

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS) REVIEW & ASSESSMENT CHECKLIST (for EDA-funded CEDS)

Planning Organization Information

Name:	South Central Connecticut Regional Economic Development Corporation/REX Development
Address:	PO Box 1576 New Haven, CT 06506
POC Name, Title:	Ginny Kozlowski, Executive Director
POC Telephone, Email:	203-821-3682

Organizational Review & Approval Process (to be completed by Organization)

Strategy committee roster included/attached:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Copy of CEDS provided to affected Regional Commission:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
Dates of public review & comment period (at least 30 days):	March 21-May 20, 2023
Date CEDS adopted by organization's governing body:	May 24, 2023
Attached documentation of public comment and adoption:	
• Governing body adoption of CEDS (minutes or resolution):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
• Verification of 30-day public comment on the CEDS:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
• Copy of all public comments received on the CEDS:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
• Explanation from the Planning Organization stating how comments were incorporated into the final CEDS:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
CEDS self-assessment checklist completed & attached (optional):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

EDA Review & Approval Process (to be completed by EDA)

Reviewer Name, Title, RO:	
Reviewer Phone, Email:	
Date CEDS Received by EDA:	
Date CEDS Review Completed:	
CEDS Review Determination:	<input checked="" type="checkbox"/> Approved <input type="checkbox"/> Deficient
Date CEDS Review Letter & Checklist Sent to Organization:	
CEDS, Review Letter, & Assessment Checklist Filed at RO:	<input type="checkbox"/> Yes <input type="checkbox"/> No
CEDS Receipt, Review Notification, & Status Entered in OPCS:	<input type="checkbox"/> Yes <input type="checkbox"/> No

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS) REVIEW & ASSESSMENT CHECKLIST (for EDA-funded CEDS)

Overview

“A CEDS is a strategy-driven plan for regional economic development. A CEDS is the result of a regionally owned planning process designed to build capacity and guide the economic prosperity and resiliency of an area or region.” This definition comes from the “Comprehensive Economic Development Strategy (CEDS) Content Guidelines: Recommendations for Creating an Impactful CEDS,” published by the Economic Development Administration (EDA) in 2015. It frames the nature and purpose of a CEDS. The checklist below is an optional assessment tool intended to help area/regional development organizations prepare viable strategies that meet EDA’s guidelines. Likewise, it is a tool for EDA staff to use in reviewing and approving a CEDS. Although it is not a required form, it is a useful tool.

Structure

The checklist follows the structure of EDA’s CEDS guidelines. The assessment elements relate to the stated requirements and recommendations contained in the guidelines. **Requirements, which are noted as such, are few. Most of the elements are recommendations.**

Instructions

The following instructions will optimize the use of this checklist for CEDS reviews and self-assessments:

- Check the appropriate box to indicate whether or not the element is present and has been satisfactorily addressed. For certain elements not applicable to the area/region, indicate “NA.”
- Where requested, note the location of the element in the CEDS by showing the section or page number(s) where the topic is addressed.
- Include comments to clarify the review, as needed, or to indicate deficiencies to be addressed, or to acknowledge exemplary treatment of the element.

Self-Assessment

It will be helpful for a CEDS-preparing organization to conduct a self-assessment of its strategy using this CEDS checklist. In so doing, the organization should be able to identify and address deficiencies prior to submitting the document for EDA review and approval. It will also be helpful for the organization to submit a copy of its self-assessment with its CEDS.

References

“Comprehensive Economic Development Strategy (CEDS) Content Guidelines: Recommendations for Creating an Impactful CEDS,” <http://www.eda.gov/ceds/>

EDA Regulations: 13 C.F.R. § 303.7; http://www.eda.gov/pdf/edas_regs-13_cfr_chapter_iii.pdf

CEDS REVIEW & ASSESSMENT CHECKLIST

1. OVERVIEW

In accordance with EDA’s regulations and guidelines, the following sections must be included in the CEDS document:

Summary Background	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:	Pages 8-31
SWOT Analysis	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:	Pages 32-46
Strategic Direction/Action Plan	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:	Pages 47-58
Evaluation Framework	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:	Pages 48, 50, 52, 55, 57, 59, and 60

Comments: In addition to the evaluation framework, each objective had associated action items to guide the process.

The CEDS must incorporate the concept of economic resilience (i.e. the ability to avoid, withstand, and recover from economic shifts, natural disasters, the impacts of climate change, etc.)

