

RECOMMENDATIONS FOR CONTINUAL IMPROVEMENT

A Service of the Calibration Program

Prepared for
The Douglas- Coffee County Chamber of Commerce and Industrial Development
Authority

Prepared by
Georgia Tech's Office of Economic Development & Technology Ventures

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OVERVIEW

Economic developers often ask Georgia Tech for guidance and assistance on key management and operational issues relating to running quality economic development programs. They are interested in operating as effectively as possible and in having a system in place for tracking their performance.

The Calibration Program has been designed to help local economic development organizations (EDO) achieve higher performance and excellence by drawing on quality management standards from International Economic Development Council's (IEDC) Accredited Economic Development Organization (AEDO) program, the International Standards Organization (ISO), and Malcolm Baldrige. The program provides EDOs with independent feedback on their operations, structure, and procedures, and recognizes excellence in local economic development efforts. This service leverages Georgia Tech's expertise in assisting clients with planning, quality management, lean enterprise, technology utilization, and overall community economic development.

In August 2005, the Douglas-Coffee County Chamber's Economic Development Commission was selected as a pilot EDO for the Calibration Program. As a pilot, selected members of the staff and board members of the Industrial Authority completed an on-line self assessment to reveal perceptions about the EDO's management system by those with direct knowledge about the EDO's operations. In addition, Georgia Tech staff conducted an on-site interview with JoAnne Lewis and a documentation review of the chamber and industrial authority's current management tools. This report details the findings from the self assessment, on-site interview, and documentation review and includes recommendations for specific action items relating to continual improvement in the EDO's organizational processes.

THE PROCESS

The Douglas-Coffee County Chamber staff, board members and industrial development authority representatives were identified and to asked to participate in the calibration program. By completing an online confidential web-based survey to provide their input, the stakeholders assessed the organization's operations in the following areas:

- Leadership
- Information Systems
- Support Staff
- Human Resources
- Strategic Planning
- Process Management
- Customer and Marketing Focus
- Partnerships and Relationships
- Use of Technology
- Outcomes

Summary of Stakeholder Ratings of Organizational Processes and Operations

Stakeholders were asked to rate several factors relating to the Douglas chamber and the industrial development authority's organizational processes and operations. They were asked to use a scale from 1 to 5 where "1" means strongly disagree and "5" means strongly agree and "N/A" means not applicable if they were unfamiliar with the question.

When asked to assess the organizational processes, the stakeholders provided the following average ratings of the organization's operations.

SELF ASSESSMENT RESULTS

Area	Average	Interpretation
Community Leadership	3.8	Strong community support for economic development. Diversified community leadership embraces change and new ideas. EDO has clear vision and mission that is clearly communicated and modeled throughout the organization. The EDO board works to secure increased funding for the EDO. Stakeholders are in general agreement that the EDO board works within the community to remove barriers to economic development progress. Board expectations are reasonable by the staff.
Human Resources	4.1	The chamber has developed a formal human resource program that is well-supported by the board and adequately staffed. The chamber president is recognized as economic development lead. Most notably, staff is compensated satisfactorily and fairly and is adequately rewarded for performance with incentives and bonuses. Staff turnover is not a significant problem.
Strategic Plan	3.5	The chamber and industrial authority are guided by a well-conceived strategic plan. Planning, to date, is very strong and adequately addresses needs for downtown development, supporting business and industry, entrepreneurs and small businesses, marketing and recruitment, and tourism development. The chamber monitors and tracks the progress in implementing the strategic plan.
Customer and Market Focus	3.8	Perceptions of customer focus are uniformly high. The chamber is effective in its efforts to communicate community competitive advantages to customers and stakeholders using current information and marketing materials.

Use of Technology	3.4	Use of technology is seen as moderate, with perceived need for better knowledge and training of the current membership program. The chamber utilizes some of the latest office technologies to enhance productivity and efficiency.
Performance Tracking	3.0	Performance tracking is characterized as weak. Although the chamber executive director maintains a personal system for tracking client information, the system does not provide all the information needed for review of past trends and analysis. The current system lacks a “decision support” function.
Communication Systems	3.7	Perceptions about communication are positive. Stakeholders overall agree that the chamber does a good job of keeping community leaders and the general public informed of economic development activity. The chamber does an excellent job in maintaining strong relationships with state and regional partners.
Process Management	3.8	Perceptions about communication are positive among stakeholders. Process management is strong with the executive director overseeing the organization’s work. Non-executive staffs have adequate control of their areas of responsibilities; however, the chamber director should make changes to the work processes to ensure adequate division of labor among office staff.
Partner Relationships	4.1	Stakeholders are in general agreement that partner relationships are strong with area legislators, statewide and regional economic development partners, and local government.
Outcomes	3.8	Stakeholders agree that the chamber displays high standards and ethics and obeys the laws and regulations. Local businesses and entrepreneurs are satisfied with the chamber’s overall performance.

DETAILED FINDINGS:

Leadership

What Did Stakeholders Say?

- Stakeholders from the chamber and industrial development authority were asked to rate the organization's processes in the area of community leadership.
- When asked to rate the organization's community leadership and level of engagement and participation in community and state activities, the stakeholders generally agree that both the chamber's and industrial authority provide very strong leadership and support economic development.
- Using a scale from 1 to 5 where "1" means strongly disagree and "5" means strongly agree and "N/A" means not applicable if they were unfamiliar with the question, stakeholders provided an overall "above average" rating of 3.9 to describe the chamber and economic development commission's level of engagement and participation in community leadership activities.
- Stakeholders rated and identified four leading factors for community leadership. They provided "strongly agree" responses with ratings of 4 or higher:
 - Community leadership supports economic development.
 - The EDO's board works within the community to remove barriers to economic development progress.
 - The EDO board works to secure increased funding for the EDO.
 - The EDO board has reasonable expectations of the staff and organization.
- Most of the stakeholders "generally agree" with the factors relating to community leadership and provided responses with ratings between 3.1 and 3.9.
 - The EDO board participates in appropriate board member training programs.
 - The EDO board regularly evaluates outcomes according to annual objectives.
 - The EDO board has an effective board rotation (leadership succession) policy that regularly reviewed and updated.
 - The EDO board participates in appropriate board member training programs.
 - The EDO board regularly shares information about the EDO with community stakeholders.
 - The EDO has a clear vision and mission that its leaders effectively communicate, support, and model throughout the organization.
 - The EDO board represents the diversity of the community.
 - The EDO lets staff know what the board thinks is most important.
 - Community leadership embraces change and new ideas.

Community Leadership

FACTOR	AVERAGE RATING
Community leadership is supportive of economic development.	4.8
The EDO board works within the community to remove barriers to economic development progress.	4.3

The board works to secure increased funding for the EDO.	4.1
The EDO board has reasonable expectations of the staff and the organization.	4.0
Community leadership embraces change and new ideas.	3.9
The EDO board lets staff know what the board thinks is important.	3.9
The EDO board represents the diversity of the community.	3.8
The EDO has a clear vision and mission that its leaders effectively communicate, support, and model throughout the organization.	3.8
The board regularly shares information about the EDO with community stakeholders.	3.4
The EDO board participates in appropriate board member training programs	3.4
The EDO board has an effective board rotation (leadership succession) policy that is reviewed and updated on a regular basis.	3.3
The EDO board regularly evaluates outcomes according to annual objectives.	3.1

Human Resources

What Did Stakeholders Say? Human Resources

When asked to assess the organization in the area of human resources, stakeholders provided a very high overall rating of 4.1.

- The majority of the factors relating to human resources received “strongly agree” responses from stakeholders with ratings between 4.0 and 4.5
 - Staff is recognized as the point of contact(s) for economic development for the community within and outside the community.
 - Staff turnover is not a significant problem for the EDO.
 - The EDO has satisfactory staff support.
 - Staff receives satisfactory benefits packages, including health insurance.
 - Staff is compensated satisfactorily and fairly, and is adequately rewarded for performance with incentives, bonuses, or other mechanisms.
 - Staff can influence the EDO's program of work.
 - Staff is encouraged, supported, and active in pursuit of further professional development.
 - Staff keeps the board informed on important operational issues.

- Stakeholders also “generally agree” with the following responses and provided ratings between 3.5 and 3.9.
 - Staffs have everything needed to do their job effectively.
 - The board and staff agree on matters of job description.

- Staff is provided with effective orientation and training.

Human Resources

FACTOR	AVERAGE RATING
Staff is recognized as the point of contact(s) for economic development for the community within and outside the community.	4.5
Staff turnover is not a significant problem for the EDO.	4.4
The EDO has satisfactory staff support.	4.4
Staff is compensated satisfactorily and fairly, and is adequately rewarded for performance with incentives, bonuses, or other mechanisms.	4.3
Staff receives satisfactory benefits packages, including health insurance.	4.3
Staffs have the ability to influence the EDO's program of work.	4.0
Staff is encouraged, supported, and active in their pursuit of further professional development.	4.0
Staff keeps the board informed on important operational issues.	4.0
Staff is provided with effective orientation and training.	3.9
The board and staff agree on matters of job description.	3.9
Staffs have everything they need to do their job effectively.	3.5

Strategic Planning

What Did Stakeholders Say?

Stakeholders provided an overall rating of 3.5 to describe the chamber's strategic planning process which indicates that stakeholders "generally agree" with the process.

- Stakeholders "strongly agree" that the chamber develops strong partnerships with other organizations, and provided a rating of "4" to factors engaging community groups with the implementation of the strategic plan.
- Most of stakeholders are in "general agreement" that the chamber's strategic planning process is effective and provided above-average ratings between 3.1 and 3.8.
 - The EDO regularly publicizes strategic planning progress to community stakeholders.
 - The EDO adopts annual objectives that are measurable and purposeful for reaching strategic plans and goals.
 - The EDO monitors and tracks strategic plan progress in implementing the strategic plan.
 - The EDO adopts an annual program of work to meet annual objectives.
 - A diverse group of community stakeholders have been involved in the process to develop, implement, and update the strategic plan.
 - I have read and fully understand the strategic plan.

- Satisfactory resources are available to the EDO for reaching strategic plan goals and objectives.
- The EDO is well-guided by a well-conceived strategic plan.
- There has been successful implementation of the economic development strategic plan.
- The EDO's strategic plan adequately addresses needs for downtown development / redevelopment, supporting business and industry, supporting entrepreneurs and small businesses, marketing and recruitment, and tourism development.
- The EDO's strategic plan is in sync with the community's comprehensive plan.

Strategic Planning

FACTOR	AVERAGE RATING
The EDO regularly partners with other organizations and community groups in the implementation of the strategic plan.	4.1
The EDO's strategic plan is in sync with the community's comprehensive plan.	3.8
The EDO's strategic plan adequately addresses needs for downtown development / redevelopment, supporting business and industry, supporting entrepreneurs and small businesses, marketing and recruitment, and tourism development.	3.7
There has been successful implementation of the economic development strategic plan.	3.7
The EDO is well guided by a well-conceived strategic plan.	3.6
Satisfactory resources are available to the EDO for reaching strategic plan goals and objectives.	3.6
I have read and fully understand the strategic plan.	3.4
A diverse group of community stakeholders have been involved in the process to develop, implement, and update the strategic plan.	3.4
The EDO adopts an annual program of work to meet annual objectives.	3.3
The EDO monitors and tracks strategic plan progress in implementing the strategic plan.	3.3
The EDO adopts annual objectives that are measurable and purposeful for reaching strategic plans and goals.	3.1
The EDO regularly publicizes strategic planning progress to community stakeholders.	3.1

Customer and Market Focus

What Did Stakeholders Say?

When asked to assess the organization in the area of customer and market focus, the stakeholders provided an overall rating of 3.8.

- The majority of the factors relating to customer and market focus were rated with "strongly agree" responses from stakeholders. They provided ratings between 3.6 and 4.6 when assessing the market and customer focus.

- Stakeholders provided several ratings of “4 or above” to describe the chamber’s strengths in the area of customer and market focus and “strongly agree” that:
 - The EDO office is easy to find and centrally located.
 - The EDO is effective at understanding and addressing the needs of visitors.
 - The EDO is effective at understanding and addressing the needs of prospects.
 - The EDO is effective at understanding and addressing the needs of entrepreneurs and emerging industry.
 - The EDO is effective at understanding and addressing the needs of existing business and industry.
- Six factors relating to customer and market focus were rated with “above average” responses and a rating between 3.6 and 3.9 which indicate that stakeholders “generally agree” that the chamber addresses the needs of its customers and markets.
 - The EDO’s office provides privacy for conferences.
 - The EDO is effective at understanding and addressing the needs of community citizens.
 - The EDO’s community information and marketing materials are current and professional in appearance.
 - The EDO is effective at understanding and addressing the needs of community newcomers.
 - The EDO’s office is functional, well-maintained, and orderly.
 - The EDO effectively communicates the community’s competitive advantages to customers and stakeholders.

Customer and Market Focus

FACTOR	AVERAGE RATING
The EDO is effective at understanding and addressing the needs of existing business and industry.	4.6
The EDO is effective at understanding and addressing the needs of entrepreneurs and emerging industry.	4.4
The EDO is effective at understanding and addressing the needs of prospects.	4.3
The EDO is effective at understanding and addressing the needs of visitors.	4.0
The EDO office is easy to find and centrally located.	4.0
The EDO effectively communicates the community’s competitive advantages to customers and stakeholders.	3.9
The EDO’s office is functional, well-maintained, and orderly.	3.9
The EDO is effective at understanding and addressing the needs of newcomers.	3.7
The EDO’s community information and marketing materials are current and professional in appearance.	3.6
The EDO is effective at understanding and addressing the needs of community citizens.	3.6
The EDO’s office provides privacy for conferences.	3.6

Use of Technology

What Did Stakeholders Say?

