

AN ORDINANCE **2017-01-19-0027**

**APPROVING THE FISCAL YEAR 2017 ECONOMIC DEVELOPMENT SERVICES AGREEMENT WITH THE SAN ANTONIO ECONOMIC DEVELOPMENT FOUNDATION IN AN AMOUNT UP TO \$590,000.00.**

\* \* \* \* \*

**WHEREAS**, the City of San Antonio (the "City") has contracted with the San Antonio Economic Development Foundation ("SAEDF") for economic development services since 2010 to enhance the City's focus on corporate retention and recruitment; and

**WHEREAS**, in 2016, following the expiration of a five-year contract, the City and EDF realigned the goals and metrics of the agreement to incorporate Forefront SA and SA Works; and

**WHEREAS**, for Fiscal Year 2017, the City and EDF have agreed to include the SA Tomorrow Economic Competitiveness policy to provide for the continued development of industry-driven initiatives, quantitative prioritization of business retention and expansion efforts, and inclusion of additional targeted project types such as financial services and headquarters; **NOW THEREFORE:**

**BE IT ORDAINED BY THE CITY COUNCIL OF THE CITY OF SAN ANTONIO:**

**SECTION 1.** The terms and conditions of the Fiscal Year 2017 Economic Development Services Agreement with the San Antonio Economic Development Foundation are approved. The City Manager or her designee is authorized to execute the Agreement, a copy of which, in substantially final form is attached to this Ordinance as **Exhibit A**.

**SECTION 2.** Funding for this Ordinance in an amount up to \$590,000.000 is available as part of the FY2017 Budget as follows:

<b>Amount</b>	<b>General Ledger</b>	<b>Cost Center</b>	<b>Fund</b>
\$500,000.00	5201040	1604010001	29059000
\$65,000.00	5202025	1607010001	11001000
\$25,000.00	5201040	1607010003	11001000

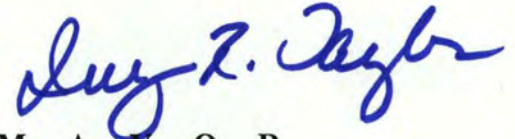
**SECTION 3.** Payment not to exceed the budgeted amount is authorized to San Antonio Economic Development Foundation (SAEDF) and should be encumbered upon the issuance of a purchase order.

**SECTION 4.** The financial allocations in this Ordinance are subject to approval by the Chief Financial Officer (CFO), City of San Antonio. The CFO may, subject to concurrence by the City Manager or the City Manager's designee, correct allocations to specific Cost Centers, WBS Elements, Internal Orders, General Ledger Accounts, and Fund Numbers as necessary to carry out the purpose of this Ordinance.

RR  
1/19/17  
Item No. 20

**SECTION 5.** This Ordinance shall become effective on and after the tenth (10<sup>th</sup>) day after passage hereof.

PASSED AND APPROVED this 19<sup>th</sup> day of January, 2017.



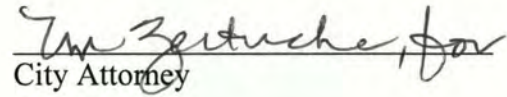
**M A Y O R**  
Ivy R. Taylor

**ATTEST:**



Lencia M. Vacek, City Clerk

**APPROVED AS TO FORM:**



Tom Zetzsche, for  
City Attorney



<b>Agenda Item:</b>	<b>20</b>						
<b>Date:</b>	01/19/2017						
<b>Time:</b>	03:34:29 PM						
<b>Vote Type:</b>	Motion to Approve						
<b>Description:</b>	An Ordinance approving the FY 2017 San Antonio Economic Development Foundation Economic Development Services Agreement in the amount of \$590,000.00 funded through the FY 2017 Adopted Budget. [Carlos Contreras, Assistant City Manager, Rene Dominguez, Director, Economic Development]						
<b>Result:</b>	Passed						
<b>Voter</b>	<b>Group</b>	<b>Not Present</b>	<b>Yea</b>	<b>Nay</b>	<b>Abstain</b>	<b>Motion</b>	<b>Second</b>
Ivy R. Taylor	Mayor		x				
Roberto C. Treviño	District 1		x				x
Alan Warrick	District 2		x				
Rebecca Viagran	District 3		x				
Rey Saldaña	District 4	x					
Shirley Gonzales	District 5		x				
Ray Lopez	District 6		x				
Cris Medina	District 7		x				
Ron Nirenberg	District 8		x				
Joe Krier	District 9		x			x	
Michael Gallagher	District 10		x				

