

Appendix 1 – Detailed Description of EDO Portfolios and Areas of Responsibility

Portfolios of the Economic Development Officer Role:

1. Business creation, retention, expansion, and attraction
2. Strategic planning
3. Marketing and promotion
4. Tourism and hospitality

Each portfolio touches upon multiple functional areas of the EDO position. These functional areas are detailed following the portfolio descriptions.

Portfolio 1 - Business creation, retention, expansion, and attraction

Description: planned and coordinated efforts made to provide value to all industries of business in Lakeshore. These efforts to spur economic growth span the entire breadth of business operations and economic development areas of focus: entrepreneurial ventures, business retention, business expansion, and foreign directed investment. A key element to the business portfolio is to act as the primary point person in the Municipality to the business and developer community. The role should work to establish efficiencies and mutually beneficial processes for all stakeholders by providing a voice to business and outlet of administration while building strong relationships between parties.

Functional Areas of EDO Role:

- Business retention and expansion
- Small business and entrepreneurship
- Investment attraction
- Workforce and talent
- Marketing and promotion

Portfolio 2 – Strategic planning and implementation

Description: the process of documenting and establishing a common vision and subsequent operational plan for the Municipality of Lakeshore as it pertains to economic development and tourism over the short, medium and long-term time horizon.

Functional Areas of EDO Role:

- Creation of Lakeshore Economic Development Strategic Plan
- Infrastructure and data
- Innovation and future proofing

Portfolio 3 – Marketing and promotion

Description: the activities Lakeshore undertakes to position itself in the mind of the consumer/stakeholder in relation to economic development and tourism opportunities. The creation and promotion of information through all forms of communication channels to inform local, regional, provincial, and international businesses and stakeholders the value of Lakeshore as a community to live, work and play in.

Functional Areas of EDO Role:

- Marketing and promotions
- Tourism and events
- Investment attraction
- Workforce and talent

Portfolio 4 – Tourism and hospitality

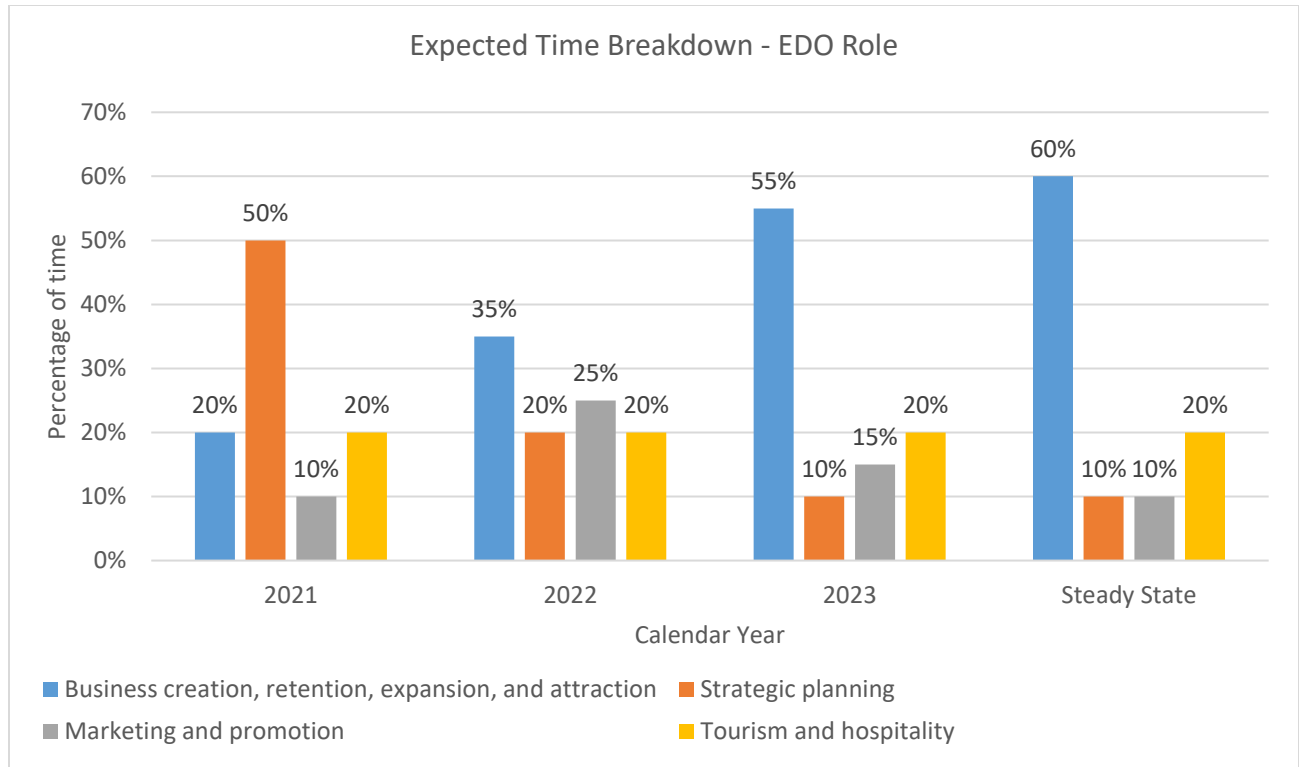
Description: often viewed as an industry of the economy as opposed to its own pillar, tourism and events should be regarded as its own pillar because of the structure of regional agencies (TWEPI vs WE EDC) and the overlapping nature of the industry as it relates to Lakeshore organizational structure (Ec. Dev and Recreation). Tourism is generally defined as people traveling outside of a 45 km radius to participate in leisure or business for not longer than one year. This definition should be extended to local residents to increase participation in the domestic tourism and hospitality sectors.