Stakeholders were asked to rate the use of technology within the EDO organization. An overall average rating of 3.4 was provided by survey participants.

- The highest factor received a 4.1 rating to describe the current use of technology. Stakeholders “strongly agreed” that the chamber uses adequate communications tools for supporting staff connectivity (e.g., e-mail, voice mail, call forwarding, networked computers, personal digital assistants).
- The stakeholders ranked most of the responses with ratings between 3.2 and 3.5 which suggests that the stakeholders “generally agree” that the chamber adequately uses technology.
 - The EDO has adequate in-house capabilities.
 - The EDO effectively utilizes the latest office technologies to enhance productivity and efficiency.
 - Staffs have access to all the technology tools needed to do the job effectively.
 - The EDO has adequate presentation capabilities.
- The stakeholders somewhat disagreed that the chamber has a satisfactory budget for purchasing and upgrading technology tools (e.g., computers, software, personal handhelds, digital phones) and provided a rating of 2.7 which is below the median of 3.

Use of Technology

FACTOR	AVERAGE RATING
The EDO uses adequate communications tools for supporting staff connectivity (e.g., e-mail, voice mail, call forwarding, networked computers, and personal digital assistants).	4.1
The EDO has adequate presentation capabilities.	3.5
Staffs have access to all the technology tools needed to do their job effectively.	3.4
The EDO effectively utilizes the latest office technologies to enhance productivity and efficiency.	3.4
The EDO has adequate in-house capabilities.	3.2
The EDO has a satisfactory budget for purchasing and upgrading technology tools (e.g., computers, software, personal handhelds, and digital phones).	2.7

Performance Tracking System

What Did Stakeholders Say?

- When asked to assess the chamber’s performance tracking system the stakeholders provided an overall “rating of 3” with 3 representing the median mark on the scale.
- Overall, stakeholders “slightly agree” that the chamber’s use of a performance tracking system is adequate, and provided ratings between 2.7 and 3.3 to the survey responses.
- Several factors were rated with a 3 or higher value to assess the performance tracking system.
 - The information system provides all the information needed to measure the quality of the EDO’s work.
 - The board and staff know how to review the performance tracking system’s metrics to determine if changes are needed.
 - The information system provides all the information needed to measure the quality of the EDO’s work.
 - The board and staff receive all the information they need to now know the organization is doing.
 - The board and staff receive all the information they need to do their work.
- Two factors were rated between 2.7 and 2.9, which is below the median of 3 and indicates that the stakeholders “somewhat disagreed” with the survey responses.
 - The performance tracking system provides all the information needed to measure the quality of the EDO’s work.
 - The board and staff use this performance tracking system to make appropriate adjustments to staff salaries or bonus **scales**.

Performance Tracking System

FACTOR	AVERAGE RATING
The board and staff receive all the information they need to do their work.	3.3
The board and staff receive all the information they need to know how the organization is doing.	3.3
The board and staff make appropriate changes in the EDO’s strategic plan and program of work, based on its performance tracking system.	3.1
The EDO utilizes an effective performance tracking system.	3.0
The board and staff know how to review the performance tracking system’s metrics to determine if changes are needed.	3.0
The performance tracking system provides all the information needed to measure the quality of the EDO’s work.	3.0
The board and staff use this performance tracking system to make appropriate adjustments to staff salaries or bonus scales.	2.7

Communications System

What Did Stakeholders Say?

- Stakeholders provided an overall rating of 3.7 to assess the chamber’s communications systems.
- When asked to assess the chamber’s communications system, the stakeholders provided an overall “rating of 3” with 3 representing the median mark on the scale.
- Three factors were rated with a 4 or higher value when assessing the communication systems indicating that stakeholders “strongly agree” with the survey factors.
 - State and regional partners are adequately informed on chamber activities and progress.
 - The chamber regularly updates the state’s and other resource partners’ web sites and databases with community information.
 - The chamber regularly issues electronic or print news releases, newsletters, or other materials on its activities and progress.
- Stakeholders generally agree with several other factors, and provided ratings between 3.4 and 3.6 to assess the communication system.
 - The EDO’s website is regularly updated with all the key information and resources needed by its customers.
 - The EDO does an effective job of informing the general public on activities and accomplishments.
 - Community stakeholders are adequately informed on EDO activities and progress.
 - The EDO’s website is easy to navigate.

Communications Systems

FACTOR	AVERAGE RATING
The chamber regularly issues electronic or print news releases, newsletters, or other materials on its activities and progress.	4.3
The chamber regularly updates the state’s and other resource partners’ web sites and databases with community information.	4.2
State and regional partners are adequately informed on EDO activities and progress.	4.0
The EDO’s website is easy to navigate.	3.6
Community stakeholders are adequately informed on EDO activities and progress.	3.5
The EDO does an effective job of informing the general public on activities and accomplishments.	3.5
The EDO’s website is regularly updated with all the key information and resources needed by its customers.	3.4

Process Management

What Did Stakeholders Say?

- The chamber’s process management system was ranked relatively highly by the stakeholders who provided an overall rating of 3.8.
- Stakeholders provided a rating of 4 on two factors. This indicates that the stakeholders “strongly agree” with these factors.
 - The executive director has control over the organization’s work processes.
 - The EDO implements innovative practices for addressing customer and stakeholder needs.
- Six factors were rated between 3.5 and 3.9 indicating that stakeholders “generally agree” that the process management system is adequate.
 - The EDO makes changes to the work processes based on customer and stakeholder feedback.
 - The EDO is able to respond to its customers and stakeholders in a timely manner.
 - The EDO has an effective referral system with state, regional, and other resources.
 - Non-executive staffs have adequate control over their areas of responsibility.
 - The EDO has been effective in implementing the program of work.
 - The EDO has adequate staff and resources to complete its work processes.

Process Management

FACTOR	AVERAGE RATING
The executive director has control over the organization’s work processes.	4.5
The EDO implements innovative practices for addressing customer and stakeholder needs.	4.0
The EDO has adequate staff and resources to complete its work processes.	3.9
The EDO has been effective in implementing the program of work.	3.9
Non-executive staffs have adequate control over their areas of responsibility.	3.8
The EDO has an effective referral system with state, regional, and other resources.	3.6
The EDO is able to respond to its customers and stakeholders in a timely manner.	3.6
The EDO makes changes to the work processes based on customer and stakeholder feedback.	3.5

Partner Relationships

What Did Stakeholders Say?

- When asked to assess the chamber's partner relationships the stakeholders provided an overall rating of 4.1.
- Overall, half of the responses "strongly agree" that partner relations are a major strength of the organization and provided a rating of 4 or above.
 - Staff is actively involved in other community organizations.
 - The EDO has an effective relationship with local government.
 - The EDO has an effective relationship with local and regional media.
 - Board members are actively involved in other community organizations.
 - The EDO has an effective relationship with area legislators.
- Several other factors were rated between 3.0 and 3.9 suggesting that stakeholders "generally agree" that the process management system is adequate.
 - The EDO collaborates effectively with community-based organizations (e.g., civic groups, social service groups, etc)
 - The EDO has been able to expand its resources through relationships with alternative funding sources.
 - The EDO has an effective relationship with statewide and regional economic development partners.
 - The EDO has satisfactory stakeholder support from the business community, political leadership, neighborhood, or other groups that are essential to its mission.
 - The EDO collaborates effectively with nearby four-year colleges and universities, technical colleges, and community colleges.
 - The EDO collaborates effectively with other local EDOs in the community.
 - The EDO collaborates effectively with other local EDOs in the region.

Partner Relationships

FACTOR	AVERAGE RATING
The EDO has an effective relationship with area legislators.	4.4
Board members are actively involved in other community organizations.	4.4
The EDO has an effective relationship with local and regional media.	4.3
The EDO has an effective relationship with local government.	4.1
Staff is actively involved in other community organizations.	4.0
The EDO has satisfactory stakeholder support from the business community, political leadership, neighborhood, or other groups that are essential to its mission.	3.9
The EDO has an effective relationship with statewide and regional economic development partners.	3.9
The EDO has been able to expand its resources through relationships with alternative funding sources.	3.8
The EDO collaborates effectively with community based organizations (e.g., civic groups, social service groups)	3.7

Outcomes

What Did Stakeholders Say?

- Factors relating to chamber outcomes were assessed by stakeholders who provided an overall rating of 3.8.
- Stakeholders provided a rating of 4 on five outcomes. This indicates that the stakeholders “strongly agree” that the EDO’s overall performance is strong in the following areas:
 - Local entrepreneurs and small businesses.
 - Existing business and industry
 - Tourists / visitors
 - High standard and ethnics.
 - Obeys laws and regulations
- Six factors were rated between 3.5 and 3.9 which suggest that stakeholders “generally agree” that the process management system is adequate.
 - The EDO makes changes to the work processes based on customer and stakeholder feedback.
 - The EDO obeys laws and regulations.

Outcomes

FACTOR	AVERAGE RATING
The EDO obeys laws and regulations.	4.4
The EDO displays high standard and ethnics	4.4
How satisfied are the following with the EDO's overall performance-tourists/ visitors.	4.2
How satisfied are the following with the EDO's overall performance-existing business and industry.	4.1
How satisfied are the following with the EDO's overall performance-local entrepreneurs and small businesses.	4.1
How satisfied are the following with the EDO's overall performance-prospects.	3.9
The EDO has a reliable funding structure and receives financial support from several sources.	3.8
The EDO receives adequate, fair, and balanced media coverage of its outcomes and performance.	3.6
How satisfied are the following with the EDO's overall performance-community leaders.	3.6
How satisfied are the following with the EDO's overall performance-community citizens.	3.4

The EDO regularly meets or exceeds annual objectives.	3.3
The EDO regularly completes its annual program of work.	3.0

DOCUMENTATION REVIEW

The Douglas-Coffee County Chamber of Commerce has developed several quality management tools to manage its daily operations.

Quality Management Tools	Yes	No
Mission and Goals Statement	X	
Articles of Incorporation and Bylaws	X	
Strategic Plan	X	
Performance Tracking System (formal process for monitoring and tracking results)		X
Annual Budget	X	
Annual Report	X	
Minutes of Board of Directors Meetings	X	
Board Policies and Procedures	X	
Personnel Policies and Procedures	X	
Marketing Plan	X	
Web Site	X	
Public Relations / Communications Plan		X
Incentives Policy	X	

QUALITY MANAGEMENT TOOLS

Georgia Tech staff conducted an on-site interview with Chamber CEO JoAnne Lewis on December 8, 2005 to review current quality management system tools and documentation in the following areas:

- Mission and Goals statement
- Articles of Incorporation and Bylaws
- Strategic Plan
- Performance Tracking System
- Annual Budget
- Minutes of Board of Directors Meetings
- Board Policies and Procedures
- Human Resource Policies and Procedures
- Marketing Plan
- Technology tools
- Website
- Public Relations / Communications Plan
- Incentives Policy

Mission and Goals:

The Douglas-Coffee County Chamber of Commerce is a 576 member voluntary organization of businesses and professionals who have converged together to promote the economic well being of Douglas-Coffee County, Georgia.

The chamber's objectives are to:

- To coordinate the efforts of commerce and industry and strengthen a healthy business climate.
- To sponsor programs of work and stimulate the employment of human and economic resources.
- To provide business leadership and help solve community problems with constructive community action.
- To understand and appreciate community assets and opportunities and promote the area, state and world.

To accomplish its goals, the chamber has adopted four areas of work: economic development, membership services, leadership and marketing.

Articles of Incorporation and Bylaws:

The Douglas-Coffee County Industrial Authority which operates as a constitutional government authority provided Georgia Tech staff with a copy of the articles of incorporation and by-laws. The authority was created for the purpose of developing and promoting industry and agriculture for the city and county. Under the by-laws, the city of Douglas collects an annual ad valorem tax of one mill for economic development activities. Coffee County collects an annual ad valorem tax of one-half mill for economic development. The by-laws have not been updated since 1954.

Strategic Plan:

In June 2005, the Douglas-Coffee County Chamber of Commerce adopted a new strategic plan. The plan was developed by a planning group consisting of community leaders, board members, and management. To support the Chamber of Commerce's mission, four strategic excellence positions have been selected with supporting objectives and strategies. The selection of the strategies resulted

from a process whereby the planning committee identified and evaluated numerous alternative strategies designed to achieve specific and measurable objectives. The four strategic excellence positions are: economic development, membership services, leadership, and marketing.

Douglas-Coffee County Strategic Plan Strategic Excellence Positions

Strategic Goals	Description
Economic Development	Create an environment for business recruitment, retention, and development.
Membership	Retention and membership growth through programs of support.
Leadership	Establish community leadership through the creation of coordinated programs for community success.
Marketing	Promote the chamber and the community to ensure economic growth.

Performance Tracking System

The chamber does not have a formal performance tracking system to measure and review its progress toward goals and objectives. Monthly board meetings are conducted to review the current status of projects and programs. The executive director maintains a personal “notes” system to capture prospect and existing business information. Metrics to support entrepreneur and small-business activity are tracked by the chamber office.

