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Description of document:	Economic Development Administration (EDA) Performance Plan FY2021-2022, 2021
Requested date:	04-February-2023
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Posted date:	03-July-2023
Source of document:	Freedom of Information Request U.S. Department of Commerce Economic Development Administration FOIA and Privacy Act Officer 14th and Constitution Avenue, NW Room 72023 Washington, D.C. 20230 Email: FOIA-EDA@eda.gov Dept of Commerce FOIA Public Access Link

March 7, 2023

RE: FOIA REQUEST File No. HQ 23-20 Cross Referenced to DOC-EDA-2023-001043

This final letter is in response to your Freedom of Information Act (5 U.S.C. § 552) ("FOIA") request that was dated on February 4, 2023 and received on February 6, 2023 by the Economic Development Administration ("EDA") via the FOIAOnline system.

Per your request, you sought the following information:

- "A copy of each of the four (4) most recent EDA annual Agency Performance Plans."

At this time, EDA has only completed one Annual Performance Plan covering the FY 21-22 timeframe. That plan is being released to you in full. In the future, EDA expects to complete additional reports annually.

Fees are charged for processing FOIA requests in accordance with the uniform fee schedule outlined in the Department of Commerce Regulations found in 15 C.F.R. § 4.11. As an "All Other" requester, you are subject to fees charged for search of the records (excluding the first two hours) and duplication of the records (excluding the first 100 pages). EDA's one responsive record is being released entirety and thus there are no fees associated with your request.

If you have any questions or concerns or would like to discuss any aspect of your request, you may contact the analyst who processed your request Ms. Ta'Shima Oliphant by email at toliphant@eda.gov. You may also contact EDA's FOIA Public Liaison:

Jeffrey Roberson
JRoberson@eda.gov

In addition, you may contact the Office of Government Information Services (OGIS) at the National Archives and Records Administration to inquire about the FOIA mediation services they offer. The contact information for OGIS is as follows:

Office of Government Information Services
National Archives and Records Administration
8601 Adelphi Road-OGIS
College Park, Maryland 20740-6001
telephone: (202) 741-5770; toll free: (877) 684-6448
ogis@nara.gov
facsimile: (202) 741-5769

You have the right to appeal this determination of your FOIA request. An appeal must be received within 90 calendar days of the date of this response letter. Address your appeal to the following office:

Assistant General Counsel for Employment, Litigation and Information (Office)
U.S. Department of Commerce
Office of the General Counsel
Room 5896
1401 Constitution Ave., NW
Washington, D.C. 20230

An appeal may also be sent by email to FOIAAppeals@doc.gov or by FOIAonline, if you have an account in FOIAonline, at https://foiaonline.regulations.gov/foia/action/public/home#. The appeal should include a copy of the original request and initial denial, if any. All appeals should include a statement of the reasons why the records requested should be made available and why the adverse determination was in error.

The appeal letter, the envelope, and the e-mail subject line should be clearly marked "Freedom of Information Act Appeal." The email, FOIAonline, and Office are monitored only on working days during normal business hours (8:30 a.m. to 5:00 p.m., Eastern Time, Monday through Friday). FOIA appeals posted to the e-mail box, FOIAonline, or Office after normal business hours will be deemed received on the next normal business day. If the 90th calendar day for submitting an appeal falls on a Saturday, Sunday or legal public holiday, an appeal received by 5:00 p.m., Eastern Time, the next business day will be deemed timely.