# **Exhibit A**





# Forefront SA Implementation Scope

San Antonio Economic Development Foundation  
(SAEDF)/ City of San Antonio (COSA)

October 2016 – September 2017

This Implementation Scope is attached to and made a part of the Economic Development Services Agreement between SAEDF and COSA



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## BACKGROUND

### Introduction

The San Antonio Economic Development Foundation (SAEDF) is the master convener for San Antonio's economic and workforce development initiatives, propelling our community to an economically healthy and prosperous future. SAEDF influences business growth to improve the overall quality of life in San Antonio, as highlighted in the organization's vision, mission and values:

**VISION:** *To propel San Antonio to the forefront of today's top performing cities.*

**MISSION:** *Lead the development and diversification of the San Antonio regional economy through the location and expansion of quality employers and job producing investments.*

The 2017 Economic Development and Strategic Plan Implementation Scope (Implementation Scope) between the City of San Antonio Economic Development Department (COSA) and the San Antonio Economic Development Foundation (SAEDF) sets forth performance metrics and coordination enhancements called for in Forefront SA: The San Antonio Strategic Plan for Economic Development (Forefront SA).

The intent of this Implementation Scope is to establish and continue to develop a sustainable collaboration model, to ensure *Targeted Industry*<sup>1</sup> leadership is secured, and to maximize allocated economic development resources, with the core focus continuing to be: 1) securing foreign and domestic job-producing investments from recruited companies, 2) supporting local industry retention and expansions, and 3) imaging/marketing of San Antonio as a progressive, well-educated city attractive to foreign and domestic Targeted Industry business investments. Pursuant to this Forefront SA Implementation Scope, SAEDF will exert a prominent role in reporting workforce development initiatives in coordination with SA Works, a local private-sector-led board.

The scope, metrics and deliverables contained in this Implementation Scope are congruent with the SA Tomorrow Comprehensive Plan and the SA2020 Vision Plan, which secured public input and direction from residents, community stakeholders, business and other community partners. Studies and publications that serve as guiding documents for this Implementation Scope are the 2013 Deloitte Economic Development Strategic Plan study, the 2015 Trade and Investment Strategy, the 2015 Cybersecurity Industry Market Study, The SA2020 Talent Pipeline Study and other community-wide studies speaking to industry growth, economic development goals and tactics, and workforce development supply and demand as it pertains to industry competitiveness.

This Implementation Scope structures, identifies key roles, drives action, and measures the annual development and execution of tactics that align with the Vision, Mission, Goals and Objectives of Forefront SA. Pursuant to this Implementation Scope, the COSA Strategic Plan for Economic Development shall be lead on the behalf of the community by SAEDF under the moniker "Forefront San Antonio." Forefront San Antonio is intended to remain in effect through 2020.



## Vision, Mission, Goals, and Objectives

**VISION:** By 2020, San Antonio will consistently rank among the top 10 for the Milken Institute's Best Performing Cities with a goal of being ranked #5 or better by 2020.

**MISSION:** Forefront SA will move the community forward collectively under one vision. It will propel the San Antonio area to an economically healthy and prosperous future by advancing the economic development effort-and-delivery system and maximizing the community's assets to spur innovation and accelerate economic competitiveness in Targeted Industries.

### GOALS AND OBJECTIVES:

**Goal I. Business Attraction:** Strengthen the city to compete for job-producing investments within Targeted Industries, both domestically and internationally.

**Objective 1.1:** By 2020, increase aggregated employment in Targeted Industries at a rate of at least 5% higher than that projected by the Bureau of Labor Statistics and the Texas Workforce Commission for San Antonio.