Annual Budget

The chamber, which receives its funding from the city and county governments has an annual budget of \$ 400,000. The local governments are the greatest supporters and advocates of the chamber and economic development. The industrial development authority administers the budget through the development of an annual contract with the chamber. The budget is managed by the internal operations director. Other sources of funding include OneGeorgia and Federal Economic Development Administration grants.

Minutes of Board of Directors Meetings

Monthly board of director meetings is conducted by the chamber and industrial development authority. The minutes of board of director meetings are approved, recorded and filed for public record. Both the chamber and industrial authority have maintained records of board minutes for at least the past three years and the minutes are available on file and are shared upon request.

Board Policies and Procedures

The Douglas-Coffee County Chamber of Commerce and Industrial Development Authority have developed a set of board policies and procedures that include: membership requirements, an attendance policy, and financial policies.

The twenty-one member chamber board of directors is the policy making body of professional leadership. The board members serve three-year terms and are elected as set forth by the by-laws. The chairman of the board presides over all meetings of the board. The membership of the industrial authority consists of seven members with three representatives from both the city and county commissions. The seventh member is selected by joint actions of the city and county commissioners.

New development authority members attend state-mandated training. The chamber has developed a local formal system for training board members. A one-day retreat and orientation session are held annually to train chamber and industrial authority board members. Board members are given the opportunity to attend the Georgia Economic Development Association (GEDA) meetings and network with statewide partners.

The board member succession plan is regularly reviewed and updated. The board member policies and procedures handbook includes:

- Board policies and procedures
- Roster and position description of officers
- Board rotation or leadership succession plan

Human Resources Policies and Procedures

The Douglas-Coffee County Chamber staff consists of five professionals addressing the needs of economic development, marketing, membership programs and services, administration, human resources, and information delivery.

The chamber operates under the direction of the president who functions as the Chief Executive officer. The president is responsible for the operation, control, and planning functions for all programs if work and serves as direct supervisor for all employees. The board charges the President with implementation of policy.

The internal operations director serves as the human resource officer, maintains financial records and serves as the operational liaison between the chamber and industrial authority.

The membership services director provides assistance for all chamber programs and services. As the Recruitment Officer for membership retention, the director has recruitment responsibility.

The economic development assistant serves as administrative assistant to the president and marketing director for the chamber. The assistant provides help in the area of research, technical assistance, program management, and other supervisory administrative services.

The information specialist serves as the receptionist and is responsible for the general review of housekeeping of lower- level public space and the break down of chamber supported programs and events.

The Douglas-Coffee County Chamber of Commerce has developed a handbook to provide employees with a general understanding of personnel policies. Established by the board of directors, the policies and procedures are reviewed annually and were last updated in 2004. Employees are required to annually review the personnel policies.

The chamber supports continuing and professional education for all staff via workshops, professional association memberships, chamber staff clinics and the chamber institute. There is not a system in place for developing training key employees for future management and leadership roles or a plan for cross training of current skills. Due to the small staff size, a leadership succession plan has not been developed. The annual turnover rate is less than 10 percent. Minor employee job performance problems have arisen from deficiencies in skills for current job assignments. There is a need for the development of training programs to facilitate continual skill development for employees.

The chamber's wages, health benefits, sick leave and holiday benefits are about the same as other EDO organizations

Non-board member volunteers are utilized and serve on various committees. The chamber provides informal training sessions that help the volunteers to learn about their committee assignments. The volunteer turnover rate is less than 10 percent.

Marketing Plan

In October 2005, the Douglas-Coffee County Chamber of Commerce adopted a new marketing plan.

Developed by the marketing committee, the plan has goals of promoting the community and enhancing economic development efforts to generate more participation in the chamber and to add value to the membership.

The general goals for the marketing plan are to:

- Review the current marketing plan annually and evaluate the effectiveness of the plan using the current website
- Assess printed marketing materials to ensure consistent message and theme.
- Establish quarterly meetings to track the progress of the marketing plan
- Create a formal marketing budget Chamber and EDA to
- Develop a board rotation or leadership succession plan

The chamber website will be the primary vehicle for implementing the plan. The plan also includes information on:

- Brand identity
- Strategies based on competitive intelligence gathering
- Targets based on key assets
- Utilization of community sales team
- Initiatives to engage statewide developers

Marketing information is distributed to potential prospects in several forms including custom reports, PowerPoint presentations, video and the web site. Marketing material is updated on an "as needed" basis. The following information is included in the marketing packet of information:

- Brand identity
- Area sites and buildings
- Business assistance resources
- Business taxes and regulations
- Commercial and industrial properties
- Demographic information
- Education information

- Entrepreneurs
- Existing business and industry
- Health care information
- International trade (export) opportunities
- Major employers

In 2005, the Douglas-Coffee Chamber and Industrial Authority successfully closed seven new projects with prospective companies and worked to expand several existing businesses in the county.

Periodically, the chamber conducts formal procedures such as surveys and reports from customers that provide detailed feedback on level of customer satisfaction. Customer feedback is annually incorporated into a continuous improvement program.

Web Site

The chamber website is the primary vehicle for marketing the community and enhancing economic development efforts in the county. The site provides static information only; however, the current marketing plans include major website improvements. The site is updated on an "as needed" basis and offers the following services:

- Annual report
- Calendar of economic development events
- Contact information
- Information for prospects
- Information for entrepreneurs
- Information for existing business and industry
- Link to public and private organizations in the community
- Links to relevant organizations outside the community
- Media releases
- Organization mission and goals statements
- Newsletter

Technology Tools

Information technology management tools are used to manage the chamber's daily operations. Most of the chamber's office processes are automated using a local area network configuration. The chamber does not have a formal disaster recovery plan and process even though the computer system is backed up on a regular basis. Hardware technical support is outsourced to a local technology company. The Microsoft Office suite and business products are used throughout the organization to communicate to members, prospects, and clients. Several communications tools such as wireless devices (cell phones, palm pilots, wireless LAN cards) are utilized throughout the organization. The current membership program is currently under-utilized due to lack of training of office staff. The following applications are automated in the organization:

- Accounting
- Scheduling and planning
- Prospect tracking (limited tracking)
- Research
- Office productivity software suite, including word processing, spreadsheet, presentation, and e-mail client per computer
- Chamber membership program

Public Relations/ Communications Plan

A formal public relations and communications plan does not exist within the chamber largely due to the organization's small size. A large variety of media forms are used to communicate chamber events, programs and business announcements to the community leadership and citizenry. The chamber website, a weekly newsletter (*Friday Fax*), a weekly television broadcast- (*the Chamber Focus*), media releases, public service announcements, and a quarterly newsletter are used to keep the communicate chamber activities.

The executive director and chamber leadership have developed very strong relationships with federal, state, and regional partners. The chamber and industrial authority provide monthly updates to the state, regional, and other resource partners. In 2005, the chamber and industrial authority worked with state partners to win several new projects:

- Education facilities and programs- new science building project, allied health and public safety facility and a new Commercial Drivers License (CDL) program
- Transportation- expansion and improvement of highway 441, 32 and 158
- Business Development- construction of new Industrial site- Park West; more than ten company business expansions and business relocations
- State conference- the chamber will host the site for the 2006 Governor's Entrepreneur and Small Business Conference

Incentives Policy

The Douglas-Coffee chamber's incentive policy generally offers tax abatement incentives to prospective businesses. The policy includes a fiscal impact analysis of economic development incentives granted to businesses and provides support to:

- New business recruitment
- Existing business retention
- Entrepreneur start-ups
- Grant funds received
- Tourism facility development

The industrial development authority supports activities economic development activities of the chamber through a contractual agreement that is updated annually. The industrial authority has also established land covenants for potential property developers.

OTHER FINDINGS

- Notable recent successes include the development of a strategic plan and a broadening of the scope of work to include commercial, tourism, and entrepreneur development.
- Clear and well-developed strategic plan in place and being followed.
- The development of strong partnerships with federal, state, and regional partners has greatly contributed to Douglas-Coffee County's competitive edge.
- The chamber has developed an effective business recruitment system that enables the community to quickly respond to the informational requests of state project managers. The chamber has developed a standard business recruitment document and a sales team that are flexible, responsive, and supportive.

- Performance is benchmarked against objectives set out in the chamber's and industrial authority's strategic plan.
- Local support from the city and county governments has contributed to the success of the current economic development program.
- Future plans to expand the number of counties within the joint development authority region will increase the potential for greater regionalism opportunities and projects.
- The community has developed a "community visioning" process that is conducted every two years to gather input from the community on economic development.
- The chamber developed a process in 2005 to review the work plans of major stakeholder organizations to develop a unified vision for the community.
- There is current use of technology, but the technology should be better managed.

RECOMMENDATIONS

1. **Invest in a performance tracking system.** The chamber should invest in a performance tracking system to measure projects and the progress of chamber goals and objectives. The system should track historical information, provide decision-support and reporting capability to help monitor business trends.
 - The performance tracking system should be set around annual economic development goals, measure the return on the community's investment such as the number of businesses created, retained, expanded, number of dollars invested into the community, number of jobs created or retained, average wages and other important information.
 - Regularly report progress and positive results to community stakeholders (leaders and citizens) relating to these objectives.
 - The performance tracking system should track the following type of information:
 - Calls to the local chamber
 - Entrepreneurs assisted
 - New prospects served
 - Existing businesses served with exporting product
 - Existing businesses served
 - Information packages mailed
 - Tourism events held
 - Calls to statewide or regional economic developers
 - Grant applications submitted
 - Hours of training attended
 - Networking events attended
 - Presentations delivered
 - Press conferences or news releases issued
 - Visits to statewide economic developers
 - The performance tracking system should collect, measure and track the follow-up information:
 - Reasons entrepreneurs chose the community
 - Reasons existing businesses and industries expand
 - Reasons existing businesses move, close or downsize
 - Reasons prospects do not locate
 - Reasons prospects locate

2. **Develop a formal public relations and communications work plan**
Effective communication is critical among economic development organizations. A well defined communications work plan should be developed and integrated into the current marketing plan. The plan should include procedures and instructions for conducting marketing campaigns, developing press releases and newsletters and guidelines for interacting with the media.
3. **Develop a security and disaster recovery contingency plan.** The chamber should develop a disaster recovery plan. Disasters do occur. Every organization is at risk to some degree. Your building could be damaged by a fire, flood, or explosion. Even a prolonged power outage, sabotaged computer system or destroyed equipment can shut your organization down. If any of these events happen, your organization may be unable able to continue operating

A good disaster recovery plan ensures business survival during a prolonged interruption of computing services. A proper disaster recovery plan is like a good insurance policy, it will be effective if all of the risks are carefully and realistically assessed.

Effective documentation and procedures are extremely important in a disaster recovery plan. According to the Toronto Users Group for Midrange Systems, the following are basic steps used in planning for contingency of a computer or building disaster:

1. **Obtain support for the plan from the Chamber management and board members.**
Chamber management and board members must support and be involved in the development of the disaster recovery planning cycle. Adequate time, budget and resources must be committed to the development of the plan.
2. **Impact Analysis**
This step will define the maximum allowable downtime of the computer systems before the downtime begins to have significant impact on the organization's ability to function. Financial losses attributed to the loss of service should be calculated.
3. **Perform a risk assessment**
Each functional area of the business should be analyzed to determine potential impact associated with several disaster scenarios. It is important to assess the impact from loss of information and services.
4. **Determine processing requirements** The critical needs of each functional area within the organization should be evaluated. The maximum amount of time that a department and the entire organization can operate without access to the computer systems must be determined.
5. **Recovery Strategies**
All alternatives to provide alternate processing capabilities should be assessed. The above requirements will help in determining the viability of a hot-site, cold-site or equipment-on-demand solutions. Financial factors will also contribute to the decision making process.
6. **Off-site storage**
One of the most critical components for the capability of a recovery is off-site storage of your system and vital records. You cannot recover what you don't have. Definition of vital records should be done jointly with the off-site storage vendor.
7. **Testing**
The ONLY way to determine if a plan will truly work is to test it. A failure during a test is a learning experience. A failure during the real thing is a second disaster.
8. **Maintenance**
The procedures should include methods for maintaining and updating the plan to reflect any significant internal, external or system changes.

Disaster recovery planning involves more than off-site storage or alternate processing. The plan should be thoroughly developed, including all detailed procedures to be used before, during and after a

disaster. The procedures should allow for a regular review of the disaster recovery plan by key personnel within the organization. The chamber board should review and approve the disaster recovery plan. Disaster recovery planning dollars are best allocated toward testing a plan, automating plan maintenance and applying the solution.

Continue to invest in technology tools that will help create great efficiency and productivity among the chamber office staff such as the development of a:

- Fully featured enterprise server for sharing resources, managing data and connectivity, and enabling net-based applications.
 - Firewall and Inter/extra/intranet to secure data.
 - Business continuity plan to protect critical information and ensure that adequate battery, data, and hardware back-ups are tested and reliable.
4. **Upgrade the chamber website to better market the community.** The website should be enhanced, expanded, improved, and maintained to better market the community and chamber activities. Innovative technologies such as web-conferencing, virtual tours, blogs, streaming media applications to load the chamber television broadcast on the web, collaboration tools, electronic brochures and reports and e-commerce applications should be explored and evaluated to help improve the level and quality of services provided by the chamber.
5. **Conduct virtual meetings using advanced technologies to reduce travel costs.** New advances in technology can substitute time-consuming face-to-face meetings and help to increase the productivity of chamber staff. The following technologies should be evaluated to combat time- pressured activities. (1)

Video Conferencing - An interactive use of video, computing and communication technologies to allow people in two or more locations to meet – either one-on-one or in groups of up to a dozen people or so – without being physically together. Video can be streamed over the Internet or broadcast over television monitors.

