

Date: November 26, 2001
To: Economic Development Commission
From: Alan I. Gordon, EDC Director
Subject: Economic Development Action Plan

The purpose of this correspondence is to propose an Action Plan for successfully planning and implementing economic development in Charlton. It is anticipated that this Action Plan will serve as a multi-year blueprint, as well as a Year One focus, by which economic development goals and objectives can be established and achieved to the satisfaction of the Economic Development Commission (EDC), general town government and the community.

Economic Development Background

During the past year, the EDC has focused upon establishing an effective economic development planning structure and obtaining the staff support to assist the EDC in making progress on economic development efforts. Progress to-date includes the following significant efforts:

Annual Goals-In April, 2001 the EDC established the following list of annual Commission goals to be addressed during 2001:

- Rezone Route 20 West
- Finalize Survey
- Complete a Development Permit Process Book
- Develop Promotional Brochures for Conferences and Fairs
- Increase Potential Development
- Apply for Water and Sewer Grants
- Conduct Public Education (regular articles, etc.)
- Create a Business Database

EDC members initially focused on advancing these goals via voluntary EDC member efforts, including the following:

- Business Enterprise Zone Project-In early 2001, a collaborative effort was established between the EDC, Planning Board and other interested parties to work with economic development consultant Jeanne Armstrong of Land Use, Inc. to analyze suitable town locations for potential economic development within a Business Enterprise Zone concept. This effort focuses on examining potential economic development-related re-zoning opportunities along portions of Route 20 and possibly elsewhere in Town.
- Development Permit Process Guidebook-on behalf of the EDC, former EDC member Bob Roessler has completed the development permit process guidebook prioritized by the EDC in the April, 2001 Commission goals.
- EDC Staff Support-in September, the EDC hired Town Planner Alan Gordon to also serve as EDC Director. The Board felt that combining economic development and planning resources in a centralized position will provide an increased level of technical staff support and coordination needed by the Commission.

Action Plan-Economic Development Focus Areas

The Economic Development Action Plan consists of multiple economic development projects, program efforts and work tasks within the following five (5) focus areas:

- Regional Collaborative Economic Development Efforts
- Business Enterprise Zone Planning
- Intergovernmental Economic Development Assistance
- Public-Private Economic Development Partnerships
- Community Marketing Efforts

Each focus area is addressed as follows in turn, with required work efforts detailed and action items prioritized.

I. Regional Collaborative Economic Development Efforts

Objective-Promote Charlton's economic growth by participating in the regional collaborative economic development effort coordinated by the Worcester Area Chamber of Commerce (WACC).

The Regional Economic Development Alliance was established in 2000 by the Worcester Area Chamber of Commerce (WACC) as a cooperative regional partnership among area economic development interests, both public and private, to facilitate regional economic growth. The program serves as a clearinghouse, connecting businesses seeking locations and expansion with host communities seeking to advance local economic development and employment. The Alliance also connects communities with federal and state funding opportunities to advance site-specific economic development projects.

It is recommended that the EDC participate in the alliance by prioritizing the following efforts:

- Participate In The Alliance's Regional Business Development Program-a cornerstone of the regional economic development effort, this program affiliates the WACC with over 40 local communities in Central Massachusetts through the sub-area Chambers of Commerce, and guides businesses and developers to communities to foster business growth and expansion. The EDC should contact the Tri-Community Area Chamber of Commerce serving Charlton and nearby communities, and request Tri-Community Chamber affiliation with the program on behalf of the member communities. This affiliation will allow the WACC program to provide technical assistance directly to Charlton including site searches, identification of financial resources, available grants and general project advocacy.
- Participate In The Comprehensive Economic Development Strategy (CEDS) Committee-the CEDS Committee consists of representatives of 40 Central Mass. communities who meet quarterly to address economic growth opportunities and update the U.S. Dept. of Commerce's *Economic Development Administration (EDA) Project List* for Central Massachusetts. Submittal of local projects to the CEDS Committee for inclusion on the list is a prerequisite to be eligible to receive funds under EDA programs, including Public Works Improvement Project (PWIP) grants and 302(a) planning grants.

It is recommended that the Commission direct the EDC Director to represent the Commission in the CEDS Committee process, with the intent of submitting to the CEDS Committee future site-specific economic development projects for funding consideration.

II. Business Enterprise Zone Planning Effort

Objective-To foster planned economic growth and development through site identification, zoning revisions and land assembly to create one or more Business Enterprise (BE) Zones in Charlton.

Since early 2001, both the EDC and Planning Board have been working with economic development consultant Jeanne Armstrong of Land Use, Inc. to analyze potential locations and resource opportunities for proposing one or more Business Enterprise Zones in Town. This effort should continue as a high priority EDC action item during the upcoming year. It is anticipated that Ms. Armstrong's initial feasibility analysis will be completed as Phase I of this effort by December, 2001. At that time, the EDC with the assistance of Ms. Armstrong and Mr. Gordon can initiate the next phase of the project, as follows:

- Contact property owners within potential Business Enterprise Zone locations to gauge interest and commitment to Business Enterprise (BE) Zone economic development opportunities.
- Work with regional and state economic development agencies to identify and secure available development funding assistance (infrastructure funding, design assistance, etc.) that will advance and leverage site-specific economic development within potential Business Enterprise (BE) Zone locations.
- Develop a Business Enterprise (BE) Zone by-law proposal and accompanying zoning map revision for addition to the Charlton Zoning By-Law at an upcoming Town Meeting.

