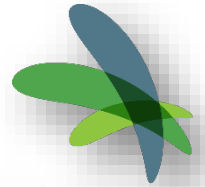


CONTACT

Wendy Brewer
Senior Manager, Proposal Development
wbrewer@tpma-inc.com
(740) 350-5880



THOMAS P. MILLER & ASSOCIATES

PROPOSAL FOR

Best Practices for Economic Development

SUBMITTED TO

Richard Gentry
City of Lee's Summit, Procurement and Contract Services
Richard.gentry@cityofls.net
816-969-1083

November 02, 2022

COVER LETTER

City of Lee's Summit
Richard Gentry
816-969-1083

Dear Richard,

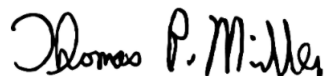
Thomas P. Miller and Associates, LLC (TPMA) is pleased to provide the attached qualifications to the City of Lee's Summit in response to the Request for Qualifications for Best Practices for Economic Development for Lee's Summit.

TPMA, headquartered in Indianapolis, Indiana, has worked across the United States on economic development, organization strategy, and strategic planning projects. Our approach places great importance on developing community understanding of a new economic reality and related opportunities that can support long-term resiliency and development. This approach allows our team to align opportunity to immediate, short-term, and long-term priorities in strategy planning.

It will be critical to examine successful organizational structure and economic development strategy as part of future planning. Analyzing which structures and agencies are the most successful and how to set up the City for economic prosperity will be vital. Brett R. Wiler has extensive experience in these regards and will guide these efforts as the Project Lead.

We are eager to partner with Lee's Summit to guide this planning process and will work with you to design a dynamic plan that supports long-term prosperity and financial feasibility. The City has grown from 91,000 to over 100,000 residents in the last 11 years and offers a strong workforce with 97% high-school graduates, and 48% of the residents holding at least a bachelor's degree. The City, with its close proximity to Kansas City, provides a strong economic basis that is led by an Economic Development Organization that has taken significant steps to support this development in the past years. Several important steps including the new vision for Downtown Lee's Summit have already been taken, and the City is moving forward. Learning from best practices from other EDO's will improve this positive narrative and make the City economically stable and well-prepared for future changes. Should you have any questions about our proposal, please contact the Senior Manager of Proposal Development, Wendy Brewer, at wbrewer@tpma-inc.com or (740) 350-5880.

Sincerely,



Thomas P. Miller
President & CEO
Thomas P. Miller & Associates, LLC



INTRODUCTION



Established in 1989, Thomas P. Miller & Associates, LLC (TPMA), provides comprehensive consulting services throughout the United States and internationally, working with nonprofit organizations, educational institutions, communities, local and state governments, and industry associations. TPMA is headquartered in downtown Indianapolis with a staff of 45 professionals, across thirteen states, who possess diverse professional experience and educational backgrounds but work collaboratively to provide our clients with holistic solutions. TPMA provides expertise in assessing markets, identifying business sector opportunities, building innovation and entrepreneurial eco-systems, and organizing social and economic resources to implement community and economic development strategies.

Our firm empowers organizations and communities through strategic partnerships and data-informed solutions that create positive, sustainable change. TPMA envisions a world that thinks strategically, works collaboratively, and acts sustainably. Working toward that vision, we have provided clients with a range of services to design, develop, evaluate, and implement effective programs.

RESEARCH & ANALYSIS CAPABILITIES // Our skilled team of researchers utilizes comprehensive data sets and provides findings in easy-to comprehend formats to inform policy and strategy. This includes workforce and labor market analyses, economic development strategy, program feasibility studies, economic impact studies, and community needs assessment.

WORK IN EMERGING COMMUNITIES // TPMA has worked in communities of all sizes from Los Angeles, California to Cumberland, Indiana. Our experience in unique locations such as Greenville, South Carolina; Moscow, Idaho; Detroit, Michigan; and Dearborn, Indiana has developed our ability to conduct research, design recommendations, and tailor strategies in communities of varying size across the United States.

COLLABORATIVE STRATEGIES // TPMA's emphasis is not just on strategic ideas, but strategic leadership and action-oriented goals – that is, helping leaders to identify data-driven opportunities and mobilize resources for implementation. We take a collaborative approach to planning, recognizing that the greatest impact is through the aligned goals of multiple stakeholders.