**Goal II. Business Retention and Expansion (BRE):** Continue to build a world-class BRE program that provides local businesses the support to remain, grow and prosper in San Antonio.

**Objective 2.1:** By 2020, increase employment in Targeted Industries at a rate of at least 5% higher than that projected by the Bureau of Labor Statistics and the Texas Workforce Commission for San Antonio.

**Goal III. Entrepreneurial Development:** Develop a complete program for entrepreneurial development, including R&D, capital formation, market access, technology transfer and business skills development.

**Objective 3.1:** By 2020, increase San Antonio's rate of new entrepreneurs (the percent of the adult population who become entrepreneurs) and startup density (startup firms per 100,000 residents) at a rate of at least 5% higher than linear projections created using current and historical data from the Kauffman Index of Startup Activity.

**Goal IV. Workforce:** Cultivate and maintain a high-quality workforce development system.

**Objective 4.1:** By 2020, San Antonio will enhance and align workforce capabilities with the needs of existing/prospective employers by increasing educational partnerships and by increasing at least 5% in stackable credentials and completed certificate programs, and number of Targeted Industry employers per year receiving workforce assistance.

**Goal V. Collaboration:** The community will continue to collaborate on Forefront SA, setting timelines for updates, measuring success, re-evaluating processes and defining future directions of Forefront SA collaboration structure and implementation.

**Objective 5.1:** Progress and impact of economic development efforts are benchmarked and measured, and best practices are reported through 2019, while maximizing accountability and coordinated service delivery.

<sup>1</sup> Terms italicized and capitalized are defined in Appendix A.



## Guiding Principles

**Coordination and Collaboration:** Economic development is a team activity and requires consensus, clear direction, and action bias. This agreement provides for both short-term tactic development and funding as well as longer-term initiative development tying together multiple annual work plans. The community must engage in a means of economic development coordination to facilitate private sector collaboration towards consistent and aggressive action towards each of the community's economic development goals.

**Private Sector Leadership:** Private Sector Leadership is key to the success of any economic development strategic plan and plays a key role in determination of goals, objectives, strategies and tactics. However, private sector leaders must be provided a clear and consistent means to move city-wide economic development objectives forward. This Implementation Scope shall provide a means by which our community secures and enacts direction from *Targeted Industries* through the SAEDF and the *Economic Development Delivery System (COSA)*. The parties to this Implementation Scope recognize that some industries will have more developed information networks to provide direction and feedback on on-going and planned initiatives.

**Maximization of Resources:** Investment of public economic development funds are focused on the highest and best use in securing and growing new jobs and investment in Targeted Industries. This Implementation Scope seeks to ensure such dollars are focused on Targeted Industry Initiatives and leveraged through short and long-term coordinated planning and execution of tactics leveraging and driving all state, federal, foundation and industry funds available towards accomplishment of the community's economic development goals set forth in this Implementation Scope.

**Agile Economic Development:** Economic development tactics and initiatives must be fluid and flexible and be continuously improved based on opportunities that occur at the speed of business.

**Data Driven:** COSA is committed to ensuring all strategies and tactics are based on timely and relevant data both to inform action as well as measuring progress in meeting community economic development objectives.

## Governance

Implementation and monitoring of *Forefront SA* shall fall under the oversight of the Executive Committee of SAEDF.

All tactics and strategies will continue to be evaluated by the COSAS, approved by the SAEDF Executive Committee, advised by the Mayor and County Judge, and shall be reflected in an annual update to *Forefront San Antonio*, which will be made available to elected officials and business leaders.

## Service Area

For purposes of SAEDF activities funded by COSA, services will be delivered for the principal benefit of the area and residents within the boundaries of City of San Antonio in effect during the



contract term. The City acknowledges that SAEDF also has obligations to Bexar County, CPS Energy, SAWS, and private sector member companies, provided, however, SAEDF shall strive to coordinate its efforts and maximize the benefits of its efforts with all such parties. Such efforts shall include, but not be limited to, keeping an open line of communication with all parties and negotiating on behalf of and for the benefit of all such parties.