The CEDS meets this requirement.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:	Page 61 and throughout the document as appropriate
----------------------------------	--	--

Comments:

2. CONTENT

The CEDS meets the following general criteria:

It was developed with broad-based community participation.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:	Extensive community outreach through interactive presentations with municipal Economic Development Commissions, Chief Elected Officials, chambers of commerce, and community groups. The Strategic Planning Committee was
--	--	---

It is readily accessible to regional stakeholders.

Yes No
Location:

comprised of members of public, private, and nonprofit organizations. In addition, a business survey was completed in Q4 2022 (Appendix C)

It is usable to stakeholders as a guide to the regional economy and for action to improve it.

Yes No
Location:

The 2023-2028 CEDS is posted on the REX Development website, and printed documents are available upon request.

The 2023-2028 CEDS was created with input from engaged stakeholders. The CEDS is referenced when various groups update their annual plans or report on accomplishments relative to the objectives and action items noted in the CEDS.

Seen through the lens of economic resiliency, the four required elements (see 'Overview' above) logically build upon each other to result in a coherent, targeted document.

Yes No
Location:

The four required elements structured the content and format of the CEDS.

Comments:

2-A. SUMMARY BACKGROUND

The "Summary Background" section meets the following criteria:

Answers the question, "Where have we been?" and presents a clear understanding of the local economic situation, supported by current, relevant data. Yes No

The information is presented in a clear and concise manner, and can be easily understood by the general public. Yes No

Data presentation allows for clear, relevant connections to the SWOT analysis and strategic direction. Yes No

Comments: In addition to the Summary Background, we also provide Appendix A: Demographic Data and Appendix I: South Central Regional Council of Governments’ 2018 Demographic and Socioeconomic Trends Report for additional context.

The “Summary Background” section provides information in the following areas that affect the regional economy, as applicable:

Demographic & socioeconomic data	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:	Pages 12-24, Appendix A, and Appendix I
	<input type="checkbox"/> NA	
Environmental, geographic, climatic, and cultural information	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:	Page 11
	<input type="checkbox"/> NA	
Infrastructure assets that relate to economic development	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:	Page 31 and 53-55 (Goal 4: Infrastructure)
	<input type="checkbox"/> NA	
Emerging or declining clusters or industry sectors	<input type="checkbox"/> Yes <input type="checkbox"/> No Location:	Pages 25-28 and 36-39 We added food production as an emerging sector.
	<input checked="" type="checkbox"/> NA	
Relationship of the area’s economy to the larger region or state	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:	Pages 10, 22, 32, 33, 35, 38, and 39
	<input type="checkbox"/> NA	
Factors that directly affect economic performance in the area (e.g. workforce, innovation assets, industry supply chains, etc.)	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:	Pages 32-39, Appendix B (Committee SWOT Analyses), Appendix C (REX Business Survey), and throughout the document as appropriate
	<input type="checkbox"/> NA	
Other factors that relate to economic performance (e.g. housing, health services, etc.)	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:	Pages 32-39, Appendix B (Committee SWOT Analyses), Appendix C (REX Business Survey), and throughout the document as appropriate
	<input type="checkbox"/> NA	

Comments:

The CEDS includes content that meets the following related criteria:

It is a vehicle that promotes the integration of economic development with other regional plans (e.g. sustainability, transportation, land use, housing, environmental protection, etc.)

Yes No
Location:

Page 44
The CEDS subcommittees include: Business Development and Recruitment; Workforce; Housing; Infrastructure; Real Estate, Land Use & Sustainability

It identifies opportunities for the integrated use of local, state, private, and federal funds.

Yes No
Location:

We use the term “partners” to identify potential funding sources or in-kind services. Pages 46, 48, 50, 52, and 55

The research for the CEDS includes a review of the long-term trends of the area.

Yes No
Location:

Pages 34-39, Appendix B (Committee SWOT Analyses), Appendix C (REX Business Survey), Appendix F (Chmura Open Jobs Report), and Appendix H (StatsAmerica Innovation Intelligence Profile)

Comments:

2-B. SWOT ANALYSIS

The “SWOT Analysis” (Strengths, Weaknesses, Opportunities, Strengths) section meets the following criteria:

Answers the question, “Where are we now?” and identifies the critical internal and external factors that speak to the region’s unique assets and competitive positioning.

