



STANDARD OPERATING PROCEDURES

2020/2021

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INTRODUCTION

This Standard Operating Procedures (SOP) handbook was compiled to provide guidance to the Tomball Economic Development Corp. (TEDC) staff regarding the operation and management of the organization's programs and administrative processes.

With the objective of being a resource for new and existing staff for training and continuity of operations, the handbook contains clear step-by-step instructions of core routine procedures that are essential to the functioning of the organization.

While the content is comprehensive, it is not exhaustive, and it is not final. The focus is on current mission-critical, routine, and scalable processes. As such, this handbook should be considered a "living" document to be improved upon as changes and new programs are developed, and these too become core processes.

Finally, employee policies are not included in this handbook. These are fully developed separately in TEDC's Employee Policy Handbook and available to all staff.

HOW THIS HANDBOOK IS ORGANIZED

This handbook is organized in two sections:

Section 1 – Organizational Background

This covers a summary of what the TEDC is about, its current organization structure, and job descriptions.

Section 2 – Administrative and Program Processes

This section covers core routine processes related to board meetings, events, and grant applications.

SECTION 1 – ORGANIZATIONAL BACKGROUND

ABOUT TEDC

The Tomball Economic Development Corporation (TEDC) is a non-profit organization formed in 1994, after citizen approval of the 4B Economic Development Tax. The TEDC is a legal entity with the statutory authority to spend economic development sales tax dollars. Tomball's total City sales tax rate is 2¢, with 0.5¢ allocated for the reduction in property tax and 0.5¢ allocated for economic development.

The Corporation is city-chartered and governed by a seven member, City Council appointed, board of directors. Annual revenues of the Corporation have grown steadily from approximately \$800,000 in the 1994-1995 fiscal year (first full year) to \$4 million in the 2017-2018 fiscal year.

The Corporation's funds are reinvested into the Tomball community as qualifying companies receive financial assistance in the form of cash grants to defray the costs of purchasing land, buildings, equipment, and improvements for relocation or expansion in the City of Tomball. The TEDC works to bring new, quality businesses and manufacturing to Tomball while still supporting the high-tech corporate industry and family owned and operated businesses. The Corporation's ultimate goal is to create primary jobs that infuse new dollars into the local economy by creating or selling products or services that are ultimately used locally or exported to regional, statewide, national, or international markets.

MISSION STATEMENT

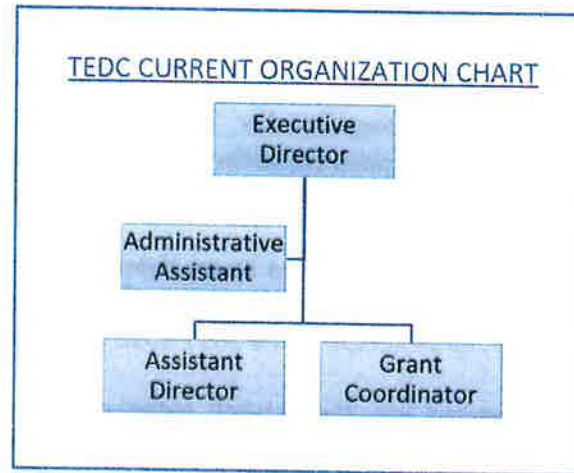
To promote economic development in the City of Tomball through the attraction of new business and industry and the retention of existing businesses by providing the resources that enable and advance the general well-being of the community.

VISION STATEMENT

Tomball is the community of choice, providing opportunities for commercial and industrial development that enable business owners and residents to benefit from Tomball's dynamic economy, strong labor force, and unmatched living and working environment.

ORGANIZATION STRUCTURE

CURRENT ORGANIZATION CHART



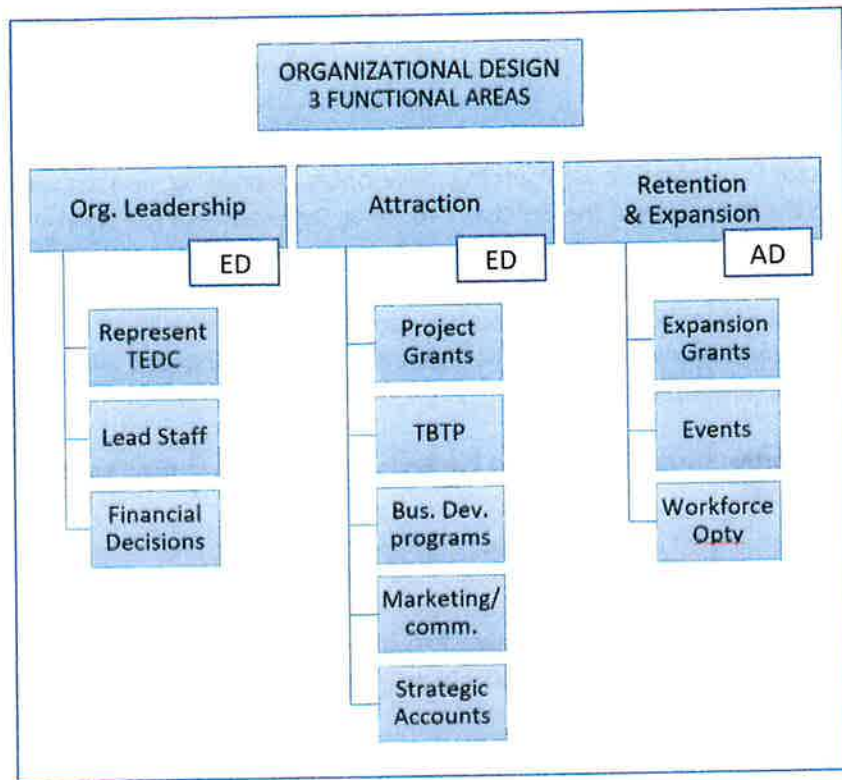
ORGANIZATIONAL DESIGN

The TEDC is organized by function in three broad areas. The first covers leadership function, i.e. stakeholder management and decision making. The second focuses on Attraction Programs, i.e. recruiting businesses to the area. The third on Retention and Expansion programs, i.e. ensuring business stay and grow in the area.

The leadership and Attraction functions are led by the Executive Director (ED), while the Retention and Expansion businesses are led by the Assistant Director (AD).

Each function oversees a group of activities that allow it to deliver its services. These activities include core and mission-critical processes that will be developed in the Standard Operating Procedures section of this handbook.

The chart below illustrates the organizational design.



JOB DESCRIPTIONS

EXECUTIVE DIRECTOR

JOB DEFINITION

The Executive Director is responsible for Planning, developing, marketing, and managing all aspects and activities related to the execution of the Tomball Economic Development Corporation's (TEDC) Strategic Work Plan. He or she must assist representatives of business, real estate, and the development community in working with the City to bring in new businesses and news jobs; develop and implement business retention and expansion programs; act as representative for the TEDC with local, county, regional, and state organizations; adhere to the legislative requirements and intended use of Type B Sales Tax for economic development.

REPORTING: The Executive Director reports to the Board of Directors of the Tomball Economic Development Corporation.

ESSENTIAL FUNCTIONS: Essential functions, as defined under the Americans with Disabilities Act, may include the following tasks, knowledge, skills, and other characteristics. This list of tasks is illustrative, it is not a comprehensive listing of all functions and tasks performed by positions in this class. Incumbents in this class may not be required to perform all duties listed and may be required to perform additional, position-specific duties.

- Negotiate program parameters that benefit the community with public agencies and external stakeholders, in accordance with federal, state, and local ordinance.
- Lead and manage the TEDC staff in a professional and collaborative manner that creates opportunities for development, and achieves high employee performance and retention.
- Develop and implement impactful strategies, grants, and incentive programs in line with community and regional economic needs and trends.
- Direct the staff and relevant external resources in the development of budgets and strategic plans.
- Drive board meetings, deciding on scheduling and agenda items to present for board approval.
- Attend and present at regional and national forums and training conferences.
- Make presentations at, and attend, TEDC and community events to enhance the visibility and effectiveness of the TEDC.
- Meet with grant applicants throughout the grant preparation process to support their successful completion.
- Review grant applications and evaluate economic impact using established methodologies and approved software.
- Lead the effort with external brokers, engineers, and all relevant parties to identify, evaluate, purchase, develop, and market real estate assets for mixed, industrial, and commercial use.
- Oversee the marketing, communication, and promotion efforts ensuring these are consistent, in line with strategic plans, and enhance the visibility and image of the TEDC.