ACTIONABLE RECOMMENDATIONS // We customize recommendations for our economic development partners based on relevant local data and personal interactions with stakeholders and residents. We accompany our community-specific recommendations with implementation schedules detailing timelines, partners, responsible parties, and funding options to allow a seamless transition from planning to implementation.

PARTNERS IN PLANNING // TPMA approaches all projects as a partner and values increasing the organization's internal capacity and relationships through partnership, research and evaluation, stakeholder engagement, and strategic/action planning. We prioritize creating and facilitating a collaborative relationship and engage the client in the design, expectations, commitment, and results of the project.

DIVERSITY, EQUITY, AND INCLUSION // TPMA understands the importance of embedding diversity, equity, and inclusion (DEI) practices into all areas of the company and our work. Our team values participatory approaches, engaging community members and those affected most by programs to ensure their voices are being heard and measuring the impact of provided services. This is especially important for project design and planning activities as it promotes buy-in, generates understanding, ensures inclusion, and leads to more comprehensive plans as all challenges, processes, and viewpoints can be addressed.

KEY PERSONNEL

For this Project, TPMA has identified a team of consultants with a depth of knowledge and experience in strategic planning, economic development, structure analysis, program analysis, regional partnerships, and strategic growth planning. In addition to qualified Project Team members, all TPMA projects leverage the expertise of the firm's full professional staff, including experts in economic diversification, talent development, evaluation, and competitive funding. This approach ensures high quality plans that incorporate the extensive experience of the entire firm. Team member roles are as follows with full resumes on the following pages:



Brett R. Wiler

**Director of Economic Development & Community Resiliency
Project Lead**

Public Administration, M.P.A. – Gannon University
Business Administration, B.Sc. – John Carroll University

☎ 814-323-1999

✉ bwiler@tpma-inc.com

Brett is the Director of Economic Development and Community Resiliency at TPMA and will serve as Project Lead. He specializes in Business retention and expansion, strategic planning, business attraction, Opportunity Zone strategy, economic development financing strategy, entrepreneurial ecosystem building, and workforce development.

Prior to joining TPMA, Brett worked as the Director of Outreach and Investment for the Erie, PA Regional Chamber where he managed an industry recognized best-practice business outreach program. In addition, Brett was the primary architect of the nation's first municipal based Opportunity Zone Prospectus and Intermediary and went on to lead the Flagship Opportunity Zone Development Company under the umbrella of the Erie Regional Chamber. Here he was instrumental in creation of the White House Roadmap to Reinvestment, which cataloged public projects so that community leaders could work with state and federal agencies to secure funding through initiatives outlined by the White House Opportunity and Revitalization Council. His work around Opportunity Zone's was the cornerstone of Erie's signature economic development conference, Erie Homecoming, that has led to over \$100 million in investment in Erie since 2019. Brett was the lead grant writer for a Build to Scale program that was awarded funding from the EDA to design and implement an active angel investment network for Northwest PA.



Lindsay Bloos

**Senior Consultant
Project Support**

Sociology, B.A. – Franklin College

☎ 812-621-0101

✉ Lbloos@tpma-inc.com

Lindsay is a Senior Consultant on the Economic Development & Community Resiliency Team at TPMA and will support all areas of the project. Her primary focus is engaging communities and developing actionable strategies for improving economic conditions and quality of life. Prior to joining TPMA, Lindsay served as Executive Director of the Madison Area Chamber of Commerce in Madison, Indiana where she regularly worked with businesses to provide support and resources. In 2020, Lindsay organized and led the COVID-19 business response team in Madison, providing critical assistance and data. She served as an Executive Team member for the City of Madison’s Stellar Communities designation, the Visit Madison Board of Directors, Madison Main Street Program’s Economic Vitality committee, and Madison’s America’s Best Communities committee. Lindsay has been actively involved in the development and implementation of strategic visions, comprehensive economic plans, affordable housing strategies, and community engagement at local and regional levels throughout the country. She recently led engagement efforts for the ACOG Oklahoma and the CEDS Update & Recovery Strategy, where she prepared a 2021 update to the Capital Area Economic Development District (CAPEDD) of Oklahoma’s 2019 Comprehensive Economic Development Strategy (CEDS) with new priorities based on the pandemic’s impact.



