PATH TO REGIONAL PROSPERITY
ACTION PLAN (2023 - 2025)
WHY THIS ACTION PLAN?

At Southwest Michigan First (SMF), we see a clear path to a more prosperous future for everyone who calls our region home. The path starts with successful businesses and meaningful job creation; it leads to flourishing communities, thriving industries, improved quality of life, and enhanced prosperity and opportunity for all.

In order to advance along a more prosperous path, we know catalytic change is required and we believe the greatest force for change is a job.

This Action Plan operationalizes and builds upon the Pillars of Work established by our Board of Directors in 2021. Through a series of synergistic focus areas, strategies, and tactics, the Action Plan is designed to guide the effective delivery of our existing work while illuminating the path ahead.

You won’t find much fluff or ambiguity in the pages that follow. Instead, you’ll find a clear outline of what we intend to accomplish, along with resulting performance measures, and revised organizational structures to guide implementation.

This plan will enable our team to:

1. Operationalize, optimize, and enhance all existing Pillars of Work within four Focus Areas.
2. Accelerate and integrate Consultant Connect, our independent directorship, within a fifth focus area.

FOCUS AREAS

1. ECONOMIC DEVELOPMENT
   Retain, Expand, and Attract Businesses

2. WORKFORCE DEVELOPMENT
   Enhance, Prepare, and Align our Workforce

3. COMMUNITY DEVELOPMENT
   Advocate For, Enhance and Promote Vibrant Communities and Business Environments

4. OPERATIONS
   Maintain Organizational and Operational Excellence

5. CONSULTANT CONNECT
   Provide Innovative Consulting Services to Economic Development Organizations
STRATEGIC SHIFTS, MILESTONES, AND ADVANCEMENTS

Through this Action Plan, we’ll make the following strategic shifts:

- Reposition SMF as a Community and Economic Development Organization
- Unite Regional Partners Around Shared Goals and Strategies
- Enhance and Align Regional Workforce Development Efforts
- Integrate Diversity, Equity, and Inclusion within all Focus Areas
- Position SMF as the Regional Convener of Catalyst Projects and Big Ideas
- Revise Organizational Structure to Drive Results through Internal Focus Areas and Divisions
### LEADERSHIP

Across the United States, you’ll find many examples of regions that have risen or fallen based on the caliber of their leadership. At Southwest Michigan First, we’re blessed with exceptional leadership and generous support from many of the region’s most influential business, academic, and nonprofit leaders.

