



**UNION COUNTY
PARTNERSHIP
FOR PROGRESS**

**STRATEGIC PLAN
AND
PROGRAM OF WORK**

**For Fiscal Years
2004-2005 And 2005-2006**

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STRATEGIC PLAN AND PROGRAM OF WORK 2004-2005—2005-2006

EXECUTIVE SUMMARY

The Union County Partnership for Progress is a new organization formed for the purpose of providing countywide economic development services to the people of Union County. This Strategic Plan and Program of Work was created to provide a roadmap for the performance of these responsibilities over the two years beginning January 1, 2005 and ending December 31, 2006.

For the purposes of this program and of defining the role of the organization, the leadership of the Partnership has **defined economic development** as: “Activities which improve the quality of life in Union County by increasing jobs and investment in the community.”

The Partnership is committed to the **Core Values** of:

Integrity Stewardship Job Competency Professional Conduct
Commitment to Clients Maintenance of a Cooperative Spirit
Commitment to Improving the Quality of Life in Union County

Organizationally, the Partnership will:

- Maintain sound administrative procedures
- Develop and implement an effective marketing and communications plan
- Maintain a comprehensive database of facts about Union County
- Encourage the expansion of needed infrastructure resources
- Secure long-term funding for the organization and its program

Highlights of this plan include the:

- Relocation of the corporate offices
- Development of a series of research reports and an Information Guide
- Expansion of new business recruiting efforts
- Introduction of a bold new existing-business retention and expansion program (BR&E)
- Development of a new user-friendly web site
- Launching of a new marketing and communications plan
- Investigation of the feasibility of developing a new publicly-owned business park.

You are encouraged to read this plan and provide any comments to the UCPP.



UNION COUNTY PARTNERSHIP FOR PROGRESS STRATEGIC PLAN AND PROGRAM OF WORK

OVERVIEW

Since its formation in early 2004, the Union County Partnership for Progress, Inc. has embarked on several months of organizational activities which included the hiring of a full-time director. Between July 6 and August 16, 2004 the Board of Directors met in three extended sessions to discuss what Economic Development means to Union County and what the elements of a countywide economic development program should be. The following represents a planned program of activities, initiatives, goals and objectives that span two years beginning January 1, 2005 and ending December 31, 2006.

This program is designed to be a roadmap for the conduct of the Partnership's activities. With that understood, it is expected that aspects of this document will be revisited from time to time and it should therefore be considered a flexible plan in the sense that unforeseen events and opportunities may alter some short-term objectives. However, this program as a whole is not to be altered lightly or easily, but with deliberate care and careful consideration for any unusual circumstances that might surface.

Every aspect of this program is expected to contribute to developing a stronger, a more diverse and a more sustainable economy for the people of Union County. Some objectives are short-term goals designed to generate business activity and secure new and expanded business announcements. Other activities are designed to help ensure long-term relationships and provide for long-range economic stability in the county. It is crucial that the Partnership, both staff and leadership, maintain a balance between these activities so that the results of one effort do not compromise the effectiveness of the other.

There has surely never been a time in our history when marketing to new and expanding business has been more important than it is today. As we in Union County come to better understand the true effect of global economics, we are compelled as a community to do all that can be done to assure that we, our children, our grandchildren and the generations that follow have secure job opportunities close to home. It is also important that we as a community do all we can to expand private investment so that the burden of public services do not rest solely on the shoulders of our individual citizens. It is in this spirit that the 2005-2006 Program of Work was adopted by the Partnership's Board of Directors, consistent with funding from public and private sources.



ECONOMIC DEVELOPMENT—CONTEXT AND DEFINITION

Economic development is best understood in the context of other community-wide endeavors. It is one of three primary civic functions:

- **Health and Human Services** – The important work of the Union County Social Services Department is an example of government’s role in the humanitarian side of civic responsibility. The United Way, Rotary Clubs, the Lions Club, Kiwanis Clubs and others are examples of service organizations focused on human services. Our churches and religious organizations perform valuable human services through their benevolent programs and community-focused activities.
- **Public Safety, Law Enforcement, the Courts and Criminal Justice** – In this period in history, we are all more aware than ever before of the extraordinary importance of our law enforcement officers, our fire fighters and other emergency workers who often risk their lives to ensure our safety. The courts and our system of criminal justice are the crucial cornerstones on which we rely to preserve our safety, culture and traditional American values.
- **Economic Development** – After these two important civic functions, many other things we do in the name of “community” could be called some form of “economic development”. From Parks and Recreation to Cultural and the Arts, from roads and streets to schools and colleges, the bulk of our energy and our financial resources goes to the efforts we hope will enhance our ability to sustain economic security, generate community wealth, and enhance our quality of life.