Kaycee Bunch

**Senior Consultant
Project Support**

Applied Community Development, M.A. – Future Generations University
Political Science, B.A. – Western Kentucky University

☎ 270-784-3021

✉ kbunch@tpma-inc.com

Kaycee is a Senior Consultant at TPMA who specializes in community and business development using strategy and programming that foster regional growth and resiliency. She will serve as the Project Support for the development of the Countywide Strategic Plan for Luce County. As Resiliency Planner for Kentucky’s Barren River Area Development District, Kaycee co-led, designed, and implemented a ten-county strategic planning initiative to support economic development in South Central Kentucky. This initiative included deployment of an interactive digital toolkit for use across the region.

Kaycee also served as Economic Development Coordinator for the Bowling Green, KY Chamber of Commerce where she oversaw regional Business Retention & Expansion (BRE) initiatives and collaborated among local and state agencies to provide business solutions tied to economic development-based incentives. As part of this role, Kaycee facilitated engagement with industry representatives to advance multi-million-dollar expansion projects. She served as a Community Agribusiness Coordinator for Peace Corps Uganda. Furthermore, Kaycee has also led several projects with a focus on Economic Development Strategic Planning. She currently serves as the Project Manager for South Central Pennsylvania CEDS and supports the EDA Comprehensive Economic Development Strategy.

EXPERIENCE WITH SIMILAR PROJECTS

TPMA has led planning and analysis for economic development agencies across the country. This experience has given us both a deep understanding of standard economic development strategies, and intimate knowledge of tailored operational structure and execution of strategy. A sample of our work experience is provided below.

Mo-Kan Regional Council, Missouri: Opportunity Zone Development & Market Analysis, 2022

TPMA contracted with the Mo-Kan Regional Council in 2022 to develop an Opportunity Zone and Market Analysis to attract investment to the region. Brett Wiler is leading the project and will generate valuable information regarding industry trends, and investment patterns in the region. Furthermore, an investigation of the regional supply chains and future investment opportunities will generate significant regional knowledge that can be applied and used for this project. Additionally, the Market Analysis will offer information about investment strategies that can be useful for the whole region and foster economic development and investment in the long run.



City of Orem, Utah: Economic Development Strategic Plan, 2022

TPMA partnered with leadership and community stakeholders from the City of Orem, Utah. Orem is the fifth-largest municipality in the state with a population of 100,275 residents. Orem is in Utah County, 45 miles south of Salt Lake City and 6 miles north of Provo. Utah County is projected to have the largest numeric increase in population in the state, adding over one million new residents to reach 1.6 million by 2065. This dramatic



increase requires careful long-term planning to manage and guide the growth of the area and to ensure their lucrative strategic areas of retail, technology-based industry jobs and small business entrepreneurship are firmly established. As the goals and objectives of the City of Orem have evolved and changed due to time and the impact of the COVID-19 pandemic, City leadership realized the importance and necessity of reviewing and revising the Economic Development Strategic Plan. TPMA has partnered with City leadership and revised the existing plan, incorporated new strategic economic areas, and initiated plans for continued resiliency. Aaron serves as the Lead for this project. The final deliverable can be viewed [here](#).

City of Morehead/Rowan County, Kentucky Community & Economic Development Strategy, 2020 - TPMA developed the plan over a 12-month period from July 2019 through June 2020. The process included a variety of data gathering tools to provide a comprehensive understanding of existing conditions in the city and county to ensure goals align with local trends. The first part of the process involved Focus Area Assessments. These assessments were broken into five focus areas. They included data gathering and analysis, asset mapping, and a SWOT analysis. This phase also involved focus groups designed to gather qualitative information on existing conditions for each focus group. The second part of the process included a variety of community engagement techniques. An online survey was created and dispersed to all who live and/or work in the City of Morehead-Rowan County. The purpose of the survey was to gather community feedback about priorities and needs for economic and community development. The survey consisted of 24 questions relating to key topic areas. The survey gathered 541 individual responses. Final plan development involved three sessions with the Steering Committee to review and refine goals, objectives, and action items. The first session took place in person following the public meeting. The second two sessions were conducted virtually via video conference. The final plan was provided to the Steering Committee for comments and feedback before completion. The final deliverable can be found [here](#).



State Chamber of Oklahoma Research Foundation: National Best Practice Scan for Economic Development; OK2030 Data Collection & Chamber Member Survey and Analysis, Oklahoma, 2012, 2017, 2019 - TPMA has led a series of projects to support economic development strategy design in Oklahoma. In 2012, TPMA developed a best practice scan of successful and innovative economic development programs and policies across the country to provide Oklahoma policymakers with a road map for the state's aggressive economic comeback. The report identified and catalogued successful and innovative practices within four areas of economic development: Programs and Initiatives; Organizational Structure; Engagement; and Workforce and Talent. Commissioned by The State Chamber Research Foundation, Oklahoma Business Roundtable and Oklahoma Department of Commerce, the best practice scan served as a platform from which the State of Oklahoma developed successful strategies and initiatives. The final plan can be viewed [here](#).