**Aaron Zeigler**  
Zeigler Automotive Group, President  
Southwest Michigan First, Chair

**Jonas Peterson**  
Southwest Michigan First  
CEO

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**BOARD OF DIRECTORS**

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<tr>
<td>Danielle Mason Anderson*</td>
<td>Miller Canfield, Principal</td>
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<td>Dan Bartholomae</td>
<td>Western Michigan University, Director of Athletics</td>
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<td>Brian Bellware</td>
<td>Gibson Insurance, Principal</td>
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<td>Greg Dobson</td>
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<td>Jack Endres</td>
<td>Mann + Hummel, VP of Operations Automotive Filtration, NA</td>
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<td>Jim Escamilla</td>
<td>Byrne &amp; Associates, President &amp; CEO</td>
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<td>Jim Felch</td>
<td>ELITE Companies, President &amp; CEO</td>
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<td>Bjorn Green*</td>
<td>TowerPinkster, President &amp; CEO</td>
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<tr>
<td>Bill Huizenga</td>
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<td>Aimee Jachym</td>
<td>Miller Johnson, Member</td>
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<td>Dan Jaqua*</td>
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<td>AmeriFirst Mortgage Banking Group, CEO &amp; Co-Founder</td>
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<td>Michael A. Jones, Sr.</td>
<td>Goodwill Industries of Southwestern Michigan, President &amp; CEO</td>
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<td>Ian Kennedy</td>
<td>Kalsec, VP &amp; General Counsel</td>
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<td>John Kerr</td>
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<td>Scott LeBeau</td>
<td>Graphic Packaging, VP of Recycled Mills</td>
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<td>James Liggins Jr.</td>
<td>Warner Norcross + Judd LLP, Senior Counsel</td>
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<td>Rich MacDonald</td>
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<td>Bill Manns*</td>
<td>Bronson Healthcare Group, President &amp; CEO</td>
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<td>Dave Maurer</td>
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<td>Todd McDonald</td>
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<td>Russ McFee</td>
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<td>Kenneth V. Miller</td>
<td>Millennium Restaurant Group, CEO</td>
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<td>Matt Molitor</td>
<td>Western Diversified Plastics &amp; Mol-Son, Vice President</td>
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<td>Edward Montgomery</td>
<td>Western Michigan University, President</td>
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<td>Kevin Murphy</td>
<td>Miniature Custom Manufacturing, President</td>
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<td>Ben Nobis</td>
<td>Nobis Agri Science, Vice President</td>
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<td>TG Nulty</td>
<td>Nulty Insurance, President</td>
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<tr>
<td>Jeffrey O’Brien</td>
<td>Workforce Strategies Inc., President &amp; CEO</td>
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<tr>
<td>Greg O’Niel</td>
<td>O’Niel, LLC, Founder</td>
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<tr>
<td>Mark Olson</td>
<td>Athletic Mentors, Founder</td>
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<td>Northwood Group, Chair &amp; CEO</td>
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<tr>
<td>Shawn Premer</td>
<td>Consumers Credit Union, CHRO</td>
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<td>Kelly Presta*</td>
<td>Sturgis Molded Products, COO &amp; Executive VP</td>
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<td>Mike Rozewicz</td>
<td>Re:Build TEKNA, General Manager</td>
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<td>Greg Salisbury</td>
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<td>Fred Schubkegel</td>
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<td>Tyler Sheerer</td>
<td>Armstrong International, CFO</td>
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<td>Robb Smalldon</td>
<td>Landscape Forms, President</td>
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<td>Paula Termuhlen</td>
<td>WMU Homer Stryker M.D. School of Medicine, CEO &amp; Dean</td>
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<tr>
<td>Becky Thompson</td>
<td>Pfizer Global Supply, Sr. Manager of Strategic Product Planning</td>
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<tr>
<td>Nancy Turtle</td>
<td>Mercantile Bank, Community Bank President</td>
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<td>Natalie Valentine</td>
<td>Peregrine Company, President</td>
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<td>Michelle VanTorrer-Werme</td>
<td>Blue Cross Blue Shield of Michigan, Regional Sales Director</td>
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<td>Thomas J. Webb*</td>
<td>Energy Consultants LLC, Chair</td>
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<td>Mark Welch</td>
<td>Flowserve, VP/General Manager, North America Seals &amp; Systems</td>
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<td>Sean P. Welsh*</td>
<td>PNC Financial Services Group, Regional President</td>
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<td>Perry Wolfe</td>
<td>Greenleaf Trust, Senior VP, Executive Director of Development</td>
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<tr>
<td>Aaron Zeigler*</td>
<td>Zeigler Automotive Group, President</td>
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*Denotes individuals on the Executive Committee.*
We envision Southwest Michigan as one of the most economically prosperous regions in the United States.

We pursue our mission by collaboratively advancing regional strategies and catalytic initiatives in the following areas:

**MISSION**

Our mission is to increase economic prosperity for all in Southwest Michigan.

We pursue our mission by collaboratively advancing regional strategies and catalytic initiatives in the following areas:

**ECONOMIC DEVELOPMENT**
Retaining, Expanding, and Attracting Businesses

**WORKFORCE DEVELOPMENT**
Enhancing, Preparing, and Aligning our Workforce

**COMMUNITY DEVELOPMENT**
Advocating For, Enhancing, and Promoting Vibrant Business Environments and Communities

**VISION**

We envision Southwest Michigan as one of the most economically prosperous regions in Michigan and the United States.