Given such a broad definition of economic development, the Partnership’s board adopted a definition that more clearly focuses our attention in two specific directions. For the Union County Partnership for Progress, economic development is:

“Any activity which creates jobs, increases community investment and enhances the quality of life.”



VISION STATEMENT

As an economic development organization focused on enhancing Union County's quality of life through the creation of jobs and investment, it is the vision of the Union County Partnership for Progress that:

“Union County is the preferred choice for business development.”

CORE VALUES

In pursuit of the organization's purpose, it is important that a framework of deeper responsibility and accountability be identified—a philosophy of fundamental core values and a code of conduct to which we steadfastly adhere.

The Core Values of the Union County Partnership for Progress are:

- ***To maintain the highest level of professional ethics and integrity***
- ***To maintain the highest level of financial stewardship***
- ***To maintain the highest level of job competency and knowledge***
- ***To maintain the highest level of professional and personal conduct***
- ***To maintain a total commitment to our business clients' best interests***
- ***To maintain a cooperative spirit with all those who seek to better the lives of the people of Union County***



ORGANIZATIONAL FUNCTIONS

In order for the organization's purpose to be fulfilled, the Partnership has identified a cluster of functional areas around which this Program of Work is to be constructed. Those functions include:

- ***Develop sound corporate administrative policies and procedures***
- ***Develop an effective business recruiting plan for new and expanding businesses***
- ***Develop and maintain an effective marketing and communications program***
- ***Develop and maintain a comprehensive database of economic research and statistics***
- ***Develop a strategy for increasing the inventory of available sites and buildings***
- ***Develop secure long-term funding for the program***

On the following pages, we provide additional details for each of these functions.



DEVELOP SOUND CORPORATE ADMINISTRATIVE POLICIES AND PROCEDURES

Corporate Offices—It is the expressed desire of the Board that the offices of the Partnership be “presentable” and appropriate to the conduct of business. In that regard, it is generally agreed that the current offices in the County Courthouse are not adequate and that a move to a more appropriate location is desired. During the 2004-2005 fiscal year, we will conduct a search for and initiate the relocation of the offices to new space.

Policies and Procedures Manual—It is sound business practice for an organization like the Partnership to have a collection of effective policies and procedures which are designed to guide the organization’s daily activities. Using the official by-laws of the corporation and our current contractual obligations, we will develop a policies and procedures manual for the organization.

Accreditation—It is the stated goal of the Board to develop a nationally recognized and widely respected local economic development organization in Union County. In order to accomplish that objective, it will be necessary to benchmark our program against the nationwide best practices in the industry. The International Economic Development Council sponsors an accreditation program (Accredited Economic Development Organization—AEDO) which encourages organizations like ours to achieve a national standard of excellence in their programs. Using this resource, we will seek and achieve AEDO accreditation within two years.

Staff Training and Education—In keeping with the core value of maintaining the highest level of job competency and knowledge, it will be a requirement that all employees of the Partnership complete a Basic Economic Development course. Further, it will be required that all employees with client handling responsibilities either have or be pursuing professional certification (CEcD) as designated by the International Economic Development Council. In addition, each year all employees will complete a minimum of one continuing education program that will either enhance their current skills or prepare them for future additional responsibilities. In the 2004-2005 fiscal year one staff member will complete the basic course, and one staff member will complete a continuing education seminar.

Measuring Effectiveness and Accountability—The viability of any enterprise can be strengthened with clear and objective measurements to determine its success or failure. This program will have six fundamental measurement tools.