Indiana Chamber Foundation: Workforce Strategic Alignment Study, Indiana, 2016 and 2018 - TPMA was tasked with identifying opportunities for innovation and to validate/advance successful practices in Indiana's workforce system, guided by a bi-partisan steering committee comprised of state agency leadership, the Governor's office, and other prominent stakeholders. In addition to staffing the Steering Committee, TPMA conducted independent research on Indiana's workforce system framework and network of customers. TPMA then inventoried and benchmarked other state systems against the Indiana system. TPMA created a final report, which included a set of recommendations. This report was used to inform the legislature during the 2017 session. The resulting legislation, HEA 1002, widely incorporated the recommendations made in our report. In 2018, TPMA was asked to update the study to reflect changes since the initial report, and to provide a new set of recommendations to keep efforts moving forward at the state level. Again, these



recommendations were used to inform the Governor, legislature, and various stakeholders. As in 2017, this report's recommendations were largely echoed in the two major workforce bills, SEA 50 and HEA 1008. TPMA continued to be involved, assisting one of the Workforce Cabinet's Action Committees (Career Counseling and Navigation) to carry out some of the mandates included in the legislation.

Office of the Texas Governor, Economic Development & Tourism: Study of Entrepreneurial Ecosystems in Texas, Texas, 2017-2018 - TPMA led a detailed cataloging and impact measurement of entrepreneurial and startup resources in the state of Texas. Our team updated the statewide directory and database of resource providers; identified investments tied to these resources and the businesses served; measured economic impact on the state; conducted a survey of investors, startups, and resource providers (over 3,000 respondents); held direct interviews with experts and investors; completed national benchmarking and best practices analysis; and completed an analysis of data findings. Based on this analysis, TPMA developed recommendations to better leverage and support investment in the Texas entrepreneurial ecosystem. The Texas StartUp Resources Directory can be found [here](#) and the Entrepreneurial Ecosystem Study can be found [here](#).



In 2020, TPMA worked with Texas Economic Development & Tourism Office to create a database on small business providers throughout the state. TPMA collected information on all types of public and private small business resource providers from every Texas county and compiled information into a database. This identified resources including workforce boards, incubators, accelerators, economic development organizations, small business development centers, and more. This information was used to create a statewide resource portal accessible for all Texas businesses.

Indiana Economic Development Corporation: Strategic Planning and Update, 2006 and 2018-TPMA has worked extensively with the Indiana Economic Development Corporation (IEDC) since its formation in 2005. We created the first economic development plan for Indiana in 2006 for the IEDC, which was one of the earliest state-level economic development public-private partnership entities. At the time, the state's economic growth had stalled. TPMA was hired by IEDC to prepare a fresh, innovative approach for economic development in Indiana. Known as [Accelerating Growth](#), TPMA engaged more than 600 leaders from across the state



representing diverse interests and incorporated their insights into the plan. It acknowledged the decline in traditional manufacturing and the need to focus on the innovation economy, utilizing Indiana's higher education strengths to support the commercialization of technology and creation of new businesses and job opportunities. This strategy balanced the urban and rural nature of Indiana focusing on high-tech growth opportunities as well as agribusiness and development of alternative energy processes to capitalize on the state's immense ag-related resources. In 2017-2018, the IEDC re-engaged TPMA to conduct an assessment of progress relative to the previous plan and identify key milestones and achievements and potential areas for additional investment. Recommendations included building the State's innovation capacity through higher education research and development facilities and investing additional resources into regional capacity building programs, such as the Regional Cities Initiative.

PROJECT APPROACH

TPMA understands that Lee Summit's economic development strategy and the EDO must be nationally competitive to attract capital investment, retain and grow the industry, and develop a strong, sustainable economic base that supports quality of life for all residents. Much work has been done, and the City has been ranked as one of the most livable small cities (12th place in 2021) in America for two years in a row. The city offers a strong workforce that mostly only commutes 24 miles to work, which shows that the economic opportunity remains strong in the city and the region in general as the Labor Shed Study in 2018 shows. This trend is supported through a strong EDO that enhances economic growth in the town and recognizes trends early. Therefore, it is vital for the EDO to recognize best practices for its own structure and sets a path to become even more successful in the future. This will entail several questions that need to be answered for the EDO.