Yes No

Considers economic resiliency, specifically, factors that can ensure the long-term success, viability, and durability of the regional economy.

Yes No Location:

Page 61 and throughout the document as appropriate

Comments:

The “SWOT Analysis” assesses a wide-variety of regional attributes and dynamics, including the following specific areas and tools:

State of the regional economy	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:	Pages 32-35
Regional clusters	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:	Pages 36-39
External trends and forces	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:	Pages 40, 51-52, and 56-57 (Goals 3 and 5)
Workforce considerations	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:	Page 33, 41, 49-50 (Goal 2), and throughout the document as appropriate
Spatial efficiencies/sustainability	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:	Pages 41-42
Broadband needs	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:	Pages 19, 43, and throughout the document as appropriate
Energy needs	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:	Pages 43 and throughout the document as appropriate
Natural hazards	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:	Pages 11, 44
Equitable development	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:	Pages 45 and throughout the document as appropriate
Partners for economic development	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:	Pages 46, 48, 50, 52, and 55
Resources for economic development	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:	Pages 46, 48, 50, 52, and 55

Comments: This document is in alignment with the state’s economic development priorities, town/regional plans of conservation and development, SCRCOG’s hazard mitigation plan, and ongoing work on affordable housing.

2-C. STRATEGIC DIRECTION/ACTION PLAN

The “Strategic Direction/Action Plan” section meets the following criteria:

Answers the questions, “Where do we want to go?” and “How are we going to get there?” by applying the SWOT analysis. Yes No

Includes a vision statement, goals, and objectives.

Yes No
Location:

Page 4 (Vision statement), pages 47-57 (Strategic Direction/Action Plan)

Includes an action plan for the implementation of the stated vision, goals, and objectives.

Yes No
Location:

Pages 47-57 The action plan is listed beneath each objective in the Strategic Direction/Action Plan

Comments:

The Vision Statement, Goals, and Objectives meet the following criteria:

They respond to the analysis of the area’s development potential and problems (i.e. SWOT analysis).

Yes No
Location:

Pages 47-57 (Strategic Direction/Action Plan)

The process used to create the vision statement involved broad community participation.

Yes No
Location:

Through outreach to various community groups and municipalities, we shared a PowerPoint of our 2022 status, and proposed steps, and collected input before completing the draft CEDS document.

The draft vision statement was widely circulated for review and comment to ensure maximum stakeholder engagement.

Yes No
Location:

The draft document of the CEDS has been posted on the REX website since March 2023. Public notices were placed with three local news outlets, New Haven Register, La Voz, and Meriden Record Journal for a 60-day public comment period. We have directed constituents to the draft via e-newsletters, social media, and partner organizations.

The goals are statements of broad outcomes and general intentions that build upon the vision statement.

Yes No
Location:

Yes. In its entirety, 2023-2028 CEDS is a cohesive document that funnels community participation, action items, goals, and objectives to support the vision statement.

The goals reflect the desires of most regional stakeholders, are realistic, and are limited to a manageable number.

Yes No
Location:

As we continue to recover from the pandemic, we have provided more latitude in the development of strategies. During this period of flux, we are offering additional flexibility to allow the region to respond to the current situation utilizing the available tools.

The objectives are specific, measurable, concrete, and support the attainment of the stated goals.

Yes No
Location:

Pages 47-57 The objectives are tied to specific action items as well as evaluation measurements.

The goals and objectives are prioritized, with consideration for the factors outlined in the CEDS guidelines.

Yes No
Location:

Yes, these factors were used as guidance when developing the CEDS.

Comments:

The Action/Implementation Plan meets the following criteria:

It must be clearly linked to the prioritized goals and objectives stated in the framework for strategic direction.

Yes No

It identifies and describes a limited number of key projects with the highest priority and potential for regional impact.