**GUIDING MOTTO**

The greatest force for change is a job.
As Southwest Michigan’s regional economic development organization, we are committed to fulfilling our mission to increase economic prosperity for all in our communities through inclusive and equitable actions that support businesses, entrepreneurs, and residents of all races, ethnicities, ages, sexual orientations, gender identifications, beliefs, disabilities, and backgrounds. When we feel free to be ourselves, we all thrive.

We will support these ongoing efforts by actively working to:

- Increase wealth creation opportunities for Black, Indigenous, and people of color (BIPOC) and other historically underserved communities through our programming and community engagement.
- Integrate diversity, equity, inclusion, and belonging within all areas of the Southwest Michigan First organization and its’ work.
- Provide equitable access to economic growth opportunities for all who live and work in Southwest Michigan.
- Strengthen and support partner organizations who share similar commitments.

Our work will continue to evolve as we listen, learn, measure, and collaborate with our regional communities to increase economic prosperity for all.
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EXECUTIVE SUMMARY

**FOCUS AREA 1: ECONOMIC DEVELOPMENT**
**IMPERATIVE:** Retain, Expand, and Attract Businesses

1. RETAIN, SUPPORT, AND EXPAND EXISTING BUSINESSES
2. IDENTIFY AND ATTRACT NEW COMPANIES, JOBS, AND INVESTMENT
3. PROVIDE MARKET INTELLIGENCE TO KEY STAKEHOLDERS
4. SUPPORT AND GROW SMALL BUSINESSES AND ENTREPRENEURS (SMF Chamber)
5. STRENGTHEN AND LEVERAGE SITE SELECTOR RELATIONSHIPS
6. ENGAGE COMMUNITY AND BUSINESS LEADERS IN THE ECONOMIC DEVELOPMENT PROCESS

**FOCUS AREA 2: WORKFORCE DEVELOPMENT**
**IMPERATIVE:** Enhance, Prepare, and Align our Workforce

1. ALIGN EDUCATION AND TRAINING PARTNERS WITH INDUSTRY NEEDS
2. INSPIRE AND EQUIP LOCAL LEADERS
3. NEW: RELAUNCH AND ENHANCE INTERNSHIP MATCHMAKING PROGRAM
4. NEW: ATTRACT NEW TALENT
5. CONNECT EMPLOYERS AND EMPLOYEES

**FOCUS AREA 3: COMMUNITY DEVELOPMENT**
**IMPERATIVE:** Advocate For, Enhance and Promote our Communities and Business Environment

1. ADVANCE PRO-BUSINESS POLICY AT ALL LEVELS OF GOVERNMENT
2. PROMOTE SOUTHWEST MICHIGAN AS AN IDEAL LOCATION TO LIVE, WORK, AND ENGAGE
3. LEAD, ORGANIZE, AND ADVOCATE FOR KALAMAZOO EVENT CENTER
4. INITIATE INNOVATIVE MARKETING TACTICS
5. SUPPORT AND CATALYZE INDUSTRIAL SITE DEVELOPMENT
6. NEW: IDENTIFY AND TRACK COMMUNITY AND ECONOMIC VITALITY
7. HOST COMMUNITY BUILDING AND NETWORKING EVENTS
8. STRATEGICALLY PROMOTE SMF’S ROLE, ACCOMPLISHMENTS, AND IMPACT

**FOCUS AREA 4: OPERATIONS**
**IMPERATIVE:** Maintain Organizational and Operational Excellence

1. SECURE ADEQUATE FUNDING TO DELIVER RESULTS – RESPONSIBLY STEWARD FUNDS
2. ATTRACT, DEVELOP, AND RETAIN AN EXTRAORDINARY TEAM OF PEOPLE
3. INTEGRATE DIVERSITY, EQUITY, AND INCLUSION WITHIN ALL FOCUS AREAS
4. OPERATE EFFECTIVELY AND EFFICIENTLY
5. PLAN AND EXECUTE IMPACTFUL EVENTS

