AGENDA

1. Introductions
2. Project Overview
3. Planning Process
4. Facilitated Discussion
5. Next Steps
INTRODUCTIONS
THEORY INTO PRACTICE
we design strategies that will support your community’s vision for the future
TIP STRATEGIES

Founded in 1995, we have over 24 years of experience in over 300 communities across 40 states, and 5 countries.

Four principals with a total staff of 15.

Committed to holistic thinking & sustainable development.

Austin, Seattle, and Boston offices with global reach.
SERVICES

- Strategic Planning
- Economic Analysis
- Workforce Assessment
- Talent Strategies
- Organizational Development
...an analysis to redefine the essential economic and community development tools and strategies to drive Montana’s economic future.

The result will be a series of recommendations, best practices, and an implementation plan to ensure strategies are deployed timely.
PROJECT DELIVERABLES

1. Key findings of the **opportunities and challenges** facing Montana’s economic and community development.
2. A **conditions assessment** that highlights the current development strategies, tools, programs, and funding mechanisms.
3. Key findings of **best practices / competitive analysis** on our regional / **national competitors** relevant to economic development in Montana. Include compelling examples, data and case studies.
4. **Articulation of roles** within **successful** EDOs, local communities and state **economic development teams**.
5. Key findings followed by **recommendations** (MT NextGen) that give **future guidance** to MEDA, its partners and key decision makers for strategic community and economic development **programs**, **practices**, **funding structures** for both **near-term** and **long-term initiatives**.
6. Provide an **implementation strategy** for recommendations that offers an appropriate **timeline**, considers a **phasing approach**, identifies **essential partners** and “**immediate next steps”**.
3 PLANNING PROCESS
Our process establishes a clear vision for economic growth.
# WHAT WE PROPOSED

## DISCOVERY
1.1 Project management & kick-off
1.2 Planning context
1.3 Current approach
1.4 Stakeholder engagement
1.5 Competitive position

## OPPORTUNITY
2.1 Benchmarking
2.2 Best practices
2.3 Capacity review
2.4 Findings workshop

## IMPLEMENTATION
3.1 Recommendations
3.2 Implementation plan
3.3 Rollout presentation
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<thead>
<tr>
<th>PHASE/TASK</th>
<th>Dec</th>
<th>Jan</th>
<th>Feb</th>
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# Project Leadership

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<th>Description</th>
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<tr>
<td><strong>Executive Committee</strong></td>
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<td>The small team that is responsible for logistics and administrative tasks.</td>
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<td><strong>Steering Committee</strong></td>
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<td>This is the core group engaged in the planning process. This group is responsible for reviewing drafts and is expected to attend all meetings.</td>
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<td><strong>Leadership Committee</strong></td>
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<tr>
<td>An advisory committee that includes members of the Steering Committee. Responsible for attending meetings and providing input for recommendations. This committee plays a key role in implementation.</td>
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STAKEHOLDER ENGAGEMENT

EDUCATION & OUTREACH
Raise awareness of the project, generate “buzz”

INPUT
Identify strengths, weaknesses, opportunities, and threats (SWOT)

REFINEMENT
Refine issues, explore opportunities, increase stakeholder buy-in

ACTION
Dedicate resources, engage other leaders
FACILITATED DISCUSSION
DISCUSSION QUESTIONS

- What are the biggest concerns around the future of Montana’s community and economic development tools, programs and funding?
- What have been the most impactful community and economic development tools, programs, and funding mechanisms in Montana? (What is working?)
- What economic and community development strategies, programs, and funding mechanisms have not been as effective? (What isn't working?)
- What are the tools, programs, and funding mechanisms that are used/needed in different parts of the state?
  - Rural needs
  - Suburban needs
  - Urban needs
DISCUSSION QUESTIONS (CONT.)

- What states/regions does Montana compete with for economic development projects?
- What tools do they have that you wish were available in Montana?
- What is the biggest challenge to changing/updating the tools that are used in Montana?
- What outcomes constitute success for the planning process?
- Which additional community leaders and organizations should be involved in this project during outreach and engagement?
NEXT STEPS
NEXT STEPS

Ongoing review of background information & analysis (Tasks 1.2 & 1.3)

Stakeholder interviews & roundtables (Task 1.4)

Next TIP Strategies visit – January
QUESTIONS
THANK YOU
STEERING COMMITTEE

Pete Akey
Glacier Bank

Sarah Converse
Sweetgrass Development

Todd O’Hair
MT Chamber

Steve Arveschoug
MEDA/Big Sky EDA

Russ Fletcher
MATR

Paul Reichert
Prospera/City of Bozeman

Shawn Real Bird
STED Commission

Kim Morisaki
Montana West

Jason Rittal
MACo

Tim Burton
MLCT

Brian Obert
MBAC

Toni Schneider
CTA Cushing Terrell
RESPONSIBILITIES: TIP STRATEGIES

• Deliver the highest quality strategy—on time and within budget
• Provide honest and direct opinions
• Communicate openly and responsively
• Represent the project positively and professionally in the community and beyond
• Bring creative ideas and strategies from best practices around the nation
• Assist in building support and enthusiasm for project
RESPONSIBILITIES: MT NextGen TEAM

• Identify and recruit key stakeholders to participate on committees and in interviews and focus groups

• Assist in scheduling meetings for trips and preparing trip itineraries

• Review draft documents in a timely manner and provide constructive input

• Serve as the champion for the plan and process in the community

• Take ownership of the project work and process to ensure successful implementation
MEDIA ENGAGEMENT

SAMPLE MEDIA RELEASE

[client logo]

[address]

Phone:  [number]
Web:    [URL]

Media Contact
[name]
Phone:  [number]
Email:  [address]

FOR IMMEDIATE RELEASE
[Date]

[CLIENT ORGANIZATION] RETAINS TIP STRATEGIES FOR STRATEGIC PLAN PROJECT

The [client organization or collaboration], a newly formed economic development collaboration, has chosen Austin- and Seattle-based TIP Strategies to guide the development of a regional economic development strategic plan. Partners of the project include the [partner names].