultants International, a highly successful international lead generation firm. Biographies of management staff from each firm are also presented.

### Applied Economics

Applied Economics ([www.aeconomics.com](http://www.aeconomics.com)) is an economic consulting firm, based in Phoenix, Arizona, specializing in:



- ▲ Industry, business and workforce data;
- ▲ Economic and fiscal impact assessment;
- ▲ Socioeconomic modeling;
- ▲ Urban planning; and
- ▲ Custom software applications for informative presentation of data and analysis.

**They are experts in providing technical information, in an unbiased and understandable format, in order to support decision-makers in making better, more informed choices.** Their clients include local governments – cities, counties, councils of government and school districts; as well as utilities, regional economic development organizations, retailers and retail developers, and various large corporations.

In the area of economic development, Applied Economics provides a variety of research and implementation support services, including:

- ▲ An interactive business climate and operating cost comparison system;
- ▲ Custom incentive calculators to calculate the value of state and local incentives for a particular company;
- ▲ Customized economic and fiscal impact models;
- ▲ Labor market studies;
- ▲ Retail market studies; and
- ▲ Economic base and target industry trends analysis.

The partners at Applied Economics have worked together for more than 20 years, and are very experienced in working with local and regional planning and development issues. They started working together in economic consulting at Mountain West Research, a regional economic and real estate consulting firm serving the western United States. Applied Economics was formed in 1995 to further specialize in the more technical aspects of economic research.



### *Sarah Murley, Co-Founding Partner*



Sarah Murley is an economist with over 20 years of experience in urban and regional economic analysis, particularly in economic development and public finance. Sarah is an experienced economic modeler, researcher, and analyst. She has performed engagements for a wide range of public sector clients including city and county governments, economic development corporations, and utilities in across the country.

In her experience as an economic consultant, Sarah has assisted many communities in creating economic development strategies. She has conducted economic base analyses, business climate assessments, target industry analyses, and labor market analyses, and incentive comparisons for numerous cities, counties, states and economic development agencies.

In addition to economic development, Sarah has applied her computer-based modeling experience to construct economic and fiscal impact models as well as developing long term financial projection models for municipalities. These economic and fiscal impact models have been applied to a range of problems from proposed annexations and land use alternatives for future development to economic development incentive evaluation.

Sarah began her career in economic consulting with Mountain West Research. She went on to work for Coopers & Lybrand and Economic Strategies Group, both in Phoenix, Arizona. Sarah left Economic Strategies Group along with Rick Brammer in 1995 to establish Applied Economics.

### **Research Consultants International**

Research Consultants International FDI, Inc. (<http://researchconsultantsinternational.com>) is a specialized market research firm that offers customized business intelligence services for economic development organizations and regional promotion agencies worldwide that are intended to identify and capture direct investment opportunities. Their experienced team of economic development and research consultants has generated leads and investment projects for more than 100 economic development organizations. **RCI puts economic developers in front of corporate decision makers** seeking to expand or relocate their organizations to a new geographic location. RCI helps their clients **create important business relationships** that increase awareness of their area's economic strengths and, ultimately, yields direct investment into their community. In order to ensure that the highest qualified leads meet client goals and expectations, their research methodology is a collaborative team effort utilizing primary data and on-going client/consultant feedback.





<p>Generated leads for more than</p> <p><b>\$1 BILLION</b></p> <p>in new investments</p>	<p>Fluent in numerous languages</p> <p><b>English French</b></p> <p><b>Spanish Italian Hebrew</b></p>
<p>Organized meetings with</p> <p><b>Fortune 500 companies</b></p> <p>on behalf of economic development organizations</p> <hr/> <p><b>50 YEARS</b></p> <p>of combined experience in professional business development</p>	<p><b>Worldwide</b> market experience</p> <p><b>North America</b></p> <p>South America</p> <p><b>Asia</b></p> <p>Europe</p> <p><b>Australia</b></p> <p><b>Middle East</b></p>

**RCI delivers results.** Their team has more than 50 years of combined experience in professional business development and have generated leads with a value totaling more than \$1 billion in new investments. With RCI, you will receive the experience and expertise of their entire team on your project and with their 24-hour customer service, a team member will always be available to attend to your needs.