## SECTION I: ROLE AS CONVENER

### 1.1. Convene Collaboratives

In accordance with the intent of Forefront SA and the Guiding Principles of this Implementation Scope, it is the desire of COSA to establish and memorialize the *Economic Development Delivery System (COSAS)* and the coordination of *Economic Development Partners* through the following activities:

- a) **Dedicated Staffing:** SAEDF shall provide staffing to coordinate lead and drive the EDDS to develop, implement and monitor Forefront SA.
- b) **Convene Collaboratives:** SAEDF shall, in partnership with COSA, convene *Collaboratives* (as defined in Appendix A) in person or virtually through use of electronic platforms with the intent of fostering consistent and on-going collaboration and coordination in pursuit of Forefront SA goals.
  - i. **Goals of Collaboratives:** *Collaboratives* shall be convened as often as needed to: 1) evaluate and continuously improve existing Forefront SA tactics; 2) secure input from industry liaisons on new tactics; and 3) identify and leverage funding opportunities for joint tactics 4.) secure consensus on reporting of outputs and outcomes of tactics towards updating the Forefront SA Plan.
    - a. *Collaboratives* for which SAEDF serves as the convenor, but not as Implementor :
      - i. **Entrepreneurial Development:** SAEDF shall, for the Entrepreneurial Development Collaborative, at a minimum secure on-going and planned Target Industry initiatives supporting the community's entrepreneurial development goals in coordination with the *Collaborative* members such as Geekdom, the The University of Texas Health Science Center at San Antonio's, University of Texas San Antonio (and other universities and anchor institutions), and The Texas Technology Development Center (T3DC), and Launch SA.
      - ii. **Workforce Development:** SAEDF shall, for the Workforce Development Collaborative, facilitate and report on on-going and planned Target Industry initiatives supporting the community's workforce development in coordination with SA Works.



## 1.2 Support Targeted Industry Liaisons

In accordance with Forefront SA and the Guiding Principles of this Implementation Scope, it is the desire of the City to establish and memorialize Targeted Industry Private Sector leadership in the delivery of the economic development services through the following activities:

- a.) **Educate Private Sector Leaders:** SAEDF shall, in coordination with *Industry Liaisons* and COSA, support communication to industry stakeholders by identifying: 1) core principles and tactics of existing economic development approaches; 2) opportunities to enhance local economic development approaches through validated industry-driven tactics and contribution of time, space or funding; and 3) new or existing resources for Industry Liaisons to move initiatives forward.
- b.) **Industry Coordination:** SAEDF shall, through each of the Collaboratives, extract from *Industry Liaisons* support for on-going tactics and coordination on new approaches to include providing the assistance of each *Collaborative* with specific short, mid, and long term tactics and strategies.
- c.) **Industry Liaison Initiatives:** SAEDF shall consider *Industry Liaison Initiatives* in the form of resource requests that:
  - i. Materially meet the performance metrics outlined in this Implementation Scope and are in alignment with COSA's SA Tomorrow Plan.
  - ii. Are provided to SAEDF and presented to the Collaboratives for discussion and the leveraging of resources by describing Key Partners, Key Resources, Key Activities, Value Proposition, Total Costs, Target Audience, Channels to reach Audience, expected Revenues or Sustainability of partnership.
  - iii. Total no more than \$25,000 per initiative, and up to \$50,000 per Targeted Industry, and are available in budgeted line item categories of the approved SAEDF operational budget.
- d.) **Resource Allocation:** SAEDF shall present selected Targeted Industry Initiatives to the SAEDF Executive Committee for partnership, OR provide conditions of or denial of partnership within 60 days of submission.

## 1.3 Updates to Forefront SA, Strategic Plan for Economic Development

In accordance with the Forefront SA and the Guiding Principles of this Implementation Plan, it is the desire of the City to establish consistent communication of progress, tactics and opportunities for community investment to business leaders through the following activities:

- a.) **Intent of Forefront SA Updates:** SAEDF shall draft the Forefront SA Plan with the intent of illustrating to Targeted Industry leaders the most impactful initiatives each of the



*Collaboratives* are planning, executing, or have completed towards growing their industry and meeting community goals. In addition, it should demonstrate progress of measureable objectives.