Web Conferencing - teleconferencing with the addition of the web for interactive presentations, using PowerPoint, Excel or other documents. Audio can be transmitted by telephone and/or PC microphones. Using the Internet and a telephone line, presentations can be made to as many as 2,500 people in different locations. PowerPoint slides or other documents are available to the audience in real time. Other participants can also use drawing tools to make points or take control of your presentation as well. Microsoft's NetMeeting works well for web conferencing.

Online Collaboration Tools - While email remains a key business tool, extranets are private websites that allow users to share files, documents and use message boards with selected customers or partners. Extranets help to reduce the need for some meetings by allowing you to have ongoing communication and document-sharing.

6. **Develop an “in-house training” program.** The chamber should develop a training program to support the training needs of office staff. In an ideal world, you would be able to hire people who already possess the exact skills your business needs. But in today’s competitive labor market, demand for skilled workers far exceeds supply.

(1) Microsoft Business Center

Non-executive staff should be crossed-trained on critical applications such as the “chamber membership program”. Time should be allotted for planned training opportunities. Well-trained employees who improve their skills can usually make greater contributions to the organization, increase productivity and experience greater job satisfaction.

In order to successfully launch an employee training program: (2)

1. **Stress training as investment.** The reason training is often considered optional at many organizations are because it is thought of as an expense rather than an investment. Training is a long-term investment in the growth and development of your human resources.
2. **Determine your needs.** As you probably don't have unlimited time or funds to execute an employee training program, it is important to decide early on what the focus of your training program should be. Determine what skills are most pertinent to address current or future organization needs or that will provide the biggest payback. Ask yourself “How will this training eventually prove beneficial to the organization?”
3. **Promote a culture of learning.** In today's fast-paced economy, if an organization isn't learning, it's going to fall behind. An organization learns as its people learn. Communicate your expectations that all employees should take the necessary steps to hone their skills and stay on top of their professions or fields of work. Make sure you support those efforts by providing the resources needed to accomplish this goal.
4. **Get management on board.** Once you have developed a prioritized list of training topics that address key needs within your organization, it's important to convince board members to rally behind the initiative.
5. **Start out small.** Before rolling out your training program to the masses, rehearse with a small group of users and gather their feedback. This sort of informal benchmarking exposes weaknesses in your training plans and helps you fine-tune the training process.
6. **Choose quality instructors and materials.** Who you select to conduct the training will make a major difference in the success of your efforts, whether it's a professional educator or simply a knowledgeable staff member. Having the right training materials is also important -- after the training is over, these materials become valuable resources for trainees.
7. **Find the right space.** Select a training location that's conducive to learning. Choose an environment that's quiet and roomy enough to spread out materials. Make sure the space is equipped with a computer and a projector so that you can present a visually stimulating training session.
8. **Clarify connections.** Some employees may feel that the training they are receiving is not relevant to their job. It's important to help them understand the connection early on, so they don't view the training sessions as a waste of valuable time. Employees should see the training as an important addition to their professional portfolios. Award people with completion certificates at the end of the program.
9. **Make it ongoing.** Don't limit training solely to new employees. Organized, ongoing training programs will maintain all employees' skill levels, as well as continually motivate them to grow and improve professionally.

10. **Measure results.** Without measurable results, it's almost impossible to view training as anything but an expense. Decide how you're going to obtain an acceptable rate of return on your investment. You'll have an easier time budgeting funds for future training if you can demonstrate concrete results.

RECOMMENDATIONS FOR CONTINUAL IMPROVEMENT A Service of the Calibration Program

Prepared for

**The Dublin-Laurens County Chamber of Commerce
And
Development Authority**

Prepared by

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OVERVIEW

Economic developers often ask Georgia Tech for guidance and assistance on key management and operational issues relating to running quality economic development programs. They are interested in operating as effectively as possible and in having a system in place for tracking their performance.

The Calibration Program has been designed to help local economic development organizations (EDO) achieve higher performance and excellence drawing on quality management standards from International Economic Development Council's (IEDC) Accredited Economic Development Organization (AEDO) program, the International Standards Organization (ISO), and Malcolm Baldrige. The program provides economic development organizations with independent feedback on their operations, structure, and procedures, and recognizes excellence in local economic development efforts. This service leverages Georgia Tech's expertise in assisting clients in the areas of planning, quality management, lean enterprise, technology utilization, and overall community economic development.

In August 2005, the Dublin-Laurens County Chamber of Commerce and Development Authority (EDO), was selected as a pilot EDO for the Calibration Program. As a pilot EDO, the Dublin-Laurens County Chamber and Development Authority and its stakeholders completed an on-line self assessment to reveal perceptions about the EDO's management system by those with direct knowledge about the EDO's operations. In addition, Georgia Tech staff conducted an on-site interview with Willie Paulk and a review of the EDO's documentation and tools. This report details the findings of the self assessment, on-site interview, and documentation review and includes recommendations for specific action items relating to the continual improvement in organizational processes.

The adoption of a quality management system will help the EDOs maintain and achieve its mission, improve its ability to meet the needs of its customer base, and boost public confidence in its performance. Some of the benefits are:

- Better understanding of operational gaps and opportunities for affection or reinforcing positive change... and achieving organizational excellence
- Improve Management Systems to operate with greater effectiveness and efficiency, and for building a stronger organization
- Improved procedures for Board members, staff, volunteers, and customers (citizens and business)
- Improved ability to track and communicate progress ((job performance)
- Heighten visibility and awareness among key stakeholders (internal and external) that the economic development organization is a well-managed, highly professional organization

Improve readiness to participate in IEDC's process to become an Accredited Economic Development Organization (AEDO), and earn national recognition for excellence.

Methodology

The *Calibration Program* is comprised of three sections:

1. Self Assessment
2. Gap Assessment & Document Review
3. On site interview and analysis presentation

Self Assessment

The Self Assessment is an on-line web enabled assessment targeted for the Executive Director and Board members of the Authority and/or Chamber. Participants are requested to provide their assessment of the organization in ten (10) key categories:

1. Community Leadership
2. Human Resources
3. Strategic Planning
4. Customer and Market Focus
5. Use of Technology
6. Performance Tracking
7. Communication Systems
8. Process Management
9. Partner Relationships
10. Outcomes

Each participant is requested to rank from 1 to 5 whether they agree with certain statements in each area. A ranking of "1" indicates strong agreement and "5" indicates strong disagreement to the statement. Individual responses remain confidential. However, collectively the responses are analyzed and a report generated. The purpose of the analysis is to allow the organization to measure or "benchmark" this perception of each area. The *Self Assessment* should be used by the executive director and board to discuss areas of concern, such as low scores, and to develop a plan for improvement. The *Self Assessment* is intended to be an internal planning tool to assist the organization with benchmarking and measuring progress over a period of time. As such, it is recommended the *Self Assessment* be conducted at least annually and preferably prior to an annual retreat.

Gap Analysis & Document Review

The *Quality Management Gap Assessment* is an on-line web enabled assessment intended to be completed by the Executive Director or President of the Authority and/or Chamber. The assessment was designed around best management practices for effective economic development. The purpose of the analysis is to identify potential "gaps" in the community's economic development program.

The "Document Review" is used to identify & review the documentation the EDO has in place.

SELF ASSESSMENT ANALYSIS

Laurens County invited eleven (11) individuals, representing the development authority and the chamber of commerce, to participate in the Self Assessment. Seven of the eleven responded to the assessment for a participation rate of 64%. The respondents were requested to rate ten (10) program categories between one and five, with one (1) being "strongly disagree" and five (5) being "strongly agree" with the question or statement. The respondents rated five of ten categories 4.00 or better. The highest rated was Relationships and Partnerships with a rating of 4.54. The lowest rated was Performance Tracking with a rating of 2.89. A summary of the assessment responses and a brief analysis of each category follows.

Community Leadership

Area	Question	Responses	Avg	High	Low
Community Leadership			3.98		
	L-1. Community leadership is supportive of economic development.	7	4.86	5	4
	L-2. Community leadership embraces change and new ideas.	7	3.57	5	2
	L-3. The EDO has a clear vision and mission that its leaders effectively communicate, support, and model throughout the organization.	7	4.29	5	3
	L-4. The EDO board has reasonable expectations of the staff and the organization.	6	4.17	5	2
	L-5. The EDO board regularly shares information about the EDO with community stakeholders.	7	3.57	5	2
	L-6. The EDO board works within the community to remove barriers to economic development progress.	7	4.00	5	2
	L-7. The EDO board lets staff know what they think is most important.	6	4.17	5	3
	L-8. The EDO board works to secure increased funding for the EDO.	5	4.20	5	4
	L-9. The EDO board participates in appropriate board member training programs.	5	4.40	5	4
	L-10. The EDO board has an effective board rotation (leadership succession) policy that is reviewed and updated on a regular basis.	7	3.14	4	2
	L-11. The EDO board represents the diversity of the community.	7	4.00	5	2
	L-12. The EDO board regularly evaluates outcomes according to annual objectives.	6	3.33	5	2

For the twelve areas in this category the weighted average response was 3.98. This indicates the respondents believe the community leadership has a "strong to moderately strong" support of the EDO. The variability in the respondent's ratings indicates some disagreement among the respondents.

The EDO board is involved with the community and is working in a positive manner to break down barriers and advance the mission of the EDO.

Areas offering opportunity for improvement are:

- The sharing of information between the EDO and community stakeholders
- An EDO board rotation policy that is reviewed and updated on a regular basis
- The board regularly evaluates the outcomes according to annual objectives

Human Resources

Area	Question	Responses	Avg	High	Low
Human Resources			4.42		
	HR-1. The board and staff agree on matters of job description.	5	3.80	5	2
	HR-2. The EDO has satisfactory staff support.	6	4.00	5	3
	HR-3. Staff have the ability to influence the EDO's program of work.	6	4.33	5	2
	HR-4. Staff are provided with effective orientation and training.	6	4.50	5	4
	HR-5. Staff are encouraged, supported, and active in their pursuit of further professional development.	6	4.67	5	4
	HR-6. Staff are compensated satisfactorily and fairly, and are adequately rewarded for performance with incentives, bonuses, or other mechanisms.	6	4.50	5	3
	HR-7. Staff receive satisfactory benefits packages, including health insurance.	6	4.67	5	3
	HR-8. Staff have everything they need to do their job effectively.	6	4.50	5	4
	HR-9. Staff keep the board informed on important operational issues.	6	3.67	5	2
	HR-10. Staff are recognized as the point of contact(s) for economic development for the community within and outside the community.	6	5.00	5	5
	HR-11. Staff turnover is not a significant problem for the EDO.	6	5.00	5	5

For the eleven areas addressed in this category the weighted average response was 4.42. This high rating signifies the respondents "strongly" believe the EDO is meeting the human resource needs of the staff, its board and the community stakeholders. The generally low variability within the responses demonstrates agreement among the respondents to most of the questions.

The respondents rated two areas (HR-1 & HR-9) below 4 but higher than 3.5. These also have the highest degree of variability within the responses. This indicates at least one respondent is not in agreement that the board and staff agree on matters of job description and that the EDO staff keeps the board informed on important operational issues.

Strategic Planning

Area	Question	Responses	Avg	High	Low
Strategic Planning			3.22		
	SP-1. The EDO is guided by a well-conceived strategic plan.	6	3.17	5	1
	SP-2. I have read and fully understand the strategic plan.	6	2.83	5	1
	SP-3. A diverse group of community stakeholders have been involved in the process to develop, implement, and update the strategic plan.	7	3.43	5	2
	SP-4. The EDO's strategic plan is in sync with the community's comprehensive plan.	7	3.71	5	2
	SP-5. The EDO's strategic plan adequately addresses needs for downtown development / redevelopment, supporting business and industry, supporting entrepreneurs and small businesses, marketing and recruitment, and tourism development.	6	3.00	4	2
	SP-6. The EDO adopts annual objectives that are measurable and purposeful for reaching the strategic goals and opportunities identified in the strategic plan.	6	2.83	5	1
	SP-7. The EDO adopts an annual program of work to meet annual objectives.	6	3.33	5	2
	SP-8. Satisfactory resources are available to the EDO for reaching strategic plan goals and objectives.	6	3.67	5	3
	SP-9. The EDO regularly partners with other organizations and community groups in the implementation of the strategic plan.	6	3.50	5	2
	SP-10. There has been successful implementation of the economic development strategic plan.	6	3.33	5	1
	SP-11. The EDO monitors and tracks strategic plan progress in implementing the strategic plan.	6	3.00	5	1
	SP-12. The EDO regularly publicizes strategic planning progress to community stakeholders.	6	2.80	4	1

For the twelve areas addressed in this category the weighted average response was 3.22. This rating is slightly above the mean score of 3.0 indicating the respondents "moderately agree" with the strategic planning program of the EDO. Additionally the wide variability within the responses indicates disagreement among the respondents as to how well the EDO is addressing its strategic planning program. The low rating for this category, relative to the other categories, coupled with the wide variability in responses suggest the EDO should review its program for strategic planning.