RCI's tailored suite of research services includes:

- ▲ Meetings and matchmaking;
- ▲ Lead generation;
- ▲ Qualification and client retention;
- ▲ Event planning;
- ▲ e-marketing;
- ▲ Customized database development;
- ▲ Strategic planning;
- ▲ B2B prospecting;
- ▲ Merger & acquisition (M&A) research; and
- ▲ EDO representation.

To optimize your EDC's investment attraction strategy, they utilize their robust proprietary database, C-level management contacts, collaborative methodology, and experience developing business outreach initiatives worldwide. With RCI's comprehensive research

approach, you receive competitive, fresh intelligence that gets you in the right place, at the right time with primed introductions.

With team members fluent in numerous languages and worldwide market experience in North America, South America, Asia, the Middle East, Europe, and Australia, RCI can connect your region to the rest of the world.

### ***Bruce Takefman, President***



Bruce Takefman, founder and president of Research Consultants International, leads a seasoned and enthused team that provides economic development consulting for some of the world's most prominent Economic development organizations. Bruce understands international markets, having worked with clients based across the United States, Canada, Europe and Asia. His work throughout different continents enables him to maximize the potential for his clients to seize global opportunities.

Bruce's experience has led him to work extensively with a wide array of clients touching upon various industries such as the biotech and agriculture, aerospace and aviation, IT, financial services, medical, advanced manufacturing, and renewable energy sectors among others. His work to date has led to millions in new investment opportunities for regions around the world.

Furthermore, Bruce possesses a strong knowledge of trade shows, having helped prepare clients to attend some of the world's most prestigious shows. Bruce leverages these networking opportunities for his clients by securing meetings with upper management executives whom meet the qualified lead criteria his clients are seeking. Bruce is a graduate from the John Molson School of Business at Concordia University in Montréal, Québec. He earned his major in marketing.

### ***Adam Solomon, Vice President, Business Development***



Adam Solomon brings a wealth of knowledge and experience to Research Consultants International. Since joining the firm in 2011, Adam has served as VP of Business Development – overseeing the implementation of company-wide research strategies and overall operational conduct. Simply put, Adam understands the business. He offers over five years of economic development consulting and research experience across a multitude of roles throughout his career. Adam has worked on behalf of over 40 economic development entities, helping secure significant corporate investments on behalf of various clients.

Adam's work also includes mandates with Fortune 500 companies worldwide. He was born in Israel and speaks three languages (English, French and Hebrew), proving his understanding of global business climates and knowing how to work collaboratively with key decision makers from international companies. His work across a wide range of industries includes aerospace,

renewable energy, software, and advanced manufacturing. Adam earned a degree in international business from Dawson College in Montréal, Québec.

***Derek “Deke” Patton, Program management***



Derek is an experienced lead generation and market research professional yielding tangible success in specialist services to economic development organizations (EDOs) such as: The Ontario Ministry of Economic Development, Employment & Infrastructure, Saskatchewan Economic Development, Economic Development Winnipeg, Oklahoma Chamber of Commerce, Invest Quebec, Charleston Regional Development Alliance, Greater Houston Partnership and the Denver South Economic Development Partnership.

Following a move to Montréal, Canada, Derek completed a BA in Political Science and took his entrepreneurial spirit into successful lead generation campaigns with wins for EDO's across North America, Europe, and Asia.

As a research associate and Fortune 500 specialist, Derek was promoted to Director of Program Management. In this role Derek determines strategic initiatives on behalf of RCI clients and has introduced sophisticated project management tools and processes to effectively assure and sustain quality.

Before arriving in Montréal Derek was a career musician who charted in his native homeland of Scotland before developing his own production company that led to live production and promotion projects with internationally renowned artists. He went on to become a senior manager in a leisure company and helped take the firm from a single unit to the largest independent chain in Scotland. Truly a creative and effective entrepreneur.



## APPENDIX

### A. Résumé for Allison Larsen, TadZo





## Allison Larsen, CECd Principal TadZo

### PROFESSIONAL EXPERIENCE

#### TadZo

*Principal (2013 – present)*

TadZo is an economic development and site selection consulting firm. Primary services encompass competitiveness assessments, strategic planning, marketing, training and facilitation for economic development organizations; and site location analysis for corporations throughout USA and Canada. With experience working in over 74 communities across 23 states/provinces, TadZo tracks best practices – *what works and what doesn't* – to draw upon for potential solutions in each unique situation facing a community.