- b.) **Annual Updates:** SAEDF shall update this Implementation Plan annually to reflect *Industry Liaison* Initiatives supported in each of the *Collaboratives* and any improvements made to *Core Industry* tactics.
- c.) **City Council Presentations:** SAEDF shall present the status of Forefront SA at the request of COSA to City Council and/or the Economic and Human Development Committee.

## SECTION II: ROLE AS IMPLEMENTOR

This Implementation Scope represents continued focus on marketing for global industry recruitment and expansion operations with enhancements outlined in the Strategic Plan. It focuses on providing a consistent structure for economic development collaboration that will ensure the community consistently integrates Target Industry private sector leadership and continuously pursues state, federal, and other resources to further scale economic development efforts in San Antonio. It consists of tactics to secure new Target Industry and Core Industry jobs and investment, is measured by the metrics outlined in Section III of this Implementation Scope, and is segmented into the following activities.

### 2.1 Industry Recruitment

Targeted Industry Recruitment consists of tactics to secure *Core* and *Targeted Industries* and is segmented into the following activities:

- a) **Marketing:** SAEDF shall continue a collaborative branding campaign to illustrate and inform companies and site selectors of COSA's business location advantages. In addition:
  - i. **SAEDF Marketing Committee:** SAEDF shall provide for an COSA representative to serve on the SAEDF Marketing Committee.
  - ii. **Unifying Brand:** SAEDF shall, by the end of the term of this Implementation Plan, launch, after receiving COSA's approval, COSA's new brand identify across economic development related entities.
  - iii. **Industry Liaison Marketing:** SAEDF shall, after COSA approval, engage and execute Industry Liaison branding and marketing tactics developed in conjunction with Industry Liaisons.
  - iv. **Foreign Market Campaigns:** SAEDF shall develop a media campaign highlighting San Antonio as a destination and implement material



improvements to their website and develop campaigns through social media, trade publications and in-country business-related newspapers.

- b) **Domestic Recruitment:** SAEDF shall robustly recruit companies seeking to expand, consolidate, or relocate within the United States within *Targeted Industries*.
  - i. **Marketing Trips:** SAEDF shall report to COSA all planned and completed marketing and outreach trips.
    - a. Reports from SAEDF shall include location, SAEDF staff person, as well as type of industries contacted and number of meetings.
  - ii. **Convention Visitor's Bureau Coordination:** SAEDF will also coordinate activities with the Visit San Antonio to leverage one (1) convention to organize a meeting/tour with corporate representatives attending conventions in San Antonio given that there are at least two conventions within a Targeted Industry in a given year.
  - iii. **Site Consultant/Industry Expert Tour:** SAEDF shall secure and coordinate location consultants and/or industry experts specializing in targeted industries for one (1) site/asset tour of San Antonio; unless an alternative opportunity presents itself during the contract year that, in COSA's opinion would materially satisfy this objective and is agreed upon in advance by all parties well in advance of end of the term of this Implementation Scope.
    - a. SAEDF shall conduct a pre and post visit survey of site consultants to gauge familiarity and feedback on COSA and report such findings to COSA.
- c) **Foreign Recruitment:** SAEDF shall implement the applicable Foreign Direct Investment (FDI)-related recommendations found in the 2015 San Antonio Trade and Investment Strategy (as the same may be updated from time-to-time) to increase FDI in San Antonio's *Targeted Industries*. SAEDF shall conduct the following activities to implement the Investment Missions:
  - i. **Japan Consulting Scope:** SAEDF shall administer the agreement with Hiro Watanabe and the Texas-Japan Office. As set forth in Section VIII below, COSA is responsible for payment of the \$90,000 under the Consulting Scope with the Texas-Japan office, payable upon execution of the Economic Development Services Scope to which this Implementation Plan is attached.
    - a. SAEDF shall provide a copy of agreement to COSA for its review and input before finalization of the agreement with the Texas-Japan Office.
    - b. SAEDF shall provide each summary of activities and outcomes produced by the Texas-Japan Office.
  - ii. **Investment Missions:** SAEDF shall coordinate all logistics to support