- **Financial Reports**—Professionally prepared financial statements will be provided to the Board on monthly basis.
- **New and Expanded Business Report**—This report will be produced on a quarterly basis and will identify the new and expanded businesses in Union County. It will include an accounting of new jobs created and new investments made in the community. It will also provide a directory of these companies for



use as a business-to-business marketing tool for local companies. This report will be posted on the new web site within 30 days of the end of each calendar quarter. This will be a primary assignment for a new Director of Research.

- Client Activity Report—This report will be offered to the Board of Directors each month and will provide a measurement of the business activity in the office. This report is the responsibility of the CEO, but other staff may provide additional information as needed.
- Business Retention & Expansion (BR&E) Call Report—This report will be delivered to the Board monthly and will reflect the number of calls made, and report any significant issues which should be addressed by the organization or the community. This report will be the responsibility of the BR&E Director.
- Project Reports—This report will be delivered monthly and will reflect the status of any projects that the organization has underway. This report will be the responsibility of the project manager assigned to each project.
- Annual Report—This report will be a printed publication which will be provided to stakeholders and the public. It will be professionally prepared and will highlight the activities of the organization over the year.

Staffing: This Program of Work calls for adding employees to the existing two-person staff. Two new full-time staff positions and a part-time position will be created to fulfill this plan.

The President/CEO and the BR&E Director are currently in place. The two new positions include an Office Manager, who will be responsible for the administrative functions of the organization and for providing administrative support. The second position is a Director of Research who will be responsible for collecting data, managing the web site, and handling all IT functions.

A “summer intern” will be hired to provide the annual update of existing statistics and factual materials.

Much of the Marketing and Communications will be outsourced to consultants and agencies that specialize in this area. It is also anticipated that we will hire a real estate consultant to prepare a special feasibility study for a business park.

A staff allocation matrix can be found in Appendix C.



DEVELOP AN EFFECTIVE BUSINESS RECRUITING PLAN FOR NEW AND EXISTING BUSINESSES

Ultimately, the value of the Partnership will be determined by how successfully we generate leads and secure the location of new businesses, and how well we support existing businesses in their efforts to expand. The following guidelines will help assure that all which can be done is being done to reach our ultimate goal.

Respond to General Inquiries—It is typical for all economic development organizations to receive inquiries regarding all manner of government and business related issues. It will be the policy of the Partnership to assure that every inquiry is dealt with in a professional and helpful manner. A directory of service providers will be maintained so that those inquiries not directly pertaining to our mission can be referred to the proper agency or organization. All staff members will be responsible for being familiar with the various sources of business and government services.

New Business Recruiting—The hallmark for our new business efforts will be the demonstration of a philosophy that, while we are supported financially by various sources, we are in fact working for our business clients. Our job is to serve as advocates for our business clients and work on their behalf to help them solve any problem that may hamper their location or expansion in Union County. In that regard it is our responsibility to respond to inquiries in a prompt, professional, and complete fashion. It is incumbent that we further demonstrate Union County's genuine interest in meeting clients' needs, by following up regularly to assure that every aspect of their decision-making process is monitored and managed in such a way that the value of a Union County location is clearly demonstrated. The operational mechanics of how this responsibility will be met (data, marketing, staff competency etc.) are discussed throughout this document.

Business, Retention, and Expansion—The majority of any community's growth in jobs and investment comes from companies who are already located in the community. It is the mission of this organization to encourage and promote, in a proactive manner, the retention and expansion of local business and industry in Union County.

The BR&E Program objective is to develop and strengthen relationships between the County and our existing businesses through a partnership that demonstrates the County's commitment to fostering a positive business climate. It is the intention of this program to assure that the county's existing businesses are aware of the resources available to enhance their opportunities for success and to facilitate their expansion within the county.