Customer and Market Focus

Area	Question	Responses	Avg	High	Low
Customer and Market Focus			4.44		
	CM-1. The EDO effectively communicates the community's competitive advantages to customers and stakeholders.	7	4.00	5	2
	CM-2. The EDO's office is functional, well-maintained, and orderly.	7	4.29	5	3
	CM-3. The EDO's office provides privacy for conferences.	7	4.57	5	3
	CM-4. The EDO's office is easy-to-find and centrally located.	7	4.86	5	4
	CM-5. The EDO's community information and marketing materials are current and professional in appearance.	7	4.43	5	4
	CM-6. The EDO is effective at understanding and addressing the needs of:	7	4.50		
	Community citizens	7	4.43	5	3
	Existing business and industry	7	4.71	5	4
	Entrepreneurs and emerging industry	7	4.29	5	2
	Prospects	7	4.71	5	3
	Visitors	7	4.29	5	2
	Newcomers	7	4.57	5	4

For the six areas addressed in this category the weighted average response was 4.44 which indicates the respondents "strongly agree" with the EDO's overall customer and market focus efforts. The relatively low variability within the responses indicate moderate to strong agreement among the respondents.

Use of Technology

Area	Question	Responses	Avg	High	Low
Use of Technology			3.87		
	UT-1. The EDO has a satisfactory budget for purchasing and upgrading technology tools (e.g., computers, software, personal handhelds, digital phones).	6	3.50	5	2
	UT-2. The EDO has adequate in-house printing capabilities.	5	3.60	4	2
	UT-3. The EDO has adequate presentation capabilities.	7	3.86	5	3

UT-4. The EDO uses adequate communications tools for supporting staff connectivity (e.g., email, voice mail, call forwarding, networked computers, personal digital assistants).	7	4.14	5	3
UT-5. Staff have access to all the technology tools they need to do their job effectively.	7	4.14	5	3
UT-6. The EDO effectively utilizes the latest office technologies to enhance productivity and efficiency.	7	4.00	5	3

For the six areas addressed in this category the weighted average response was 3.87 indicating “moderately strong agreement” with the EDO’s integration and use of technology in its work programs.

Three areas (UT-1, UT-2 & UT-3) received ratings less than 4.0 suggesting the respondents moderately agree the EDO is:

- Adequately budgeting for purchasing & upgrading technology tools
- Has adequate in-house printing capabilities
- Has adequate presentation capabilities

Performance Tracking System

Area	Question	Responses	Avg	High	Low
Performance Tracking			2.89		
	Perf-1. The EDO utilizes an effective performance tracking system.	4	3.00	5	1
	Perf-2. The performance tracking system provides all the information needed to measure the quality of the EDO's work.	4	3.00	5	1
	Perf-3. The board and staff receive all the information they need to do their work.	6	3.33	4	2
	Perf-4. The information system provides all the information needed to measure the quality of the EDO's work.	6	3.17	4	2
	Perf-5. The board and staff receive all the information they need to know how the organization is doing.	6	3.33	5	2
	Perf-6. The board and staff know how to review the performance tracking system's metrics to determine if changes are needed.	5	2.80	4	2
	Perf-7. The board and staff regularly make appropriate changes in the EDO's strategic plan and program of work, based on its performance tracking system.	5	2.00	4	1
	Perf-8. The board and staff use this performance tracking system to make appropriate adjustments to staff salaries or bonus scales.	4	2.50	4	2

The assessment addressed eight areas for this category and the weighted average response for the entire category was 2.89...the lowest rating of the ten categories. At least one respondent answered "don't know" for all eight areas. There is a high degree of variability in the responses to each area indicating disagreement among the respondents. The generally low scoring of the entire category suggests the EDO and Board should review procedures, policy and documentation in this area.

Communications System

Area	Question	Responses	Avg	High	Low
Communications Systems			3.78		
	Comu-1. The EDO's web site is regularly updated with all the key information and resources needed by its customers.	5	3.80	5	3
	Comu-2. The EDO's web is easy to navigate.	5	4.20	5	3
	Comu-3. The EDO's web site has been designed to rank highly on the key Internet search engines.	5	3.80	5	3
	Comu-4. The EDO regularly issues electronic or print news releases, newsletters, or other materials on its activities and progress.	7	3.57	5	2
	Comu-5. The EDO regularly updates the state's and other resource partners' web sites and databases with community information.	3	4.00	5	3
	Comu-6. State and regional partners are adequately informed on EDO activities and progress.	6	3.83	5	3
	Comu-7. Community stakeholders are adequately informed on EDO activities and progress.	7	3.57	4	2
	Comu-8. State and regional partners are adequately informed on EDO activities and progress.	6	3.83	5	3
	Comu-9. The EDO does an effective job of informing the general public on activities and accomplishments.	7	3.43	5	1

For the nine areas addressed in this category the weighted average score was 3.78 indicating "moderately strong" support of the EDO's overall communication systems. At least one response of "don't know" was received in 6 of the 9 areas. This suggests some of the respondents are not aware or are not informed about some of the EDO communication policy, procedures and actions.

Comu-1 thru Comu-3 addresses the EDO's web site and respondents strongly agree the site is updated routinely with key information, is easy to navigate and is well designed.

Comu-4 thru Comu-9 addresses the effectiveness of communication from the organization to the public, community stakeholders, regional and state partners. Again the ratings indicate "moderately strong" support for EDO is keeping its partners and stakeholders informed of its activities, progress and accomplishments.

Process Management

Area	Question	Responses	Avg	High	Low
Process Management			4.13		
	PM-1. The executive director has control over the organization's work processes.	7	4.86	5	4
	PM-2. Non-executive staff have adequate control over their areas of responsibility.	6	4.16	5	3
	PM-3. The EDO has adequate staff and resources to complete its work processes.	7	4.00	5	3
	PM-4. The EDO is able to respond to its customers and stakeholders (e.g., citizens, entrepreneurs, existing business and industry, legislators, local government, local and regional media, prospects, site location consultants, tourists/visitors) in a timely manner.	7	4.29	5	3
	PM-5. The EDO implements innovative practices for addressing customer and stakeholder needs.	7	4.00	5	3
	PM-6. The EDO makes changes to the work processes based on customer and stakeholder feedback.	7	4.00	5	2
	PM-7. The EDO has an effective referral system with state, regional, and other resource partners.	7	3.71	5	1
	PM-8. The EDO has been effective in implementing the program of work.	7	4.00	5	2

For the eight areas addressed in this category the weighted average score was 4.13 indicating “strong” support of the EDO’s overall process management systems.

The high ratings for PM-1, PM-2, PM-3, and PM-4 indicates the respondents strongly to very strongly believe that the director and staff have control over their individual areas of responsibility and is able to respond to its customers.

Partnerships and Relationships

Area	Question	Responses	Avg	High	Low
Partnerships and Relationships			4.54		
	PAR-1. Board members are actively involved in other community organizations.	7	5.00	5	5
	PAR-2. Staff are actively involved in other community organizations.	6	4.67	5	4

PAR-3. The EDO has satisfactory stakeholder support from the business community, political leadership, neighborhood, or other groups that are essential to its mission.	7	4.71	5	4
PAR-4. The EDO has been able to expand its resources through relationships with alternative funding sources.	6	3.83	5	3
PAR-5. The EDO has an effective relationship with:		4.50		
Area legislators	7	4.57	5	3
Statewide and regional economic development partners	7	4.14	5	1
Local government	7	4.71	5	3
Local and regional media	7	4.57	5	3
PAR-6. The EDO collaborates effectively with:		4.56		
Community-based organizations (e.g., civic groups, social service groups, etc.)	7	4.14	5	2
Nearby 4-year colleges and universities, technical colleges, and community colleges	7	4.57	5	3
Other local EDOs in the community	6	4.67	5	3
Other local EDOs in the region	7	4.86	5	4

For the six areas addressed for this category the weighted average response was 4.54 the highest rating of all the categories. The ratings indicate very favorable community involvement by its board and staff and equally as important that the EDO has the community stakeholder support for its mission. These areas are the foundation for a successful program of work.

Outcomes (Program Results)

Area	Question	Responses	Avg	High	Low
Outcomes			4.08		
	OC-1. The EDO regularly completes its annual program of work.	7	3.86	5	2
	OC-2. The EDO regularly meets or exceeds annual objectives.	7	3.71	5	2
	OC-3. The EDO obeys laws and regulations.	7	4.43	5	2
	OC-4. The EDO displays high standards and ethics.	7	4.43	5	2
	OC-5. The EDO has a reliable funding structure and receives financial support from several sources.	7	3.43	5	2
	OC-6. The EDO receives adequate, fair, and balanced media coverage of its outcomes and performance.	7	4.43	5	4

OC-7. How satisfied are the following with the EDO's overall performance?		4.29		
Community leaders	7	4.43	5	4
Community citizens	7	4.29	5	4
Existing business and industry	7	4.57	5	4
Local entrepreneurs and small businesses	7	4.00	5	2
Prospects	7	4.14	5	2
Tourists/visitors	7	4.29	5	3

For the seven areas addressed for this category the weighted average response was 4.08. The EDO received high ratings for obedience of laws and regulations and display of high standards and ethics.

Areas if opportunities are in completion of its annual program of work, meeting and exceeding its annual objectives and diversification of its funding.

DOCUMENTATION REVIEW

Quality Management Tools	Yes	No
Mission and Goals Statement	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Articles of Incorporation and Bylaws	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Strategic Plan	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Performance Tracking System (formal process for monitoring and tracking results)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Annual Budget	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Annual Report	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Minutes of Board of Directors Meetings	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Board Policies and Procedures	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Personnel Policies and Procedures	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing Plan	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Web Site	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Public Relations / Communications Plan	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Incentives Policy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>

Mission and Goals Statement

The Chamber and the Development Authority have established written mission and goals statements. The Chamber's statement appears to be more prevalent and used most often. Consideration should be given to placing more emphasis on the Development Authority's statement and goals.

Articles of Incorporation and Bylaws

The Chamber and the Development Authority are on file and available upon request. A specific date the By-Laws were last updated was not available.

Strategic Plan

The Chamber establishes a formal work plan annually during a board retreat. The plan is adopted by the executive committee and goals are established for the year. Some objectives are longer term than a single year and roll over year to year. A formal long term plan (5-10 year) has not been established.

The Development Authority is in the process of developing a strategic plan and it is expected to be complete this year.

Performance Tracking

The Chamber uses a combination of tracking tools. A membership software package is used to track membership additions, deletions and changes but is focused primarily on the membership. This system is very useful for membership purposes and accurately tracks the goals related to membership. Other tools are manual and informal.

The Development Authority has no formal performance tracking system.

Annual Budget

The Chamber budget is generated principally by membership dues.

The Development Authority is funded by the Laurens County Commissioners. The amount has not changed for several years. Some consideration has been given to a mileage rate basis but never approved. The Development Authority contracts with the Chamber for the services of the Executive Director.

Annual Report

A combined annual report is produced for the Chamber and Development Authority. It is published and distributed to stakeholders.

Minutes of Board of Directors Meetings

Minutes of board meeting are recorded and maintained on file. Minutes may be obtained upon request and are not published on a routine basis.

Board Policies and Procedures

Board policies and procedures have been developed and maintained on file at the Chamber. The Chamber board is made up of 18 members who are representative of the chamber membership. A seven member Executive Committee consisting of a Chairman, Treasurer, Past Chair and Vice Chairs of Economic Development, Community Development and Tourism, and Membership Services is responsible for the overall direction of the Chamber. A plan of succession within the Executive Committee provides for year to year continuity.

The Development Authority Board consists of seven members; Three (3) appointed by the County, three (3) appointed by the City of Dublin and one (1) appointed at large.

Personnel Policies and Procedures

The Chamber has developed formal personnel policies and procedures and these are reviewed annually.

The Development Authority contracts with the Chamber for services. Formal policies and procedures do not exist. However, the Authority board is reviewing whether it needs to develop its own policies and procedures.

Marketing Plan

The Chamber marketing plan is developed annually and integrated into its work plan. The Chamber relies primarily on committee for input and guidance. Based on the annual work plan goals are identified, responsibility and accountability assigned. The Chamber uses various means to implement its plan such as membership drives, newsletters, newspaper coverage, etc.

The Development Authority does not have a formal marketing plan and relies heavily on the Executive Director for direction. The Executive Director is well recognized within the economic development community and very effectively leverages the resources of Laurens County. Marketing strategies include advertisement in trade journals and magazines, developer's day, lead generation and follow-up, etc.

Web Site

The Chamber has a web site and it contains content of interest to its clients, businesses, entrepreneurs, tourism, new comers and many others. The web site is updated on an as needed basis to keep the content current. The site is attractive and easily navigated. Links to member web sites are provided for the member who have a web site. For members who do not have a web site the Chamber is considering hosting a single page for that member on a fee basis.

The Development Authority does not have a "stand alone" web site. However it is represented on the internet as a page or section of the Chamber's site titled "Economic Development." The content includes information about the population, labor market, tax structure, industries and spec building. Links to Quick Start, The Dubose Porter Business & Industry Training Center, and the Airport are on the site.

Public Relations / Communication Plan

The Chamber does not have a formal Public Relations / Communications Plan. However the Chamber recognizes the importance of public relations and communications and these areas are effectively addressed in committees under the Vice Chair for Community Development and Tourism.

Incentives Policy

The Development Authority offers the standard incentives for the recruitment and expansion of industry. However specific components of the incentive package are determined on the basis of the project and its impact to Laurens County. Georgia Tech's LOCI is used for each project to determine the fiscal impact.

