



USF's 44th

Basic Economic Development Course



USF Muma
College of Business
UNIVERSITY of SOUTH FLORIDA



November 3-6, 2020



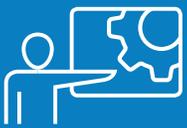
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Welcome



It is my pleasure to welcome you to the 44th Annual University of South Florida Muma College of Business Basic Economic Development Course. Florida is home to nearly 2.5 million small businesses, accounting for 99.8 percent of all employers, who employ more than three million Floridians. This is in addition to the one million self-employed small business owners who create a job for themselves. It is these small businesses who have been major contributors to the more than 1.2 million private sector jobs created in Florida since 2010.

Florida's economic turnaround story was not by chance. Our story is a testament to the collaborative culture of public-private partners who share in the mission and commitment of making Florida the best state for small business. To aid our state's small businesses, and ensure their continuing success, the state arguably offers one of the nation's best ecosystems for businesses to start, grow, and succeed.

With the best business tax climate in the Southeast, fourth largest economy in the nation behind California, Texas and New York, pro-business policies, and no personal income tax, it's not a surprise that nearly 2.5 million small businesses call Florida home.

Entrepreneurship is a tenet of economic development, which is recognized at the national level. Communities cannot thrive without a sustainable entrepreneurial ecosystem. The Florida SBDC Network recognizes that established second-stage companies are the key job creators in our state and therefore, we have made a concerted effort to provide specialty services to those businesses.

Our consultants spent more than 20,000 hours with our small business owners within our 10-county footprint in 2019 and 70 percent of that time was dedicated to helping them grow by expanding their markets. We know that companies won't hire more employees unless they experience a sustained increase in revenue. The Florida SBDC at USF works with second-stage companies that are ready for expansion and we provide them with our statewide-targeted growth services, which include:

- Growth Acceleration Services — This provides second-stage companies with an in-depth business assessment structured to develop growth strategies. Our consultants spend between 50 to 150 hours with the business, identifying areas of expansion.
- Government Contracting Services — We assist established businesses in selling their products and services to the federal, state, and local governments as prime and sub-contractors.
- International Trade Services — Our Certified Global Business Professionals prepare Export Marketing Plans for second-stage companies looking to take advantage of the 95 percent of markets that exist outside the U.S.

During the COVID-19 pandemic, the Florida SBDC team has focused its efforts on the financial health of adversely impacted small businesses. We have assisted them in applying for various financial opportunities, including the State of Florida Emergency Bridge Loan (EBL) program, the SBA's Economic Injury Disaster Loan (EIDL) and Paycheck Protection Program (PPP), and city and county CARES Act grants. We continue to assist small businesses with their grant applications, guiding them to prepare adequate financial statements, tax returns, and other required documentation. The Florida SBDC team also has already begun to assist these businesses in preparing their PPP Forgiveness applications to submit to their lending institutions.

As an economic development practitioner, I encourage you to work closely with your local SBDC. Together we can work towards helping our communities grow and succeed. I know you will gather useful resources and make lasting connections during this week. Welcome to the 2020 Basic Economic Development Course!

Eileen Rodriguez, Regional Director
Florida SBDC at University of South Florida

Special thanks to our Scholarship Sponsors



USF's 44th Basic Economic Development Course Agenda

Tuesday, November 3, 2020

8:30 - 9 a.m.

Course Orientation/Welcome

Course Overview/ Guidelines

Kris Manning, Executive Director
Florida SBDC at USF

Welcome

Keith Norden
Florida Economic Development Council

Cathy Chambers
Manager, Economic Development, FP&L

9 - 11 a.m.

A1: Economic Development Marketing and Attraction

Javier Marin, CECD, CGBP, Director of Business
Development
Polk Global Trade Alliance, Central Florida
Development
Council

Find out how to give your community a competitive advantage through marketing its assets utilizing relationship-building strategies.

11 - 11:30 a.m.

Lunch break

11:30 - 1:30 p.m.

A2: Ethics in Economic Development

Sharon Hannah-West, JD
Professor, Ethics, Law and Sustainable Business
Muma College of Business, USF

When faced with ethical dilemmas, individuals and organizations need to carefully consider all options regarding actions, methodologies and outcomes.