Develop a Target List of Potential Visit Candidates—Using the following criteria, we will systematically call on and survey our local business and industry:

- Largest employers in the County



- Companies which could be expansion candidates
- Companies that are aware of the program and request a visit
- Company that is referred and identified as needing a call or having difficulties
- Major employer (50 or more employees) that has had a change of management

The steps we will take in this effort will be as follows:

- **Pre-Visit Research**—A preliminary web-based review and examination of existing files for targeted local companies will be conducted to ensure a basic understanding of the companies' activities and financial strength, both inside Union County and beyond.
- **Scheduled Visits**—The visitation plan will focus on making personal contact with key management and to collect pertinent information. It is the primary objective of the visitation effort to demonstrate that the County values the health of our existing businesses and is interested in their opinions of this community. The visit is also designed to assure that the UCPP is their ally and a resource for solving problems. It will be the objective of the program to call on companies a minimum of once a year. It is expected that follow-up visits and referrals to other community resources will be frequent.
- **BR&E Survey**—The survey is designed to provide a systematic method of interviewing local companies during the visit. The survey will contain specific questions designed to uncover problems, attitudes, expansion opportunities, and new business leads. However, no information of a confidential nature will be collected, and there will be no requirement for the company to participate in the survey.
- **City of Monroe Industry Appreciation Event**—It will be the intention of the Partnership to support, promote and engage in the activities of the City of Monroe's highly successful Industry Appreciation event.

A full-time staff person will be assigned to the BR&E program, and while this person will have some other new business client related duties, BR&E will their primary responsibility.

Small and Entrepreneurial Business—Most of the new business clients we see are and will be, in fact, small businesses as defined by the U.S. Small Business Administration. It will be the policy of the Partnership to make available to small and entrepreneurial businesses all the services of the organization that would be available to any other business, to encourage them, and in conjunction with the evolving programs of the Chamber of Commerce and other organizations, to conscientiously work to be a valued resource to the county's small and entrepreneurial businesses.

Public Incentives—After almost a decade of use, public incentives remain controversial and provocative. Yet, more and more it is becoming clear that, while we



can decide whether to get in the game or not, it is our competition that determines the rules. And our competition has determined that public incentives will be a component of most significant economic development projects.

The Partnership will provide counsel, as requested, to the County and to any of the municipalities within the county who have a need to address public incentives.

When appropriate the Partnership will also act as counsel to business clients who are seeking to evaluate the value of public incentives which may be available to them in Union County and North Carolina.

It will be the Partnership's policy to consider incentives an inducement, not an entitlement, and to promote public incentives to business clients only when it can be clearly demonstrated that the incentive is material to the client's decision to locate in Union County.

Retail Development—The loss or “export” of retail sales to neighboring counties represents a major economic loss to Union County. It is incumbent on the Partnership that we support efforts to reverse this trend. While there is no specific retail program outlined in this plan, it is the position of the Partnership to engage and support, to the fullest extent possible, the development of retail business in Union County, and to support our cities and towns in their efforts to encourage appropriate retail development in their communities.

The Partnership will support the Chamber's long-range efforts (currently known as “Shop Union County”) to encourage our citizens to spend their retail dollars in Union County.

Agri-Business—Up to 30 percent of Union County's current economy is directly or closely related to agriculture, and Union County has a strong agricultural heritage from which a new era of farm-related business can emerge. It is our intention to partner with the County's Agricultural Extension Office and the considerable agricultural related resources in Union County to develop a platform for recruiting targeted agricultural related companies in such industries as processed foods, agricultural implement manufacturing, chemicals and processing equipment.

It is also our intent to support the cities, towns and communities in Union County in their efforts to preserve agricultural heritage. We will do this by cooperating with the communities' efforts to plan for the preservation of certain areas of the County for agricultural uses.



DEVELOP AND MAINTAIN A COMPREHENSIVE DATABASE OF ECONOMIC RESEARCH AND STATISTICS

It is vital in the practice of economic development to have a substantial amount of accurate and current statistical data to support the contention that Union County is the “preferred choice for business development”. In Union County there is a scarcity of reliable, readily available data in a common format to support a careful business analysis of the County. The Charlotte Regional Partnership maintains some data, and the Monroe Economic Development Commission has data on Monroe. The planning and the utility departments of both the County and the City of Monroe plus the state’s Employment Security Commission also have substantial community data, however, little of the information available in Union County today is formatted for economic development purposes. It is proposed in this plan that the Partnership resolve this shortcoming by developing and maintaining a thorough database of economic research and reports to include:

Site and Building Database
Information Guide
Workforce Resources
Federal/State Loans
Financing Resources

Transportation Maps
General Demographics
Education Guide
Venture Capital

Utility Maps
Workforce Skills Profile
Incentive Guide
New/Expanded Business

WEB SITE

In today’s business world, a functional and effective web site is absolutely crucial. Increasingly prospects make their first contact with a county by visiting its economic development website. It will be the Partnership’s responsibility to establish and maintain a comprehensive, current, accurate and “user friendly” web site. Creating the web site will be a major priority of this organization.