**FOCUS AREA 5: CONSULTANT CONNECT** (Taxable Non-profit, Independent Directorship)
**IMPERATIVE:** Provide Innovative Consulting Services to Economic Development Organizations

1. PROVIDE SITE SELECTOR ENGAGEMENT SERVICES TO ECONOMIC DEVELOPMENT ORGANIZATIONS
2. HOST ENGAGING AND RELEVANT EVENTS
3. PROVIDE FEE FOR SERVICE CONSULTING SERVICES
4. DELIVER AWARDS AND RECOGNITION FOR ECONOMIC DEVELOPMENT LEADERS
5. NEW: DIVERSIFY AND EXPLORE NEW REVENUE STREAMS
STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND THREATS (SWOT)

During 2021, the Southwest Michigan First Board of Directors identified high level economic and social headwinds impacting our region. Subsequently, those initial observations have been added to, refined, and reorganized based on Board guidance, stakeholder surveys, and feedback from community outreach meetings in 2022. Together, these findings are organized as strengths, weaknesses, opportunities, and threats below:

### ORGANIZATIONAL SWOT

**Helpful to Achieving the Objective**

<table>
<thead>
<tr>
<th>Internal in Origin</th>
<th>Helpful to Achieving the Objective</th>
<th>Harmful to Achieving the Objective</th>
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<tr>
<td><strong>STRENGTHS</strong></td>
<td>• Team</td>
<td>• Major Investor Variability</td>
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<td></td>
<td>• Culture</td>
<td>• Incomplete Strategic Plan</td>
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<td></td>
<td>• Mission</td>
<td>• 1-Year Investor Commitments</td>
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<td></td>
<td>• Adaptability + Creativity</td>
<td>• Broad Scope of Work</td>
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<td></td>
<td>• Office + Event Space</td>
<td>• Limited Regional Collaboration</td>
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<td></td>
<td>• Site Selector Relationships</td>
<td>• Limited Integration of Operational Systems</td>
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<td></td>
<td>• Private Sector Funding</td>
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<td><strong>OPPORTUNITIES</strong></td>
<td>• Federal Funding Programs</td>
<td>• Revenue Variability</td>
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<td></td>
<td>• Consultant Connect Growth</td>
<td>• Rapid Inflation</td>
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<td>• SMF Chamber Brand Growth</td>
<td>• Economic Uncertainty</td>
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<td></td>
<td>• Returning/Renewed Partnerships</td>
<td>• Changing Philanthropic Giving</td>
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<td><strong>WEAKNESSES</strong></td>
<td></td>
<td>• External Organizational Perception</td>
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### REGIONAL SWOT

**Helpful to Achieving the Objective**

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<td><strong>STRENGTHS</strong></td>
<td>• Overall Value Proposition</td>
<td>• Limited Labor Force Availability</td>
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<td></td>
<td>• Health Science + Pharmaceutical Industry Cluster</td>
<td>• Limited Industrial Buildings &amp; Sites</td>
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<td>• Medical Device Industry Cluster</td>
<td>• Limited Residential Development</td>
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<td>• Advanced Manufacturing Industry Cluster</td>
<td>• Limited Regional Alignment</td>
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<td>• Design, Research + Development Industry Cluster</td>
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<td>• Agriculture + Food Processing Industry Cluster</td>
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<td>• Logistics Industry Cluster</td>
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<td>• Automotive Industry Cluster</td>
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<td>• Philanthropy</td>
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<td>• Quality of Life Amenities</td>
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<td>• Affordability</td>
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<td><strong>OPPORTUNITIES</strong></td>
<td>• Regionalism</td>
<td>• Population Decline</td>
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<td>• ARPA Funding Availability</td>
<td>• Population Aging</td>
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<td>• Event Center</td>
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<td>• Training and Education Capacity and Alignment</td>
<td>• Global Economic Uncertainty</td>
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<td><strong>WEAKNESSES</strong></td>
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<td>• Inflation</td>
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<td><strong>THREATS</strong></td>
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<td>• Higher Education Enrollment Decline</td>
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See Appendix 5 for supporting information.
FOCUS AREA 1: ECONOMIC DEVELOPMENT