Please contact my office at via email if you have any questions or concerns.
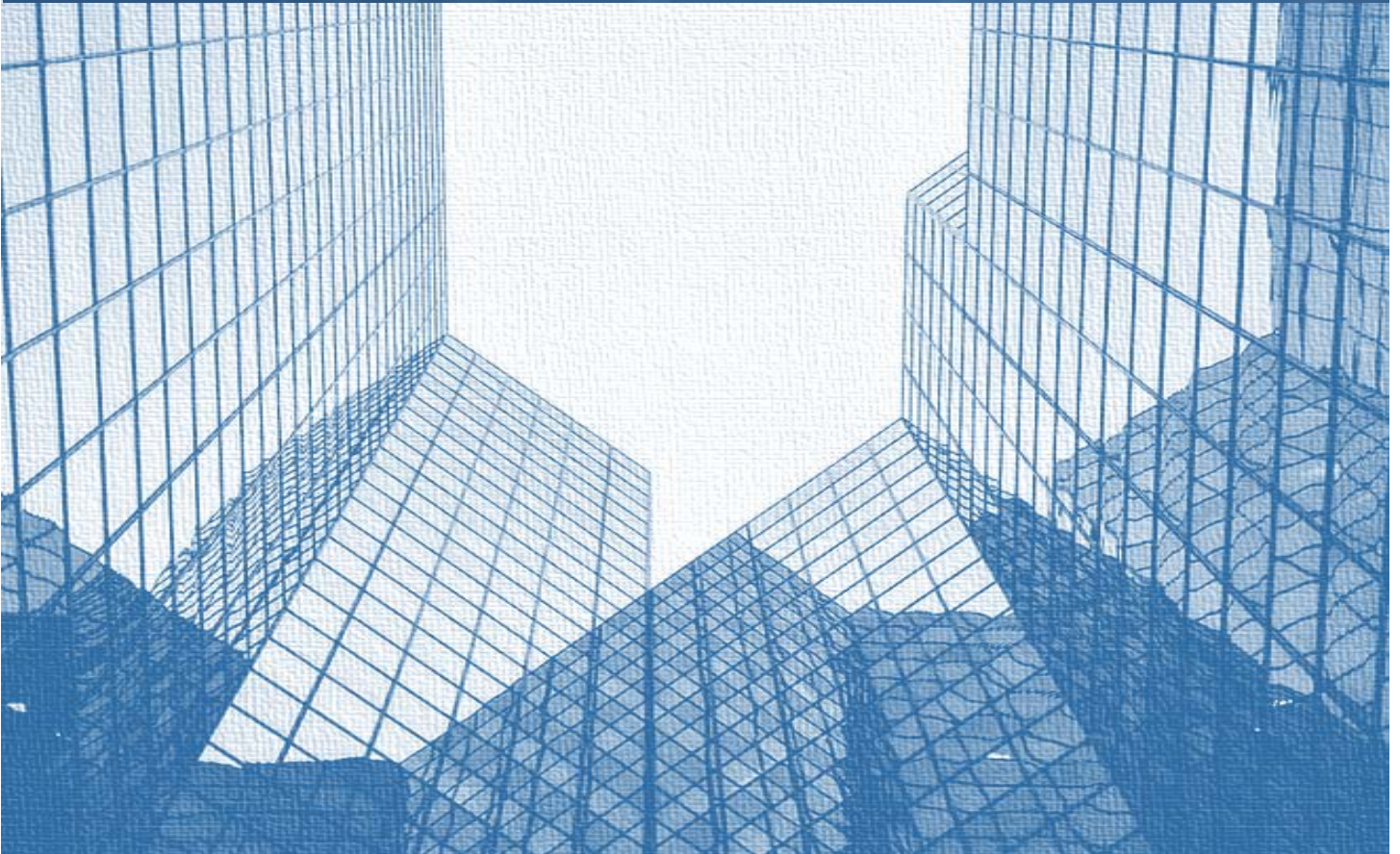
Sincerely,

JEFFREY ROBERSON

Jeffrey Roberson
Freedom of Information Act Officer

PERFORMANCE PLAN FY21-22

U.S. Economic Development Administration

CONTENTS

INTRODUCTION

To support accomplishing its 2021-2025 Strategic Plan, the Economic Development Administration (EDA) has developed this Agency Performance Plan to serve as a roadmap for advancing the agency's strategic goals and objectives through planning and execution of intentional strategies and actions for FY21-22. The plan also defines the outcomes sought and the proposed measures that EDA will use to track progress toward accomplishing these outcomes. While this two-year Agency Performance Plan includes ideas for initiatives and actions that are anticipated for future years, it will be updated annually to allow the agency to adapt its approaches to changes in the internal and external operating environments.

Starting in FY21, EDA plans to focus on building the necessary organizational infrastructure to advance the Strategic Plan and tackle a set of critical operational improvements identified through EDA's recent organizational assessment, business process reviews, and strategic planning efforts. These improvements build on EDA strengths, address operating challenges, and promise to catalyze a transformation within EDA that will strengthen its performance, agility, and effectiveness at delivering its important mission. Championed by the Deputy Assistant Secretary/ Chief Operating Officer, an Organizational Excellence Task Force will guide and oversee the execution of the following strategic initiatives that will take place in FY21-22:

- Strengthened internal communications, collaboration, and knowledge management
- Improved grants management process and technology
- Enhanced data and analytics infrastructure
- Strengthened EDA mission strategy
- Holistic EDA workforce strategy

The framework designed for the Organizational Excellence Task Force establishes a structure to ensure active executive engagement in the agency's strategic initiatives. It also helps provide for structured involvement of employees in the execution of agency organizational excellence and transformation priorities to incorporate diverse perspectives and facilitate change management. In addition, to enhance awareness of and engagement in these efforts across EDA, the Organizational Excellence Task Force is committed to regularly soliciting and incorporating employee feedback, adapting plans as needed, sharing takeaways from ongoing organizational studies, and communicating initiative progress.