While creating a web site is now a relatively simple matter, one that can sustain usefulness for a wide range of users is a more challenging assignment. This component of the Program of Work is a substantial undertaking for our organization. It is expected that creation of the web site will be outsourced to experienced professionals, and that the daily maintenance and content changes will be a primary responsibility of the new Director of Research.



DEVELOP AND MAINTAIN AN EFFECTIVE MARKETING AND COMMUNICATIONS PROGRAM

Marketing to New Business—If there is a single function among all those discussed in this Plan that is paramount to the future economic development of Union County, it is Marketing and Communications. No activity of the organization will contribute more to the purpose of the Partnership than this one.

Throughout the Charlotte Region and perhaps beyond, Union County suffers from an undeserved reputation as a community of the past. In the minds of many, the textile and agricultural heritage of the past lingers as a key indicator for what Union County is today. This, of course, could not be further from the facts. Over the last two decades Union County has expanded and diversified its economy in many ways. This diversification has been most evident by how moderately the most recent economic downturn affected the county. The rest of the world, however, does not know the truth about Union County, and it will be the goal of the Partnership to change those perceptions.

We propose to create a new “brand” for Union County and market this new identity throughout the region, the state, and the nation. A key component to this process will be our continued support and involvement with the Charlotte Regional Partnership and the N.C. Department of Commerce.

In *Appendix A* is the Marketing and Communications program designed to begin in first quarter 2005 and continue in varying forms throughout the organization’s existence.

Develop and Maintain a Comprehensive Public Communications Program—As a public/ private partnership, it is incumbent on the Board and the staff to provide continuing communications regarding the activities of the organization. While it is widely recognized that the client-handling component of the organization must be conducted largely in confidence, it will be the objective of the organization to periodically report to stakeholders and the public on its activities.

Stakeholders of the Partnership include: The Board, utilities and other allies, service providers, the local business community, the media, business clients, all funding sources, and the general public.

By the end of the first quarter 2005, we will have developed and begun implementation of a comprehensive communications program designed to fulfill this requirement. The program will consider elements such as:

- Regular and systematic reports to the Board of Directors such as business client activity, financial reports, and other issues requiring accountability
- Special report sessions for selected business sectors (i.e. banks, realtors, Chamber members, etc.)
- Internet email newsletter



- Special postal mailings
- Special media briefings
- Professionally prepared and widely circulated annual report
- Regular public speaking schedule
- Active participation in selected organizations such as Rotary, United Way etc.
- Development of an Advisory Board of those in the county responsible for the delivery of services to business clients. This Board would include those responsible for building permits, building inspections, electric and other utility services, planning and zoning, job searching, workforce training, etc.
- Consideration of an Annual Economic Outlook Conference.

The Charlotte Regional Partnership and the NC Department of Commerce—We will continue to be active members of the CRP. Mr. Shalati will continue to serve on the Board of Directors and Mr. Ewing will continue to serve as an active member of the Economic Developers Advisory Committee (EDAC). All of the marketing activities initiated by the Union County Partnership for Progress will be crafted and executed in conjunction with the CRP and the NC Department of Commerce.

Marketing Plan details for 2005-2006 can be found in Appendix "A".



DEVELOP A STRATEGY FOR INCREASING THE INVENTORY OF AVAILABLE SITES AND BUILDINGS AND OTHER INFRASTRUCTURE

Sites and Buildings—It is widely believed that the reason Union County has been passed over for many business development opportunities is largely due to the lack of sites properly served by utilities. It is also widely believed that the lack of suitable existing buildings has also hurt Union County’s business development efforts.