1:30 - 1:45 p.m.

Break

1:45 - 2:45 p.m.

A3: Small Business Development Strategies

Bill Burnham, Business Consultant
Florida SBDC at USF

See how your local Florida SBDC office can help existing firms survive and grow.

Wednesday, November 4, 2020

9 - 11 a.m.

B1: Economic Development Finance

Andrea L. Falvey, CECD, Business Development
Manager
Pinellas County Economic Development

Learn about financial capital for business start up and for existing businesses to expand.

11 - 11:30 a.m.

Lunch break

11:30 - 1:30 p.m.

B2: Real Estate Development and Reuse

Tracy Garcia, CECD, EcDMP, Director
Agency for Economic Prosperity
Elevate Lake Economic Development

Real estate development and reuse is central to economic development projects and opportunities. Learn key points regarding this complex aspect of business attraction, expansion and retention.

1:30 - 1:45 p.m.

Break

1:45 - 3:45 p.m.

B3: Workforce Development

Jim McShane, MPA, CEO
CareerSource Capital Region

Discover the tools that economic development organizations can use to attract upgrade and retain a quality workforce.

Thursday, November 5, 2020

9 - 11 a.m.

C1: Neighborhood Development Strategies

Geri Campos Lopez, CECD, Director
Redevelopment and Economic Opportunity
Manatee County

Neighborhoods are the building blocks for healthy, vibrant, thriving towns, cities and regions. Learn how to apply the basic tools and strategies of economic development to a specific geographic location to increase wealth and connections and promote the social, economic, political and physical well-being of neighborhoods.

11 - 11:30 a.m.

Lunch break

11:30 - 1:30 p.m.

C2: Managing Economic Development Organizations

Ruth Buchanan, CECD, Director
Business Development
Lee County Economic Development Office

Learn the key principles and practices for managing organizations as well as how to engage boards and councils, staff and community stakeholders, constituents and customers to achieve job creation and community growth and development.

1:30 - 1:45 p.m.

Break

1:45 - 2:45 p.m.

C3: Entrepreneurial Strategies

Yanina Rosario, Associate Director
Florida SBDC at USF

See how your local Florida SBDC office can help existing firms survive and grow.

Friday, November 6, 2020

9 - 11 a.m.

D1: Economic Development Strategic Planning

Robert E. Salonen, CECD, Director
Government Affairs & Strategic Partnerships
Florida Institute of Technology

Review the challenge to ensure the existing policies and programs meet the economic development needs and desires of a community within local resource constraints.

11 - 11:30 a.m.

Lunch break

11:30 - 1:30 p.m.

D2: Business Retention & Expansion

Karen Stewart, CECD
Deputy County Administrator
Manatee County Government

Getting the information you need from a typical business retention visit? Explore ways to enhance your business retention program in this interactive session.

How to Access Webinars and PowerPoints

Accessing Webinars

An individual access email will be sent for each of the Basic Economic Development Course webinars. You must use the link given in each of those individual emails to access the webinars. Follow the letter and number order listed in the Agenda above for accessing the courses (A1, A2, etc.). If you did not receive an access email for one of your courses, email staceyp1@usf.edu.

Accessing PowerPoint Presentations

Presentations are posted online at SBDCtampaBay.com/bedc2020, where the presenter has signed a release form allowing for posting. The materials as posted online are for registered attendees only and the link should not be shared with non-registered individuals. Use the password emailed to you prior to the start of the course by Kris Manning.

Instructor Bios

Ruth Buchanan, MBA, CEcD

Business Development Director, Lee County Economic Development



Ruth A. Buchanan, MBA, CEcD, is the Business Development Director for the Lee County Economic Development Office. Buchanan is responsible for developing, managing and executing strategies to retain, expand and attract businesses to Lee County. Some of the projects she is involved in are: expansions of Nor-Tech, Neogenomics and Gartner, recruitment of specialty manufacturers, life science, and business support service companies, as well as the development of future business parks in Lee County. The recent international trade summit showcased Lee County as a viable business destination to 35 international companies from 9 countries.

