



Proposal for Professional Services: 5-Year Strategic Implementation Plan



Tadzo

The Intersection of Site Selection & Economic Development

Allison Larsen, Principal
TadZo
Office (509) 972-0833
Mobile (509) 952-6104
allison@TadZoConsulting.com
www.TadZoConsulting.com

Prepared for:
McKinney Economic Development Corporation

October 8, 2016

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I. COVER LETTER

October 8, 2016

Mr. Darrell Auterson, President
McKinney Economic Development Corporation
5900 S. Lake Forest Drive, Suite 110
McKinney, TX 75070

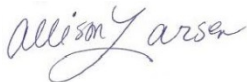
Dear Darrell,

Thank you for your interest in TadZo assisting the McKinney Economic Development Corporation with your strategic planning efforts. It was a pleasure to work with you and McKinney EDC's Board of Directors during the May strategic planning workshop. I look forward to helping you further shape specific action plans to grow McKinney's economy.

In this proposal I present the specific scope of services to review and refresh target industries; build corresponding business cases to prove McKinney's compelling advantages; and ultimately create a 5-Year Strategic Implementation Plan for McKinney EDC. The approach to this project is actionable coaching versus a study orientation. As a result, your team will have their fingerprints all over the plan as it will be developed through a series of work sessions. My goal is to help you and the McKinney EDC build capacity and ownership of the plan through an engaging process.

Please review and contact me with any questions.

Respectfully submitted,



Allison Larsen, Principal
TadZo

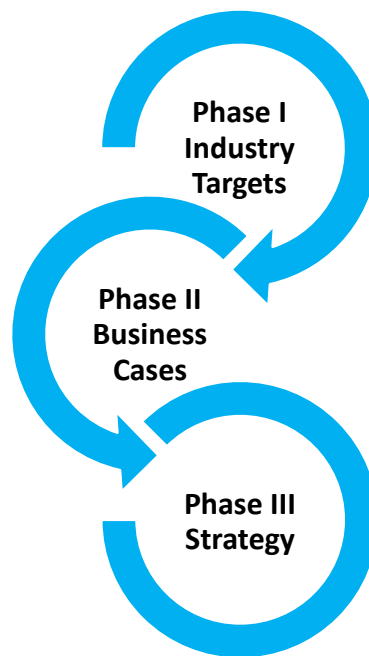
II. PROPOSED SCOPE OF WORK

Over the last five years, McKinney EDC has experienced turnover of the President position. In 2011, a Strategic Plan and Target Industry Analysis was prepared by TIP Strategies only to sit on the shelf without implementation because of disruptive staff turnover. Meanwhile, The MEDC Board has held planning sessions to set annual priorities for MEDC efforts.

Now with a new President on board who is a Certified Economic Developer with extensive experience, MEDC would like to develop an actionable, specific program of work that defines a 5-Year Implementation Plan. You are seeking a consultant to help MEDC leverage past studies and plans for plan development in the context of McKinney's current situation.

As such, the approach to this planning project will be oriented to coaching such that staff and the MEDC build ownership of the plan through engagement. Instead of outright telling MEDC what to do, TadZo will ask key questions that help you craft a relevant plan of action that assures commitment for implementation towards well-defined metrics.

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



Phase I - Industry Targets

It is understood that MEDC does not want a Target Industry Study. Instead you are interested in a review of the targets identified in the 2011 study and strategic plan.

TadZo will conduct a cursory review of industry performance for identified targets in Collin County (data not available at city level) benchmarked to Dallas-Ft Worth-Arlington MSA, Texas and the nation.

Data will include:

- ▲ Employment
- ▲ Employment trends
- ▲ Average Earnings
- ▲ Payrolled Business Locations
- ▲ Locational Quotient
- ▲ Shift Share Breakdown
- ▲ Key occupations
- ▲ Gender, age, ethnicity breakdown of industry workforce
- ▲ Purchases within and outside area for industry

We will also take a current look at which clusters are performing well in Collin County and/or Dallas-Ft Worth-Arlington MSA based on the ranked importance of the following screens are to your targeting:

- ▲ Earnings per worker
- ▲ Overall job growth
- ▲ Regional job growth in comparison to national average job growth
- ▲ Employment concentration higher than national average job concentration
- ▲ Industry's contribution to gross regional product

Although this information is not a formal target industry analysis of data, it will provide information on industries that will help staff to prioritize targets which will be further vetted during the Business Case phase.

Phase II - Business Cases

In today's world of "information overload" is very important to not only target industry sectors but also clearly demonstrate why your community is the location of choice for the industry sector. Competitive economic development organizations "connect the dots" (i.e. competitive advantages) to link a strong case for their community relative to specific industry needs.

This step will involve TadZo coaching MEDC staff in the assembly of business case data and information for each of your target industries.