**IMPERATIVE:** Retain, Expand, and Attract Businesses

**WHY?** Helping businesses create jobs and invest in our region is the foundation of our organization. We believe successful businesses will positively impact almost every aspect of community well-being and vitality.

**DIVISION LEADS:**

- Business Development + Market Intelligence
- SMF Chamber | Small Business + Entrepreneurship

STRATEGIES & TACTICS (listed in order of priority)

1. **RETAIL, SUPPORT, AND EXPAND EXISTING BUSINESSES**

1.1 Implement regional company visitation/consultation and assistance plan
1.2 NEW: Identify and report strengths and weaknesses of regional operating environment
1.3 Provide employers with access to resources and concierge support services
1.4 Identify supplier expansion and/or relocation opportunities
1.5 NEW: Ensure minority-owned businesses are served by targeting them for existing industry visits, also connecting them to statewide and local resources.
1.6 NEW: Host Advanced Manufacturing Consortium
   1.6.1 Lead Regional Supplier Summit
   1.6.2 Host Sustainability Collaborative

2. **IDENTIFY AND ATTRACT NEW COMPANIES, JOBS, AND INVESTMENT**

2.1 NEW: Implement regional business attraction program
2.2 Identify and pursue supplier expansion and/or relocation opportunities
2.3 Actively pursue corporate relocation opportunities, with a focus on the following industry clusters:
   - Advanced Manufacturing
   - Health Sciences and Pharmaceuticals
   - Medical Devices
   - Design, Research and Development
   - Agriculture and Food Processing
   - Automotive
   - Logistics

3. **PROVIDE MARKET INTELLIGENCE TO KEY STAKEHOLDERS**

3.1 NEW: Enhance market analysis and reporting capabilities
   3.1.1 NEW: Publish Major Development Map
   3.1.2 NEW: Publish Business Resource Guide
3.2 NEW: Strengthen and formalize research partnership with W.E. Upjohn Institute for Employment Research
   3.2.1 NEW: Explore Consensus Forecast partnership
3.3 Identify, analyze, and forecast industry trends, opportunities, and threats
3.4 Integrate market research into community marketing programs
4 SUPPORT AND GROW SMALL BUSINESSES AND ENTREPRENEURS

4.1 Implement Business First Education Series
4.2 NEW: Implement First Path Program for entrepreneurship training
4.3 NEW: Implement Supplier Diversity Initiative
4.4 NEW: Provide awards and recognition for small and retail businesses
4.5 Provide ribbon cutting services
4.6 NEW: Grow Southwest Michigan First Chamber brand awareness and capacity
   4.6.1 Grow investors and membership
   4.6.2 NEW: Align Chamber brand with all small business, entrepreneurship, and retail assistance programs and services
   4.6.3 NEW: Update Chamber membership benefits
   4.6.4 NEW: Update Chamber webpages
4.7 Host business networking and educational events
   4.7.1 Host business community townhalls
   4.7.2 Host Black & Brown Mixers
   4.7.3 Host Business Breakfast Roundtable Series

5 STRENGTHEN AND LEVERAGE SITE SELECTOR RELATIONSHIPS

5.1 Implement site selector outreach, communication, and engagement strategy to attract new business opportunities

6 ENGAGE COMMUNITY AND BUSINESS LEADERS IN THE ECONOMIC DEVELOPMENT PROCESS

6.1 Organize, engage, and lead Regional Economic Development Partners
6.2 NEW: Launch State of Economic Development Event

2023 MILESTONES / ADVANCEMENTS

Launch State of Economic Development Event  Assist in the Creation of 800 New Jobs  Elevate Chamber Brand  Enhance Market Intelligence

NOTES
FOCUS AREA 2: WORKFORCE DEVELOPMENT

IMPERATIVE: Enhance, Prepare, and Align our Workforce

WHY? The presence of a skilled and abundant workforce is the single most important ingredient of successful economic development. In order to grow our economy, we must guide, support, and lead innovative and robust workforce development strategies.