This plan also introduces a suite of key performance indicators (KPIs) to help gauge agency performance in relation to the goals, objectives, and strategies stated in the Strategic Plan and this Performance Plan to ensure the agency is continuously improving and adapting its efforts as needed. Outcome measures describe a successful outcome for EDA by 2025 and will allow the agency to evaluate progress and determine when it has successfully achieved a strategic objective. The plan also identifies performance metrics that are leading indicators of progress towards the outcome measures. The proposed KPIs use data from agency operations, employee sentiment, and customer feedback to help EDA leadership and staff better understand EDA's progress and make informed decisions. KPIs will be evaluated with regional, headquarters, and agency-wide lenses as appropriate to assess progress across the agency. In several instances, KPIs will be determined by initiative teams themselves to capture measures that are most relevant and actionable. The specific targets that the

agency aims to achieve will be further defined in FY21 and updated on an annual basis to reflect progress.

IMPLEMENTATION OF EDA STRATEGIC GOALS

Goal 1: Excel at Customer-Centric Delivery of Economic Development Programs

Objective 1: Increase process efficiency of EDA's program portfolio

Outcome: EDA will streamline its program delivery processes and provide employees with modern tools to increase efficiency and reduce administrative burden. By 2025, there will be an XX% reduction in employees reporting process inefficiencies negatively impacting their work, according to the Staff Pulse Check Survey.

Strategies:	Key Milestones in FY21 and FY22:
A. Streamline and improve program delivery processes **B.** Modernize grants management technology	• Streamlined and improved grants management process defined, documented and implemented • Full systems requirements gathered and implemented in new grants management tool **KPIs and Targets:** • **Outcome Measure**: XX% reduction in employees reporting process inefficiencies negatively impacting their work, according to the Staff Pulse Check Survey • Additional KPIs, including an objective measure of process efficiency, will be defined by the initiative team
Strategic Initiatives in FY21 and FY22	**Initiative Lead, Organization**
Initiative: Improved Grants Management Process and Technology	Kyong Pak, OFMS and Shalini Bansal, SRO

In FY21, EDA will launch a new strategic initiative, **Improved Grants Management Process and Technology**, to advance this objective. The initiative will streamline and improve the grants management process and equip employees with the tools required to increase efficiency and reduce administrative burden. The proposed actions under this initiative, which is anticipated to continue in FY22, include:

- Implementing the recommendations from the Business Process Review conducted in 2020;
- Defining an improved grant-making process that ensures compliance with regulatory requirements while reducing administrative burden;

- Developing user-informed requirements for a new grants management software system, based on the streamlined and improved process; and
- Testing, deploying this new system and ensuring its integration with other systems used in this work process, including the agency's new customer relationship management tool.

The initiative will also define performance metrics to track the efficiency of the process.

Objective 2: Consistently deliver a high-caliber pre-award and post-award customer experience

Outcome: EDA will consistently provide a high-quality experience to customers throughout the pre- and post- award process. By 2025, greater than XX% of customers will report a high degree of satisfaction with their experience with EDA's services and processes pre- and post- award.

Strategies:	Key Milestones in FY21 and FY22:
A. Deepen understanding of customer experience **B**. Strengthen post-award support for grantees **C**. Strengthen pre-award support for applicants	• Customer journey map developed • Post-award customer service training created and delivered • Pre-award applicant support tools created and delivered • Updated EDA website launched **KPIs and Targets:** • **Outcome Measure**: >XX% of external customer groups report a high degree of satisfaction • **Outcome Measure**: XX Net Promoter Score (NPS) or Customer Effort Score (CES) (measuring the amount of effort a customer must exert to receive support) • **Lead Measure:** Customer experience leading indicators will be defined as part of the future CX Initiative
Strategic Initiatives in FY21 and FY22	**Initiative Lead, Organization**
Initiative: EDA Customer Experience (CX)	Name, Office (TBD)

EDA is committed to adopting a customer-centric approach that provides a high caliber experience for the agency's customers (potential applicants and grantees). EDA aims to provide an applicant experience that is easy to follow, clear, accessible and predictable. Once the grant is awarded, the overall grantee experience is influenced by the ease of EDA's post-award processes, the responsiveness, helpfulness, expertise and collaboration of EDA staff and the efficiency and utility of EDA's customer resources. The actions and strategies that EDA will undertake to continuously improve its customer experience are designed to address these factors.