Investment Missions to Japan and one additional tier one country and shall:

- a. Support tactics developed in conjunction with Industry Liaisons.
- b. Arrange, as needed, all one-on-one meetings in-country with identified target companies.
- c. Coordinate all marketing and promotional materials in support of the Investment Mission.
- d. All such information, including, but not limited to, the companies with which the mission will engage shall be provided to COSA as far in advance of the mission date as possible. COSA staff shall be included in or informed of agenda preparations and finalization, which is all subject to the review and approval of the Director of the Economic Development Department.

iii. **Investment Promotion Forum:** SAEDF shall organize at least one *Investment Promotion Forum* in a tier one country for companies in *Targeted Industries* and shall:

- a. Report quarterly any outcomes created from the engagement describing any outcomes achieved such as business relationships, prospects or export opportunities created.

iv. **International Stakeholders Committee:** SAEDF shall organize, schedule, host, and manage the quarterly meetings of the International Stakeholders Committee to coordinate and align international engagements among all community partners.

d) **Prospect Management:** SAEDF shall provide hosting and site selection assistance for prospective foreign and domestic companies, including options and information on all areas of COSA and, when appropriate, an emphasis on targeted geographic areas of COSA and County, including, without limitation, the Central Business District, Port San Antonio, Brooks City Base, and all other ICRIP or the Business Sector's identified in COSA's Comprehensive Plan.

i. **Single Point of Contact:** SAEDF shall act as the single point of contact for all recruitment prospects and:

- a. Ensure projects are provided an overview of doing business in San Antonio and advised of available incentives, provided an incentive application, and connected with the appropriate Economic Development Partners.
- b. Manage each project to ensure effective and frequent communication and coordination with Economic Development Partners, including project status, and what is required of the Economic Development Partner to ensure COSA effectively competes for the project.



Coordinate with COSA foreign representatives to schedule and facilitate one-on-one and small group meetings with companies in *Targeted Industries* c. Prepare and distribute briefing materials for delegates in preparation for one-on-one meetings.

## 2.2 Industry Retention and Expansion

The goal of Targeted Industry Retention and Expansion is to avoid job loss, capture future growth, become more aware of the industry locally, domestically and globally, and encourage corporate leaders to be more involved in the community. It consists of tactics to retain and expand *Core* and *Targeted Industries*, is measured by the metrics set forth in Section III of this Implementation Scope, and is segmented into the following activities.

- a) **Staffing:** SAEDF shall allocate a senior executive position for the coordination and implementation of the Business Retention and Expansion (BRE) program, who shall work closely with EDD's BRE Manager.
- b) **BRE Program Visit Prioritization:** SAEDF shall prioritize visitations under this Implementation Scope by proposing a prioritization process that includes the following elements:
  - a. Prioritization of TYPE of business
    - i. SAEDF shall develop an objective scale and means to weight the following variables in importance: Number of Employees, Wages, Headquarters Operation, Foreign Owned, Targeted Industry, and Strategic Significance of Loss, and provide such information to COSA on an ongoing basis.
  - b. Prioritization of CONTEXTUAL RISK
    - i. SAEDF shall develop an objective scale that measures the likelihood that a company will expand or leave San Antonio scoring variables such as: lease expiration, recent acquisition or other corporate signal, leadership changes, changes, the effects of possible annexation, in oil prices, state and local legislation, and provide such information to COSA on a consistent basis.
- c) **BRE Program Visits:** SAEDF shall coordinate visits by representatives of the Recruitment and Retention Collaborative to no less than the top 20 companies based on item 2.2 (b), to include at a minimum:
  - a. One visit for the Mayor and City Manager to include briefing materials such as bios and company background and agenda as soon as possible but in no event later than two weeks before the scheduled visit. This element may be waived at the discretion of COSA if the City Manager and/or Mayor are unavailable.
  - b. An COSA representative, preferably the BRE Manager, should be invited to be present at each meeting and, when possible, that invitation should be extended



one week before the visit; recognizing that it is the company's decision as to when a visit can take place.