DIVISION LEADS:
- Workforce Development

STRATEGIES & TACTICS (listed in order of priority)

1 ALIGN EDUCATION AND TRAINING PARTNERS WITH INDUSTRY NEEDS

1.1 NEW: Publish Workforce Blueprint for Southwest Michigan
   1.1.1 Forecast occupation/skill set needs
   1.1.2 Identify training and education gaps and/or surpluses
   1.1.3 Identify top in-demand occupations and career paths
   1.1.4 Create workforce and talent strategy
   1.1.5 Establish Workforce Report Card to track progress
   1.1.6 Educate and inform employers and regional stakeholders about critical workforce and talent issues

2 INSPIRE AND EQUIP LOCAL LEADERS

2.1 Provide thought-provoking, inspirational content through Catalyst University
   2.1.1 NEW: Explore, identify, and implement revised event structure to improve financial performance
2.2 Provide leadership training through Leadership Kalamazoo and First 50
2.3 Provide fee-for-service leadership training
   2.3.1 NEW: Update, publish, and promote standard training offerings

3 NEW: RELAUNCH AND ENHANCE INTERNSHIP MATCHMAKING PROGRAM

3.1 NEW: Review, align, and maximize internship promotion through matchmaking portal
3.2 Collaborate with and promote Monroe-Brown internship opportunities
3.3 Pursue recognized internship matchmaking partnerships with higher education partners

4 NEW: ATTRACT NEW TALENT

4.1 NEW: Support Quality of Life and Talent Attraction campaign
4.2 NEW: Partner with Back to Michigan Statewide Talent Attraction efforts
4.3 Partner with local colleges and universities to leverage alumni networks for returning talent initiatives
5 CONNECT EMPLOYERS AND EMPLOYEES

5.1 Advance MIX/Design and sustainability collaboratives
5.2 NEW: Explore workforce development partnership with Michigan Works!

2023 MILESTONES / ADVANCEMENTS

- Align Education and Training Partners with Industry Needs
- Relaunch and Enhance Internship Matchmaking Services
- Increase Fee for Service Training

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FOCUS AREA 3: COMMUNITY DEVELOPMENT

IMPERATIVE: Advocate For, Enhance and Promote our Communities and Business Environment

WHY? Place is important to people and companies. We need culturally strong, vibrant neighborhoods and business environments where everyone can share in greater prosperity. We also need to aggressively promote our region and elevate our business brand nationally.

DIVISION LEADS:
- Public Policy + Strategic Initiatives
- Marketing + Communications

STRATEGIES & TACTICS (listed in order of priority)

1 ADVANCE PRO-BUSINESS POLICY AT ALL LEVELS OF GOVERNMENT

1.1 NEW: Publish Public Policy Guiding Principles for:
   - Advanced Economic Development Programs + Services
   - Enhanced Education + Workforce
   - Competitive Tax + Regulatory Environments
   - Efficient and Reliable Infrastructure
   - Vibrant Communities and Housing

1.2 Leverage Economic Development Leaders for Michigan to advance pro-business policy
1.3 Leverage Business Leaders for Michigan to advance pro-business policy
1.4 Pursue partnership with West Michigan Policy Forum
1.5 Provide economic development training with elected/appointed leaders
1.6 NEW: Increase connectivity with elected officials at all levels

