



CDBG Planning Grant Program Minimal Planning Requirements

Effective date: October 31st, 2018

Plan Type: Economic Development Planning

Description

The following are the minimum technical specifications for an Economic Development Plan as part of an OCRA CDBG Planning grant. Once the initial draft is completed, a digital copy should be submitted to OCRA for review. Once OCRA has approved the draft plan, it must be submitted to and approved by the local governing body. Once approved by the local governing body, a final digital and paper copy that includes the approval by the local governing body must be submitted to OCRA in order to close-out the grant.

Minimum Planning Requirements

The plan must include or address all of the following items and relevant content:

Required Items

- Cover Page
- Table of Contents
- Executive Summary (2-4 pages)
- High-quality, colored and captioned maps, photographs, and/or drawings that illustrate the critical elements of the plan
- Concise narratives with minimal use of professional jargon
- Citation of all sources used in both the footnote and the reference page
- Plans must be in color, have page numbers, and be free from unusual formatting.

Required Contents (Plan must be organized in this order and with these headings)

A. Executive Summary

1. Purpose of the plan
2. Scope of the plan
3. Process to develop plan, including public input via hearings, surveys, etc.
4. Plan summary in 2-4 pages
5. Outline of key goals, strategies and desired outcomes

NOTE: Include page references

B. General Background

Provide a brief overview of the demographic, economic and educational profile of the target area (city/town, county, or region), including but not limited to:

1. Key population features (such as age structure, population change, educational attainment, etc.)
2. Economic base (major employers, main industrial activity, etc.)

3. Key anchor institutions in the community/county (such as public library, hospitals/clinics, community centers, museums, public schools, higher education institutions, etc.)

C. Economic Development Planning Committee (EDPC)

Provide a summary of the EDPC. This should include:

1. List of the members of the committee and the entity they represent
 - This committee should be diverse in terms of representation (such as local government, local/regional economic development organizations, business/industry, education, health, nonprofit, faith-based, as well as other appropriate organizations/agencies and demographic groups)
2. Outline of the committee's work in developing the plan including a listing of meetings, summaries of public hearing, and a discussion of how consensus was reached for the plan
3. Describe role of the EDPC which includes, but is not limited to:
 - Serving as liaison between the area, OCRA, partners, funders
 - Engaging in studying key data indicators related to economic development
 - Being actively involved in developing, with active public input, the Economic Development Plan for the targeted area

D. Existing Conditions

Describe the current state of the community with regards to economic development. Specifically, provide information on the following:

1. Current economic conditions
 - Businesses within the community
 - Local trade sector
 - Local retail, commercial, and governmental services
 - Industrial base of local economy
 - Anchor institutions and their economic impact
2. Community assets and how they impact the economic situation
 - Community capacity and infrastructure
 - Comparative advantages
 - Community values and vision trade-off assessment
 - Labor force, education and training metrics (e.g. college and career readiness stats, labor force participation rate, etc.)
3. Economic opportunities
 - Industrial clusters, supply chain factors, labor force and skills base
 - Business growth and formation potential
 - Land use constraints and opportunities

E. Economic Development Vision and Key Goals

1. Vision of the future state of the local economy. The vision must:
 - Be future focused (5 to 10 years) and take into consideration foreseeable needs of the community
 - Identify tools that can be used to attract businesses to the community

- Include ideas for encouraging innovation and entrepreneurship among local community members
2. Key goals, along with measurable strategies linked to each goal, that will help sustain economic growth
- F. Economic Development Action Plan
1. Discussion of predominant ideas, guiding principles and action steps for the following:
 - Economic diversity
 - Business development potential
 - Redevelopment and revitalization
 - Labor force, education and training
 - Regulatory processes
 - Urban growth area
 - Resource areas and critical areas
 - Compliance with comprehensive plan elements
 2. Present a specific action plan to implement the Economic Development Strategy
 - Community infrastructure
 - Business assistance
 - Business retention, expansion, formation and recruitment
 - Process and regulation
 - Communication, marketing and promotion
 - Management, monitoring and accounting
 - Financing and incentives
 - Timeframes and mechanisms for evaluation, monitoring and updating the plan
 3. Description of how current assets can be leveraged to implement the action plan

G. Action Items

The purpose of this section is to immediately begin to take action as dictated in the plan. The plan should therefore conclude with a summary of action items that will be taken upon OCRA approval of the plan. The following are recommended action items for this type of plan:

1. Communicate finalized plan to local stakeholders
2. Implement action plan described in previous section

H. Appendices

For further guidance on how to create an Economic Development Plan, see the following resources:

Rural Economic Development: Building a Sustainable Community – National Rural Economic Developers Association (NREDA)

[Integrating Economic Development Strategies into Everyday Planning](#) – Metropolitan Council



[Planning for Economic Development](#) – Municipal Research and Services Center

[Framework for Creating a Smart Growth Economic Development Strategy: A Tool for Small Cities and Towns](#) – EPA Office of Sustainable Communities Smart Growth Program

Creating a Strategic Plan for Local Economic Development: A Guide – Federation of Canadian Municipalities

[Comprehensive Economic Development Plan](#) - Northwest Indiana Regional Development Authority

Local Government Tool Box: Economic Development – Ohio State University Community Development

Effective Date

This minimum planning requirements are effective as of October 31st, 2018, and will remain in effect until amended, superseded, or rescinded.