III. Intergovernmental Economic Development Assistance

Objective-To identify and secure economic development funding and technical assistance from state agency sources to advance site-specific local economic growth opportunities.

Opportunities exist within several Massachusetts state agencies to secure funding and technical assistance to advance local economic development projects. The EDC needs to work directly with property owners and entrepreneurs to identify and advance site-specific economic growth opportunities. However, at the same time, the EDC needs to educate itself, the community and project proponents as to the availability of both agency funding and development assistance opportunities. As such, it is recommended that the EDC obtain as much information as possible regarding state funding and assistance sources, followed by application in conjunction with property owners/entrepreneurs for assistance from these programs.

Examples of available economic development assistance resources include the following:

- MassDevelopment-As the state's economic development finance authority, this agency offers a wide range of early-stage economic development project assistance, including Predevelopment Assistance, Brownfields Program Funding, Bond Financing, Industrial Park/Special Projects Funds and an Equipment Financing Program. Appendix B of this Action Plan includes program summary information from MassDevelopment.

The Central Mass. office staff of MassDevelopment met in October and November, 2001 with the EDC Director to review resource opportunities and is available to work with the EDC, property owners and entrepreneurs/developers in providing funding and technical assistance to advance site-specific economic development opportunities.

- Mass. Alliance For Economic Development-the MAED is a quasi-public program, the goal of which is to connect businesses seeking to expand or relocate with communities seeking to foster economic growth. The MAED keeps an up-to-date computerized inventory of available economic development sites categorized by local community, which MAED makes available to companies. At the same time, MAED forwards to communities notices of businesses seeking expansion locations.

While the Town of Charlton has received occasional information from MAED, the Town has not initiated a comprehensive effort to take advantage of MAED resources. It is recommended that the EDC through its Director formally submit a comprehensive inventory of potential economic growth sites for the MAED to promote to entrepreneurs. At the same time, the EDC should request MAED notification of all businesses and entrepreneurs that request local inventory information from MAED, from which the EDC Director can directly contact the project proponents regarding potential Charlton site availability.

IV. Public-Private Economic Development Partnerships

Objective-Foster site-specific economic growth by establishing working partnerships between the EDC and local entrepreneurs/property owners, leveraging funding and resources to advance economic development.

Other sections of this Economic Development Action Plan identify regional, state, federal and quasi-public resource opportunities that can be obtained for advancing economic growth in Charlton. However, a mandatory main priority of any local economic development planning effort must be the establishment of direct partnerships between the EDC and site-specific landowners, entrepreneurs, developers and business or corporate interests. In such partnerships, the EDC will serve as a conduit between the funding and technical resources identified in other sections of this Action Plan, and the entrepreneurs that require these resources to implement site-specific economic growth opportunities.

It is recommended that the EDC foster development of such partnerships by two means:

- Direct, one-to-one outreach by the EDC and EDC Director to known property owners and entrepreneurs of potential economic growth sites to promote awareness and offer assistance in seeking and obtaining funding and technical assistance commitment.
- Hosting by the EDC of periodic local public presentation meetings and information sessions at which entrepreneurs as well as the general public are directly informed by program representatives of the various funding and technical assistance sources of availability.

V. Community Marketing Efforts

Objective-To promote Charlton through marketing and educative outreach activities as an advantageous private sector economic site location.

The previous four focus sections of this Economic Development Action Plan prioritize site-specific efforts for achieving local economic growth. In addition, any comprehensive economic development plan must equally prioritize community marketing and outreach efforts. Such activities will build a wide awareness of Charlton as an advantageous economic growth site location, thereby generating development proposals from within the regional and state-wide business community.

Specific program and work tasks to further this marketing objective include the following:

- Budgeting and purchase by the EDC of a portable exhibition booth that can be displayed at applicable conferences and exhibits including the annual New England Business Exposition and other appropriate business trade exhibitions.
- Developing an inventory of promotional materials to market Charlton via the exhibition booth, direct mailings and distribution at appropriate meetings. Funding to assist in promotional material design, production and printing should be solicited from any grant sources potentially available from such sources as the Worcester County Visitors & Convention Bureau, Mass. Office of Tourism and the Quinebaug-Shetucket National Heritage Corridor Commission.

Conclusion

In summary, the above Action Plan provides the necessary framework for the Economic Development Commission, staff, general town government and all interested parties to work together and successfully achieve our mutual economic development planning goals and objectives. By allocating our time and resources among all five of the focus areas, the Town in coordination with various partner agencies and entrepreneurs will advance our economic development efforts. This Action Plan should be regarded as a flexible blueprint, subject to revision and updating by the EDC as economic development planning efforts progress.