- d) **BRE Program Profile Development:** Through these visits SAEDF shall generate a profile for a minimum of 20 companies an assessment of key customers, supplier recruitment targets, the state of their respective industries and any local challenges they are facing (such as workforce, technical assistance, infrastructure, and/or permitting).
  - a. SAEDF shall, in the company profile and quarterly reporting narrative, list company contact information and indicate the specific technical assistance provided to the company and the result or outcome of the assistance provided.



## SECTION III: METRICS AND DELIVERABLES

### 3.1 Implementor Deliverables:

SAEDF shall report progress towards annual goals in an unformatted Excel spreadsheet listing the detail of each of the following metrics as well as aggregated information presented in format of the Industry Recruitment Goal and Industry Retention/Expansion Goals as developed and approved by the Executive Committee of the SAEDF and incorporated as key performance indicators on overall community economic vitality and specifically on SAEDF performance with respect to the goals outlined in the table below.

Indicator	Definition   Calculation	Direction	Unit	Actual Y-T-D	2017 Goal	Frequency	Tier
Gross Metropolitan Product (GMP)	Based on Real GMP for San Antonio from the Bureau of Econ. Analysis (2010 - 2015) as compared to Peer City's provided by the EDD for the City of San Antonio, TX.	+	#	Currently Rank # 9 among peer cities	Rank # 8 among peer cities	Annual	1
Median Household Income	Based on annual unemployment rate among peer cities. Reported by the Bureau of Labor Statistics (15') - Peer City's provided by the EDD for the City of San Antonio, TX.	+	#	Currently Rank # 10 among peer cities	Rank # 9 among peer cities	Annual	1
Unemployment rate	Based on annual unemployment rate among peer cities. Reported by the Bureau of Labor Statistics (15') - Peer City's provided by the EDD for the City of San Antonio, TX.	-	#	Currently Rank #4 among peer Cities	Rank # 3 among peer cities	Annual	1
Foreign Direct Investment	Capital investment growth of international companies reported from FDI Markets.com (2010-Current)	+	\$	159,700,000 (est.)	162,700,000	Annual	1
Total Job Growth	Year to Year (seasonally adjusted) measure of Job Growth (all industries) as reported by the Texas Workforce Commission	+	%	3%	3%	Annual	1
Entrepreneurial Start Up Activity & Density	Ranking of start-up activity and density by Kaufmann Index 2016 (2015-2016)	+	#	#13	Rank #10	Annual	1
Local CAPEX	Based on project based CAPEX assisted by the SAEDF. Calculated goal was the cumulative average from 2010-2015	+	\$	1,397,979,300	300,000,000	Annual	1
Target Sector Employment Growth *NAICS	A cumulative average from the Texas Workforce Commission year end (2016 - Current) employment growth per target industry sector	+	%	Baseline Q1 (City FY17')	≥ 1%	Annual	1



Estimated Payroll by Target Sector Industries	<i>Based on increase of aggregated reported project based wages per target industry sector.</i>	+	\$	Baseline Q1 (City FY17')	≥5,000,000 per Quarter	Quarterly	1
Number of Located Projects	<i>Information based on year end aggregated total for target sector industries.</i>	+	#	Total: 26   REC: 17   BRE: 9	Total: 26   REC: 10   BRE: 16	Annual	2
Total Number of Added Jobs	<i>Committed Jobs is the number of jobs for total duration of the project as reported by the company. Year 1 jobs represents the total number of jobs added in Year 1 of a project as reported by the company   Information provided by VP's Committed and Year 1 aggregated project based job figures per respected target industry sector.</i>	+	#	Baseline Q1 (City FY17')	Committed: 3,000   Year 1: 1,000 BRE: 1,800   REC: 1,200	Annual	2
Number of New High Wage Jobs (est.)	<i>\$50,000 threshold is set as 5% above the county's average annual wage</i>	+	#	Baseline Q1 (City FY17')	600 (20%)	Annual	2



SAEDF / COSA Contract Budget (Fiscal Year 2016-2017)

<b>Income</b>		
COSA Contract	\$590,000	
<b>Total Income</b>		<b>\$590,000</b>
<b>Operating Expenses</b>		
<b>Staff Expenses</b>		<b>\$238,000</b>
<b>Prospect and Marketing Expenses</b>		<b>\$293,000</b>
<b>Administrative/Other Expenses</b>		<b>\$59,000</b>
<b>Total Operating Expenses</b>		<b>\$590,000</b>
<b>Net Cash</b>		<b>\$0</b>

Note: COSA Income includes \$90,000 for continued funding of the Texas-Japan office.