These widespread beliefs were confirmed by The Fluor Corporation’s 8th District Comprehensive Economic Development Study, which was released on November 19, 2002, which stated:

“Union County has a number of available buildings, however, several of these facilities are highly specialized and a number are former textile plants with low ceiling heights or other constraints that make them extremely difficult to convert to other production processes”.

“Of the sites available, only a few sites have the necessary infrastructure (water, gas, electricity, telecom, sewer/wastewater treatment capabilities) for attracting immediate projects to Union County. Union County is in desperate need of more product (both prepared sites and available/multi-use buildings)”.

To secure the resolution of this issue, it is proposed that the UCPP begin the process of determining the feasibility of creating a county-owned, multi-use business park with speculative buildings that would appeal to a broad range of industrial and office clients. This project would be governed by a committee appointed by the Partnership Board and could potentially involve the employment of real estate professionals performing in a consulting capacity.

If it is deemed feasible to pursue such a project, the proposed study would also examine the methodology of forming a joint public/private partnership to develop and implement a plan for the project.

In addition to this project, it is crucial that the Partnership develop and maintain a reliable site and building inventory of current properties which includes: maps containing utility locations, topography, roads, floodway identification, aerial photographs, interior and exterior photographs of buildings, and a thorough up-to-date profile. This resource is needed in order to accommodate immediate inquiries. This will be a primary assignment for a new Director of Research.

NOTE: Should it be deemed feasible for Union County to undertake the development of a business park, it will be imperative that the availability of public infrastructure to the site be readily available. It is the nature of locating business and industry today that business clients typically cannot wait for the infrastructure to be installed if it is not



already in place. The success of any venture on behalf of the County is contingent on the presence of public utilities to the site.

Highways, Roads and Streets—While there is little the Partnership can do to affect the construction of highways in the county, it is understood that transportation access is the most important factor governing the location of a project. It will be the Partnership's position to support the efforts of the MPO or any community in the County which is attempting to improve the competitive position within the County through the improvement of the road network in Union County. It is also the Partnership's responsibility to sponsor additions to the Transportation Improvement Plan when it is deemed appropriate.

We will also be responsible for sponsoring a client's request for NCDOT Rail or Industrial Access Grants as needed.

Water and sewer extensions—While Union County's water supply and distribution systems seem sufficient at the current time, the lack of a major natural raw water supply will impact the location of major water users to Union County. It is incumbent on the Partnership to maintain thorough familiarity with the water service in the county and to support the extension of water service to areas that might be desirable for business locations.

Sewer availability is another matter. The rapid growth of Union County's population has stretched the wastewater treatment capacity of both the County and the City of Monroe. It is crucial that the wastewater treatment capacity throughout Union County be expanded for the benefit of the business recruiting efforts. To those ends, the Partnership will support all efforts to resolve wastewater treatment issues throughout the county and support the expeditious expansion of the wastewater treatment capabilities in the county.

Workforce Development—We will share information collected through our BR&E program with the proper service providers, and support their efforts to expand the workforce development needs of Union County employers and economic development clients.

The UCPP will also maintain a directory of workforce development providers and workforce development funding sources.



DEVELOP SECURE LONG-TERM FUNDING FOR THE PROGRAM

This Program of Work will not happen without proper funding. It will be the Board of Directors' responsibility to develop a funding formula and methodology that will provide the necessary funds to support these efforts.

As our name implies, the Union County Partnership for Progress will develop a funding plan for this program consistent with the concept of a public/private funding partnership. That plan will be put in place in the fall of 2004 and will be realized in early 2005 so that the Strategic Plan and Program of Work can be implemented during 2005 and 2006.

Related objectives include:

Secure IRS Not-For-Profit Status—An effort to secure 501-C-3 status for the Partnership is underway. It is hoped that this effort can be resolved by year end 2004 so that fundraising can begin in anticipation of that designation being secured.

Develop a long-range funding strategy—Under the guidance of the Partnership's Board of Directors, a long-range funding strategy will be developed by year end 2004 for implementation in first quarter 2005.



APPENDIX A

Marketing Plan 2005-2006

During the 2003-2004 fiscal year, the Board of Directors of Union County Partnership for Progress agreed that several marketing initiatives should be considered as a way to better position Union County to attract new business and retain existing business. This is a departure from the more passive marketing approaches of the past.