2 PROMOTE SOUTHWEST MICHIGAN AS AN IDEAL LOCATION TO LIVE, WORK, AND ENGAGE

2.1 NEW: Create and begin implementation of Quality of Life + Talent Attraction campaign
2.2 Create and share content highlighting the region on social media channels
2.3 Deliver First & 42 e-newsletter weekly

3 LEAD, ORGANIZE, AND ADVOCATE FOR KALAMAZOO EVENT CENTER

3.1 Commission and publish feasibility study
3.2 Create and publish operating structure
3.3 Create and publish concept design
3.4 Organize financing structure

4 INITIATE INNOVATIVE MARKETING TACTICS

4.1 Evaluate and adopt best practices
4.2 Streamline marketing and communications activities for consistent messaging and tracking
4.3 Increase engagement through new video content
5  SUPPORT AND CATALYZE INDUSTRIAL SITE DEVELOPMENT

5.1 Identify available and high-priority sites
5.2 Identify development obstacles and opportunities

6  NEW: IDENTIFY AND TRACK COMMUNITY AND ECONOMIC VITALITY

6.1 NEW: Publish Community Dashboard
6.2 NEW: Update Peer Regions

7  HOST COMMUNITY BUILDING AND NETWORKING EVENTS

7.1 Host First & Foremost
7.2 Host Policy Engagement Events

8  STRATEGICALLY PROMOTE SMF’S ROLE, ACCOMPLISHMENTS, AND IMPACT

8.1 Highlight assisted businesses through social media
8.2 Create and share team profiles

2023 MILESTONES / ADVANCEMENTS

Quality of Life + Talent Attraction Campaign → Publish Public Policy Guiding Principles → Publish Community Dashboard → Publish Community Survey

NOTES
FOCUS AREA 4: OPERATIONS

**IMPERATIVE:** Maintain Organizational and Operational Excellence

**WHY?** Our plan is only as strong as the team and resources we have to execute it. In order to deliver the results we all want to see, we need to maintain a talented, equipped, and engaged team.

**DIVISION LEADS:**
- Operations
- Investor Engagement

**STRATEGIES & TACTICS** (listed in order of priority)

1. **SECURE ADEQUATE FUNDING TO DELIVER RESULTS; RESPONSIBLY STEWARD FUNDS**
   1.1 Prepare balanced and fully aligned budget to support Action Plan
      1.1.1 Reengage, stabilize, and elevate major investors
      1.1.2 If necessary, explore multi-year fundraising campaign
      1.1.3 If necessary, explore investor level increases
      1.1.4 If necessary, scale back program and service delivery
   1.2 Identify, secure, and manage new investors and revenue sources
      1.2.1 Identify, secure, and retain Council of 100 members
      1.2.2 Identify, secure, and retain Chamber members
      1.2.3 NEW: Manage MEDC Revitalization and Placemaking (RAP) grants
      1.2.4 NEW: Explore grant opportunities through foundations, corporate giving programs and individual donors

2. **ATTRACT, DEVELOP, AND RETAIN AN EXTRAORDINARY TEAM OF PEOPLE**
   2.1 Ensure sufficient staffing and support exists to achieve success
      2.1.1 If necessary, discontinue or pause select programs and services
   2.2 Update performance review process
   2.3 Establish year-end performance incentives tied to organizational goals
   2.4 Foster a culture of continuous benchmarking, learning, adaptation, and improvement

3. **INTEGRATE DIVERSITY, EQUITY, AND INCLUSION WITHIN ALL FOCUS AREAS**
   3.1 Identify and adopt best practice processes
   3.2 Foster a fully inclusive organization, which celebrates diversity of all types and strives for individual along with shared accomplishment

4. **OPERATE EFFECTIVELY AND EFFICIENTLY**
   4.1 NEW: Refresh organizational structure to improve efficiency and alignment
      4.1.1 NEW: Empower Division Leaders to drive performance
   4.2 NEW: Adopt web-based payment processing
   4.3 NEW: Adjust CRM to meet team needs and enhance reporting
5 PLAN AND EXECUTE IMPACTFUL EVENTS