Ruth brings several years of management experience, most recently serving more than eight years as the Economic Development Manager for the City of North Port, Florida. She and her team won the Florida Economic Development Council's Regional Deal of the Year Award in 2018 for their collaborative work to bring in \$130 million spring training facility which will have a \$1.7 billion economic impact to the region. As a member of the Lee County EDO her responsibilities included directing the department's efforts in business attraction and retention while acting as a frequent liaison to local economic and commercial organizations.

Ruth is a graduate of the University of the Philippines and received her MBA from the International University of Japan, including a semester at Manchester Business School (UK). She earned the Certified Economic Developer (CEcD) from the International Economic Development Council. The CEcD is the leading industry designation and represents demonstrated competency in economic development with a high-level of knowledge and practical experience in the field.

Bill Burnham

Business Consultant, Florida SBDC at University of South Florida



Bill Burnham is a lifelong resident of the Tampa Bay area. He is a graduate of the University of South Florida where he majored in accounting. He obtained his MBA from Florida Institute of Technology.

Bill has more than 25 years of experience working with Fortune 500 companies, nearly 20 of those years in management positions. During that time he managed more than 200 employees and spent time in accounting, finance, manufacturing, production control and strategic planning. He managed government contract budgets in excess of \$50 million dollars and operating budgets of more than \$25 million dollars. He prepared analysis for potential acquisitions, proposals for government contracts and conducted company-wide training programs on several different topics.

Complementing his large company background, he also has 15 years of experience as a small business owner in industries as diverse as dry cleaning and home health care. In addition to those endeavors he has also worked as a business broker and business valuator performing valuations and selling business throughout the state of Florida. He has hands on knowledge in business planning, budgeting, forecasting, profit and loss management, cash management, business sales, business valuation and franchise operations.

Geri Campos Lopez

Director, Redevelopment and Economic Opportunity Department, Manatee County



Geri Campos Lopez is a Certified Economic Developer with over 20 years of experience spanning the redevelopment, economic development, and affordable housing markets in the public, private, and non-profit sectors. Geri joined Manatee County in 2016 to create a new department focused on the redevelopment and revitalization of its urban areas and to create economic opportunities for residents and businesses by linking their housing, community and economic development projects and programs.

Prior to Manatee County, she was the City of Clearwater's Director of Economic Development and Housing for 14 years. She has worked as a consultant in Boston, Massachusetts assisting clients such as the housing authorities of the cities of Memphis, Boston, Houston and conducted policy work for the U.S. Department of Housing and Urban Development.

Geri holds a Master in City Planning from the Massachusetts Institute of Technology and a Bachelor of Arts in Architecture from Yale University.

Andrea Falvey, CEcD

Business Development Manager, Pinellas County Economic Development



Andrea Falvey joined Pinellas County Economic Development in February 2011, as a Business Development Manager specializing in the industry sectors of Life Sciences, Medical Technologies and Business and Financial Services.

Andrea's past experience includes her role as Economic Development Analyst with the City of St. Petersburg's Planning & Economic Development department. There, she specialized in the City's Brownfields redevelopment program, marine science cluster and served as the program manager for its Bank on St. Petersburg program. Prior to her work with St. Petersburg, Andrea spent five years with an industrial and commercial property development firm in Tampa.

Andrea holds a Bachelor of Science in Biology from the University of South Florida (USF), and an MBA with course concentrations in marketing, finance and management, also from USF. She received the distinction of Certified Economic Developer (CEcD) through the International Economic Development Council (IEDC).



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Cybersecurity
Government Contracting
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Operational Analysis
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Tracy Garcia, CEcD, EcDMP

Director, Elevate Lake Economic Development



Tracy Garcia became Director of Elevate Lake Economic Development in October 2018. As director, she leads the office responsible for implementation of the county's economic development plan related to recruitment, expansion and retention of businesses and targeted industries, advising on regulations affecting economic development efforts, assists with defining and promoting strategic corridors, conducting economic impact analysis to determine projects return on investment, enhancing available sites inventory, maintaining a high-level understanding of local economic drivers and assets, and engaging with local stakeholders and partners that are critical to Lake County's economic growth. Tracy was recently elected by her peers to serve on the Florida Economic Development Council's 2020-2021 Board as their East Central Regional Director.