KNOWLEDGE AND SKILLS

- Excellent multi-party negotiation skills while following federal, state, and local ordinances.
- Critical decision-making including the ability to process relevant information, committing to a definitive course of action.

- Excellent understanding of the economics of community development grants and their administration.
- Excellent communication skills for providing guidance and support to the TEDC Board, organizational leaders, employees, and citizens.
- Success at coalition building among staff and citizens to minimize perceived barriers.
- Demonstrated professional and ethical standards that promote equity in the treatment of all.
- Ability to maintain positive productive relationships with the TEDC Board, the City Council, general public, the commercial community and development interests, and to balance responses to their respective needs in the best interest of the entire community
- Experience in developing projects from initial contact, proposal submission, site visits, negotiating incentives through start-up and ongoing existing industry support.

DISTINGUISHING CHARACTERISTICS

Personal and professional integrity of the highest order, demonstrated in both the candidate's public and private life. Strong leadership and interpersonal skills, exhibited through confidence and an open management style with organizational leaders, stakeholders, and staff.

QUALIFICATIONS

- Bachelor's degree in Public or Business Administration, Urban Planning, Community Development, Economics.
- or a related field from an accredited higher education institution
- Five or more years of experience in leadership positions in the economic development field, in public economic development planning, or community development and redevelopment, or public administration involving related program development
- Valid Class C Texas motor vehicle operator's license.
- U.S. Citizen or valid work permit

ASSISTANT DIRECTOR

JOB DEFINITION

The Assistant Director is responsible for assisting the Director in planning, directing, managing and overseeing the activities and operations of the Economic Development Corporation, including business recruitment, retention, and expansion; budget and financial operations; development, implementation and oversight of a comprehensive economic development strategy; contract monitoring and compliance, workforce development programs; coordination and collaboration with community economic development partners; development of policies and guidelines; and marketing activities.

REPORTING

Immediate supervision is provided by the Executive Director of the Tomball Economic Development Corporation and in his/her absence, the President of the Board of Directors.

ESSENTIAL FUNCTIONS

Essential functions, as defined under the Americans with Disabilities Act, may include the following tasks, knowledge, skills and other characteristics. This list of tasks is illustrative, it is not a comprehensive listing of all functions and tasks performed by positions in this class. Incumbents in this

class may not be required to perform all duties listed and may be required to perform additional, position-specific duties.

- Develop and implement retention and expansion programs, incentives, and events for existing business clients, in line with the ED's directions and TEDC's strategic plans.
- Lead the project management efforts to implement grants and programs, and events, working collaboratively with external stakeholders to ensure their success.
- Lead and manage the retention and expansion grant program, supporting applicants as needed to ensure the successful completion and approval of the grants.
- Lead the execution of economic development events, ensuring adherence to time and budget limits.
- Assist in developing and recruiting economic development prospects.
- Assist in developing, planning, and implementing strategies and programs to encourage business growth, development and investment in Tomball.
- Collaborate with TEDC staff on the preparation of the board meetings.
- Represent the TEDC when the ED is not available to liaise with city council, state agencies, and other external stakeholders.
- Collaborate on the preparation of the TEDC Annual Report, Strategic Work Plan, Budget and other reports and publications.
- Prepare and implement marketing programs in collaboration with staff and external parties.
- Perform administrative tasks in collaboration with other staff ensuring their accuracy and quality. These include maintaining client and demographic databases; drafting agendas, memoranda, marketing material, and communications as needed and/or as directed by ED.
- Attend, and present at, business, community, and regional events.
- Attend staff, board, and committee meetings.

KNOWLEDGE AND SKILLS

- Excellent project management skills with attention to timing, budget, details, and a focus on deliverables and accuracy.
- Strong interpersonal skills, applied to work effectively with all internal and external stakeholders including staff, contractors, business leaders, elected officials, and members of the public.
- Knowledge of operational characteristics, services, and activities of economic development programs.
- Knowledge of public and private sector considerations in site selection.
- Excellent written and verbal communication skills, including the ability to make public presentations.
- Knowledge of principles and practices of economic and community development and redevelopment.
- Experience with marketing and promotion as related to economic development and tourism activities.
- Ability to build strong business relationships with colleagues and stakeholders.