5.1 Provide logistics and support services for SMF and partner-led events
5.2 Maximize Catalyst Center impact and revenue

2023 MILESTONES / ADVANCEMENTS

Secure Adequate Funding to Achieve Results  Host 300+ Events  Receive Clean Audit  Integration of DEI in All Focus Areas

NOTES
FOCUS AREA 5: CONSULTANT CONNECT (C2)

**IMPERATIVE:** Provide Innovative Consulting Services to Economic Development Organizations

**WHY?** Through Consultant Connect, we’re able to generate revenue for SMF, support key staff, build site selector relationships, and gather valuable market intelligence. Along the way, we’re supporting and equipping economic development leaders across the United States.

**DIVISION LEADS:**
- Consultant Connect

### CONSULTANT CONNECT SWOT

<table>
<thead>
<tr>
<th>Helpful to Achieving the Objective</th>
<th>Harmful to Achieving the Objective</th>
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<tbody>
<tr>
<td><strong>STRENGTHS</strong></td>
<td><strong>WEAKNESSES</strong></td>
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<tr>
<td>• C2 Team</td>
<td>• Declining Growth Opportunities for Hosting</td>
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<tr>
<td>• Client + Site Consultant Relations</td>
<td>• Site Selector Events</td>
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<tr>
<td>• Existing Events</td>
<td>• Limited Scope of C2 Brand</td>
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<tr>
<td>• Existing Services</td>
<td>• Limited Recurring Membership Revenue</td>
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<tr>
<td>• Top 50 Economic Developer Awards</td>
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<tr>
<th><strong>OPPORTUNITIES</strong></th>
<th><strong>THREATS</strong></th>
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<tr>
<td>• Continued Growth of C2 Model</td>
<td>• Increased Competition</td>
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<tr>
<td>• Leadership Training for Economic Developers</td>
<td>• Limited Capacity to Expand Site Selector Network</td>
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<td>• Certificate Programs</td>
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<td>• Additional Awards</td>
<td>• Inflation + Market Specific Cost Variables</td>
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<tr>
<td>• ECONOMIX Growth</td>
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<td>• Online Content</td>
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<td>• International Opportunities</td>
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<td>• State Partnerships</td>
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<td>• Economic Development Association Partnerships</td>
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**STRATEGIES & TACTICS** (listed in order of priority)

1. **PROVIDE SITE SELECTOR ENGAGEMENT SERVICES TO ECONOMIC DEVELOPMENT ORGANIZATIONS**
   1.1 Provide fee for service Summit Series events
   1.2 Provide fee for service Destination Summit events
   1.3 Provide fee for service custom events (white label events)
   1.4 Provide fee for service regional site consultant tours
2  HOST ENGAGING AND RELEVANT EVENTS
   2.1 Host Annual ECONOMIX

3  PROVIDE FEE FOR SERVICE CONSULTING SERVICES
   3.1 Provide Clifton Strengths Assessment and other leadership trainings

4  DELIVER AWARDS AND RECOGNITION FOR ECONOMIC DEVELOPMENT LEADERS
   4.1 NEW: Expand Recognition for Economic Development Organizations
   4.2 Recognize and Promote Top 50 Economic Developers in North America

5  NEW: DIVERSIFY AND EXPLORE NEW REVENUE STREAMS
   5.1 NEW: Identify new service offerings that increase revenue and profit margins
   5.2 NEW: Leverage partners to deliver programs, services, and content
   5.3 NEW: Engage Top 50 leaders in advisory role

2023 MILESTONES / ADVANCEMENTS

- Grow Total Revenue to $2.1M
- Profit Margin Goal of 5% of Revenue ($105,000)
- Launch Updated Website and Menu of Services

NOTES
CHOOSE THE PATH
THE GREATEST FORCE FOR CHANGE IS A JOB