#### Projects:

- County of Mohave, AZ – Lake Havasu Call Center Brochure
- City of Yakima, WA – Economic Development Strategic Planning
- South Willamette EDC, OR – Organizational Identity
- McKinney Economic Development Corporation, TX – Strategic Planning Workshop Facilitation
- Town of Ajax, ON – Economic Development Strategy Review & Update
- Muskogee City-County Port Authority, OK – Economic Development Strategy & Marketing Plan
- Redmond Economic Development, Inc., OR – Board Retreat Facilitation
- Prineville/Crook County Economic Development Council, OR – Board Retreat Facilitation
- City of Coquitlam, BC – Technology Workshop Facilitation
- Northern Kentucky Tri-ED – Economic Development Training & Best Practices
- Enid Regional Development Alliance, OK – Board Retreat Facilitation
- Muskogee City-County Port Authority, OK – Competitiveness Assessment & Target Industry Analysis
- Redmond Economic Development, Inc., OR – Community Economic Development Report Card
- Oakland County, MI – Economic Development Partners Facilitation for Partner Action Plan
- Greater Spokane Inc., WA – Driving Competitive Change for the Spokane Region
- Muskogee City-County Port Authority, OK – “Economic Development 101” Facilitated Session for Community Leaders
- City of Eugene, OR – Competitiveness Work Session
- City of Springfield, OR – UGB Expansion Sites Assessment
- Oklahoma Governor’s Economic Development Marketing Team – Annual Retreat Facilitation
- Martinsville-Henry County EDC, VA – Website Advisory Services
- City of Ada, OK – Website Advisory Services
- Eugene-Springfield-Lane County, OR – “Big Look” Regional Economic Development Organization & Strategy
- Martinsville-Henry County EDC, VA – Target Industry Analysis & Business Case Research
- Tri-Cities, WA – TRIDEC New Economy Target Industry Study
- Maple Valley, WA – IEDC Economic Development Advisory Services (pro-bono)
- Northern Kentucky Tri-ED – Strategic Planning Facilitation
- Ada Jobs Foundation, OK – Target Industry Analysis, Branding and Economic Development Strategy

- Martinsville-Henry County EDC, VA – Best Practices Assessment & Recommendations
- Greater Pensacola Chamber of Commerce, FL – Implementation Retainer
- Ken-Tenn Regional Alliance, KY & TN - Strategic Plan

## **Chabin Concepts**

### ***Principal (2002 - 2013)***

- Ken-Tenn Regional Alliance, KY & TN - Industry Targeting, Business Cases
- City of Chula Vista, CA - Strategic Positioning, Cluster Analysis & Marketing Strategy
- Greater Pensacola Chamber of Commerce, FL - Regional Econ. Dev. Strategy & Marketing Plan
- Cedar Hill EDC, TX - CompetitiveReady Asset Scorecard
- Oklahoma City Partnership - Rural Community Assessments and Recommendations
- Public Service of Oklahoma - Economic Development Marketing Training
- Nebraska Public Power District - Rural Economic Development Training
- Wisconsin Economic Development Association - Competitive Proposals Training & Economic Development Sales Training
- Ajax, Ontario - CompetitiveReady Asset Scorecard
- Columbia County Economic Team, OR - Business Attraction Plan
- City of Merced, CA - Economic Development Work Session & Plan
- Porterville, CA - Strategic Plan Update
- West Sacramento, CA - Business Resource & Innovation Center Study
- McPherson IDC, KS - CompetitiveReady Asset Scorecard; Target Industry Study; Economic Development Strategic Plan
- Brownsville EDC, TX - Comparative Benchmarking
- City of Sugar Land, TX - Economic Development Strategy
- City of Shasta Lake, CA - GreenTech Industrial Park
- Bowling Green Area Chamber of Commerce, KY - Target Markets Analysis; updated South Central Kentucky Marketing Plan
- City of Beaverton, OR - Target Industry Analysis and Implementation Plan
- City of Scottsdale, AZ - Competitiveness Assessment/Target Industry Study
- City of Merced, CA - Business Case Development
- Frisco EDC, TX - Comprehensive Economic Development Strategy
- Colusa County, CA - Economic Development Roadmap
- Confederate Tribes of the Umatilla Indian Reservation, OR - Marketing Advisement & Work Session
- Rio South Texas - Competitive Assessment and Market Position
- Greater Yuma EDC, AZ - Marketing Plan and Business Cases
- Quad City IA & IL - Logistics Industry Study; Wind Website
- San Jose Redevelopment Agency, CA - Downtown Tenant Preferences Study; Organization and Marketing Plan
- Grenada County EDD, MS - Economic Development Strategic Plan; Website; Business Cases
- Northern Rural Training and Employment Network (NORTEC) - Designing Local Skills Strategies for STEM Occupations
- Mid-Michigan Region - Location Analysis & Positioning for Photovoltaic Industry
- City of Santa Rosa, CA - Economic Development Plan; Consultative Selling Work Session
- Bowling Green Area Chamber of Commerce, KY - South Central KY Regional Marketing Plan and Business Cases
- Northern Colorado EDC - Marketing Plan
- Mariposa County, CA - Economic Vitality Plan
- Greater Phoenix Economic Council, AZ - Business Case and Prospecting Program
- Grays Harbor Public Development Authority, WA - Strategic Marketing Program
- Victor Valley EDA, CA - Regional Marketing Program; Target Industry Study
- State of Washington Prospecting and Marketing Program



