

# Economic Development Task Force *Final Report & Recommendations*

June 2020

## Task Force Members

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## Executive Summary

Based on its deliberations, the Economic Development Task Force recommends the following steps be undertaken to bolster JMU's economic development efforts and to continue our service as an anchor institution in the Shenandoah Valley. The actions are divided across time over the next five years.

### Year 1 (2020-2021)

- Identify and publicize a single, initial point of contact (POC) for Economic Development at JMU. The POC will be responsible for connecting the various resources at JMU with those needing them, both on and off campus.
- Form an Economic Development Council (EDC) comprising stakeholders from across JMU and the local community. The Council will have both strategic and tactical responsibilities in this area and the Council Chair will regularly brief senior leadership on the work of the Council.

### Years 2-3 (2021 – 2023)

- Develop a strategic plan for Economic Development. The EDC will manage an inclusive strategic planning process to identify opportunities for JMU in the years ahead and to provide guidance on how we can be organized to best take advantage of the opportunities.

### Years 4-5 (2023-2025)

- Create and staff an Economic Development Office with primary coordination responsibilities for economic development work across campus.

The supporting details for these and other recommendations are provided in our report. We look forward to working with senior leadership as we continue to support this critical function.

## INTRODUCTION

The Economic Development Task Force (EDTF) convened in September 2019 and concluded in June 2020 with the purpose of identifying ways to better coordinate and utilize the resources of the university to help support economic growth activities and initiatives, and developing recommendations for the structure and function of “economic development” at JMU.

The EDTF identified the following preliminary outcomes:

- Make a recommendation to President Alger and Provost Coltman about how to move forward.
- Work out a structure and process.
- Create an inventory of who is doing what at JMU and identify any gaps.
- Complete an environmental scan to see what other institutions have as their economic development structure.
- Bring in guest speakers to better understand economic development. Look into others involved in local economic development and administrators from other universities.

The process of collecting input since the first convening and to-date has included:

- Regular meetings and electronic communications throughout the process.
- Reviewing materials and websites.
- Meeting with a variety of stakeholders.
- Preparing for, conducting, and analyzing interviews with local economic developers and points of contact at peer institutions.
- Completing internal summaries and comparisons; and
- Preparing the final report.

This report provides the EDTF recommendations for Year 1 (FY 21), Years 2 – 3, Years 3 – 5 and Long Term. The appendix includes the two semester summary reports that provide more detail regarding the steps the EDTF utilized to guide its work and ultimate recommendations. The EDTF consensus is that a more formalized economic development structure is necessary at JMU, including the eventual creation of an Office of Economic Development. Due to potential financial constraints of COVID-19, the EDTF recommends a phased approach over the next 5 years to better coordinate economic development activity at JMU until an Office of Economic Development can be established. Our recommendations are categorized into:

- Organization and Operation
- Strategic Planning
- Talent
- Innovation
- Place and
- IEP Designation and Assessment.

Table 1 that follows provides a summary of our suggested timeline and action items.

Table 1

JMU Economic Development Taskforce Short and Long Term Action Items								
	ORGANIZATION & OPERATION	STRATEGIC PLANNING	TALENT	INNOVATION	PLACE	ASSESSMENT & IEP DESIGNATION		
Year 1	Central Point-of-Contact	SWOT Analysis					Year 1	
	Formation of Council Across Divisions	Define Economic Development Values: What does economic development mean to JMU; define our region and JMU's role as an anchor institution.			Facilitate COVID-19 discussions with community and government.	Embrace "Talent, Innovation, and Place" Model		
Years 2-3	Formalize Reporting Structure	Identify and strengthen areas of JMU's strategic competitiveness.	Work with SVP and other local economic developers to determine gaps in workforce development that specifically match JMU expertise.	Develop framework for how Innovation-Collaboration-Creation-Entrepreneurship (ICCE) is expressed through economic development.	Become more active in economic development associations.	Outline process and participants to pursue IEP designation.	Year 2	
		Continue to define Economic Development Values.						
	Establish clear lines of communication and responsibilities.	Identify and promote unique areas of distinction and excellence.	Facilitate and actively contribute to academia/industry partnerships and committees. (ex: human capital/workforce development needs)					
		SWOT Analysis: Continue building asset map.						
Establish KPIs/measurements that align with strategic goals and identity.			Begin IEP designation process.					
Years 3-5	Establish Office of Economic Development	Define faculty rewards and incentives. Emphasize interdisciplinary team scholarship; support faculty in applying external, knowledge-based solutions; promote the role of non-STEM disciplines identifying issues and solutions.	Expand learning credentialing options	Expand tech knowledge transfer (publications, patents, prototypes) for business creation opportunities; tech licensing.	Convene of space for entrepreneurship center, innovation/maker spaces, meetings/conferences, alumni networks, and exchanges (student or faculty; internships)	Obtain IEP designation	Years 3-5	
			Support model public K-12 programs					
		Establish KPIs/measurements that align with strategic goals and identity.	Provide leadership in post-secondary education and workforce development.					Promote local business formation and investment.
			Coordinate and serve regional human capital needs.					Actively support community economic development.
				Use the institutions' procurement practices in a targeted manner to maximize regional economic impact.				
Long Term			Support music, art, and cultural programs as community assets.	Support growth of the regional innovation ecosystem.		Measure economic, social, and cultural outcomes from research and innovation/economic development activities via economic impact study.	Long Term	
					Assess the outcomes from collaborative work.			

## ORGANIZATION & OPERATION

In order for the university to effectively leverage its position in the community as a key driver of economic activity and to work more collaboratively across divisions, colleges, and offices, the task force recommends that the university establish a central point of contact for economic development. This person would not necessarily be responsible for economic development but would appropriately channel and facilitate economic development related activity to the relevant parties within the university. Additionally, the task force recommends the creation of a University Economic Development Council. The Council would be responsible for broader economic development strategic planning and would serve as the core group of individuals at JMU who contribute the most to economic development within the university. The EDTF explored the possibility of having two subgroups within the council. One subgroup would be the tactical group, which would consist of more of the practitioners and the other group would serve as strategic advisors.