DISTINGUISHING CHARACTERISTICS

Capable of working independently, professionally, and effectively on activities that involve a higher degree of scope, confidentiality and complexity. Highly organized and detail-oriented leader that can implement and support the decisions of the ED, while directing or collaborating as appropriate with

other staff members. Community-centric team player who champions workplace values of integrity and fairness.

QUALIFICATIONS

- Bachelor's degree with major coursework in economic development, public relations, marketing, business administration or related field.
- 5 or more years' experience in the field of economic development, with specific emphasis on business recruitment, retention, and expansion.
- 3 years of supervisory responsibility.
- Must be proficient in Microsoft Office applications and ability to quickly learn new software.
- Valid Class C Texas motor vehicle operator's license.
- U.S. Citizen or valid work permit

GRANT COORDINATOR

JOB DEFINITION

The Grant Coordinator's role main purpose is to assist in the development, planning, and implementation of a variety of economic development initiatives for the Tomball Economic Development Corporation (TEDC). Responsibilities include coordinating the preparation, planning, and organization of various grants; interacting with members of the public, grant applicants, third-party agencies, and city officials; and working collaboratively with other staff members on marketing, accounting, event planning, and administrative activities.

REPORTING: The Grant Coordinator reports to the Executive Director of the Tomball Economic Development Corporation and in his/her absence, the President of the Board of Directors.

ESSENTIAL FUNCTIONS

Essential functions, as defined under the Americans with Disabilities Act, may include the following tasks, knowledge, skills and other characteristics. This list of tasks is illustrative, it is not a comprehensive listing of all functions and tasks performed by positions in this class. Incumbents in this class may not be required to perform all duties listed and may be required to perform additional, position-specific duties.

Grants and Economic development, approx. 50%

- Work closely with TEDC's leadership to Coordinate and facilitate Economic Development program activities that achieve the City's economic development strategies
- Assists in developing programs and initiatives to attract, retain, and expand a diversified mix of businesses and public/private partnerships that enhance the City of Tomball's business atmosphere, tax base, and livability.
- Meet with local businesses and aspiring business owners to identify their needs and make referrals to grant resources, programs and services that meet those needs.
- Work closely with business candidates to coordinate the data collection, preparation, and submission of grant applications.
- Interacts with the public to inform them about development matters and concerns by phone, email, or with direct citizen contact.

- Build strong working relationships and networks with small businesses and organizations that serve the business community in Tomball.
- Coordinates with community organizations, regional agencies, businesses, and non-profit organizations as needed in the development of programs, initiatives, and events.
- Research and analyzes industry best practices and evaluates trends to support the organization's success in implementing its economic development goals.
- Attend and support TEDC events as appropriate, including setting up and cleaning up as needed.

Administrative and Accounting, approx. 30%

- Assists with the preparation of formal and technical reports, working papers, presentations, and correspondence, including board packages, annual retreat materials, and events throughout the year.
- Assist executive director in tracking, organizing, and executing real estate transactions.
- Assist in preparing annual budget and projects future costs and allocations.
- Perform daily book-keeping activities as needed and as directed by leadership team.
- Cover the front desk and incoming phone calls as needed.

Marketing, approx. 20%

- Assist in the development and maintenance of the organization's website.
- Work with outside PR and marketing resources to develop and produce communications, information pamphlets, and event promotional materials as needed.
- Work collaboratively with leadership and staff to develop and produce marketing flyers and event gifts as needed.
- Develop and manage the organization's social media presence.

KNOWLEDGE AND SKILLS

- Good project management skills with attention to timing, budget, details, and a focus on deliverables and accuracy.
- Strong interpersonal skills, applied to work effectively with all internal and external stakeholders including staff, contractors, business leaders, elected officials, and members of the public.
- Excellent written and verbal communication skills, including the ability to make public presentations, produce marketing materials, reports, memoranda and other written communications.
- Knowledge of principles and practices of economic and community development and redevelopment, with an active interest in continuously improving this knowledge and understanding new trends.
- Experience with digital marketing and promotion.
- Demonstrated integrity and professionalism needed to maintain absolute confidentiality of work-related issues, customer records and restricted City information.
- Ability to follow sometimes complex and ambiguous directions and complete them successfully, utilizing available resources.
- Ability to work independently on routine and simple tasks.

DISTINGUISHING CHARACTERISTICS

Highly organized and professional, with excellent written and oral communication skills. People oriented possessing the ability to relate to, and work effectively with, a variety of stakeholders. Has the

ability to maintain cool and stay on task during highly active multi-party events and gatherings. A Community-centric team player who champions workplace values of integrity and fairness.

QUALIFICATIONS

- Bachelor's degree in community development, business, marketing, communication, journalism, public administration or a related field.
- Ability to multitask, think critically and innovatively, network well, build partnerships, and be highly flexible are essential.
- 2 years of successful work directly related to economic development, city planning, or public administration.
- Proficiency working with Microsoft Office applications
- Working knowledge of social media.
- Valid Class C Texas motor vehicle operator's license.
- U.S. Citizen or valid work permit

ADMINISTRATIVE ASSISTANT

JOB DEFINITION

The Administrative Assistant performs a wide variety of clerical and administrative support functions for the Tomball Economic Development Corporation. He or she provides information and assistance to the public regarding TEDC programs, events, and staff availability as directed.

REPORTING

The Administrative Assistant reports to the Executive Director and supports the work of the Assistant Director and the Grants Coordinator as required or directed. When the Executive Director is absent, the Administrative Assistant reports to the Assistant Director.

ESSENTIAL FUNCTIONS

Essential functions, as defined under the Americans with Disabilities Act, may include any of the following representative duties, knowledge, and skills. Factors such as regular attendance at the job are not routinely listed in job descriptions but are an essential function. Essential duties and responsibilities may include, but are not limited to, the following:

- Performs basic clerical and administrative duties, including data entry, record keeping, basic accounting, preparing, and processing documents and maintaining files.
- Greets clients and guests by phone and in person in a professional, courteous manner; ensures that guests are provided with accurate information and/or are directed to the appropriately; receives and responds to questions and requests for information from the general public within the scope of authority;
- Coordinates and maintains schedule for TEDC staff including, but not limited to, arranging meetings, appointments, and conference calls, reserving meeting rooms, and making travel arrangements.
- Assists customers with applications, forms and other documents as instructed by TEDC leadership.
- Attends staff, board, and committee meetings as required.

- Coordinates and prepares agendas, minutes, and reports; maintains all pertinent records; and prepares correspondence, memoranda, and other essential documents.
- Updates TEDC website and social media on a regular basis.
- Compiles data for reports.
- Monitors compliance with agreements as directed.

KNOWLEDGE AND SKILLS

- Good writing skills with the ability to draft business email and other communications that are professional and with correct spelling and grammar.
- Knowledge of basic principles and procedures of record keeping.
- Ability to follow directions accurately and complete the tasks assigned independently and efficiently, asking for input only as needed to clarify instructions.
- Strong interpersonal skills applied to work effectively with all internal and external stakeholders including staff, contractors, business leaders, elected officials, and members of the public.
- Possess the adaptability and flexibility to adjust to the fluctuations in the schedules of the leadership team and effectively communicate calendar and meeting changes to all parties affected.
- Excellent organizational skills in all aspect of the work including maintaining calendars, tracking RSVP's for events, phone responses, meeting schedules, incoming phone calls, filing and tracking documents.
- Good customer service skills, including handling incoming phone calls and TEDC visitors in a friendly, courteous and professional manner.
- Demonstrated integrity and professionalism needed to maintain absolute confidentiality of work-related issues, customer records and restricted City information.
- Interest and ability to become knowledgeable about TEDC's programs and its stakeholders.
- Ability to work collaboratively with colleagues and outside stakeholders.
- Assist colleagues with preparations of events as well as during events including preparing swag bags, decorating, clean ups, managing registration tables, sending follow up communications, and other tasks as directed.

DISTINGUISHING CHARACTERISTICS

- Highly customer oriented and efficient, with good written and oral communication skills. Good people skills, possessing the ability to relate to, and work effectively with, a variety of stakeholders. Has the ability to maintain cool and stay on task in a highly dynamic environment. A Community-centric team player who champions workplace values of integrity and fairness.

QUALIFICATIONS:

- High School Diploma or GED equivalent is required
- Two years of clerical experience or equivalent combination of education and experience.
- Proficiency working with Microsoft Office applications.
- Familiarity with social media.
- Valid Class C Texas Driver's License.
- U.S. Citizen or valid work permit

SECTION 2 – STANDARD OPERATING PROCEDURES

ABBREVIATIONS THROUGHOUT THIS SECTION

AD = Assistant Director
Admin = Administrative Assistant

ED = Executive Director
GC = Grant Coordinator

BOARD OF DIRECTORS MEETINGS

INTRODUCTION

Board meetings are one of the most complex processes that the TEDC staff must undertake regularly. It is complex because of the large and diverse number of stakeholders and documents that must be aligned and brought together, within short and very specific timeframes.

While some of the processes may be concurrent and overlap we are presenting them in a linear manner for clarity.

Step 1 – Define Agenda

At least one month prior to a meeting, ED and AD define agenda items by evaluating readiness of grant applications and TEDC initiatives for inclusion.

Step 2 – Confirm Board of Directors and presenters' attendance

- At least one month prior to meeting, Admin and/or GC contact board members to confirm attendance. He or she must ensure there is a quorum at the meeting to vote and make decisions on relevant agenda items
- Admin and/or GC coordinate with presenters to ensure they come to meeting

Step 3 – Prepare Meeting Room

At least one month prior to meeting, Admin and/or GC must

- reserve the room
- contact IT to ensure Audio Visual will be ready

Step 4 – Make Grant Applications Ready For Presentation and Board of Directors Approval

- Staff works together to Prepare Data Sheets
- ED updates Project Grants worksheet
- AD and ED prepare impact Analysis and Report
- Staff works together to review financials

Step 5 – Prepare Other Agenda Items For Meeting

Admin and/or GC complete the following tasks at the latest XX days before the meeting:

- Drafts Agenda based on ED and AD input, as well as review of prior year agenda to identify recurring items for inclusion.

- Compile presentations and relevant research and analysis for inclusion in meeting packages.
- Reach out to engineer and consultant for updates relevant to agenda items, and modify these items as needed based on supervisor input.
- Upload Muni agenda items
- Draft talking points and deliver to ED.

Step 6 – Publish Meeting Related Notices

Within XX days of meeting, Admin and/or GC must

- post the agenda at City Hall and on TEDC's Website, and
- Post public notices for public hearings on projects

Step 6 – Produce and Deliver Meeting Packet

Admin and/or GC must have completed the following tasks:

- Print needed copies of all material for inclusion in board and staff binders – this includes signature pages where relevant.
- Assemble the binders
- XX days before the meeting, Email agenda packet out to board, ex-officio, and clients.

Step 7 – Manage Meeting

- XX days before the meeting Admin and/or GC ensure ED has talking points and necessary materials to lead the meeting
- Admin and/or GC Ensure snacks and beverages are available at meeting.
- ED and AD present agenda items as appropriate.
- AD records the meeting.

Step 8 – Administer Meeting Follow-up

Admin and/or GC must perform the following tasks:

- Prepare minutes and submit to ED for approval within XX days after meeting.
- Post on website once approved.
- Upload audio recording.
- Follow up with clients as needed
- Keep track of 60-day requirement for grants and client follow-up

EVENT PLANNING

INTRODUCTION

TEDC holds multiple events throughout the year, most of which are geared toward the Retention and Expansion function of the organization. Events are driven by the AD. While the range of events varies from lunches to job fairs and conferences, the process to bring them about is consistent, with the majority of the steps repeated for each event. It is expected that a new employee will learn about the variation in steps for each type of event as they gain more experience in their position.

While some of the processes may be concurrent and overlap we are presenting them in a linear manner for clarity.

Step 1 – Define the Event Topic

The AD and ED work together to define the event theme or topic as well as the agenda.

Step 2 – Define Event Structure

At least XX weeks before the event, the AD defines the event parameters and gives it shape by making the following decisions:

- Define a budget, in line with TEDC's available resources and plans
- Set event date, in coordination with decision makers of parties involved
- Identify featured Speaker (s) in line with event topic
- Identify a venue
- Select a caterer
- Select other vendors if any are involved
- Identify sponsors and partners

The Admin and or GC assist as follows:

- Decides on decorations
- Selects swag items in line with topic and sponsors
- Plans seating

Step 3 – Secure Event Components

In a team effort, the work to secure the schedule and/or reserve the different components is divided among several staff members. Arrangements must be finalized at least XX weeks before the event date.

The AD leads and executes the following activities:

- Coordinate with sponsors and partners
- Negotiate contracts and manage relationship with external parties.
- Contact and schedule the speaker (s)
- Book the venue

The Admin and/or GC is tasks with securing the remaining components

- Order catering
- Order decorations
- Obtain swag supplies – purchasing as needed and collecting it from sponsors
- Order rental supplies such as audio-visual, if relevant.

Step 4 – Prepare Event Marketing

The Admin and/or GC perform the following activities

- Work with an outsourced marketing company to design the marketing material, including flyers. Digital material must be finalized XX weeks before the event, Printed material XX weeks before event.
- Create and manage the event database to be used for email blasts

Step 5 – Promote Event

The Admin and/or GC perform the following activities:

- Post on Social Media, at least XX weeks before event with updates as appropriate.
- Design and send email blasts, at intervals starting at least XX weeks before event
- Create and send invitations, at least XX weeks before event

Step 6 – Manage Ongoing Communications With Participants

The Admin and/or GC perform the following activities:

- Manage RSVP's and update database, catering needs, and seating accordingly
- Follow up with vendors and confirm details

Step 7 – Manage Event Venue Set-Up

The Admin and/or GC perform the following activities:

- Liaise with venue manager to decide best day/time to set up
- Assemble swag and set up at venue
- Create welcome and directional signage and place at venue
- Decorate venue
- Prepare seating
- Create and print agenda and guest packets as appropriate

Step 8 – Manage Day of Event

The Admin and/or GC perform the following activities:

- Manage the reception table
- Assist with audio-visual as needed
- Clean up after event – remove decorations, left over swag, packets, etc.
- Manage vendors and assist as needed for set up and exit
- Liaise with venue manager

Step 9 – Administer Event Budget

The Admin and/or GC perform the following activities:

- Manage billing and payables
- Perform bookkeeping activities as needed

GRANTS

TEDC offers several types of economic incentives in the form of grants. These are outlined in [Appendix A, TEDC Financial Incentives document](#). While each grant type differs in their purpose and size of incentives, there is a consistent and standard process to take candidates applying for a grant from the initial conversation to approval. Where there are variations, it is expected that the new employee will learn how to navigate the differences among grants with experience.

While some of the processes may be concurrent and overlap we are presenting them in a linear manner for clarity.

Step 1 – Meet with Business for Pre-Application Meeting

After a business contacts the TEDC, the AD, ED, and/or GC meet with business principals for a pre-application meeting to determine if a project qualifies, or potentially which grant makes the most sense.

Step 2 – Support Application Submittal

TEDC staff direct the applicant to the correct application form and works to answer the business's questions as they complete the application and collect the required supporting documents.

This process can take several weeks to several months depending on the type of grant and the business's ability to provide the required information.

The Application form for each type of grant outlines all of the application requirements. As a reference several application forms are attached in Appendix B.

Step 3 – Conduct Tier 1 Review

Once the application is complete, TEDC staff reviews the application and performs a cost-benefit analysis to determine the level of assistance.

Depending on which grant is being considered, ED, AD, and/or GC meet with the client to discuss the incentive amount, make adjustment to the application if needed, and propose a date for submission to the Board for approval.

Step 3.a – Approval Decision Tier 1 Review - For certain grants, as with the FIG program, the approval is decided at the tier 1 review by a TEDC committee.

Step 3.b. – Approval Notification - For these types of grants the grantee will be notified in writing of the decision of approval or non-approval within 10 days of the decision.

Step 4 – Conduct Tier 2 Review and Approval

AD or the management team makes the decision to place the grant request on the Board of Directors meeting agenda for review and consideration. The process to prepare the grant for inclusion in these meetings is further detailed in the [Board of Directors Meetings SOP](#)

The Board of Directors conducts a review of the application during the meeting, including asking questions to the applicant, and makes a decision.

Step 5 – Follow up with Grant Recipients

TEDC staff follows up with Grant Recipients within 60 days of decision.

Step 6 – Disburse Grant Funds

Upon receipt of a grantee's letter requesting the funds, TEDC management reviews the grantee's completion of the conditions required to receive the grant. Each type of grant has different requirements. These are outlined in [Appendix A](#) and [Appendix B](#).

If conditions are met, Funds are awarded within thirty (30) days of receipt of this letter.

APPENDIX A – TEDC FINANCIAL INCENTIVES

This will be inserted in final version

APPENDIX B – APPLICATION FORMS

These will be inserted in final version.