Letters of Commitment from Funders, Co-Sponsors, Partner Agencies

The Chamber does not directly use letters of commitment from these entities. However it does offer various levels of membership which in turn provides mutual benefits to the company as well as the Chamber.

The Development Authority does not have Letters of Commitment

Letters of Agreements or Memorandums of Understanding

Letters of Agreements, Memorandums of Understanding or contracts exist between the Chamber and the Development Authority for services, the Chamber and City for the use of Hotel and Motel taxes.

RECOMMENDATIONS

1. **Initiate a Formal Long Term Strategic Planning Process.** The Chamber and Development Authority should initiate and conduct a formal Strategic Planning Process to develop long term objectives with 5-10 year horizons. These long term objectives should become the basis of annual retreats and annual work plans which include quantifiable, measurable goals that support and advance the organizations toward the strategic objectives.
2. **Formalize a performance tracking system.** The Chamber and Development Authority should develop a formal performance tracking system. The system should include specific goals established in the annual work plan and the long term strategic plan when it is complete. The system should be used to track historical information, provide decision-support, and reporting capabilities to help benchmark and monitor progress.
3. **Entrepreneur Assistance / Development.** Entrepreneurs are the backbone of economic development and generate much of the economic wealth within a community. A well rounded economic development program addresses small business, industry, tourism and entrepreneurs. Laurens County has yet to follow the lead of many of the counties in Georgia who are obtaining the “Entrepreneur Friendly” designation offered through the Georgia Department of Economic Development. The Chamber should seriously consider leading this effort.
4. **Create a “Stand Alone” Development Authority website or enhance the “Economic Development” portion of the Chamber’s Website.** Many consultants and prospects are using the internet to search for potential industrial sites and gather preliminary information. The Development Authority should consider its own stand alone site with critical links to the economic development community. The site should be designed to provide content meeting the needs of prospects and consultants. The site should be designed to rank highly on key internet search engines.

If the Development Authority chooses not to create its own website the “Economic Development” page of the Chamber’s site should be enhanced to provide additional content and links to provide additional information about the authority.

- The Development Authority Mission Statement
- Incentive policy
- Available sites and acreages, photography, etc.

5. **Develop a formal Marketing Plan for the Development Authority.** The development authority does not have a formal marketing plan and integrated into the strategic plan being developed. The marketing plan should include advertising/media strategies, funding, resources, leveraging of internal and external resources and identification of specific goals.

RECOMMENDATIONS FOR CONTINUAL IMPROVEMENT A Service of the Calibration Program

Prepared for

Stephens County Development Authority

Prepared by

Georgia Tech's Office of Economic Development & Technology Ventures

Greg Laudeman

Revised February 10, 2006
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Georgia Institute of Technology
Atlanta, GA 30332

OVERVIEW

Economic developers often ask Georgia Tech for guidance and assistance on key management and operational issues relating to running quality economic development programs. They are interested in operating as effectively as possible and in having a system in place for tracking their performance.

The Calibration Program has been designed to help local economic development organizations (EDO) achieve higher performance and excellence drawing on quality management standards from International Economic Development Council's (IEDC) Accredited Economic Development Organization (AEDO) program, the International Standards Organization (ISO), and Malcolm Baldrige. The program provides economic development organizations with independent feedback on their operations, structure, and procedures, and recognizes excellence in local economic development efforts. This service leverages Georgia Tech's expertise in assisting clients in the areas of planning, quality management, lean enterprise, technology utilization, and overall community economic development.

Stephens County Development Authority was selected as a pilot EDO for the Calibration Program. As a pilot EDO, the Stephens County Development Authority and its stakeholders completed an on-line self assessment to reveal perceptions about the EDO's management system by those with direct knowledge about the EDO's operations. In addition, Georgia Tech staff conducted an on-site interview with Mitch Griggs, Director, and a review of the Stephens County Development Authority's documentation and tools. This report details the findings from the self assessment, on-site interview, and documentation review and includes recommendations for specific action items relating to the continual improvement in organizational processes.

SELF ASSESSMENT

Area	Average	Std. Dev.	Interpretation
Overall Rating (14 responses)	3.1	1.05	The overall rating is moderate, with moderate variation in ratings.
Community Leadership	2.9	0.92	Support of and direction from community leaders for economic development is moderate. Stakeholders are in general agreement about this. Board expectations are seen as reasonable. Board participation in training was a notable issue.
Human Resources	3.5	1.00	Staff is recognized as economic development lead, but resources may be lacking and there is concern about staff turnover
Strategic Plan	2.4	0.90	Planning, to date, appears to be weak. There are concerns about participation, adequacy of planning resources and of the plan itself, and limited implementation.
Customer and Market Focus	3.2	1.01	Perceptions of customer focus are moderate. Understanding of prospects is seen as strength.

Use of Technology	3.1	0.98	Use of technology is seen as moderate, with perceived need for better presentation tools
Performance Tracking	2.1	0.84	Performance tracking is characterized as low, with relatively low variation. There is apparent desire for more complete measures
Communication Systems	3.0	1.05	Perceptions about communication are moderate. Internet visibility is seen as good, but communication with general public and website freshness may be weaknesses.
Process Management	3.3	1.10	Process management leans towards moderate, especially non-executive staff autonomy. Innovation appears to be a weakness
Partner Relationships	3.3	1.06	Partner relationships are moderate, except "stakeholder support." There was moderate variation in views on these topics.
Outcomes	3.5	1.25	Outcomes were seen as moderate, with broad variation. Operational outcomes (legal and ethical) were strong, but effective outcomes (meeting annual objectives) and reliability of funding may be issues.

DOCUMENTATION REVIEW

No documentation review is available because Director Griggs did not complete the Gap Analysis survey.

OTHER FINDINGS

- SCDA recently hired an ED professional as director, and moved office location. "Getting arms around everything, knowing where we are" is the biggest challenge.
- Since new director came in, SCDA has been inundated with prospects.
- "Meet and greet," responding to prospect needs, and board meetings have been demanding. SCDA is "doing stuff on the fly" with little time for organization. Day-to-day operations, staffing, and physical facilities have been issues.
- The new SCDA offices are difficult to locate (poor signage), physically inaccessible, and somewhat unattractive
- There are scant records of SCDA resources, particularly real estate properties. "It's almost like we're starting from scratch, but with a history we have to dig through," according to Director Griggs. Record-keeping, organization, etc., major issues.
- ED advantages include location, location, location between Greenville and Atlanta, rail and road infrastructure, plentiful water resources, new tech school satellite campus in industrial park (training, QuickStart, conference facility, etc.), General quality of life (mountains in north, eastern border is either river or lake), cultural and natural resources (National Forest land), and elementary school system consistently achieves state average

- SCDA recognizes the need for a solid strategic plan and is working towards this goal
- While SCDA has some information that can be tailored to prospect interests, there is a recognized need for additional marketing materials. Director Griggs desires to have standardized but customizable information in digital format. Website is decent (Griggs notes, "I've seen much worse")
- There is concern that the local culture does not value education because previous generations relied on industry that did not require academic achievement.
- The SCDA carries significant debt load from previous projects. The budget has been increased but is still small, and the SCDA has no income producing activities, no capacity-building money (only "bird-in-hand" funding), maximum millage but no minimum for DA, funded at county's pleasure based on their capacity.
- The community lacks both land development and use ordinances and adequate industrial facilities. There are large, old facilities that are practically unusable because of low ceilings, poor layout, etc.
- Director Griggs wants to do reverse prospecting but have limited ability to visit prospects.

RECOMMENDATIONS

1. Make time for organization and planning. Get support and participation for this process from local and state partners. Leverage new director and social network for this purpose.
 - a. Establish a quality, lean, and/or continuous improvement program within SCDA
2. Similarly, engage partners in developing other revenue-producing programs: informational programs, fund (and awareness) raising events, etc., especially those that showcase community assets
3. Request special funding from local stakeholders for rebuilding SCDA records. The county could greatly assist the process by investing in a fully populated GIS.
4. Also consider a special funding request or other resource-raising program to pay for improved marketing
5. Develop information standards and templates for managing programs, providing prospect and partner information, and communicating with stakeholders
6. Clearly identify resources necessary to maintain current reactive operations, to make the SCDA more proactive, and to leapfrog to a high-performance, world-class EDO, and share this information with stakeholders.

RECOMMENDATIONS FOR CONTINUAL IMPROVEMENT A Service of the Calibration Program

Prepared for

Carroll Tomorrow

Prepared by

Georgia Tech's Office of Economic Development & Technology Ventures

Greg Laudeman

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Georgia Institute of Technology
Atlanta, GA 30332

OVERVIEW

Economic developers often ask Georgia Tech for guidance and assistance on key management and operational issues relating to running quality economic development programs. They are interested in operating as effectively as possible and in having a system in place for tracking their performance.

The Calibration Program has been designed to help local economic development organizations (EDO) achieve higher performance and excellence drawing on quality management standards from International Economic Development Council's (IEDC) Accredited Economic Development Organization (AEDO) program, the International Standards Organization (ISO), and Malcolm Baldrige. The program provides economic development organizations with independent feedback on their operations, structure, and procedures, and recognizes excellence in local economic development efforts. This service leverages Georgia Tech's expertise in assisting clients in the areas of planning, quality management, lean enterprise, technology utilization, and overall community economic development.

Carroll Tomorrow was selected as a pilot EDO for the Calibration Program. As a pilot EDO, the Carroll Tomorrow and its stakeholders completed an on-line self assessment to reveal perceptions about the EDO's management system by those with direct knowledge about the EDO's operations. In addition, Georgia Tech staff conducted an on-site interview with Slater Barr, Director, and a review of the Carroll Tomorrow's documentation and tools. This report details the findings from the self assessment, on-site interview, and documentation review and includes recommendations for specific action items relating to the continual improvement in organizational processes.

SELF ASSESSMENT

Carroll Tomorrow was selected as a pilot EDO for the Calibration Program. As a pilot EDO, the Carroll Tomorrow and its stakeholders completed an on-line self assessment to reveal perceptions about the EDO's management system by those with direct knowledge about the EDO's operations. In addition, Georgia Tech staff conducted an on-site interview with Slater Barr, Director, and a review of the Carroll Tomorrow's documentation and tools. This report details the findings from the self assessment, on-site interview, and documentation review and includes recommendations for specific action items relating to the continual improvement in organizational processes.

Area	Average	Std. Dev.	Interpretation
Overall Rating (6 responses)	4.27	0.860	Strong overall rating, with moderate variation.
Community Leadership	3.83	1.063	High moderate. Board rotation, help with funding, and training may be issues, but are outweighed by vision, willingness to change, and board collaboration and communication
Human Resources	4.27	0.782	Carroll Tomorrow is clearly the "infomediary" for the community, with staff that is both supportive of and supported for this role. Only possible weakness: staff compensation.
Strategic Plan	4.47	0.696	Stakeholders find the strategic plan to be both well-conceived and effectively executed, with potential weakness in publicizing meetings.

Customer and Market Focus	4.73	0.583	Very strong, with clear unanimity among stakeholders.
Use of Technology	4.31	0.749	Pervasive and strategic use of technology is evident. Be sure to stay focused on gaining productivity and efficiency from technology, and make sure the technology budget is adequate.
Performance Tracking	3.61	0.954	Appears to be the only significant concern of stakeholders. The metrics appear to be set, but may need more effective tracking and response.
Communication Systems	4.04	0.903	Carroll Tomorrow is given exemplary ratings for communications with state and regional partners and with the media.
Process Management	4.47	0.718	Strong in all components of process management, the only issue may be adequate resources.
Partner Relationships	4.35	1.027	The board and staff both appear to be involved with other local institutions, and have excellent relationship with state and regional partners.
Outcomes	4.56	0.660	Strong. Stakeholder satisfaction is high, and Carroll Tomorrow is seen as being excellent in operational outcomes and executing a plan of work.

DOCUMENTATION REVIEW

Quality Management Tools	Yes	No
Mission and Goals Statement	✓	
Articles of Incorporation and Bylaws	✓	
Strategic Plan	✓	
Performance Tracking System (formal process for monitoring and tracking results)	✓	
Annual Budget	✓	
Annual Report	✓	
Minutes of Board of Directors Meetings	✓	
Board Policies and Procedures		✓
Personnel Policies and Procedures	✓	
Marketing Plan	✓	
Web Site	✓	
Public Relations / Communications Plan	✓	

Incentives Policy	✓
Letters of Commitment to CEO from Funders, Co-Sponsors, Partner Agencies	✓
Letters of Agreement or Memorandums of Understanding with Other Organizations in Community or Region	
Other	

OTHER FINDINGS

- Notable recent successes in developing facilities for relocations/expansions and start-ups.
- Active involvement in recently updated comprehensive plan
- Financing is the only major issue, especially diversifying funding sources
- Strongly oriented towards, and well-staffed for, research and other high-value services
- Endemic poverty, lack of educational achievement, and other quality of life issues are challenging to address when driven by job-creation
- Performance is benchmarked against objectives set out in the Carroll Tomorrow strategic plan
- Excellent use of technology, but additional requirements remain unmet.
- Clear and well-developed strategic plan in place and being followed.

RECOMMENDATIONS

1. Consider business development. Carroll Tomorrow faces the same challenge as many local non-profits—sustainability—but it is better positioned to develop products, services, and programs that could generate revenue. These include:
 - a. Information and research (knowledge management)
 - b. Media production
 - c. Management consulting
 - d. Professional development
 - e. E-learning

Such services would need to be linked to Carroll Tomorrow’s strategy, and executed as public-private partnerships, but they could be viable as member service profit centers.