Tracy previously worked in Polk County, Florida, for Polk County Tourism and Sports Marketing on tourism-related projects and for the Central Florida Development Council focusing on business attraction for the warehousing and distribution industry as well as assisting companies with expedited permitting procedures.

Prior to migrating into economic development, Tracy worked for almost 30 years in various roles of the civil engineering industry. She started her engineering career as a board drafter for a surveying firm, transitioned to an AutoCAD designer, then onto the construction field as an inspector for SCDOT roadway projects. Tracy moved to Central Florida in 2004 and worked almost a decade for Carter Engineering, LLC in Winter Haven, conducting pre-construction permitting submittals and securing multi-jurisdictional agency development approvals.

Tracy holds an Associate in Civil Engineering Technology from Spartanburg Technical College and a Bachelor of Business Administration from Southern Wesleyan University. She is a Certified Economic Developer by the International Economic Development Council and an Economic Development Master Practitioner by the Advanced Economic Development Leadership Program - a collaboration facilitated by the University of Alabama, Clemson University, Texas Christian University and the University of Southern Mississippi (Inaugural Class of 2018).

Sharon Hannah-West, JD

Faculty Member and Director, University of South Florida



Sharon Hanna-West, JD, is a University of South Florida Muma College of Business graduate programs' faculty member and the director of the Sustainable Business concentration at the Patel College of Global Sustainability. She teaches in the USF Muma College of Business-Universidad San Ignacio de Loyola program in Lima, Peru, and is the former USF Exide Distinguished Lecturer in Ethics and Sustainability.

Her former business experience includes the founding of a multi-million-dollar corporation engaged in international trade. After several adjunct and guest lectureships, she joined the graduate programs faculty full time and developed a new core ethics course for the MBA programs.

Active in growth management, CSR and sustainability issues, Sharon studies sustainable solutions to help businesses respond to the challenges posed by climate change with a goal of making them affordable and profitable.

She developed the Building Sustainable Enterprise concentration for the USF MBA program and the Sustainable Business concentration for the MA in the Patel College of Global Sustainability, and teaches several related courses.

Her Ethics, Law and Sustainable Business practices graduate course has developed many sustainability plans for major corporations, non-profits and local businesses. She is a frequent lecturer and media commentator on business sustainability, ethics and environmentally-friendly business practices.

Javier Marin, CEcD, CGBP

Director, Redevelopment and Economic Opportunity Department, Manatee County



Javier advances the vision of the Central Florida Development Council (CFDC) through international trade, small business expansion and retention, as well as attraction of foreign direct investment. He directs the activities of the Polk Global Trade Alliance as well as the recruiting projects of foreign investors. Javier has earned hands-on, in-depth expertise in business growth, trade finance, business lending, mortgages, strategic planning, and business reorganization and relocation. He was most recently an Assistant Director with the Florida Small Business Development Center at USF, where he was responsible for international trade, finance, and growth acceleration services. Prior to that, Javier invested a combined 22 years in banking and held the positions of CEO of the DNJSA Federal Credit Union, manager at Chase Bank and vice president at SunTrust Bank. He was also the mayor of the town of Dover, NJ for one term.

Javier holds an AAS in Business Administration from Middlesex County College and a BAS in Public Administration from Polk State College. He has also earned credentials as a Certified Economic Developer (CEcD), and Certified Global Business Professional (CGBP). Javier is currently pursuing a Master's in International Business Administration. He has lived in Colombia and Sweden and is also fluent in Spanish and Swedish.

Jim McShane, MPA

CEO, CareerSource Capital Region



Jim McShane has an extensive background in sales, management, interior design, workforce development, and economic development. He was president of a family business in Munster, Indiana. He served as an elected official for four years. Jim is an active participant on numerous boards and committees.

Jim is known for his systems thinking and collaborative approach. He serves on the U.S. Conference of Mayors Workforce Development Council nationally and has chaired the Gadsden County Development Council and the Big Bend Continuum of Care Council. Jim is going into his 20th year in workforce development in operational leadership. Jim also serves on the Florida Workforce Development Association on its executive committee.

Kris Manning, CRA

Executive Director, Basic Economic Development Course



Kris Manning has been the office manager at the Florida SBDC at University of South Florida since 2000 and was promoted to Manager of Fiscal and Business Administration at the University of South Florida with the Muma College of Business after completing her Bachelor of Science in Applied Science in August 2012. She also earned a master's in biblical studies from Evangelic Seminary University.