- City of Henderson, NV - Target Industry Study, Customized ACT Training
- Prospecting Services for Oklahoma Business Roundtable, Portland Development Commission (OR), Shasta County EDC (CA), City of Victorville (CA) and Victor Valley EDA (CA)
- Northwest Pennsylvania Regional Planning Commission - Regional Website Review & Training
- State of Washington - Prospecting and Marketing Program
- City of Castle Rock, WA - Strategic Marketing Plan
- City of Rio Vista, CA - Industrial Strategy
- City of Madera, CA - Enterprise Zone Renewal Application
- New Mexico Economic Development Partnership - Targeting and Positioning
- Spokane Area EDC, WA - Strategy & Organization Re-engineering
- San Diego EDC, CA - Organizational Enhancement
- Oregon Economic Development Association - Targeted Industry Prospecting Campaign
- Solano County EDC, CA - Perception Interviews and Client Handbook

### **Economic Development Corporation serving Fresno County**

#### ***Vice President, Client Services and Interim President/CEO (1999 - 2002)***

- Primary contact for site consultants and businesses, resulting in nearly 5,200 new and 800 retained jobs
- Architect of state-of-the-art tools for enhanced responsiveness to clients - Comparative Demographics, Site Selection Core Database (IEDC standards), Real Estate Database, Comparative Operating Cost Analysis, and Incentive Calculator; award winning at state and national levels
- Established “Red Teams” of signature-level authorities to meet with prospects, including a specialized “EDC Workforce Red Team”
- Secured grants from USDA, Workforce Investment Corporation, and California Technology Trade & Commerce Agency
- Managed 10 employees

### **Madera County Industrial Development Corporation**

#### ***Manager of Business Development and Marketing (1997 - 1999)***

- Business attraction, marketing, public relations – yielding 2,500+ new jobs

### **Other Sales & Marketing Experience**

- **Universal Marketing Services, Inc.** – General Manager; international marketing; set up distribution network in 20+ countries
- **Merck & Co., Inc.** – nationally recognized “League of Excellence” winner for sales performance
- **California State Fair** – supervised Counties and Agri-Fair exhibits

## **EDUCATION**

### **University of Oklahoma, Economic Development Institute**

Graduate

### **University of California, Davis**

B.S., Agricultural Education

### **California Agricultural Leadership Program**

Fellow, Class XXIV

## FACILITATION TRAINING

Liberating Structures' Learn the Rules; Bend the Rules Design Studio – Austin, TX

Liberating Structures Workshop – Seattle, WA

The Principles of Graphic Facilitation Workshop, The Grove – San Francisco, CA

The Art of Facilitation, University of California – Davis, CA

## PROFESSIONAL AFFILIATIONS

### International Economic Development Council

Active Member

- IEDC Certified Economic Developer (CEcD)
- IEDC Board Member 2016 – 2017
- Past Chair, Education and Certification Committee

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