Functional Areas of EDO Role:

- Tourism and events
- Marketing and promotions

Expected Time Allocation:

The chart and table below outline the expected time allocation for the EDO position over the next 3 years and into a steady state of typical work planning.



<u>Portfolio of Role</u>	<u>2021</u>	<u>2022</u>	<u>2023</u>	<u>Steady State</u>
Business creation, retention, expansion, and attraction	20%	35%	55%	60%
Strategic planning	50%	20%	10%	10%
Marketing and promotion	10%	25%	15%	10%
Tourism and hospitality	20%	20%	20%	20%

As visualized above, the focus of 2021 will continue to be strategic planning. As the pandemic lifts, and sanitary capacity is unlocked, the expectation of the role is to primarily serve the businesses of the community which is evident by a proposed 60% of the time allocation in the steady state. Of note, there is a spike in 2022 related to marketing and promotion as there is expected a higher than regular amount of work to be completed to build assets and marketing infrastructure.

Functional Areas – Description, Objectives, Responsibilities, Key Performance Indicators (KPIs)

Timing:

- All *RESPONSIBILITIES* are considered ongoing and have already been undertaken
- All *OBJECTIVES* are planned to begin (or have begun) in 2021. The proposed completion date is identified in brackets.

Business Retention and Expansion (BR&E)

Description	Efforts that encourage local businesses to stay and grow in the community. It is an ongoing process of interactive, two-way contact and touchpoints with local business to ensure we understand the current business climate; challenges and opportunities. Conversely, it is important that this area provides pertinent information and opportunities to the businesses from the municipality or other levels of government. BR&E can be differentiated from Small Business by employment numbers (more than 10 ee's) and types of industry (generally industrial, large commercial).
Responsibilities	<ul style="list-style-type: none"> • CIP Program Administration and Development • Primary point of business enquires/ concierge service • Engage with businesses to encourage expansion • Information and Assistance (data, networking opportunities, connections, government funding) • Provide advice (general business practice, expansion planning, multi-national planning)
Objectives 2021 & 2022 (Target Quarter)	<ul style="list-style-type: none"> • Complete BR&E strategic plan section (Q3/Q4 2021) • Create and maintain an active business directory list through a customer relationship management software project (Q1 2021) • Apply for Rural Economic Development Fund Grant through OMAFRA (Q3/Q4 2021) – (*In consultation with OMAFRA Program Reps, the EDO was recommended to apply after completion of the Strat Plan as the application would have more weight and therefore could have higher financial asks)
Stretch Objectives	<ul style="list-style-type: none"> • Form and lead industry advisory committees (Agri, Manufacturing, Small Business, Restaurants, Retail, Other) • Create process mapping document for various types of developments. Example - process for a commercial plaza development
KPIs	<ul style="list-style-type: none"> • Total investment amount

	<ul style="list-style-type: none"> • Total jobs facilitated • Business assists/match making • Events or workshops • Outreach (corporate calls/plant tours)
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Small Business and Entrepreneurship (SB&E)