2. Invest in staff, primarily by assuring they have ample resources to execute the plan. As much as direct compensation, implementation resources boost professional dedication. One way to achieve this is to tie resources to revenue generation as well as plan execution. The more work staff does for stakeholders and members, the more resources they have for implementation.
3. Invest in technology. Investments to date appeared to have paid off well. Next steps might include:
 - a. A fully featured enterprise server for sharing resources, managing data and connectivity, and enabling net-based applications
 - b. A firewall and Inter/extra/intranet or web portal. Basically, put all of your data on the server, then make it all available via a web front-end. (This is easier than it sounds.)
 - c. Business continuity plan and off-site data back-up. Be sure you have adequate battery, data, and hardware back-ups.

- d. Consider expanding and integrating video and GIS, particularly via the web portal. The application space for both of these venerable technologies is advancing rapidly.
 - e. Apply collaborative approaches to technology planning. Engage other community stakeholders in developing a community technology strategy.
4. Carroll Tomorrow's greatest challenge may be to inculcate personal initiative and drive to excel more deeply into its communities. Challenges are sometimes opportunities. Because of clear vision and disciplined action, Carroll Tomorrow has met and exceeded its goals. Now the opportunity is for the organization to attach fundamental community capacity with the same vigor and determination it applied to economic development and community planning.

RECOMMENDATIONS FOR CONTINUAL IMPROVEMENT A Service of the Calibration Program

Prepared for

The Jefferson County Development Authority

Prepared by

Georgia Tech's Office of Economic Development & Technology Ventures

**Danny Duggar
Project Director**

January 16, 2006
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Georgia Institute of Technology
Atlanta, GA 30332

OVERVIEW

Economic developers often ask Georgia Tech for guidance and assistance on key management and operational issues relating to running quality economic development programs. They are interested in operating as effectively as possible and in having a system in place for tracking their performance.

The Calibration Program has been designed to help local economic development organizations (EDO) achieve higher performance and excellence drawing on quality management standards from International Economic Development Council's (IEDC) Accredited Economic Development Organization (AEDO) program, the International Standards Organization (ISO), and Malcolm Baldrige. The program provides economic development organizations with independent feedback on their operations, structure, and procedures, and recognizes excellence in local economic development efforts. This service leverages Georgia Tech's expertise in assisting clients in the areas of planning, quality management, lean enterprise, technology utilization, and overall community economic development.

In August 2005, the Jefferson County Development Authority, was selected as a pilot EDO for the Calibration Program. As a pilot EDO, the The Jefferson Development Authority and its stakeholders completed an on-line self assessment to reveal perceptions about the EDO's management system by those with direct knowledge about the EDO's operations. In addition, Georgia Tech staff conducted an on-site interview with Tom Jordan and Lillian Agel and a review of the EDO's documentation and tools. This report details the findings of the self assessment, on-site interview, and documentation review and includes recommendations for specific action items relating to the continual improvement in organizational processes.

The adoption of a quality management system will help The Development Authority of Jefferson County maintain and achieve its mission, improve its ability to meet the needs of its customer base, and boost public confidence in its performance. Some of the benefits are:

- Better understanding of operational gaps and opportunities for affection or reinforcing positive change... and achieving organizational excellence
- Improve Management Systems to operate with greater effectiveness and efficiency, and for building a stronger organization
- Improved procedures for Board members, staff, volunteers, and customers (citizens and business)
- Improved ability to track and communicate progress ((job performance)
- Heighten visibility and awareness among key stakeholders (internal and external) that the economic development organization is a well-managed, highly professional organization

Improve readiness to participate in IEDC's process to become an Accredited Economic Development Organization (AEDO), and earn national recognition for excellence.

Methodology

The *Calibration Program* is comprised of three sections:

1. Self Assessment
2. Gap Assessment & Document Review
3. On site interview and analysis presentation

Self Assessment

The Self Assessment is an on-line web enabled assessment targeted for the Executive Director and Board members of the Authority and/or Chamber. Participants are requested to provide their assessment of the organization in ten (10) key categories:

1. Community Leadership
2. Human Resources
3. Strategic Planning
4. Customer and Market Focus
5. Use of Technology
6. Performance Tracking
7. Communication Systems
8. Process Management
9. Partner Relationships
10. Outcomes

Each participant is requested to rank from 1 to 5 whether they agree with certain statements in each area. A ranking of "1" indicates strong agreement and "5" indicates strong disagreement to the statement. Individual responses remain confidential. However, collectively the responses are analyzed and a report generated. The purpose of the analysis is to allow the organization to measure or "benchmark" this perception of each area. The *Self Assessment* should be used by the executive director and board to discuss areas of concern, such as low scores, and to develop a plan for improvement. The *Self Assessment* is intended to be an internal planning tool to assist the organization with benchmarking and measuring progress over a period of time. As such, it is recommended the *Self Assessment* be conducted at least annually and preferably prior to an annual retreat.

Gap Analysis & Document Review

The *Quality Management Gap Assessment* is an on-line web enabled assessment intended to be completed by the Executive Director or President of the Authority and/or Chamber. The assessment was designed around best management practices for effective economic development. The purpose of the analysis is to identify potential "gaps" in the community's economic development program.

The "Document Review" is used to identify & review the documentation the EDO has in place.

SELF ASSESSMENT ANALYSIS

Jefferson County invited nine (9) individuals, representing the development authority and the chamber of commerce, to participate in the Self Assessment. Six of the nine responded to the assessment for a participation rate of 67%. The respondents were requested to rate ten (10) program categories between one and five, with one (1) being "strongly disagree" and five (5) being "strongly agree" with the question or statement. The respondents rated seven of ten categories 4.00 or better. The highest rated was Human Resources with a rating of 4.50. The lowest rated was Communication Systems with a rating of 3.54. A brief analysis of each category follows.

Community Leadership

Area	Question	Responses	Avg	High	Low
Community Leadership			4.36		
	L-1. Community leadership is supportive of economic development.	6	4.67	5	4
	L-2. Community leadership embraces change and new ideas.	6	4.00	5	3
	L-3. The EDO has a clear vision and mission that its leaders effectively communicate, support, and model throughout the organization.	6	4.67	5	4
	L-4. The EDO board has reasonable expectations of the staff and the organization.	6	4.67	5	4
	L-5. The EDO board regularly shares information about the EDO with community stakeholders.	6	4.67	5	4
	L-6. The EDO board works within the community to remove barriers to economic development progress.	6	4.67	5	4
	L-7. The EDO board lets staff know what they think is most important.	6	4.50	5	4
	L-8. The EDO board works to secure increased funding for the EDO.	6	4.30	5	3
	L-9. The EDO board participates in appropriate board member training programs.	6	4.50	5	4
	L-10. The EDO board has an effective board rotation (leadership succession) policy that is reviewed and updated on a regular basis.	6	3.50	5	1
	L-11. The EDO board represents the diversity of the community.	6	3.83	5	2
	L-12. The EDO board regularly evaluates outcomes according to annual objectives.	6	4.33	5	3

For the twelve areas addressed in this category the weighted average response 4.36. Ten of the twelve areas were rated above 4.0 and have a low variability within the ratings. This indicates “**strong agreement**” among the respondents that the organization is supported by the community and the organization is addressing items to maintain the support of the community leadership.

Two areas (L-10 & L-11) addressing board member rotation and diversity were rated 3.5 & 3.83 respectively. Additionally these also had the highest degree of variability within the responses. These ratings are considered good and are above the mean of 3.0. However the variability within the responses indicates the response group does not agree as strongly in these areas as others. This does not necessarily indicate a problem with the rotation or diversity of the board. Rather that the EDO should review its board selection policy and procedures to be sure it provides for a diverse representation.

Human Resources

Area	Question	Responses	Avg	High	Low
Human Resources			4.50		
	HR-1. The board and staff agree on matters of job description.	6	4.67	5	4
	HR-2. The EDO has satisfactory staff support.	6	4.50	5	4
	HR-3. Staff has the ability to influence the EDO's program of work.	6	4.67	5	4
	HR-4. Staff are provided with effective orientation and training.	6	4.33	5	4
	HR-5. Staff are encouraged, supported, and active in their pursuit of further professional development.	6	4.67	5	4
	HR-6. Staff are compensated satisfactorily and fairly, and are adequately rewarded for performance with incentives, bonuses, or other mechanisms.	6	4.60	5	4
	HR-7. Staff receive satisfactory benefits packages, including health insurance.	6	4.60	5	4
	HR-8. Staff have everything they need to do their job effectively.	6	4.00	5	3
	HR-9. Staff keep the board informed on important operational issues.	6	4.50	5	4
	HR-10. Staff are recognized as the point of contact(s) for economic development for the community within and outside the community.	6	4.33	5	3
	HR-11. Staff turnover is not a significant problem for the EDO.	6	4.67	5	4

For the eleven areas addressed in this category the weighted average response was 4.50. Every area was rated above 4.0. This high rating coupled with a low degree of variability indicates **“very strong agreement”** among the respondents that the EDO is meeting the Human Resources needs of the staff, board and community stakeholders.

Strategic Planning

Area	Question	Responses	Avg	High	Low
Strategic Planning			4.03		
	SP-1. The EDO is guided by a well-conceived strategic plan.	6	4.33	5	4
	SP-2. I have read and fully understand the strategic plan.	6	4.00	5	3
	SP-3. A diverse group of community stakeholders have been involved in the process to develop, implement, and update the strategic plan.	6	4.17	5	3
	SP-4. The EDO's strategic plan is in sync with the community's comprehensive plan.	6	4.33	5	4
	SP-5. The EDO's strategic plan adequately addresses needs for downtown development / redevelopment, supporting business and industry, supporting entrepreneurs and small businesses, marketing and recruitment, and tourism development.	6	3.67	4	3
	SP-6. The EDO adopts annual objectives that are measurable and purposeful for reaching the strategic goals and opportunities identified in the strategic plan.	6	4.00	5	3
	SP-7. The EDO adopts an annual program of work to meet annual objectives.	6	4.00	5	3
	SP-8. Satisfactory resources are available to the EDO for reaching strategic plan goals and objectives.	6	4.00	5	3
	SP-9. The EDO regularly partners with other organizations and community groups in the implementation of the strategic plan.	6	4.17	5	3
	SP-10. There has been successful implementation of the economic development strategic plan.	6	3.83	4	3
	SP-11. The EDO monitors and tracks strategic plan progress in implementing the strategic plan.	6	4.00	5	3
	SP-12. The EDO regularly publicizes strategic planning progress to community stakeholders.	6	3.80	5	2

For the twelve areas addressed in this category the weighted average response was 4.03. This score indicates the respondents “strongly agree” with the overall strategic planning program of the EDO. Areas SP-5, SP-10 & SP-12 received a rating below 4.0 and offer the EDO the best opportunity to improve the overall rating of this category.

SP-5: “The EDO’s strategic plan adequately addresses needs for downtown development / redevelopment, supporting business and industry, supporting entrepreneurs and small businesses, marketing and recruitment, and tourism.” This area received a weighted average rating of 3.67 with a

high of 4.0 and low of 3.0. The low variability between the ratings suggests general agreement among the respondents and the lower than composite average for the category (4.03) indicates the strategic plan should be reviewed to be sure it is adequately addressing this area.

SP-10: “There has been successful implementation of the economic development strategic plan.” This area received a weighted average rating of 3.83 with a high of 4.0 and low of 3.0. Again, the low variability between responses suggests general agreement among the respondents.

SP-12: “The EDO regularly publicizes strategic planning progress to community stakeholders.” The weighted average response to this area was 3.80. While this area did not receive the lowest rating it does have the greatest variability between responses. This suggests there is less agreement among the respondents that the EDO is communicating to stakeholders the progress of the strategic plan.

Customer and Market Focus

Area	Question	Responses	Avg	High	Low
Customer and Market Focus			4.27		
	CM-1. The EDO effectively communicates the community's competitive advantages to customers and stakeholders.	6	4.00	5	3
	CM-2. The EDO's office is functional, well-maintained, and orderly.	6	4.17	5	3
	CM-3. The EDO's office provides privacy for conferences.	6	4.50	5	4
	CM-4. The EDO's office is easy-to-find and centrally located.	6	4.50	5	4
	CM-5. The EDO's community information and marketing materials are current and professional in appearance.	6	4.50	5	3
	CM-6. The EDO is effective at understanding and addressing the needs of:		3.92		
	Community citizens	6	4.17	5	3
	Existing business and industry	6	4.00	5	3
	Entrepreneurs and emerging industry	6	3.83	5	3
	Prospects	5	4.20	5	3
	Visitors	6	4.00	5	3
	Newcomers	6	3.33	5	2

For the six areas addressed in this category the weighted average response was 4.27. This high category rating indicates the respondents “Strongly Agree” with the EDO’s overall Customer and Market Focus efforts.

Only one area received a rating below 4.0 - CM-6. CM-6 addresses how effectively the EDO understands and meets the needs of six customer sets. Two customer sets received a rating of less than 4.0; entrepreneurs and emerging industry (3.83) and newcomers (3.33). Newcomers received the greatest variability in responses and the lowest rating. These responses suggest there may not be agreement among the respondents as to how the organization is supporting these customer sets.