- ▲ **Research and documentation** of McKinney's specific assets and competitive strengths as it relates to target industry needs.
- ▲ **Case studies** on feature companies.
- ▲ **Differentiation:** A good Business Case resembles a preemptive client proposal – understanding the needs of the target and positioning assets to meet those needs. As such, there could be a lot of potential information available. This step refines the data to hone in on differentiator proof points. The outcome of this step identifies assets that set McKinney apart from the competition for each target industry.
- ▲ **Value Proposition:** With the refined differentiators determined, it is important to frame the proof points as benefits, not just facts, to the target industries. This step defines the compelling benefits of why McKinney is THE LOCATION OF CHOICE for each respective target industry. The value proposition is the culmination of research, with proof points to support the beneficial claims.
- ▲ **Example** business cases and sample case studies will be provided to aid understanding.

By organizing information to prove McKinney's competitiveness to meet the needs of a particular industry, this work will also draw attention to any gaps McKinney may have to compete effectively for a target. This information will be helpful in analyzing if the target is truly viable for McKinney; or what MEDC may want to focus on for strategic initiatives to improve McKinney's competitiveness.

For the final list of updated target industries, TadZo will provide intelligence on source locations for targeting business recruitment efforts.

Phase III - Strategy

The final phase of this project is the development of a 5-Year Strategic Implementation Plan for the McKinney EDC.

Step 1 – Background

To come up to speed fully on MEDC's past and current 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.

Step 2 – Asset Evaluation

TadZo will provide staff with key evaluation criteria and coach through assessment of factors important to target industries. Through onsite evaluation and work sessions, staff will frame specific analysis to inform the MEDC Board on the competitive or weakness of the following factors:

- ▲ **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.

Although these factors were discussed in the May MEDC Board Strategy Session, this will be a more informed evaluation.

Step 3 – MEDC Program Review

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 4 – Strategy Priorities Work Sessions

The results of the Industry Target review, Business Case assembly, Asset Evaluation and MEDC Program Review will be synthesized in a work session with staff, MEDC Board members and other key stakeholders you would like to involve. The outcome of this work session defines priorities for McKinney EDC's 5-Year Strategic Implementation Plan.

Step 5 – Strategic Initiative Work Sessions

For each priority strategic initiative, TadZo will coach staff through hands-on development of an actionable implementation plan.

For instance, key elements addressed for a marketing initiative would include:

- ▲ **Tools:** website, marketing collateral, media, etc.
- ▲ **Marketing Communications:** where to apply messages and tools for effective communications that raise awareness of McKinney.
- ▲ **Outreach & Lead Generation:** marketing missions, tradeshow and events aligned to target audiences.
- ▲ **Marketing Plan Schedule**
- ▲ **Performance Metrics**

Step 6 - Written Action Plan

All of the planning completed in previous steps will be assembled into MEDC's 5-Year Strategic Implementation 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 staff 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.

Project Deliverables

Following is a summary of project deliverables:

● Industry Data

● Business Cases

- ✓ The outcome of Phase II is information organized for marketing and recruitment implementation. Application of this information will be further defined in the Strategic Implementation Plan.














● MEDC 5-Year Strategic Implementation Plan




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

III. PROJECT LOGISTICS

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				
	Nov	Dec	Jan	Feb	Mar
Project Kick-off Call					
Phase I - Industry Targets					
Phase II - Business Cases		Trip 1 			
Phase III - Strategy			Trip 2 Trip 3 	Trip 4 	
Project Update Calls					

 Consultants off-site work  Conference calls  Deliverable

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
Phase I - Industry Targets	\$6,500
Phase II - Business Cases	8,500
Phase III - Strategy	25,000
Total	\$40,000

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

- **Trip 1** – Business Case Work Session.
- **Trip 2** – Asset Evaluation Coaching, MEDC Program Review Work Session. Coaching on Business Cases.
- **Trip 3** – Priority Strategic Initiatives Work Session. Finalize Business Cases.
- **Trip 4** – Strategic Initiative Work Sessions.

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

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.

Work References

A sampling of diverse TadZo projects are described on the following pages.

Muskogee City-County Port Authority - Oklahoma



Reference Name:	Eric Miller, Director of Business & Economic Development Muskogee City-County Port Authority
Phone Number:	(918) 682-7887
Email:	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

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

- ▲ 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

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 75 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:

- Katy Area EDC, TX – Economic Development Strategic Plan
- 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

www.TadZoConsulting.com

Email - allison@TadZoConsulting.com

Twitter - @allisonTadZo

Office - 509.972.0833

LinkedIn - www.linkedin.com/in/allisontadzo

Mobile - 509.952.6104

Tadzo

The Intersection of Site Selection & Economic Development