Yes No
Location:

Pages 47-57 The action plan is listed beneath each objective in the Strategic Direction/Action Plan and in the REX Project List (Appendix E)

Comments:

The Action/Implementation Plan describes explicitly how the region will work together to achieve its goals and measurable objectives by including the following elements:

<p>An outline of the steps required to take each selected high-priority activity from inception to successful completion.</p>	<p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:</p>	<p>Pages 47-57 The action plan is listed beneath each objective in the Strategic Direction/Action Plan</p>
<p>A roster of the key individuals and institutions that will be responsible for implementing and supporting these steps.</p>	<p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:</p>	<p>Pages 46, 48, 50, 52, and 55</p>
<p>A reasonable estimate of the costs associated with implementing the activity.</p>	<p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Location:</p>	<p>Cost estimates are provided for items on the REX Project List (Appendix E)</p>
<p>A list of the integrated funding sources (public, private, non-profit) to support the costs.</p>	<p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:</p>	<p>Pages 46, 48, 50, 52, and 55</p>
<p>A realistic time frame for execution (i.e. implementation schedule), with relevant benchmarks and performance measures that address overall impact.</p>	<p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:</p>	<p>Pages 47-57 The action plan is listed beneath each objective in the Strategic Direction/Action Plan and has a proposed completion date or is indicated as an ongoing action.</p>
<p>The identification of prioritized activities includes broad-based participation from regional stakeholders, including those affected by the proposed activities and those that can ensure their success.</p>	<p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:</p>	<p>Pages 47-57 The action plan is listed beneath each objective in the Strategic Direction/Action Plan and has a proposed completion date or is indicated as an ongoing action, and the REX Project List is prioritized (Appendix E).</p>

Comments: In addition to the traditional outreach by REX/SCCREDC, the staff has been extremely proactive in participating with other organizations. We have found that many stakeholders are consumed by the recovery process or are understaffed, so we have increased our efforts in participating with other relevant groups, such as the Regional Leadership Council, SCRCOG housing committee, Workforce Alliance Strategic Planning Committee, and a host of others.

2-D. EVALUATION FRAMEWORK

The “Evaluation Framework” section meets the following criteria:

It answers the questions, “How are we doing?” and “What can we do better?” by applying the SWOT analysis. Yes No

It cascades from the strategic direction and action plan. Yes No

Performance measures are identified to evaluate the progress of activities in achieving the vision, goals and objectives. Yes No
Location:

Pages 48, 50, 52, 55,57, 59, and 60

Performance measures go beyond job creation to address linkages to other important factors, such as conditions the region needs to reverse or create, and what regional assets can be leveraged. Yes No
Location:

Pages 48, 50, 52, 55,57, 59, and 60

Comments:

2-E. ECONOMIC RESILIENCE

The “Economic Resilience” section addresses the following two approaches in harmony with the principles outlined in EDA’s CEDS Content Guidelines:

“Steady State” Initiatives: Planning for and implementing resilience through specific goals or actions to bolster the long-term economic durability of the region. Yes No
Location:

Page 61 and throughout the document as appropriate

“Responsive” Initiatives: Establishing information networks among the various stakeholders in the region to encourage active and regular communications between the public, private, education, and non-profit sectors. The “Economic Resilience” section demonstrates how the region serves as a source of information to deal with an economic challenge and a convener of regional stakeholders to gather data and encourage collaboration in the post-disruption stage. Yes No
Location:

Page 61 and throughout the document as appropriate

Comments:

3. FORMAT

The structure and presentation of the information in the CEDS takes the following factors into consideration:

Keeps the audience in mind with respect to the length of the document, the presence of an executive summary, the placement of supporting data, etc. Yes No

Communicates creatively by having a professional and appealing look and feel, by including attractive and informative graphics and photos, and by using both hard-copy and electronic formats. Yes No

Thinks beyond the document by finding ways to use it to engage stakeholders in meaningful conversations, and to leverage its relevance and use through social media. Yes No

Comments: The recommended 35 page limit on the document was a challenge for us. We utilized other regions' documents that had been recognized by NADO as effective CEDS to trim the document. In addition, we moved more detailed information into appendices for readers looking for additional depth.

4. PREPARATION

The preparation of the CEDS included the following key steps and elements:

<p>A strategy committee, which broadly represents the main economic interests of the region, was formed to facilitate the planning process, and to develop and update the CEDS.</p>	<p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:</p>	<p>Pages 3-5</p>
<p>The CEDS documents how the planning organization collaborated with its diverse set of stakeholders in the formation of its strategy committee and the development of the CEDS.</p>	<p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:</p>	<p>Pages 3-7</p>
<p>The planning organization has or will collaborate with EDA and other entities funded by EDA (e.g. University Centers, Economic Development Districts, Tribes) on</p>	<p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Location:</p>	<p>Pages 3-7, 46, 48, 50, 52, and 55</p>

the development and implementation of the
CEDS.

Comments: