



Elected Officials Training

Okeechobee County Economic Development Corporation

November 20, 2020

GRAY SWOOPE
PRESIDENT & CEO

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Project Objective + Approach

Thank you for your consideration.

Local elected officials serve on the front lines of their communities. It can be a challenging responsibility, particularly as it pertains to increasing better jobs, retaining talent and growing local businesses. Yet, with the proper preparation and training, local officials can serve as catalysts for increased economic vitality.

When executed properly economic development builds strong, growing and resilient local economies. However, success in economic development and the specific strategies to accomplish it looks different from county to county, city to city. Regardless of the community, leadership is critical in advancing local economic development. Given the current economy and the state's position on incentives, it is more important than ever for communities to have a clear understanding of their local economic development strengths and opportunities. These leverage points are especially important in the context of rapidly evolving business and workforce demands as well as the growing inequity among rural and urban communities. Therefore, it's important for local leaders to understand the practice of economic development, their roles within it and how to build the community's extended sales team.

VisionFirst will lead a one-day crash course for elected officials and volunteer leadership focusing on building local economies, growing jobs and investment and bolstering community competitiveness.

It is anticipated that three members of VisionFirst's staff will facilitate the training.

KICK-OFF MEETING:

Within 10 days after contract execution

It is important to begin the work by conducting a web-conference planning session between VisionFirst and the Okeechobee County Economic Development Commission. This kick-off meeting will allow us to discuss expected attendees of the training, times and outcomes.

Training Agenda:

VisionFirst Advisors will lead training attendees through a three-hour program that combines presentations, guided self-evaluation and learning exercises to engage and inspire action. It is suggested that the training take place from 9:00 am to noon.

The training will focus on six key components:

1. Overview of economic development
2. Value to community
3. The economic development professional's duties
4. Elected officials and other key stakeholder's duties (The Delta Team)
5. Comprehensive approach
6. County and regional competitiveness

Based on our previous work in the county in conducting a re:Vision plan, VisionFirst recommends the below agenda for further refinement.

DRAFT AGENDA

Duration:	Topic:	Presenter:
10 minutes	Kick-Off & Welcome	Terry Boroughs
	Introduction of VisionFirst Team	Gray Swoope
	Housekeeping: Format & Participation	Greg Word
35 minutes	What Does Economic Development Look Like Now? <ul style="list-style-type: none"> What is Economic Development? Three Ways to Build an Economy The Importance of Regional Coordination 4Rs of Recovery & COVID 	Gray Swoope
35 minutes	The Importance of Collaboration <ul style="list-style-type: none"> Delta Team Mitigating Risk Understanding Your Product Confidentiality & Public Records 	Griff Salmon
35 minutes	The Second Impression <ul style="list-style-type: none"> Data Drives Decisions Recruitment, Expansion and Retention Business Climate Policy 	Griff Salmon & Nancy Heintz
10 minutes	BREAK	
35 minutes	Understanding & Improving Your Workforce <ul style="list-style-type: none"> Data At-A-Glance What to Promote & Explain Case Studies & Testimonials Tips for How to Work with Your Workforce Providers 	Greg Word & Nancy Heintz
35 minutes	Marketing in the Midst of a Pandemic <ul style="list-style-type: none"> Building Your Presentation Bolstering Your Web Content Proactive Messaging 	Greg Word & Nancy Heintz
10 minutes	BREAK	
35 minutes	The True Value of Incentives <ul style="list-style-type: none"> Financial Incentives Non-Financial Incentives Knowing When to Walk Away Compliance in the Midst of COVID 	Kathy Gelston

Estimated Price Proposal

The proposed fee for the project is \$7,500 for one virtual training for the OCEDC's Board of Directors. This fee is based on the estimated time and experience of the individuals performing the work.

MEET OUR TEAM



VISIONFIRST ADVISORS
STRATEGY | ACTION | RESULTS

Strategy starts with a vision first.

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Gray Swoope

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AREAS OF EXPERTISE

- 30 Years of Leading Site Selection, State, Regional & Local Economic Development
- Economic Development Risk Mitigation
- Leverage of Economic Development for Greater Impact
- Experience in Helping States & Communities Invest in Infrastructure & Talent
- Building Community Capacity to Leverage Funds
- Compliance Processes & Procedures

A recognized leader in economic development and site selection, Gray Swoope is president and chief executive officer of VisionFirst Advisors. After a successful 30-year career in economic development, Gray launched the VisionFirst consulting practice in 2015. The firm, a wholly owned subsidiary of Butler Snow LLP, partners with a diverse base of private and public sector clients to develop effective pathways for success.