In 2020 EDA began a major redesign of its external website. The new **EDA Website Redesign** is expected to be launched in FY21 and will feature more streamlined and user-friendly navigation and more easily accessible resources for applicants and grantees. The redesigned website will function as a communications tool for EDA, highlighting success stories and providing resources to build applicant capacity for successfully completing grant applications.

In addition, in FY21, EDA will continue to administer **customer service surveys** to track levels of customer satisfaction and identify opportunities for improvement. The Customer Service Survey administered by the Performance and National Programs division will be refined and the data gathered will be shared with all Regional Offices and National Program Offices to inform ongoing process improvement.

EDA will also continue implementation of a **customer relationship management system** (Salesforce) to provide EDA employees with modern tools to build relationships with current and potential grantees/partners; establish visibility of grants demand; manage interactions with potential grantee projects in the pipeline; leverage dashboards/reports to analyze EDA interactions with grantees/partners and have visibility into the pool of applicants and contacts. Building on the three Salesforce CRM applications that were rolled out in November 2020 (Disaster Supplemental Funds; Office of External Affairs; and Economic Development Integration), EDA will roll out two additional applications in FYI21 (Trade Adjustment Assistance for Firms and Revolving Loan Funds).

In late FY21 / early FY22, EDA plans to launch a new strategic initiative on customer experience. The **EDA Customer Experience (CX)** initiative will be a multi-phase initiative designed to help EDA continue to gain a deeper understanding of customer needs and experience and to integrate those insights into EDA's operations. The initiative is anticipated to include efforts to define a customer journey map, develop and deliver training on customer service to EDA employees, gather, analyze and act on customer feedback data, and continuously strengthen the implementation and use of updated tools and processes to better support customer service. The initiative will also define clear operational and voice-of-the-customer metrics and targets to inform further improvements.

Goal 2: Effectively Anticipate, Respond to, and Implement Change

<table>
<tr><td colspan="2">**Objective 1: Strengthen connectivity and collaboration across the agency**

Outcome: EDA employees' levels of connectedness and collaboration will continuously increase. By 2025, EDA's scores in engagement, alignment, communication, and collaboration via the FEVS Effective Communication Index will be greater than XX%.</td></tr>
</table>

Strategies: **A**. Improve internal communications **B**. Improve collaboration and knowledge management capabilities	Key Milestones in FY21 and FY22: • Office365 (SharePoint and Teams) rolled out across EDA • EDA-wide Intranet rolled out **KPIs and Targets:** • **Outcome Measure**: >XX% FEVS scores in the Effective Communication Index • **Outcome Measure**: >XX% Best Places to Work Teamwork Category • Additional KPIs will be further defined by the initiative team
Strategic Initiatives in FY21 and FY22	**Initiative Lead, Organization**
Initiative: Strengthened Internal Communications, Collaboration and Knowledge Management	Laura Ostenso, OFMS and Laura Stone, OEAC
Initiative: Communities of Practice at EDA	Name, Office (TBD)

In FY21, EDA will roll-out a key digital platform to strengthen internal communication, collaboration, knowledge sharing and knowledge management among all EDA offices: Office 365. The Office 365 suite (including SharePoint and Teams) will provide EDA employees with modern tools to stay connected and informed as well as collaborate seamlessly whether in office or working remotely. The **Strengthened Internal Communications, Collaboration, and Knowledge Management** initiative will include developing the SharePoint site architecture and governance around the use of the tools, as well as training and user adoption strategies to ensure that EDA employee are well equipped to take advantage of the tools. The SharePoint platform will also house an EDA-wide intranet, a key tool for strengthening EDA internal communications and helping EDA employees find the right information when they need it. These tools will facilitate and foster one EDA approach to collaboration and communication, without constraining the creativity of regional and programmatic offices while also providing the means to share strategies that have been successful in meeting unique needs.