Description	Similar service and offerings to BR&E but generally focused on small business (less than 10 ee's) and 'main street' business. For small business, there may be more mentoring, guiding, and consultation due to size, experience or lack of sophistication. All entrepreneurship starts as small business. This role will have some mentoring, but will be a key access point to other services in the region that specialize in this area. The strategic plan may consider structures that can be put in place by Lakeshore to support entrepreneurship.
Responsibilities	<ul style="list-style-type: none"> • Primary point of contact for business related enquiries • Business concierge service – assisting through start-up, expansion, internal Lakeshore processes • Direct and connect individuals to SBEC at WE EDC • Maintain a listing of funding sources and government support
Objectives	<ul style="list-style-type: none"> • Complete SBE strategic planning section (Q3/Q4 2021) • Maintain high degree of involvement with the Belle River on the Lake BIA. Act as key point person within Lakeshore administration.
Stretch Objectives	<ul style="list-style-type: none"> • Create starter guides for small business startups (ex. How to start a restaurant or hair salon or convenience) store.
KPIs	<ul style="list-style-type: none"> • Total investment amount • Total jobs facilitated • New startups • Business assists/ matchmaking • Business consultations - recommendations

Investment Attraction (IA)

Description	The efforts undertaken to entice a company located outside of the region to open a new branch, subsidiary, or franchise in the Municipality. Generally considered <i>Foreign</i> direct investment, for the scope of Lakeshore, we should follow the same guidelines as WE EDC whereby FDI files are companies from anywhere outside
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	of Windsor-Essex. There will be a <i>HIGH</i> degree of integration with WE EDC related to FDI as the scale and scope of projects often require regional, provincial, or federal involvement. WE EDC
Responsibilities	<ul style="list-style-type: none"> • Evaluate employment land utilization - document ownership. Contact ownership for marketability of land • Support sale/purchase of municipal land • Provide site selection data (workforce data, staffing considerations) • Ongoing and regular liaising with WE EDC Investment Attraction • Point of contact for all FDI enquiries and RFQ's
Objectives	<ul style="list-style-type: none"> • Complete IA Strategic plan section (Q3/Q4 2021) • Public and private land inventory (Q2 2021)
Stretch Objectives	<ul style="list-style-type: none"> • Develop promotional materials to be included on the WE EDC website
KPIs	<ul style="list-style-type: none"> • Active files (Low, Medium, High) • Total of jobs facilitated • Total investment amount

Tourism and Hospitality

Description	Tourism is the generally considered activities of people travelling to and staying in places outside of their usual environment for leisure, business or other purposes. Ontario Tourism generally considers anything outside of 45 km as tourism. For Lakeshore, this area of role the EDO role should be more holistic in some respects. Yes, there is and will be traditional tourism effort to bring visitors from outside of Windsor-Essex; however, consideration should be given to the general promotion of activities, events, and participation in the community by residents of Lakeshore and the surrounding municipalities. A vibrant events, hospitality and tourism industry, regardless of the geographic source of patrons, supports BR&E and small business which is a key element to the EDO position and the general success of the Lakeshore economy.
Responsibilities	<ul style="list-style-type: none"> • Liaise with Recreation and Communications to assist in management and execution of municipal-funded local events and celebrations. • Work with TWEPI in promotion of Lakeshore tourism activities • Engage with Tourism related businesses – generate listings – promote on website

	<ul style="list-style-type: none"> • Work with Lakeshore's agency of record and communications to create and maintain Lakeshore assets for tourism • Represent Lakeshore in tourism related committees and conferences • Budget management • Engage with recreation and fitness to explore sport tourism, sport tournament, and other tourism drivers • Engage with the hotel to encourage business travel and conference tourism
Objectives	<ul style="list-style-type: none"> • Launch pilot "Lakeshore experiences" pilot programming with TWEPI by working with its destination development team – review efforts (Q2 2021) • Hire a tourism and events coordinator (Q3 2021) • Complete and administer the MAT and budget (pending council approval). Create and lead Tourism Advisory Group.(Q2 2021)
Stretch Objectives	<ul style="list-style-type: none"> • Document and oversee short term accommodations (pending council direction) • Lakeshore Tourism Strategy
KPIs	<ul style="list-style-type: none"> • Number of events • Event visitors • Event economic impact (TREIM or other) • Active tourism campaigns – engagement data

Workforce and Talent

Description	Supporting the business community in the recruitment and retention of labour and talent into Lakeshore. Ensuring that the supports from Lakeshore are in place to maintain business sustainability related to labour and workforce. The promotion of Lakeshore as a premier location to live, work, and play for individuals who in or entering the workforce.
Responsibilities	<ul style="list-style-type: none"> • Maintain active data for companies – know source material • Maintain active relationships with the academic institutions and other non-profits related to workforce • Act as point of contact for enquiries related to 'living in Lakeshore' • Maintain relationships with staffing agencies • Engage with businesses if a top talent recruitment effort is underway • Maintain relationships with Lakeshore Youth Council to explore short and long-term talent strategies
Objectives	<ul style="list-style-type: none"> • Create and maintain active labour data in Lakeshore (Q2 2021)