## APPENDIX A: Definitions

**Core Industry(ies):** Financial and Professional Services Operations, Distribution, and sectors have well-established infrastructure, supply lines, and labor force pipelines in place to be successful and continue to grow.

**Economic Development Collaborative(s):** A group of public sector entities and partners that specializes in one or of the direct service provision elements of: Recruitment, Expansion, Entrepreneurial Development, Workforce Development or Collaboration. The role of the collaborative is to plan and execute short and long-term tactics and strategies in support of Industry Liaisons. At a minimum, Collaborative stakeholders: 1) represent a material public or public/private investment that can be leveraged; and 2) have direct contact with the business community in providing one or more services in the interest of securing new targeted industry jobs and investment.

**Economic Development Delivery System (COSAS):** the continuous improvement process by which the SAEDF coordinates public sector stakeholders in the five service delivery areas for collaboration with Industry Liaisons contracted to educate and secure direction from Targeted Industry leaders.

**Economic Development Partners:** Partners who's coordination is required to leverage resources, expertise, such as: COSA and Bexar County leadership and economic development departments, local chambers, trade associations, Alamo Colleges, Workforce Solutions Alamo, Texas Research and Technology Foundation, Texas Workforce Commission, Free-Trade Alliance, Governor's Office, the Economic Development Administration, the Department of Labor, higher education, media, and many others.

**Economic Development Program Model Canvas:** the economic development program model canvas consists of nine-categories describing programs or initiatives including: key activities, key partners, key outcomes, and costs and funding sources. The purpose of the canvas is to clearly and comprehensively explain all the elements of a program or initiative and identify areas for improvement through collaboration.

**Estimated New Payroll:** the estimated total payroll of all companies assisted by the SAEDF. Not all companies assisted will report total new payroll. For those companies where total payroll is not communicated in writing SAEDF will perform the following calculation (Total Jobs X Average Estimated Wage).

**Forefront San Antonio:** The San Antonio Strategic Plan for Economic Development authored by Deloitte Consulting and released in 2015, which is executed through an Implementation Scope by the SAEDF on behalf of COSA.

**High Wage Jobs:** Performance Metric, which measures the success of efforts towards raising the Median Income in San Antonio. High Wage Jobs are the number of jobs whose earnings are above the average of the last four quarters of the Bexar County Average Weekly Wage as reported by the TWC. This data is collected by securing written communication from companies



that have been provided technical assistance by SAEDF.

**Industry Liaisons:** Designated individuals under contract with the COSA or validated by industry leaders, the Coordinating Council and the SAEDF Executive Committee. Industry Liaisons are contractually obligated to communicate the functions of the COSAS to industry and provide strategy and tactic proposals to the COSAS from the represented Targeted Industries. Current Industry Liaisons include BioMedSA and Cybersecurity San Antonio.

**Industry Liaison Initiatives:** an initiative that is identified and driven by the Industry Liaison to create or refine Collaborative tactics and that may require asset allocation. Example: Cybersecurity Industry Liaison requests funding for development of collateral marketing material for a specific industry segment from Canada.

**Targeted Industry(ies):** Healthcare/Biosciences, Aerospace and Transportation Manufacturing, Information Technology/Information Security and New Energy industry subsectors as determined by the March 2013 Deloitte Target Cluster SWOT Analysis and Economic Development Scan and the SA2020 *Targeted Industries*.

**Premium Job Projects:** economic development projects that are not captured in the targeted industries but provide jobs 105% of the Bexar County Average weekly Wage.

**Investment Promotion Forum:** An event in which San Antonio is promoted to group of 20 or more foreign stakeholders at one time vs. individual meetings