### Year 1 Objectives

#### **Appoint a central point of contact within the university to serve as a navigator**

A central point of contact will provide our external community partners with a clear pathway for communicating with the university. This person should have an in-depth knowledge of how the university is structured so they are able to appropriately direct and help facilitate economic development initiatives internally and externally. It needs to be very clear to our external partners that there is one person who is the contact person for economic development at JMU.

#### **Form the University Economic Development Council**

The task force recommends the creation of a University Economic Development Council, which would be comprised of two groups: strategic and tactical. The strategic group would be focused on the bigger picture economic development efforts at JMU, while the tactical would be more of the day-to-day practitioners involved with economic development.

In addition to identifying a central point of contact for the internal and external communities to better navigate university's economic development efforts, is the recommendation to establish a formalized reporting structure for economic development. Currently, there are multiple divisions and offices that engage in different economic development related activities, which has resulted in internal and external confusion. Developing and communicating, both internally and externally, a clear reporting structure for economic development will provide much needed clarity and organizational efficiency. Additionally, clearly defining the communication channels and responsibilities of economic development will remove confusion and delineate responsibilities for economic development efforts at the university.

## Year 2 Objectives

### **Formalize economic development reporting structure**

The University Economic Development Council will lead a strategic planning effort (described in the following section) to guide JMU economic development activities. As part of this strategic planning process, the council will work with senior leadership to identify the most efficient and appropriate reporting structure for economic development at JMU.

### **Establish clear lines of communication and responsibilities**

The University Economic Development Council, as part of the strategic planning process, would also outline the responsibilities for the council. The council will improve communication by allowing a platform for individuals to be engaged with one another and update each other on their economic development projects or initiatives.

## Year 3-5 Objectives

### **Initiate formation of Office of Economic Development (?)**

In coordination with university leadership, the council, using the strategic planning process and learning from Years 1-3, will develop a structure for the formation of an Office of Economic Development.

## **STRATEGIC PLANNING**

Through discussion and sharing of responsibilities and activities, the Economic Development Task Force recognized the broad and varied array of JMU economic engagement related activities (including scholarly engagement, community support, workforce development, commerce development, small business development, entrepreneurial ecosystem support, and financial investment). It was also noted that connectivity and synergy between these activities could be leveraged for enhanced and focused impact. Further, it was recognized that limited time and resources restrict the opportunities that can or should be pursued.

## Year 1 Objectives

### **Conduct a SWOT Analysis**

JMU's Economic Development activities must be pursued from a position of strength and opportunity, while recognizing areas for improvement and maintaining an awareness of external influences. Within the upcoming year, we recommend that the proposed University Economic Development Council, perform a SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis to formalize our

understanding of current economic development engagements and functions, to identify areas of notable strengths, and to inform JMU's role as an anchor institution to the region. Outputs of the proposed SWOT analysis include the completion of a SWOT matrix and accompanying report, informed by qualitative (stakeholder surveys and interviews) and quantitative data (metrics of activity).

Baseline information has already been collected by the EDTF, including initial development of an asset map. Additional visualization of the asset relationships is required. Feedback from senior leadership, the broader campus community, external stakeholders (industry and community partners), as well as a compilation of associated metrics is also required. A baseline understanding of current activities, working relationships, and office functions (within and beyond JMU) along with the SWOT analysis will assist in developing future economic development goals from a position of strength and relevance to our region.

### **Years 2-3 Objectives**

#### **Define Economic Development at JMU**

Although the asset mapping and SWOT Analysis recommend in Year 1 will lead to an initial definition of JMU's role(s) in economic development for the region, alignment of resources and efforts towards realization will necessitate continuous evaluation and adjustment. During this time period, a critical review and refinement of the initial JMU Economic role definition is necessary.

#### **Identify and promote unique areas of distinction and excellence**

Identify and promote unique areas of distinction and excellence. In order to identify and promote areas of excellence, the council will seek input from diverse representatives, internally and externally for guidance and feedback including a representative from the Senior Leadership team, University Marketing and partner organizations (such as the Shenandoah Valley Partnership, HR Chamber of Commerce) Create a content calendar that anticipates the region's activities in economic development and consider publications already in circulation such as "Madison Magazine". Marketing expertise is already on staff in various departments and programs associated with JMU, and external PR relationships exist. Learn and share exemplar activities and best practices to various external audiences via regional, state, and national associations including VEDP and VEDA.

#### **Continue building an asset map (part of SWOT analysis)**

Continue to encourage growth and ongoing participation by including new "assets", projects, partnerships and programs to the asset map. Continue to engage the already identified assets with regular communication and networking opportunities for local and/or regional events.

Foster research and service-learning projects that encourage the interaction of JMU classes with small businesses - such as the ongoing SBDC partnership with MGT 357 (Evidence Based Decision Making). Entrepreneurs, small local retailers, larger businesses in 2<sup>nd</sup> stage growth and regional organizations (recently the Shenandoah Valley Regional Airport) benefit from this type of interaction and deliverables.

### **Establish Key Performance Indicators/measurements that align with strategic goals**

Once strategic goals are identified, key performance indicators (KPIs) will be established. KPIs are indicators that are quantifiable/measurable. These KPIs will be used to evaluate the impact of JMU's economic development efforts.

### **Years 3-5 Objectives**

#### **Foster & Enhance Faculty/Staff Involvement & Incentives**

Workforce development, scholarly innovation, industry project engagement, and community support initiatives rely on faculty and staff involvement in their implementation. Further, SCHEV guidance and recent Commonwealth legislation encourage active university participation in economic development, with emphasis on business creation and workforce development. JMU's economic development initiatives benefit from existing strengths in interdisciplinary team scholarship, applied problem solving, transfer of external knowledge-based solutions, and the integration of science, humanities, and the arts. Impactful economic engagement with our region requires involvement of faculty and staff throughout the university.

However, faculty and staff do not always recognize how public impact research and pedagogy are related to economic development. To more fully connect faculty and staff with economic development priorities, explicit incentives and rewards that align with the strategic economic development goals must be established. First, a framework for engaging faculty and staff early in project or initiative development is required (points of contact, involvement in framing the initiative and understanding what is feasible). The importance of economic development should be reflected in faculty Promotion and Tenure guidelines or annual review processes. Further, exemplar faculty and staff impact through economic engagement activities should be identified, curated, publicized, and celebrated in university communications and recognitions. To this end, we recommend an effort to identify and implement faculty and staff rewards to incentivize engagement in university economic development priorities.

Year 3 – Through conversations with deans, AUHs, faculty, and staff, identify opportunities to highlight the importance of and identify barriers to involvement in economic development efforts.



Year 4-5-Formulate and begin to implement strategies to overcome these barriers. Identify, curate, and convey exemplars of participation and impact through faculty and staff involvement in economic development.

## **TALENT**

The impact and diversity of industry in Virginia present challenges and opportunities for JMU. Preparing and sustaining a modern and adaptive workforce to meet all these critical needs require intentional innovation and deliberate collaboration from our many exceptional postsecondary institutions, industry partners, and state legislators.

### **Years 2-3 Objectives**

Work with the Shenandoah Valley Partnership and local economic developers to determine gaps in workforce development that specifically match JMU expertise

Facilitate and contribute actively to academia-industry partnerships/ committees (e.g. human capital/workforce development needs)

### **Years 3-5 Objectives**

#### **Expand learning credentialing options**

In support of the university's commitment to meeting the needs of the Commonwealth, and President Alger's Key Goals, create new curricula and certificates in Information Technology, Health Care and Education.

Potential measures of progress include, partnering with Colleges, Schools and Units to:

- Develop plans for new majors, minors and certificates (graduate and undergraduate). Develop new non-credit certificate and digital credential programs, the undergraduate certificate program in Manufacturing and operations Production Management for Merck employees and beyond.
- The Merck/BRCC partnership is advanced:
  - Hiring a Director for the Biotechnology program and
  - Placing 6-8 interns each semester with Merck. This will also include the
  - Creation of an undergraduate student Internship program for biotechnology and ISAT majors for Merck
  - Developing new Manufacturing and Operations Production Management track in the Bachelor of Individualized Studies (ADP) for Merck employees and beyond.
  - Participating in Online Virginia Network (OVN) to offer online, undergraduate courses.

#### **Support model public K12 programs**

As a former teachers' college, JMU has a long and strong foundation in K12 education throughout the region. Teachers prepared at JMU, and the students they educate within their communities, are some of the most important strategic economic drivers in Virginia. Leveraging and promoting this strength provides significant opportunity for JMU.

- Create industry partnerships that support classrooms of the future to improve both our preparation programs and K12 education throughout the Commonwealth.
- Create a doctoral education research center that supports and advances the practice of world-class K12 education programs that are inclusive, equitable, challenging and strategically contribute to a comprehensive workforce of the future.
- Support initiatives that place our top teacher candidates in underperforming school divisions and encourage/support placements in communities with underrepresented populations.

### **Provide leadership in postsecondary education and workforce development**

This is also a long-term strategic goal to inspire students towards career paths that align with workforce needs and support JMU recruiting efforts.

- Support JMU College of Education for a doctoral program in Ed Leadership
- Support engaged learning camps and activities across campus
  - Expand the K-12 STEM Center
  - Promote existing youth programs (FIRST Robotics, Furious Flower, space camp, code academy, College4Kids, Saturday Morning Physics, etc.)
- Identify gaps - expand youth programs that align workforce needs with academic programs and recruiting efforts
- Support/facilitate/coordinate workforce training (in partnership with other stakeholders) as needs arise for major employers (e.g. local/regional industry expansion necessitates training programs to meet higher-level job requirements/skills)
- Coordinate & serve regional human capital needs

### **Long term**

#### **Support music, art, and cultural programs as community assets**

We recognize that Humanities and the Arts play significant roles in creating economic opportunity and help make our community competitive and desirable places to visit, live and work.

- Work with regional Tourism Destination Marketing Organizations and the Virginia Tourism Corporation (VTC) to inventory Programs and Venues that connect with the University
- Compile customer profile data currently available from various sources including VTC to assist the promotion of University programs, Venues and other Assets as part of the destination marketing effort by the localities we serve
- Assist in efforts already established or cultivate new avenues for JMU students to become involved with music, art, and existing cultural programs for internships, summer employment and full-time long-term job opportunities
- Encourage faculty to serve on local, state and national Boards or Associations connected with various industries associated with the Arts
  - Virginia Association of Museums
  - Virginia Restaurant, Lodging and Travel Association
  - Shenandoah Valley Travel Association (nearing 100 years in existence and formed in Harrisonburg)

#### **Demonstrate the value of social science, art, and humanities in the innovation ecosystem**

- Identify characteristics of humanities happening at JMU that could evolve into pathways for students to create or be involved in our regional innovation ecosystems
- Find ways to dispel the myth that innovation only occurs in science and technology by promoting how creativity is a component of innovation
- Continue to build relationships with industry partners to leverage a team of students in cross-discipline areas of study. For example, projects that attract and combine Engineering students working with Art majors and Business students that aim to fulfil existing gaps in regional workforce needs

## INNOVATION

Innovation begins with a problem that needs to be solved and can ultimately lead to applications that are useful and relevant to society. Innovation can happen on a variety of scales from micro to macro and the support for innovation can vary. Innovation helps drive economic development by spurring existing companies to improve and new companies to form.

### Years 2-3 Objective

#### **Develop framework for how Innovation-Collaboration-Creation-Entrepreneurship (ICCE) is expressed through economic development**

JMU needs to have a clear understanding for what ICCE means on campus that is communicated to all stakeholders. Economic development through both innovation and technology transfer must be integrated in this framework and faculty and students need to have clear pointers to the individuals that work in this area.

- Establish an ICCE asset roadmap to inform students, faculty, and staff of the mechanisms to advance innovations emerging from course work, interdisciplinary collaborations, and public impact research. Identify areas of responsibility, “hand-off” and coordination expectations. (maker spaces, capstone projects, JMU X-Labs and similar courses, research office, IP and tech transfer, JMI, angel investment networks, GCFE, incubator and accelerator programs, corporate relations, proof-of-concept funding and support). Note that some of these efforts are already occurring within the ICCE Coordinating Group and Council.
- Leverage the existing ICCE Council and Coordinating Team efforts to connect innovation with economic development. Include a representative from the Economic Development Council or Office of Economic Development as a member of the ICCE Council.
- Raise awareness among faculty, staff, and students of the processes and support mechanisms to advance public impact research, innovation, and entrepreneurial concepts.
- Communicate to faculty, students, and staff on the variety of pathways for involvement as inventors, licensees, founders, or entrepreneurs (e.g., not all faculty inventors wish to pursue developments as founders, but other options for advancing the innovation exist).

JMU may also support growth in the regional innovation ecosystem by making resources available to help guide community members in their innovation efforts (e.g. connections to Peter Denbigh’s

Innovation Hub in Staunton). Innovation may happen within existing firms or may lead to the development of new firms (founded locally or transported from elsewhere).

### **Years 3-5 Objective**

#### **Expand knowledge (tech) transfer (publications, patents, prototypes) for business creation opportunities, tech licensing.**

- Provide proof-of-concept funding to develop prototypes that increase opportunities for moving innovations to the marketplace through licensing
- Incorporate customer discovery techniques in the process of innovation and creativity process to increase opportunities to meet real needs.
- Publish stories of real-world impact and results raise awareness of JMU's contributions to innovation-led economic development.

### **Long Term Objective**

#### **Support growth of the regional innovation ecosystem**

Support programs, courses, research that foster innovation-focused collaborations between students, faculty, and industry.

- Identify target areas of emphasis/need and regional business/industry interests for growth (through conversations with Economic Developers, Chambers of Commerce, GoVA emphasis areas, Commonwealth strategic priorities, positions of university strengths, etc.)
- Communicate these emphasis areas, identify opportunities of university strength (and bandwidth/resources) to connect to emerging problems, needs, and target growth areas/field to encourage development of programs, courses, research, and/or pilot projects to connect university (faculty, staff, and students) with industry and locality needs.
- Formulate and communicate a strategic approach to prioritize response to industry and locality needs, as financial and time limitations will not allow responsiveness to everything.
- Coordinate partnership development responsibilities between Corporate Relations, Professional and Continuing Education (ED elements), and the Office of Research, Scholarship, and Creative Endeavors.

## **PLACE**

Geography matters. Every place has certain advantages and challenges due to its location. Economic development needs to maximize the advantages and minimize the challenges of a particular place, and the Shenandoah Valley is no exception. We want JMU to help ensure that our area has attractive, competitive communities to draw, support and grow business to ensure that our area is a place where people want to live, create and take jobs, raise families, participate in civic life, age, and retire.

According to APLU, place is defined as the many and diverse ways in which institutions contribute to making attractive, competitive communities—places where people want to live; create and take jobs; raise their families; participate in civic life; and age and retire.

### **Year 1 Objective**

#### **Facilitate COVID-19 discussions with community and government**

In the post pandemic recovery, institutions will be vital in rebuilding the economy, especially locally. As the largest employer in the region, the task force recommends the university play a vital role in convening the local stakeholders to work together in new ways to address the COVID recovery. The university can serve as a resource to gather individuals and convene business, government, and community leaders.

### **Years 2-3 Objectives**

#### **University participation in local, state, and national economic development associations**

The task force recommends that the university become more involved in local, state, and national economic development groups and associations. Many individuals within the institution already have deep connections at these organizations. Increased participation in these organizations will allow JMU representatives to learn more about economic development best practices and connect with professionals.

- Virginia Economic Developers Association (VEDA)
- Virginia Economic Development Partnership (VEDP)
- University Economic Development Association (UEDA)
- Association of Public and Land Grant Universities (APLU)
- Virginia Chamber of Commerce
- Local/regional organizations such as Shen. Valley Partnership, Staunton Creative Community Fund, Shen. Valley Technology Council, and others

### **Years 3-5 Objectives**

#### **Expand the university's role as a convener and facilitator of meetings and conferences**

The task force recommends that the university use its position as an anchor institution to the greatest extent possible by hosting economic development meetings, conferences, and other events. Meetings and conferences would seek to educate and inform other economic development professionals of the work at JMU and heighten awareness to the internal and external community of the role JMU is playing in economic development. The university has numerous spaces for events and conferences to be held and should promote proximity of Hotel Madison and SHD. Events should also tap into the vast network of JMU alumni. Additionally, the institution should seek to place students to express an interest in economic development with available internships.

#### **Recruitment and promotion of local business formation and investment & actively support community economic development**

In the long term, the task force recommends that the university become actively involved in the recruitment and promotion of businesses in the Harrisonburg and Rockingham Metropolitan Area.

#### **Use the institution's procurement practices in a targeted manner to maximize regional economic impact**

As a driver of the local economy, the university should seek to patronize local contractors and services to the greatest extent possible, within the bounds of the allowable procurement practices.

## IEP DESIGNATION & ASSESSMENT

The IEP University designation is an excellent way to elevate the visibility of an institution's excellence in and commitment to regional economic and community development. However, a great value of the designation program lies in the process in which institutions earn the designation. Institutions engage on and-off-campus stakeholders to collectively assess strengths and areas of needed improvement in how the university knows, measures, and tells its economic engagement impact. At the heart of the IEP Universities program is promoting institutional change to maximize the impact of research, learning, and engagement on the regional economy and society.

### Years 3-5 Objective

#### **Obtain IEP Designation**

APLU and its Commission on Economic and Community Engagement (CECE) established the Innovation and Economic Prosperity (IEP) Universities Program to help higher education institutions know, measure, tell, and improve their campus enterprise supporting economic and community development. The designation recognizes institutions that have demonstrated a meaningful, sustainable, and substantial commitment to and strategy for economic and community development.

The IEP Universities program helps institutions to codify, elevate and advance their "economic engagement" enterprise which encompasses the many and varied ways universities work with their public-private partners to carry out:

- Talent and workforce development
- Innovation, entrepreneurship and technology-based economic development
- Place development through public service, outreach, extension, and community engagement

The IEP designation is based on a set of metrics described as "four simple ideas": know, measure, tell, and engage. That is, economic engagement activities are thought to have meaningful impact when universities know what they do well and what they need to improve on, when they measure their engagement levels, and when they are able to tell the story of their economic contributions. Universities are then better positioned to engage collaboratively with their campus and communities' stakeholders to promote economic prosperity.

## APPENDIX

1. Semester Summary Report for the Economic Development Task Force, December 2019
2. Semester Summary Report for the Economic Development Task Force, June 2020

# Semester Summary Report for the Economic Development Task Force

December 2019

## Task Force Members

Melissa Lubin (Dean, Professional & Continuing Education; Task Force Chair)  
Mary Lou Bourne (Director, Research and Scholarship)  
Mike Busing (Dean, College of Business)  
Allison Dugan (Shenandoah Valley Small Business Development Center)  
Keith Holland (Interim Vice Provost, Research and Scholarship)  
Josh Humphries (Government Relations)  
Bob Kolvoord (Dean, College of Integrated Science and Engineering)  
Joyce Krech (Shenandoah Valley Small Business Development Center)  
Jay Langston (Shenandoah Valley Partnership)  
Patrick McQuown (Center for Entrepreneurship)  
John Meck (Corporate Council)  
Nick Swayne (X-Labs)  
Nicky Swayne (Shenandoah Valley Technology Council)  
Nick Swartz (Associate Dean, Professional & Continuing Education)



## **Task Force Objectives**

The Economic Development Taskforce convened in September 2019 with the purpose of identifying ways to better coordinate and utilize the resources of the university to help support economic growth activities and initiatives.

## **Preliminary Task Force Outcomes as Identified by President Alger and Provost Coltman**

President Jon Alger and Provost Heather Coltman kicked off the first meeting by discussing their views of the role of economic development in higher education. They identified items they believe the taskforce should work toward. A summary of their comments follows.

### President Alger Comments

- Determining structure and coordination is critical moving forward. People often do not know where to go outside of the university, so internal and external coordination should be established.
- The various JMU offices engaged with economic development should catalogue the work they are currently doing.
- JMU should have a role in the “wider conversation” regarding economic development since the university already has a lot of economic impact in the local area. The state and other institutions are coming up with projects to develop high paying jobs through partnerships, and JMU should be part of those projects.
- Virginia Tech, University of Virginia, and the state are involved in rural Virginia, and JMU should be part of that conversation. There is a high-tech revolution and an increase in automation resulting in changes. We should consider addressing how higher education is responding to these changes.

### Provost Coltman Comments

- It is important to create an inventory of what is happening across the university; “Great work but behind a curtain.”
- We should take into consideration non-traditional students, who often have more experience than the typical undergraduate student.
- It is important to include individuals/faculty from various backgrounds, as they can bring various experiences and strengths from their own disciplines.

### Preliminary Taskforce Outcomes

- Make a recommendation to President Alger and Provost Coltman about how the Task Force would like to move forward.
- Work out a structure and process.
- Create an inventory of who is doing what at JMU and identify any gaps.
- Complete an environmental scan to see what other institutions have as their economic development structure.

- Bring in guest speakers to better understand economic development. Look into others involved in local economic development and administrators from other universities.

Prior to the conclusion of the first task force meeting, Dr. Lubin asked the Taskforce to think of 1 or 2 words that represent what economic development means to them. The word cloud below represents their responses.



### Review of Economic Development Definitions

Prior to the Oct. 10<sup>th</sup> Economic Development Task Force meeting, members defined what “economic development” meant to them. The goal of this exercise was to provide the task force with a broader framework to work with, as well as a general frame of reference for economic development. There was little divergence among the definitions, and there were several similarities (e.g. focus on jobs, the increase of prosperity and higher quality of life). The task force discussed the resources they were inspired by to create these definitions, such as University of North Carolina, University of Virginia, Virginia Tech, and others. A list of the definitions is provided in the Appendix.

### **Developing Committees**

During the October 10<sup>th</sup> meeting the task force decided to organize themselves into 3 subcommittees to include:

- Further define the role of James Madison University in economic development;
- Research how other universities structure economic development within their institutions; and
- Asset mapping to identify where the university's assets lie both internally and externally.

During the November 14<sup>th</sup> meeting, the task force split up into their respective committees to discuss and develop a plan on moving forward. Task force members convened at the end of the meeting to discuss each committee's course of action moving forward:

- *Environmental Scan Committee*  
Intend to research institutions within the Commonwealth, develop criteria within those institutions, and then compile the information and make recommendations afterward.
- *Asset Mapping Committee*  
Prior to the current meeting, Jay Langston provided a useful list of mostly external assets. Internal assets will be defined through researching and compiling information using JMU's Engagement Database.
- *Defining Role Committee*  
Would like to hear from the local economic developers in the upcoming December 12<sup>th</sup> meeting to see where the "gaps" are and then decide which gaps would be best to fill. May do a small inventory of how JMU has been participating in local communities. Would also like to also define a clear footprint.

### **Economic Developers Meeting**

The task force invited the following economic developers from throughout Shenandoah Valley to meet with them via zoom (those in italics accepted the invitation to participate).

- *Brian Shull (City of Harrisonburg)*
- *Jenna French (Shenandoah County)*
- Billy Vaughn (City of Staunton)
- *Casey Armstrong (Rockingham County)*
- *Robin Sullenberger (Highland County)*
- Sam Crickenberger (Rockbridge County)
- Shawn Hershberger (Winchester)
- Courtland Robinson (VEDP)
- Debbie Melvin (VEDP)

The following questions were asked:

1. What is your role and how do you connect with JMU?

2. What are some of the obstacles you have faced trying to navigate JMU when it comes to economic development?
3. From your perspective and experience, what is the role of JMU in economic development?
4. When it comes economic development, how can we make it easier for you to navigate the university?
5. From an economic development perspective, what advice would you give for JMU to have a more positive impact on our community?

### **Upcoming Tasks**

- Survey peer college presidents (see Appendix for preliminary questions)

## ***Economic Development Definitions***

- Specific to the economic development role of JMU in our environment: Economic development for JMU is leveraging the resources of our campus and campus community to support and promote our existing industry, provide leadership in coordinating the region’s academic and governmental resources, and provide scaffolding and support to develop our innovation and entrepreneurial human capital to create new opportunities in the region.
- Economic development consists of the set of activities that supports and grows the economic output of a particular region or area and improves the quality of life for its residents. It covers a full gamut from the support of current firms with workforce and technology to augment productivity, the growth and expansion of these firms, and attracting new firms, whether they be existing concerns from other areas or startups. ED includes supporting a robust start-up/entrepreneurial ecosystem including the network of potential funders. As a part of an entrepreneurial ecosystem, there needs to be a robust understanding of the development of intellectual property to the point of commercialization. ED also includes being a partner in regional or state initiatives and interfacing with those authorities.
- Assistance to businesses that results in the creation of jobs. This, in turn, stimulates investment in the economy. Assistance can be financial (grants, tax incentives, and other government seed funding). It can also be knowledge and guidance provided by community partners such as universities and other agencies.
- Economic development is defined as the expansion of capacities that contribute to the advancement of society through the realization of individuals’, firms’, and communities’ potential.
- The result of economic development is greater prosperity and higher quality of life, but this is realized through increases in four dimensions of capacity outcomes:
  - Community capacity: The physical, social, and environmental assets that influence the context for economic development;
  - Firm and industry capacity: The assets relevant to firms and industry, including workforce, facilities and equipment, organization, and supply chain;
  - Entrepreneurial capacity: The potential for generating new small businesses, including a risk-taking culture, networks, and access to financial capital and a skilled workforce;
  - Innovative infrastructure: The capacity to support new products, processes, and organizations, in terms of facilities, support services, and willingness to take risks.

These capacities are overlapping and mutually reinforcing. Other categorizations are certainly possible, but such categorizations are needed to measure progress. Measuring capacities permits an overview of the status of a regional economy and measures the direction of change. These categories represent broad constructs that governments could use as benchmarks for making progress toward economic development. The capacities provide a diagnosis of the prospects for future prosperity and economic well-being. They indicate where capacity is strong

or increasing and highlight where additional investigation is required to understand roadblocks, stumbling blocks, and information gaps.

- Economic development can be a foundational process involving many variables, all of which are unique to the specific community(s) involved. Economic development is ultimately the creation of jobs (and sustainable wealth) to improve the well-being of a community or region. Economic Development is best done in partnership with other organizations. By conducting research, creating and delivering programs and services, and learning new and innovative ways to consult and foster new entrepreneurs, small business, and existing industries, long-term economic prosperity can exist.
- Economic development is the process of aligning ideas, capital, and policies to enhance the economic and social well-being of a community or region.
- Economic development is not economic growth (numbers). Economic development in a community or region improves the economic well-being and quality of life of its residents. Economic development requires that qualitative improvements occur—utility of residents improve. Economic development requires collective action and balance (more jobs and income, more housing and goods, etc).

According to APLU and UEDA: “In higher education, economic development means proactive institutional engagement, with partners and stakeholders, in sustainable growth of the competitive capacities that contribute to the advancement of society through the realization of individual, firm, community, and regional-to-global economic and social potential.” This is achieved by institutions of higher education through programs, services, and activities that involve human capital/talent development, research and innovation, and stewardship of place.

- Economic Development engages public-private-partnerships through advancing talent and workforce development; innovation, high-tech initiatives and entrepreneurship; and place-based development to sustain, improve, expand and increase resiliency for our communities.

### **Draft Peer Institution Questions**

1. What is your name and title?
2. What is the name of your institution?
3. What state is your institution located?
4. Is your institution public or private?
5. What is the role of economic development at your institution?
6. Do you consider economic development to be centralized or decentralized at your institution?
7. If economic development is centralized at your institution, where is economic development housed and where does it report (president, provost, other)?
8. If you have an office/unit of economic development, what is the office/unit's mission statement?
9. How many faculty/staff are dedicated to economic development at your institution?
10. Who is the primary point of contact for economic development at your institution?
11. If economic development is decentralized at your institution, how is it structured?
12. How many students are enrolled at your institution? Full/part-time, grad/undergraduate
13. How many full and part-time faculty and staff does your institution employ?
14. Does your institution have the Carnegie Community Engagement Classification?
15. Does your institution have an APLU designation?
16. What is your university mission statement?
17. Is your institution in a metropolitan statistical area? If so, what is the MSA name and population?