Manning received her CRA Train Certification and Advance Certification for USF Research in which she helped develop the curriculum for the online program and mock research project development for the university for those who are interest in fulfilling their research training in grants.

In her role as business manager for the Florida SBDC at USF she monitors budgets, reconciles monthly ledgers and submits monthly budget reports for the Florida SBDC Network, PTAC, State Performance, South Florida State College, and Greater Hernando Chamber of Commerce grants in excess of \$1.5 million.

She is also responsible for all aspects of the annual Basic Economic Development Course, an IEDC-accredited program.

Yanina Rosario, CGBP

Associate Director, Florida SBDC at University of South Florida



Yanina Rosario is an associate director and business consultant for the Florida SBDC at University of South Florida. She provides business owners with one-on-one expertise for optimizing business performance through marketing, strategic business planning, and business certification. She also teaches the Women/Minority/Disabled Veteran-Owned Certification seminar.

Her expertise comes from nearly 20 years in economic development, guiding pre-venture and well-established business owners through procurement, licensing, planning, marketing and financing. She's helped clients secure more than \$3.2 million in small business loans.

Yanina is a member of the City of Tampa Equal Business Opportunity Advisory Committee, and the Minority Enterprise Development Week (MEDWeek) planning committee. She obtained a bachelor's in marketing from the University of Central Florida and a MBA in management from the Florida Institute of Technology. She's also a NASBITE International Certified Global Business Professional.

Robert Salonen, MPA, CEcD

Director, Government Affairs & Strategic Partnerships, Florida Institute of Technology



Robert Salonen is Director, Government Affairs & Strategic Partnerships for the Florida Institute of Technology (Florida Tech). In this capacity, he is a primary university liaison for local, state and federal elected officials. He also connects the talent and technology development capabilities of the Space Coast tier-one research university to government, industry and community interests.

Rob is a graduate of Florida Tech with a Master of Public Administration (MPA), and the University of Connecticut with a Bachelor of Arts. He earned the Certified Economic Developer (CEcD) credential from the International Economic Development Council (IEDC) in Washington, D.C. Rob is also a member of the Phi Kappa Phi Honor Society for academic excellence, a graduate of Leadership Brevard and an Eagle Scout/Adult

Volunteer Scout Leader.

Prior to joining Florida Tech, he was a member of the executive team that founded the Southern Aero Medical Institute and Brevard Regional Hyperbaric Center in Melbourne, Florida. Through his subsequent decade-long role at the Economic Development Commission of Florida's Space Coast, he was a team member and a leader of multiple economic development projects and initiatives including Embraer, the U.S. Navy's Strategic Weapons Systems Ashore, CEV – LMCO Orion, Boeing CST 100 Starliner, Blue Origin, Northrop Grumman and the Certified Production Technician program.

Rob is a long-time board member for the behavioral health system Circles of Care, a board member of the National Space Club – Florida Committee, as well as a board member for the Florida Ocean Alliance. He is an appointed member of the City of Palm Bay Business Improvement District which includes the L3Harris, Renesas, and Florida Tech CAMID campuses. He is an instructor for Strategic Economic Development for the IEDC accredited Small Business Development Center's Basic Economic Development Course. He represents Florida Tech interests as a trustee member of the Titusville, Cocoa Beach, Melbourne, and Palm Bay Chambers of Commerce. He served previously on the executive committee for the Economic Development Commission of Florida's Space Coast, as a board member for the Founder's Forum, and as a member of the federal Florida District Export Council NCW.

Karen Stewart, CEcD

Deputy County Administrator, Manatee County Government



Karen Stewart is the Deputy County Administrator for Manatee County Government. Karen is the county administration lead for economic development and provides leadership to facilitate economic development and redevelopment projects by linking county departments and the business community.

Since 2009, economic development incentives, resources and programs have helped more than 100 companies locate or expand in the community with the potential to create more than 6,000 jobs over the next several years.

Karen has a Master of Science in Leadership from Nova Southeastern University, is a graduate of Eckerd College and a Certified Economic Developer (CEcD) through the International Economic Development Council (IEDC).

Notes



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