Working With Allies

The North Carolina Department of Commerce, local and regional utility providers, local and regional real estate brokers, local and regional real estate developers along with the Charlotte Regional Partnership are our primary allies in the marketing of Union County to new businesses. A proposed Business Retention and Expansion program is the primary marketing activity directed to expanding local businesses.

Utilizing the resources of our primary allies and supplementing these activities from our own marketing budget, the following activities are presented as the marketing strategy for the coming two years.

It is important to understand that some of these allied-sponsored activities are restricted to a certain number of participants, and it is unlikely that we can participate in every event. It is our intention to campaign actively for inclusion in all of the events approved by the Partnership's Board, with the intention of participating in as many as possible.

When we partner with the Charlotte Regional Partnership (CRP) on international or domestic missions, we are typically responsible only for the cost of hotels. Under the present travel policy, the CRP covers airfare, ground transportation, meals, and the cost of any events associated with the mission. When we partner with the State of North Carolina, the participants typically cover the cost of the mission. If it is a joint mission with the State and the CRP, the CRP will usually cover the participant expenses in line with its policies.

State and Regional Advertising

Through a new branding initiative, we will develop and implement a state and regionally focused marketing plan designed to improve the region's impression of Union County. It can be expected that the easiest projects to locate will be those companies who are growing and who need more cost effective space than is available to them locally, or those companies who need to serve the Charlotte market yet do not want to locate in



Mecklenburg County. Decision-makers from these companies can best be approached by a sound, effective, localized campaign which would include the following:

Charlotte Observer
PBS Station WFAE
Greater Charlotte Biz

Business Journal(s)
Business North Carolina
NC Economic Development Guide

Targeting Industry

We will investigate all recent target industry recommendations. We will utilize the Charlotte Regional Partnership's research capabilities, industry associations, CoreNet contacts, the target industry work of the NC Department of Commerce, and other resources to assure the most effective and best coordinated effort in identifying and pursuing preferred target companies. In conjunction with the CRP and the NCDOC we will directly market Union County to selected companies within targeted industries.

Domestic Client Missions

Sponsored by the CRP, these missions will be to selected geographic areas and will target specific business clients in specific industries. The UCPP Board supports participation in at least two ally-sponsored domestic business client missions, which will be consistent with the targeting efforts of the NCDOC and the Charlotte Regional Partnership.

Consultant Missions

Many domestic site search projects are conducted by firms that specialize in the site location process and are staffed by experts in the area of public incentives. Both the NCDOC and the CRP have consultant missions scheduled. It is suggested that we participate in at least two consultant missions during each year of the two years of this plan.

CoreNet Conferences

CoreNet is a global organization of corporate real estate executives from major U.S., European, and Asian firms. The organization conducts two Global Summits in the U.S. and two offshore conferences each year. The UCPP Board supports the continued participation in these Summits and our participation in the NCDOC hospitality events at the Summits when they occur. We do not expect to attend either of the international CoreNet conferences during 2005 or 2006.

Queen's Cup Steeplechase

Union County is fortunate in that it has a unique sporting event in the Queen's Cup Steeplechase. We intend to support and encourage this event and to explore the possibility of hosting a special marketing activity around this unique opportunity.



Regional Real Estate Broker/NCDOC Developers Event

A regional event saluting the real estate brokers in the Charlotte Region and the North Carolina Department of Commerce Developers will be considered. This event will be designed to present our community in a favorable light to those realtors, real state developers and State DOC personnel who can influence clients to consider locations in Union County, or who may be encouraged to make equity real estate investments in the county. This activity would likely involve one food event, a tour of the county focused on sites and buildings, and another food event with a speaker.

North Carolina Economic Developers Association

The NCEDA has several meetings each year, with major conferences in February and June. Both of these meetings provide important opportunities to interact and network. UCPP Board supports continued participation in these conferences, and participation whenever practical in other NCEDA activities in Raleigh.

NCEDA is also the professional association for the economic development practitioners in North Carolina.