# Semester Summary Report for the Economic Development Task Force

June 2020

## Task Force Members

Dr. Melissa Lubin (Professional & Continuing Education; Task Force Chair)  
Mary Lou Bourne (Research, Scholarship and Creative Endeavors)  
Dr. Mike Busing (College of Business)  
Allison Dugan (Shenandoah Valley Small Business Development Center)  
Dr. Keith Holland (Research, Scholarship and Creative Endeavors)  
Josh Humphries (Government Relations)  
Dr. Bob Kolvoord (College of Integrated Science and Engineering)  
Joyce Krech (Shenandoah Valley Small Business Development Center)  
Dr. Jay Langston (Shenandoah Valley Partnership)  
John Meck (Advancement)  
Nick Swayne (X-Labs)  
Nicky Swayne (Shenandoah Valley Technology Council)  
Dr. Nick Swartz (Professional & Continuing Education)



## **Task Force Objectives**

The Economic Development Taskforce continued their work during the spring semester with a main goal to identify ways to better coordinate and utilize the resources of the university to help support economic growth activities and initiatives. The Taskforce anticipates submitting a final report with recommendations to President Alger and Provost Coltman by the end of June 2020.

## **Environmental Scan of Peer Institutions**

One goal of the Taskforce was to identify how peer universities structure economic development within their own institutions. An environmental scan survey was developed, presented to and reviewed by President Alger and Dr. Coltman. Based on their feedback, the Taskforce decided to review as much information as they could on their own (via web searches) and directly call institutions if they needed more information. They believed this approach would capture information an online survey may not be able to reflect. Based on the university's eventual move to a Research 2 (R2) Carnegie classification, the task force identified a list of peer and aspiration institutions including R2 universities.

- Old Dominion University
- George Mason University
- Virginia Commonwealth University
- William & Mary
- Virginia Tech
- University of Virginia
- Bowling Green State University
- East Carolina University
- East Tennessee State University
- North Dakota State University
- Ohio University
- Miami of Ohio
- University of North Carolina (Charlotte)
- Western Michigan University

The questions for the Environmental Scan were inspired by APLU's IEP framework:

1. Whether economic development is centralized or decentralized within an institution, as well as other structural questions.
2. Various factual information (# of students, whether public/private, APLU designation, etc.).

## **Overview of APLU & IEP**

Bob Klein provided an overview of the Association of Public & Land-Grant Universities (APLU) and the Innovation and Economic Prosperity (IEP) Universities Program. Bob discussed:

- The mission statements of both the American Association of State Colleges

and Universities (AASCU) and APLU, pointing out that both focus on public impact.

- AASCU membership vs. APLU membership requirements and which universities are members of each. APLU Membership can be “automatic” based on classification rather than reaching a designated research threshold. JMU is a member of AASCU.
- APLU’s structure, as it works under commissions (CADE, CECE, CFERR, CIMA, CII, SMTI, CUSU). Bob also pulled up the website, [www.aplu.org](http://www.aplu.org), where there is a description of all the councils and commissions.
- APLU’s projects and initiatives (also on website). Bob also discussed initiatives relevant to the task force’s interests: Public Impact Research & Economic Development and Community Engagement.
- IEP program, which is both a designation and set of awards given by APLU and UEDA. The IEP program recognizes institutions that have demonstrated a meaningful, ongoing and substantial commitment to economic and community development, growth, and economic opportunity. Four awards are given based on the categories of Talent, Innovation, and Place.

### **Asset Mapping**

JMU’s Engagement Database was used to catalogue internal and external assets, however much of the information within the database was outdated or no longer relevant. In addition, it was acknowledged that the database is more of a historical record of which projects and programs existed rather than what currently exists. Alternatively, the task force decided to catalogue internal assets by providing information in each of their respective areas through the lens of APLU’s Talent, Innovation, and Place. The Economic Development Task Force convened on April 17, 2020 via teleconference (Zoom). Each task force member presented how their role and respective organization intersects with economic development through the lens of Talent, Place and Innovation.

*Bob Kolvoord, JMU College of Integrated Science and Engineering*

- **Talent**
  - Has programs provide talent that can be funneled into other areas
  - Helps connect people so opportunities and talent can meet
- **Place** – Concentrates on providing skills that are needed in the economy; focus on the applied STEM areas, which is where the largest demand is. Work with local partners:
  - Merck initiative
  - Amazon initiative
  - Students are part of the large technical workforce in NOVA
- **Innovation**
  - CISE was formed on the premise of innovation and have innovative programs
  - Work closely with others (like College of Business) to connect with the entrepreneurship world

*Jay Langston, Shenandoah Valley Partnership*

- **Talent** – Workforce; talent retention and talent attraction
- **Innovation** – Takes the entire local ecosystem into consideration, especially on how to integrate manufacturing within the current ecosystem
- **Place**
  - Links and connects people/community to resources
  - Markets amenities and resources within the area (esp. to the workforce)

*John Meck, JMU Corporate & Foundation Relations*

- **Talent, Innovation & Place** – John facilitates mutual beneficial partnerships by guiding people (from outside JMU) to the correct individuals and resources within JMU.