Building on the roll-out of the Office 365 collaboration environment, EDA will also focus on launching and supporting internal Communities of Practice to help EDA employees connect around topical areas of interest / work activities to share knowledge and best practices and to identify solutions to common challenges.

EDA will also implement other improvements to strengthen internal communications while minimizing information overload. These include:

- Using multiple platforms and communications channels to deliver timely information to employees;
- Providing regular updates on EDA-wide initiatives and progress on EDA priorities;
- Increasing opportunities for two-way communication / employee feedback to make sure that concerns are heard and employee insights and ideas are leveraged;
- Further recognizing employee and team accomplishments; and
- Highlighting best practices that can be replicated across the agency.

Specifically, there will be a roll-out of the EDA Mission and Strategic Plan for FY21-25 that will employ these methods and provide overall communication on the shared purpose for employee connectivity and collaboration. Internal communications strategies and tactics will continuously be improved based on insights and employee feedback.

> **Objective 2: Develop an agile, capable, and "right-sized" workforce**
>
> **Outcome: EDA will recruit, onboard, develop, and deploy employees to ensure a right-skilled and right-size workforce to meet evolving mission needs. By 2025, there will be a XX% decrease against the baseline in number of gaps between existing employees' skills and EDA's needs, and EDA's scores on the Strategic Management category of Best Places to Work will be greater than XX%**

Strategies:	Key Milestones in FY21 and FY22:
A. Develop a strategic workforce plan **B**. Flexibly deploy internal talent **C**. Effectively leverage external talent	• Workforce Analysis (baseline assessment of workforce competencies and skills gaps) conducted • Workforce Plan developed • Workforce Model developed • Implementation of strategies within Workforce Plan begun **KPIs and Targets:** • **Outcome Measure**: XX% decrease against the baseline in number of gaps between existing employees' skills and EDA needs • **Outcome Measure:** >XX% Best Places to Work Strategic Management Category • **Outcome Measure:** >XX% in FEVS Human Capital Assessment and Accountability Framework (HCAAF), Talent Management category • **Lead Measure**: Hiring cycle time (from job posting to onboarding) less than XX days.

	• Additional KPIs will be further defined by the initiative team
Strategic Initiatives in FY21 and FY22	**Initiative Lead, Organization**
Initiative: Holistic EDA Workforce Strategy	Quinn Henderson, OFMS; Ikeyne Umunnah, OEAC and Marguerite McGinley, PRO

In FY21, EDA will launch the **Holistic EDA Workforce Strategy** initiative to ensure that the agency remains able to recruit, develop, deploy, and retain a skilled workforce to meet evolving mission demands. EDA will conduct a **Workforce Analysis** to establish a strong baseline understanding of the current workforce profile and a desired future state of roles and competencies. The analysis will focus on mapping the current state of competencies across roles at EDA, identifying skills needed to perform critical functions, and establishing future state roles and competencies based upon a refined grants process. The **Workforce Plan**, informed by the Workforce Analysis, will align with strategic plan goals and agency priorities and enable effective alignment of employee skillsets across the agency. Key considerations for EDA's workforce plan include:

- Developing a strategic workforce and succession plan;
- Defining streamlined processes for hiring, including special hiring authorities and inter-agency details to build in flexibility for unpredictable skillset needs;
- Enhancing training and development opportunities to continuously build employee capacity including through expanded opportunities for internal details and cross training; and
- Supporting supervisors and managers in building the capabilities to effectively operationalize an agile workforce.

Objective 3: Establish a strong planning and performance improvement culture

Outcome: EDA will continuously improve operations and will be more prepared for future challenges or shifts in priorities. By 2025, EDA's score for the FEVS Results-Oriented Performance Culture index will be greater than XX%.