PGA Tournament in Charlotte

In the spring of 2005, Charlotte will host the Wachovia-sponsored PGA Tour event. The Charlotte Regional Partnership is expected to host one or more functions for consultants and business clients in conjunction with the tournament. The extent to which we may be able to participate is yet to be decided, but the Board supports the appropriate participation in this event consistent with time and budget considerations.

US Open Golf

The North Carolina Department of Commerce is scheduled to host a golf and hospitality event for consultants and business clients in conjunction with the 2005 U.S. Open Golf Tournament in Pinehurst. The extent to which we may be able to participate is yet to be determined and may be influenced by the CRP's involvement. The UCPP Board supports the examination of marketing opportunities associated with this event and expects participation consistent with time and budget considerations.

International Client Missions

Client missions, both domestic and foreign, consist of pre-arranged calls made to specific clients who are candidates for new investment. Both the NCDOC and the



Charlotte Regional Partnership schedule missions each year. Occasionally, but not always, these projects are conducted jointly.

The Charlotte Regional Partnership and the NCDOC have experience conducting missions to Europe and Asia. The Charlotte Regional Partnership also has substantial experience and many contacts in Europe (particularly in Germany) and has been consistent in conducting these missions over the years. The UCPP Board believes that the international market is an untapped opportunity, and supports our participation in at least one International mission during the period of time covered by this plan.

Other Opportunities

The primary goal of the marketing effort is to increase client activity for both new and existing business.

It is the intention of the UCPP Board that the marketing plan for the organization be flexible and responsive to other marketing opportunities which may surface.

In keeping with our mission to provide job opportunities for the people and increase the tax base in Union County, this plan is designed to be a flexible guide for marketing the considerable economic resources here. Should a marketing opportunity not outlined above present itself, it is the intention of the UCPP Board to give it careful consideration. Participation in these opportunities will be determined in light of the mission of the organization and in consideration of sound resource management. Positioning Union County to best benefit from an ever-changing economic environment is of the highest concern for the organization.



APPENDIX B

Business Retention & Expansion Program

Program Objectives:

- Develop an enhanced working relationship with the existing industries in Union County, a partnership that demonstrates the County's commitment to fostering a positive business climate
- Build on the competitive strengths and deal with any weaknesses in the business community
- Introduce existing industries to resources that may enhance their opportunity for local success, as well as assist with any expansion needs
- Facilitate and match the industries' needs with existing programs.

Action Plan for Building a Partnership—Working partnerships will be developed with existing industries through a scheduled visitation plan. The visitation plan will include three basic elements: meeting key decision makers, conducting an industry/community survey, and leaving information in their hands. It is the goal of the visit to demonstrate that the County values the “health” of existing business, to show interest in their input, and most importantly, to communicate that the Partnership is their ally and liaison with local government.

Prior to each visit, staff will research the company to identify the NAICS (North American Industrial Classification System) code, basic functions of the company, and corporate structure. Previous expansions, reductions in employment or other changes in the Union County operation will be determined.

Visits—Briefly discuss the Union County Partnership for Progress and introduce the Retention and Expansion Program along with its objectives. Conduct the survey with them. The survey will consist of specific questions focused on determining what in Union County is acting as a catalyst for their business and what if anything may be acting as a deterrent. With this information, during or after the visit, the BR&E Manager can offer assistance, referral to a needed resource, or assistance with future expansion. Visited companies would also be given a new publication briefly explaining the UCPP, the BR&E program, and other services offered.

Following the Visit—UCPP staff will undertake whatever actions are appropriate to assist each visited business and strengthen the County's overall business climate, including involvement of other County officials and regular follow-up as needed.

Assessing the Union County Business Climate—The BR&E program will help compile useful knowledge of how our corporate citizens are functioning in Union County. We will also be able to track with more accuracy job gains and losses.

The compiled information will also be valuable in more objectively assessing the strengths and any weaknesses of the Union County economy and business climate,



which in turn can help drive continuous improvement efforts, both in serving existing companies and in attracting new ones.

By helping improve the local business climate, the BR&E program should in turn help generate an expanded industrial tax base, further diversifying the local economy, creating employment opportunities for the citizens of Union County and lessening the burdens of local government.