Prior to starting VisionFirst, Gray served in Florida Governor Rick Scott's administration (2011-2015) as secretary of commerce and president and CEO of its public/private economic development organization, Enterprise Florida, Inc. Under his leadership, Enterprise Florida elevated its economic development presence and delivered the best results in the organization's history. Florida announced competitive project wins during his tenure that included Amazon, Bristol-Myers Squibb, Hertz, Navy Federal Credit Union, Northrop Grumman and Verizon.

Before joining Governor Scott, Gray served as the executive director of the Mississippi Development Authority (MDA) under then Governor and current VisionFirst board chair, Haley Barbour. During his tenure at MDA, Gray played a vital role in recruiting companies such as Toyota, PACCAR, GE Aviation and SeverCorr (now Steel Dynamics) to the state. In addition, Gray's leadership following Hurricane Katrina was critical to Mississippi's recovery efforts. MDA acted as the state's fiscal agent for \$5.4 billion of the federal recovery package appropriated through the Department of Housing and Urban Development. The MDA team created many of the recovery programs being used today for natural disasters like Hurricanes Sandy, Harvey, Irma and Florence.

Gray is passionate about economic development, having served at all levels representing both urban and rural regions. A constant student of the profession, he never stops the pursuit of learning and applying this knowledge for success in today's fast-paced economy. Gray earned both undergraduate and graduate-degrees from Mississippi State University.



Griff Salmon

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AREAS OF EXPERTISE

- Location Advisory
- Asset Review & Inventory
- Stakeholder & Board Management
- Business Development & Retention
- Global Trade

Griff serves as a principal for VisionFirst Advisors in Orlando. His extensive background in operations and business development allows him to offer a unique perspective to economic development organizations and companies looking to expand or relocate. Prior to joining VisionFirst, Griff served as the executive vice president and chief operating officer for Enterprise Florida (EFI), where under his leadership the business development team announced project wins such as GE, Amazon and Lockheed Martin. In addition, Griff effectively managed the organization's divisions to strategically focus resources while his collaborative management style led to partnerships with a statewide network of regional and local economic development organizations.

Griff also served as director of the Mississippi Development Authority's (MDA) Global Business division. At MDA, the business development team announced projects from companies such as GE Aviation, Toyota, PACCAR and McKesson. Griff was also congressional liaison for MDA's Federal Department of Defense and Congressional Liaison Bureau where he worked to maintain military presence in the state as well as expand capabilities to secure future missions as part of the federal government's Base Realignment and Closure Act.

Griff earned a master's degree in public policy and administration at Mississippi State University and a B.S. from Millsaps College.



Nancy Blum-Heintz

Senior Consultant
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AREAS OF EXPERTISE

- Strategic & Crisis Communications
- Workforce & Demographic Research
- Community Strategy
- Public Records & Transparency Policies
- Strategic Planning & Best Practices

Nancy brings nearly two decades of executive-level marketing, communications, government relations and economic development expertise to VisionFirst. Nancy previously served as the national director of communications for the Foundation for Excellence in Education (ExcellinEd), a leader in education reform that designs policy and implementation strategies to improve our nation's educational attainment and workforce competencies.

Nancy worked alongside VisionFirst's principals when she served as vice president of strategic alignment and communications at Enterprise Florida (EFI). In that position, she developed policies and strategies for the organization to adhere to Florida's strict public records laws while at the same time balancing necessary client confidentiality.

Nancy succeeded at bringing greater strategic vision to communications by expanding the use of proactive communications, strategic outreach and social media to improve media coverage and website engagement.

Nancy moved to the EFI position after serving as chief communications officer for the Department of Economic Opportunity (DEO). She has also served in leadership roles at several state agencies in Florida including the Department of Health and the Department of Environmental Protection. While at the Department of Environmental Protection, Nancy led issue management campaigns for high profile environmental events such as Everglades restoration, the Apalachicola - Chattahoochee-Flint River System water disputes as well as the Deepwater Horizon oil spill.

Nancy earned her bachelor's degree from Florida State University and is a certified user of Chmura's JobsEQ.