Strategies:	Key Milestones in FY21 and FY22:
A. Improve strategic and operational planning **B**. Improve capacity for continuous performance improvement **C**. Improve identification and mitigation of risks	• Planning and Performance Improvement function established • Strategic Plan updated annually • Annual Agency Performance Plans issued • Quarterly reporting on Strategic Plan progress (initiatives and metrics) **KPIs and Targets:** • **Outcome Measure**: >XX% FEVS score for Results-Oriented Performance Culture index • **Outcome Measure**: >XX% FEVS score for HCAAF Leadership and Knowledge Management scores

	• **Lead Measure:** XX% of employee performance plans are aligned to EDA strategic goals and objectives • Additional KPIs will be further defined by the initiative team
Strategic Initiatives in FY21 and FY22	**Initiative Lead, Organization**
Initiative: Planning and Performance Improvement	Noha Gaber, OAS

To further enhance the agency's ability to accomplish its strategic goals and objectives and advance a culture of planning and informed decision-making, in FY21, EDA leadership will collaborate to strengthen, formalize, and align its enterprise risk management, planning, programming, performance improvement and budget formulation activities. This will be an ongoing effort to structure and align the governance related to and the execution of these processes. In addition, staff involvement in the implementation of the agency strategic plan, including through participation in the strategic initiative teams will further broaden knowledge of planning and performance improvement concepts.

Building on the Business Process Review conducted in FY20 and implementation of its recommendations as well as the development of the first EDA Strategic Plan, in late FY21 / early FY22 EDA also plans to develop a framework and institutionalize a function for continual business process improvement and equip EDA employees with the knowledge and tools to undertake improvement efforts.

Goal 3: Foster an Exceptional Workplace that Attracts, Develops and Retains a Talented Workforce

Objective 1: Help all employees meet performance and professional goals
Outcome: EDA employees will regularly participate in professional development opportunities and receive effective performance coaching to strengthen their capabilities. By 2025, EDA scores in the Best Places to Work Training and Development Category will be greater than XX%.

Strategies:	Key Milestones in FY21 and FY22:
A. Strengthen employee participation in a suite of effective, relevant training and professional development opportunities **B.** Strengthen performance coaching	• Leadership Development Program executed • Existing professional development resources catalogued to inform improvements **KPIs and Targets:** • **Outcome Measure**: >XX% score in Best Places to Work Training and Development Category • Additional KPIs will be further defined by the initiative team
Strategic Initiatives in FY21 and FY22	**Initiative Lead, Organization**
Initiative: Workforce Strategy	Quinn Henderson, OFMS; Ikeyne Umunnah, OEAC and Marguerite McGinley, PRO

Training, learning, and development will be a major component of the broader **Workforce Strategy**. As part of EDA's workforce planning efforts, EDA will continuously work with employees to identify training and development needs and enhance the training, learning, and development opportunities available in order to best deliver on EDA's mission. EDA will promote employee engagement by clearly tying participation in training and professional development opportunities with professional growth and advancement. Additionally, the agency will focus on clearly communicating career progression standards to employees and supporting career progression planning within the agency. The initiative will also support front-line supervisors to effectively coach employees on performance expectations and provide guidance on appropriate professional development opportunities. EDA's ongoing Leadership Development Program lays the groundwork for providing supervisors with the skills and tools to effectively coach staff. EDA will regularly incorporate feedback from employees to identify opportunities to improve employee engagement and satisfaction.

Objective 2: Foster an innovative and transparent culture
Outcome: EDA will equip and empower employees to advance a culture of continuous improvement and innovation. By 2025, EDA will report an increase in transparency and empowerment through scores of greater than XX% on the Best Places to Work Effective Leadership: Empowerment category, and increased innovation through scores greater than XX% on the Best Places to Work Innovation category.

Strategies:	Key Milestones in FY21 and FY22:
A. Promote an environment where employee voices are heard and incorporated **B.** Equip employees to innovate and problem solve	• Continuous Process Improvement function launched **KPIs and Targets:** • **Outcome Measure**: >XX% FEVS scores on Best Places to Work Effective Leadership (Empowerment) Category • **Outcome Measure**: >XX% FEVS scores on Best Places to Work Innovation Category • Additional KPIs will be further defined by the initiative team

Strategic Initiatives in FY21 and FY22	Initiative Lead, Organization
Initiative: Communities of Practice	Name, Office (TBD)
Initiative: Planning and Performance Improvement	Noha Gaber, OAS

Cultivating an environment that encourages and empowers employees to share ideas and insights is an ongoing focus. EDA will continue and expand its ongoing efforts to provide opportunities for employees to share their insights, ideas, and feedback to inform continuous improvement to the EDA workplace. The annual Federal Employee Viewpoint Survey provides an opportunity for employees to share their feedback on a range of workplace and work environment dimensions. In addition, EDA leadership seeks feedback from employees through an internal quarterly Pulse Survey. EDA leadership will continue to use the employee feedback from these and other mechanisms to implement improvements in an ongoing manner and communicate how employee feedback was used to make changes and improvements. Future training for front-line supervisors will also emphasize the important role they have in helping to cultivate this innovative and safe environment.