Use of Technology

Area	Question	Responses	Avg	High	Low
Use of Technology			3.93		
	UT-1. The EDO has a satisfactory budget for purchasing and upgrading technology tools (e.g., computers, software, personal handhelds, digital phones).	6	3.67	5	3
	UT-2. The EDO has adequate in-house printing capabilities.	6	3.83	5	3
	UT-3. The EDO has adequate presentation capabilities.	6	4.17	5	3
	UT-4. The EDO uses adequate communications tools for supporting staff connectivity (e.g., email, voice mail, call forwarding, networked computers, personal digital assistants).	6	4.50	5	3
	UT-5. Staff has access to all the technology tools they need to do their job effectively.	6	4.00	5	3
	UT-6. The EDO effectively utilizes the latest office technologies to enhance productivity and efficiency.	5	3.40	4	3

For the six areas addressed in this category the weighted average response 3.93. This indicates a “moderate to strong agreement” with the EDO’s use of technology.

Three out of six areas (UT-1, UT-2, and UT-6) received a rating of less than 4.0. This indicates the respondents “moderately agree” the EDO is:

- Adequately budgeting for purchasing & upgrading technology tools
- Has adequate in-house printing capabilities
- Effectively utilizes the latest office technologies

The remaining areas received ratings above 4.0 indicating strong support and agreement for the EDOs use to these technologies.

Performance Tracking System

Area	Question	Responses	Avg	High	Low
Performance Tracking			3.60		
	Perf-1. The EDO utilizes an effective performance tracking system.	6	3.60	4	3
	Perf-2. The performance tracking system provides all the information needed to measure the quality of the EDO's work.	6	3.60	4	3

Perf-3. The board and staff receive all the information they need to do their work.	6	3.60	4	3
Perf-4. The information system provides all the information needed to measure the quality of the EDO's work.	6	3.40	4	2
Perf-5. The board and staff receive all the information they need to know how the organization is doing.	6	3.83	5	3
Perf-6. The board and staff know how to review the performance tracking system's metrics to determine if changes are needed.	6	3.40	4	3
Perf-7. The board and staff regularly make appropriate changes in the EDO's strategic plan and program of work, based on its performance tracking system.	6	3.60	4	3
Perf-8. The board and staff use this performance tracking system to make appropriate adjustments to staff salaries or bonus scales.	5	3.75	4	3

For the eight areas addressed in this category the weighted average response of 3.60 suggest a “moderate” support of the EDO’s Performance Tracking system. The highest rating received was 3.83 and, with the exception of Perf-4 and Perf-5, the variability between responses was low indicating agreement among the respondents. The generally low scoring of the entire category suggests the EDO and Board may need to review procedures, policy and documentation in this area.

Communications System

Area	Question	Responses	Avg	High	Low
Communications Systems			3.54		
	Comu-1. The EDO's web site is regularly updated with all the key information and resources needed by its customers.	6	3.20	4	2
	Comu-2. The EDO's web is easy to navigate.	6	4.33	5	4
	Comu-3. The EDO's web site has been designed to rank highly on the key Internet search engines.	6	2.33	4	1
	Comu-4. The EDO regularly issues electronic or print news releases, newsletters, or other materials on its activities and progress.	6	3.33	4	2
	Comu-5. The EDO regularly updates the state's and other resource partners' web sites and databases with community information.	6	3.50	4	2
	Comu-6. State and regional partners are adequately informed on EDO activities and progress.	6	3.80	4	3
	Comu-7. Community stakeholders are adequately informed on EDO activities and progress.	6	3.83	5	3

Comu-8. State and regional partners are adequately informed on EDO activities and progress.	5	3.75	5	3
Comu-9. The EDO does an effective job of informing the general public on activities and accomplishments.	6	3.83	5	2

For the nine areas addressed in this category the weighted average response was 3.54the lowest of all the categories. Variability between the ratings (2.33 to 4.33) coupled with the fact that several areas were answered with “Don’t Know” suggest weak to moderate support by the respondents.

Comu-1 thru Comu-3 addresses the EDO’s web site. The area of most concern within this group is Comu-1 “The EDO’s web site is regularly updated with all the key information and resources needed by its customers.” The relatively low score (3.20) and high variability in responses indicate the web site may not be updated on a timely basis. A main purpose of a web site is to provide a presence on the internet and provide (content) information to clients and potential prospects. The organization should investigate and determine if information is being updated routinely on its web site.

Comu-4 thru Comu-9 addresses the effectiveness of communication from the organization to the public, community stakeholders, regional and state partners. The highest rating in this group was 3.83 which is good but also suggests a need for improvement. Additionally this group of responses had a high degree of variability and several responses of “Don’t Know.” It is possible the respondents are not aware of the communication that is occurring.

Process Management

Area	Question	Responses	Avg	High	Low
Process Management			4.02		
	PM-1. The executive director has control over the organization’s work processes.	6	4.33	5	3
	PM-2. Non-executive staff have adequate control over their areas of responsibility.	6	4.00	5	3
	PM-3. The EDO has adequate staff and resources to complete its work processes.	6	3.83	5	3
	PM-4. The EDO is able to respond to its customers and stakeholders (e.g., citizens, entrepreneurs, existing business and industry, legislators, local government, local and regional media, prospects, site location consultants, tourists/visitors) in a timely manner.	6	4.17	5	3
	PM-5. The EDO implements innovative practices for addressing customer and stakeholder needs.	6	3.83	5	3
	PM-6. The EDO makes changes to the work processes based on customer and stakeholder feedback.	6	3.83	5	2
	PM-7. The EDO has an effective referral system with state, regional, and other resource partners.	6	4.20	5	3
	PM-8. The EDO has been effective in implementing the program of work.	6	4.00	5	3

For the eight areas addressed in this category the weighted average response was 4.02 indicating “strong” support for this category. Five out of eight areas (PM-1, PM-2, PM-4, PM-7, and PM-8) received a rating of 4.0 or greater. The ratings indicate that the respondents believe the director and staff have control over their individual areas of responsibility and is able to respond to its customers. The respondents also believe the EDO is effectively implementing its program of work.

Three areas (PM-3, PM-5, PM-6) received a rating of 3.83 each. These areas tend to deal with the development of a program of work rather than control and execution. 3.83 is a moderate to good rating however the variability within the responses indicates less agreement among the respondents. Particularly, the variability within the responses to PM-6 suggests the respondents are not in agreement as to how the EDO makes changes to the work processes based on customer feedback.

Partnerships and Relationships

Area	Question	Responses	Avg	High	Low
Partnerships and Relationships			4.15		
	PAR-1. Board members are actively involved in other community organizations.	6	4.67	5	4
	PAR-2. Staff are actively involved in other community organizations.	6	4.50	5	3
	PAR-3. The EDO has satisfactory stakeholder support from the business community, political leadership, neighborhood, or other groups that are essential to its mission.	6	4.17	5	3
	PAR-4. The EDO has been able to expand its resources through relationships with alternative funding sources.	6	3.67	5	2
	PAR-5. The EDO has an effective relationship with:		4.13		
	Area legislators	6	3.83	5	3
	Statewide and regional economic development partners	6	4.17	5	3
	Local government	6	4.33	5	3
	Local and regional media	6	4.17	5	3
	PAR-6. The EDO collaborates effectively with:		3.76		
	Community-based organizations (e.g., civic groups, social service groups, etc.)	6	3.67	4	3
	Nearby 4-year colleges and universities, technical colleges, and community colleges	6	3.83	4	3
	Other local EDOs in the community	6	3.80	4	3
	Other local EDOs in the region	6	3.75	4	3

For the six areas addressed in this category the weighted average response was 4.15. The ratings indicate very favorable community involvement by its board and staff and equally as important that the respondents believe the EDO has the community stakeholder support for its mission. These areas are the foundation for a successful program of work.

Responses to PAR-4 indicate the EDO should review its effort to expand its resources through alternative funding sources. However there was a high degree of variability within the responses to this question which indicates the respondents are not in substantial agreement.

Responses to PAR-5 indicate a need to improve relationships with local legislators. Also, responses to PAR-6 reveal a need to improve collaborative efforts with various organizations.

Outcomes (Program Results)

Area	Question	Responses	Avg	High	Low
Outcomes			4.16		
	OC-1. The EDO regularly completes its annual program of work.	6	3.67	4	3
	OC-2. The EDO regularly meets or exceeds annual objectives.	6	3.67	4	3
	OC-3. The EDO obeys laws and regulations.	6	4.67	5	4
	OC-4. The EDO displays high standards and ethics.	6	4.83	5	4
	OC-5. The EDO has a reliable funding structure and receives financial support from several sources.	6	4.00	5	2
	OC-6. The EDO receives adequate, fair, and balanced media coverage of its outcomes and performance.	6	4.33	5	3
	OC-7. How satisfied are the following with the EDO's overall performance?		3.97		
	Community leaders	6	4.17	5	4
	Community citizens	6	3.83	5	2
	Existing business and industry	6	3.80	5	3
	Local entrepreneurs and small businesses	6	3.80	5	3
	Prospects	6	4.20	5	4
	Tourists/visitors	6	4.00	5	3

For the seven areas in this category the weighted average response was 4.16. The EDO received high ratings for obedience of laws and regulations and display of high standards and ethics.

Two areas (OC-1 & OC-2) which deal with the EDO regularly meeting its annual program of work and meeting or exceeding annual objectives received a rating of 3.67, slightly above the mean rating of 3.0. The variability within the responses was relatively low indicating general agreement among the respondents. It is noted the "Performance Tracking" category received a score of 3.60. It is believed that with the adoption of accountability performance tracking measures the ratings of OC-1 & OC-2 will improve.

DOCUMENTATION REVIEW

Quality Management Tools	Yes	No
Mission and Goals Statement	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Articles of Incorporation and Bylaws	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Strategic Plan	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Performance Tracking System (formal process for monitoring and tracking results)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Annual Budget	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Annual Report	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Minutes of Board of Directors Meetings	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Board Policies and Procedures	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Personnel Policies and Procedures	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Marketing Plan	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Web Site	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Public Relations / Communications Plan	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Incentives Policy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>

Mission and Goals

The Development Authority has a written mission and goals statement. Develop industrial parks in the County with infrastructure and speculative buildings. Create a positive business climate and stimulate investment and jobs in the county and region. It was last updated in 2002 when the Development Authority was reconstituted.

Articles of Incorporation and Bylaws

The Development Authority was reconstituted in 2002 at that time the articles of incorporation and bylaws were reviewed. The bylaws are maintained on file and available for review upon request.

Strategic Plan

The Development Authority does not have a Strategic Plan.

Performance Tracking System

The Development Authority does not have a performance tracking system

Annual Budget

The Development Authority is funded on a fixed milage rate basis (0.75 mil) generating approximately \$300,000.00 per year. Additionally SPLOST funds have been appropriated for infrastructure improvements, purchase of industrial land located in north Jefferson county and to construct a speculative building.

Annual Report

The Development Authority does not prepare an annual report.

Minutes of Board of Directors Meetings

Minutes of the Board meetings are recorded and maintained on file for review upon request

Board Policies and Procedures

The Development Authority is in the process of developing formal policies and procedures

Marketing Plan

While the Development Authority actively markets its assets and the benefits of Jefferson County a formal plan and strategy does not exist. The Authority uses brochures, news and print media, the website and relationships to advance its causes.

Website

The Development Authority has a presence at www.JeffersonCounty.org. With the exception of the contact information the other pages are "coming soon." Appropriate content has been identified such as sites, incentives, demographics, partners and linkages but have not been added the website. It is suggested the authority review the status and accelerate the process.

Public Relations / Communications Plan, etc.

A formal plan is in the planning stages.

Incentive Policy

The incentive policy is not formalized and is considered on a case by case basis.

RECOMMENDATIONS

1. **Develop and document an economic development strategic plan.** The self assessment indicates strong support of the EDO's strategic planning program but the gap analysis reveals the EDO does not have a formal documented strategic plan. A long term strategic plan complete with goals, objectives and accountability will provide continuity and focus allowing the community to meet its long and short term goals. It also becomes the basis for much of the program of work and performance tracking.
2. **Establish a performance tracking system.** In the self-assessment the "Performance Tracking" category received the lowest score. The gap analysis and on-site interview revealed a formal tracking process does not exist. Successful EDOs clearly identify key performance measures and track performance against these measures. Tracking and measuring performance against key objectives is essential to staying on track, maintaining accountability and meeting the objective. It can also be used for effective communication tool to the board and stakeholders and assists with the development of appropriate programs of work.

3. **Formalize Board Policy and Procedures.** The self assessment identified diversity within the board and a routine review of board rotation as areas of concern. The on-site interview revealed a desire for board training beyond the required training by the state. Written policy and procedures provide the basis for effective board succession and documents expectations of board members.
4. **Formalize a Public Relation / Communication Policy and Plan.** A well defined plan of work should be developed and implemented. The plan should include procedures and instructions for conducting marketing campaigns, developing press releases and newsletters as guidelines for interacting with the media. It should also address interaction with internal and external partners and stakeholders.
5. **Publish an Annual Report.** Currently neither the Chamber nor the Development Authority prepares an annual report for its clients and stakeholders. An annual report is an effective way to communicate goals, progress, plans, and needs to interested parties and stakeholders. An annual report should be prepared and distributed.
6. **Complete the Website.** A quick review of the website revealed much of the content as “coming soon.” It could not be determined how long the content has been absent but the copyright date was 2004. Many consultants and prospects are using the internet to search for potential industrial sites and gather preliminary information prior to a formal visit. The Development Authority should accelerate population of the content and links on the site.