Greg Word

Senior Consultant
JACKSON, MISSISSIPPI

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AREAS OF EXPERTISE

- Graphic Design, Branding & Marketing
- Research & Analysis
- Community Campaign Strategy
- GIS-Mapping & 3-D Modeling
- Collaborative Management

Greg brings a breadth of experience that is both broad and specialized in product development, research and analysis, industrial building and site evaluations, lead generation, economic research packages, GIS-based mapping as well as 3-D modeling and virtual reality profiles. He has been recognized for his work in marketing and design ranging from branding, identity and logo design to prospect-centered packaging, proposals, digital renderings, print and digital advertisements as well as interactive presentations.

Greg most recently served as senior vice president of Economic Development for the Greater Jackson Alliance. In this role, the organization was recognized by Community System's Digital 25 as an "organization that best uses digital technology to differentiate its community online to better serve businesses." Most recently, he was recognized as North America's Top 50 Economic Developers by Consultant Connect. Prior to joining the Alliance, he was bureau manager of Business Intelligence and Support for the Mississippi Development Authority. Greg also served as manager technical/graphic services for North Mississippi Industrial Development Association. In these roles, his involvement in economic development teams helped produce numerous successful projects resulting in more than \$3 billion in investment and thousands of announced jobs.

A graduate of Mississippi State University, Greg currently serves on the board of directors for the Mississippi Economic Development Council as Past President.



Kathy Gelston

Financial Analyst
JACKSON, MISSISSIPPI

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AREAS OF EXPERTISE

- Government Finance
- Deep Understanding of State Taxation
- Incentives Contracting & Compliance
- Public/Private Partnerships
- Complex Financial Mechanisms

With close to 30 years of executive-level public-sector experience, Kathy brings to VisionFirst a depth of understanding of public and private-sector finance particularly in the execution and compliance of economic development programs. Kathy has the unique ability to explain incredible complex financial mechanisms in a way that both the media and taxpayers can understand.

Prior to joining VisionFirst, Kathy served as associate vice president of corporate engagement and economic development at Mississippi State University working with industry to identify university and business partnership opportunities in research, training, or problem resolution. As a member of the executive management team for the Office of Research and Economic Development for the university, Kathy set research policy, managed the university research park as well as several university level research centers, provided technical assistance and identified university opportunities for projects considering location or expansion in the state.

Before her tenure at the university, Kathy served as chief financial officer for the Mississippi Development Authority (MDA), the state's primary economic development entity, overseeing the agency's Financial Resources and Accounting and Finance divisions. She was responsible for the agency's legislative activities, coordinating state-funded incentive programs, and developing incentive packages for industry locating or expanding in the state.

Previously, Kathy worked at KPMG, where she served as the Mississippi specialist and a state and local tax manager for two years, and at the Mississippi Department of Revenue, where she worked for 12 years. She served as deputy director of audit and compliance while at the agency.



Brenda Lathan

Senior Consultant
JACKSON, MISSISSIPPI

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AREAS OF EXPERTISE

- Regional and Rural Development
- Product Development
- Retail Development
- Project Management
- Business Retention and Expansion
-

Brenda is an economic developer specializing in rural and regional economic development, most recently serving as senior vice president for the highly successful Golden Triangle Development Link in Mississippi.

Brenda focuses on improving community competitiveness through her commitment to meeting customer and project demands. With more than 20 years experience, she has been recognized for her achievements in product and retail development. While with the Link, she contributed to a portfolio of economic development projects resulting in more than \$6 billion in capital investment and the creation of more than 6,000 new jobs.

Active in the community, Brenda was recognized by the Mississippi Business Journal as one of Mississippi's Top 50 Business Women and she has served on the Board of Directors for the Mississippi Economic Development Council as well as the International Council of Shopping Centers.

Brenda is a graduate of the Mississippi University for Women. She also attended Oklahoma University's Economic Development Institute and the International Council of Shopping Center's Retail Development Program at Penn State's Wharton School of Business.



Nicole Costello

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VISIONFIRST ADVISORS
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AREAS OF EXPERTISE

- Financial Controls & Accounting Best Practices
- State & Local Purchasing Procedures
- Contract Management
- Client Communications
- Organizational Controls & Operations
-

Nicole brings nearly a decade of banking and high-level administrative services to VisionFirst. In her position as office manager, she serves as the backbone of VisionFirst by implementing policies and procedures while also managing accounts payable, receivables and monthly billing.

Prior to joining VisionFirst, Nicole previously worked in retail banking and residential lending at BB&T, JP Morgan Chase and Wachovia Bank. For Nicole, customer service has always been the key to creating successful relationships and results and she brings that perspective to VisionFirst.

Nicole graduated from Florida State University with a bachelor's degree in Economics. She also is a licensed real estate professional.