*Josh Humphries, Government Relations*

- **Talent** – Showcases talent at the university
- **Place**
  - Tries to be responsive to needs of the Commonwealth
  - There are more conversations between legislative leaders that educational institutions will be a key player within the economic recovery of the state
- **Innovation** – Involved in transition from Research Investment Board to the Virginia Innovation Partnership Authority

*Joyce Krech & Allison Dugan, Small Business Development Center*

- **Talent** – Business advising (and knowing which resources to provide)
- **Innovation** – Addressing recovery issues for businesses
- **Place** – Serve 6 counties and 5 cities

*Keith Holland, JMU Research and Scholarship*

- **Talent** – Helps faculty develop their portfolios as experts and connects them to resources to help grow their professional identity, especially through research centers (e.g. Virginia Clean Cities, IIHHS, CISR)
- **Place** – Receives a lot of community response from businesses and startups requesting resources and interactions
- **Innovation** – Keith sits on a number of boards and committees including:
  - State Council for Higher Ed and the Virginia Research Investment Committee, which have centered around fostering entrepreneurship and intellectual property transfer out of the universities
  - CIT Investment Committee; there's a transition of funding mechanisms from the Research Investment Board to the Virginia Innovation Partnership Authority

*Mary Lou Bourne, JMU Research and Scholarship & James Madison Innovations, Inc.*

- **Talent**
  - Assists entrepreneurs through Entrepreneurial training (ICAP)
  - Connects entrepreneurs to resources
  - Founding board member of Virginia is for Entrepreneurs

- **Innovation**
  - Intellectual property, moving innovations to market
  - Educates students undertaking creative work or inventions
  - Research commercialization and startup investment through James Madison Innovations
- **Place** – Supports entrepreneurial ecosystem and university initiative on recovery
  - JMU Technology Innovation & Economic Development (TI-ED)
  - Founding member and Chair of Shenandoah Valley Innovation Coalition (SVIC)
  - Maintains SVIC website for community innovation roadmap and asset inventory
  - Participated in a community Strategic Doing project to build innovation roadmap
  - Helped launch Shenandoah Valley Angel Investors and maintain website
  - Chair of GO Virginia Region 8 Entrepreneurial Ecosystem via MOU between JMU and Region 8 Council
  - Led initiative resulting in a GO Virginia Region 8 application submitted for “Startup Shenandoah Valley”

*Melissa Lubin, Professional & Continuing Education*

- **Talent** – Provides education and resources for adult learners (workforce development)
  - Graduate & Undergraduate Studies (Adult Degree Program, graduate degrees and certificates)
  - Professional Development (certificates, training, test prep)
  - Respond to business, government/nonprofit needs (Merck, Amazon, Non-profit Institute, Roanoke Higher Education Center)
- **Innovation** – As a self-supporting organization, PCE is a place to enable innovation and entrepreneurship through program incubation, piloting and program launch.
- **Place**
  - Respond to business, government, and nonprofit needs (Merck, Rural Virginia Initiative, Lifelong Learning Institute, Youth Programs)
  - Sponsored programs (SVP, SVTC, Virginia Ed Strategies, Campus Compact)
  - Melissa is appointed to boards at the local, regional, and national level. She is also active in statewide associations.

*Mike Busing, JMU College of Business*

- **Talent** – Provides and contributes to various initiatives and programs for college and K-12 students
  - Center for Economic Education; financial literacy (K-12)
  - Discovery Museum exhibit on financial literacy
  - Cyber Days; cyber literacy
  - MBA program
  - CPA Bootcamp
  - Experiential learning opportunities
- **Place** – Provides opportunities for students to serve/help the local community
  - Service learning (w/Mercy House; MLK Day of Service, etc)
  - Virginia International Trade Alliance (VITAL)

- **Innovation** – Innovative work produced from summer grants. Some of that work is associated with or impacts economic development.

*Nick Swartz, Professional & Continuing Education*

- **Talent**
  - Director of the Madison Center for Community Development, which provides a variety of assistance to public service organizations
  - Community-Based Graduate Assistantship Program, which allows graduate assistants from other areas to bring their expertise and energy to a variety of special projects
- **Innovation** – Local partnerships (e.g. such as Bricks and Clicks, Business Resilience Taskforce, COSTARTERS: Rebuild)
- **Place**
  - Responds to community needs, such as SHD Task Force, Business Resilience Taskforce
  - Active in Statewide associations, such as VEDA and Chamber of Commerce

*Nick Swayne, 4-VA, JMU X-Labs & FIRST*

- **Talent**
  - Sponsorships have been contributed to *FIRST* programs for talent retention. Many of these sponsors also contribute to other places like X-Lab classes.
  - Programs and education initiatives help build wider interest in workforce and education
  - Talent development; provides transdisciplinary education and intergenerational education
  - Several programs help build diversity of the workforce (e.g. Fab Lab)
- **Place**
  - *FIRST* LEGO League pulls in a lot of people into JMU and Harrisonburg
  - Sometimes local industries will reach out. They can be either helped directly (e.g. taking local farmer's market online) or can be connected to other local resources which can lead to partnerships.
  - Nick attends conferences and represents JMU as an innovative place.
- **Innovation**
  - Maintains several programs that requires innovative work (transdisciplinary education, intergenerational education, *FIRST* programs, etc.)
  - Brings in partnerships with an innovative focus to JMU (e.g. Hacking for Defense)
  - Holds Innovation Summit to highlight innovative work from students and faculty
  - Nick serves on Autonomous Vehicle Advisory Board
  - Nick is one of founding board members of Community Innovation Network

*Nicky Swayne, Shenandoah Valley Technology Council*

- **Talent** – Hosts, contributes to, and/or promotes various local educational events and networking opportunities

- SVTC Luncheons
- FIRST LEGO League
- HCPS Biennial STEM fair
- TECHSTERS
- ICAP (Lean Startup Introductory Course)
- Tech Nite
- **Innovation** – Supports innovation and the entrepreneurship community through
  - Shenandoah Valley Innovation Coalition (SVIC)
  - SVTC networking events (tech [knowledge] transfer and business creation)
- **Place** – Participation in various local projects within the community
  - Local entrepreneurial ecosystem building by introducing and using the “Strategic Doing” process/method
  - Involvement with SHD Task Force
  - Communicates and coordinates with a variety of stakeholders (universities in the region; economic development offices; chambers of commerce; coworking places; the state of Virginia (e.g. SEC TECH’s office); local, state, and federal legislators
  - Involvement with Harrisonburg-Rockingham COVID-19 Business Support Task Force
  - SVTC’s existence contributes to the connectivity of the local tech community and businesses. SVTC serves as communications enabler and connector for the Valley’s tech users and creators