	<ul style="list-style-type: none"> • Complete workforce and talent audit derived from primary and secondary sources (Q2 2021) • Update website to reflect labour and talent in the community (Q4 2021) • Develop project(s) scope and on-board co-op or interns from academic institutions for Lakeshore (Q3 2021)
Stretch Objectives	<ul style="list-style-type: none"> • Consider talent attraction campaign – integrate Lakeshore into other regional campaigns
KPIs	<ul style="list-style-type: none"> • Recruitment conversations • Number of campaigns • Confirmed new residents (direct from conversations)

Infrastructure and Data

Description	The tracking, documenting, and potentially assisting with planning of key infrastructure for economic development. Maintenance and tracking of data to allow for strategy creation and assistance with decision making.
Responsibilities	<ul style="list-style-type: none"> • Maintain and build awareness for current and future infrastructure and projects • Maintain resident demographic/psychographic/economic data • Maintain monthly economic development related data/ prepare semi-annual or annual reports • Work with IT/GIS to visualize data to support tourism or economic development • Build business cases and develop consensus for future infrastructure investment • Represent Lakeshore on data strategies or groups related to economic development • Maintain ongoing KPI's related to economic development and tourism. Prepare quarterly reports
Objectives	<ul style="list-style-type: none"> • Complete infrastructure and data audit for Lakeshore (to be used in Strategic Plan) (Q3/Q4 2021) • Lead transit feasibility study – deliver to council and SMT (Q3 2021)
Stretch Objectives	<ul style="list-style-type: none"> • Incorporate Lakeshore into regional data strategy • Prepare comprehensive data report for SMT/Council
KPIs	<ul style="list-style-type: none"> • External infrastructure meetings (ex.Hydro One) • Projects led • Projects supported • Committees • Quarterly report to SMT • Annual council report

Innovation and Future Proofing

Description	Ensuring that Lakeshore is aware of top trends, next generation infrastructure, smart-city initiatives, and how municipalities and business are being impacted by future expectations of work and life. Tied to infrastructure, this area is key to ensuring that Lakeshore is a progressive and future looking municipality and is not 'lost in the past'.
Responsibilities	<ul style="list-style-type: none"> Engage with next generation technology provides to ensure Lakeshore is positioned for future (broadband, 5G, autonomous vehicles, zero emissions) – related to infrastructure Ensure local businesses are aware of major changes or challenges related to tech Maintain relationships with regional for and non-profits whose mandate is related to data and technology (WE EDC's Innovation and Automobiltiy Department, Workforce Windsor Essex)
Objectives	<ul style="list-style-type: none"> Operationalize Lakeshore Economic Development Strategy
Stretch Objectives	<ul style="list-style-type: none"> Review current state of Lakeshore position relatively to Next Gen Technology Create an annual report to SMT and council regarding smart cities or next generation technology Formally engage with regional economic development groups for next-generation planning
KPIs	<ul style="list-style-type: none"> External infrastructure meetings (ex. Hydro One) Projects led Projects supported Committees Semi-annual report to SMT Annual council report

Marketing and Promotion

Description	The activities Lakeshore undertakes to position itself in the mind of the consumer/stakeholder related to economic development and tourism opportunities. The creation and promotion of information through all forms of communication channels to inform local, regional, provincial, and international businesses and stakeholders the value of Lakeshore as a community to live, work and play in.
Responsibilities	<ul style="list-style-type: none"> Maintain marketing/ promo materials for Business Retention & Attraction

	<ul style="list-style-type: none"> • Maintain marketing/ promo materials for Tourism and Events • Represent Municipality at Trade Shows and Ec. Dev meetings • Create periodic reports for council/ SMT • Ensure Lakeshore related materials are updated with WE EDC and other regional stakeholders • Attend business networking events • Work with Communications to promote business development and celebrate business success within Lakeshore. • Update SMT and council for new businesses. Work with business to promote/ highlight successes • Ensure council is present at various 'Grand Openings' for new business • Consideration of Economic Development and/or Tourism Microsites on Lakeshore.ca
Objectives	<ul style="list-style-type: none"> • Update of Lakeshore community profile (Q2 2021) • Create Lakeshore Economic Development 'pitch deck(s)' (Q3 2021) • Work with Communications on economic development marketing/communications plan • Work with communications on tourism plan (Q4 2021 & 2022) • Ensure visibility on upcoming WE EDC website (Q2 2021) • Creation of Economic Development/Tourism microsite
Stretch Objectives	<ul style="list-style-type: none"> • International marketing and promotional campaigns
KPIs	<ul style="list-style-type: none"> • Website metrics • Social media metrics (if applicable) • Campaign performance • Organic calls