TPMA is prepared to develop comprehensive profiles through research and examination of lead economic development organizations and agencies. The process will include a collection of publicly available data and further investigation of strategy and performance through analysis of historical reports, existing initiatives, and ongoing planning efforts. TPMA will work closely with Lee's Summit Leadership as we perform the following scope of work.

Task 1: Project Launch

Upon executing the contract, TPMA will facilitate a virtual project launch with Lee Summit Leadership to make introductions, discuss the scope of work, identify roles and responsibilities, and agree upon project timelines and deliverables.

TPMA values regular open communication with our clients. For this project, we propose bi-weekly update calls throughout the process. We will use this time to provide updates and discuss the next steps for the project, as well as provide an opportunity for feedback on the work being done and any adjustments that need to be made. A communication schedule will be confirmed as part of the project launch meeting.

Timeline

December 2022

Task 2: Identify the Top Economic Development Organizations

TPMA will conduct preliminary research to identify up to five Economic Development Organizations, that are serving communities or cities of similar key characteristics including those that are situated on the periphery of a major metropolitan area (and any other key factors). The team will prepare a comparative analysis of a broad economic profile that includes:

- Organizational structure
- National State Economic Output measured by GDP and GDP per capita
- Population
- Land mass

- Consumer Spending
- Major Industry Sectors
- Industry Density
- State Employment Data

TPMA will review preliminary data and organize selection with the City's leadership team to identify organizations, with special attention to long term economic success.

Timeline

January 2023

Task 3: Analysis of the Organizations' Structure

TPMA will investigate the operational structure of comparable organizations' and compile a complete report for each organization that may include the following information, where publicly available:

- Organizational Structure including staffing, departmental delineation, allocation of resources, and reporting procedures.
- Corporate or business structure of the organization (stand-alone, division of the municipal organization, division of another community group, or other)
- Operational Structure including public-private partnerships, interagency relationships, and defined responsibilities.
- Collaborative Agency Framework including responsibilities, performance metrics, and measures of accountability.
- Financial Framework – including funding models, agreements, campaigns, tax revenues, private investment, existing gaps, and volatility.
- Procedures and processes related to changes in government administration

Timeline

February 2023

Task 4: Analysis of the Organizations' Strategy

TPMA will conduct a comprehensive review of each economic development organization's strategy. This research will examine all coordinated organization efforts to support existing businesses, foster entrepreneurship, attract investment, advise partners, and sustain consistent levels of progress. Research will include a review and analysis of the following information, where available:

- Relationships with city and community partners
- Relationship with regional and state partners
- National and regional Research Strategies and Partnerships
- National and regional Referral Partnerships
- Lead Generation Strategy
- Marketplace Investment Strategies

- Workforce Investment Strategies
- Community Investment Strategies and Localized Partnership Roles
- Public Affairs and Lobbying Activity
- Investment and Venture Capital Partnerships
- Investment Incentive Programs including related policies, portfolios, grants, loans, bonds, and performance metrics
- Comprehensive Economic Development Strategy Plans

Timeline

February 2023

Task 5: Analysis of Organizations' Performance

To complement the information and data for the organizations' structure, operation, and strategy, TPMA will gather and analyze each area's economic and program performance data including:

- Job Growth over the past 5 years
- Qualified Investment Prospects over the past 5 years
- Qualified Prospect Commitment over the past 5 years
- Confirmed Relocation, Expansion or Investment Projects over the past 5 years
- Completed Relocation, Expansion or Investment Projects over the past 5 years
- Failed or Abandoned investment projects over the past 5 years including any known factors
- Program structure changes over the past 5 years
- Competitive Funding awards over the past 5 years including operational, programmatic, infrastructure, and capacity building opportunities.

Timeline

March 2023

Task 5: Final Report and Detailed Profiles

TPMA will design a final report that includes research findings and organization profiles. Profiles will include detail and a summary of all analyses. Information for each organization will be analyzed to present correlations among agency structure and key indicators of economic growth. Additionally, the final report will include a comparative analysis of these organizations to measure performance and evaluate key success factors. Finally, the Project Team will advise Lee's Summit on which structure and strategy would be most advantageous for the city. TPMA will facilitate a presentation with the Mayor, City Council, and staff during April 2023 to present a final report.

Timeline

April 2023