In addition, EDA will continue to expand participation of employees from across the agency in cross-functional teams, working groups and communities of practice. For example, the suite of strategic initiatives that are outlined in this plan are designed to include employees from across the agency to create a culture of alignment and foster innovative thinking and action. Building on these efforts, in late FY21 / early FY22, EDA plans to launch **Communities of Practice** as a new strategic initiative. This initiative will provide all EDA employees with an avenue to network and collaborate

across regions and offices to share best practices and identify challenge areas. The Communities of Practice will encourage innovation by providing a space for employees to collaborate on and share ideas.

Another planned initiative, **Planning and Performance Improvement**, will support employees in problem identification, collaborative problem solving, solutions testing, and evaluation of results. This initiative will provide a focused way to empower, involve, and equip employees with the skills and tools to continuously improve the processes they do every day at work. It will also provide a mechanism for employees to collaborate on and test ideas to improve EDA-wide business processes and common challenges in a low-risk environment.

Objective 3: Promote diversity, equity and inclusion in the workplace Outcome: EDA will make improvements to the state of diversity, equity, and inclusion within the agency. By 2025, EDA's scores on the Best Places to Work Support for Diversity category will be greater than XX%.	

Strategies: **A.** Develop an understanding of the state of diversity, equity and inclusion within EDA and identify areas for improvement **B.** Act on identified improvement opportunities	Key Milestones in FY21 and FY22: • Baseline data analyzed • Plan to address identified improvement opportunities developed • Implementation of planned improvement opportunities started **KPIs and Targets:** • **Outcome Measure**: >XX% FEVS scores on Best Places to Work Support for Diversity Category • Additional KPIs will be further defined by the initiative team
Strategic Initiatives in FY21 and FY22	**Initiative Lead, Organization**
Initiative: Diversity, Equity, and Inclusion	Name, Office (TBD)

In late FY21 / early FY22, EDA will launch a **Diversity, Equity, and Inclusion** initiative with the purpose of developing a deeper understanding of the state of diversity, equity, and inclusion within EDA, noting current best practices as well as areas for improvement. The Diversity, Equity, and Inclusion initiative team will propose strategies and practices to continuously advance a culture of diversity, equity, and inclusion at EDA. This initiative will promote a workplace where individuals consistently feel safe and supported, are empowered to speak up, and are included. The initiative is expected to focus on empathy, as well as acknowledging privilege and bias in the workplace. In addition to the planned initiative, EDA will continuously identify opportunities to improve diversity, equity, and inclusion in the agency's hiring practices and evaluation processes.

<table>
<tr><td colspan="2" style="background-color:#5B9BD5; color:white;">Objective 4: Provide an excellent internal customer experience for all employees

Outcome: EDA employees will have the tools and infrastructure to excel in their roles. By 2025, greater than XX% of EDA employees will report high levels of satisfaction with internal customer support services.</td></tr>
</table>

Strategies:	Key Milestones in FY21 and FY22:
A. Understand needs of internal customers **B.** Improve internal service delivery	• Review of OFMS business processes conducted • Improvements to OFMS business processes implemented **KPIs and Targets:** • **Outcome Measure:** >XX% of EDA employees report high levels of satisfaction with internal services (collected through Pulse Survey) • Additional Voice of the Customer and lead KPIs will be defined by the initiative team
Strategic Initiatives in FY21 and FY22	**Initiative Lead, Organization**
Project: OFMS Organizational Excellence	Pamela Smith, CRO (on detail to OFMS)

OFMS provides critical mission-enabling support to EDA. In FY21, EDA plans to launch the OFMS Organizational Excellence project to evaluate OFMS capabilities and identify opportunities to elevate the experience of EDA employees with the internal services provided, including the services related to human resources (e.g., onboarding, hiring, training and development), IT, purchasing, and other mission-enabling functions. The project, to be executed in FY21 and FY22, is anticipated to include:

- Conducting a review of OFMS business processes;
- Conducting a comprehensive internal services journey mapping exercise to understand the experiences of EDA employees with OFMS services;
- Designing and administering a bi-annual internal customer satisfaction survey;
- Updating existing internal policies and developing the system for policy definition and management;
- Documenting Standard Operating Procedures and Service Level Agreements;
- Developing and documenting improved OFMS processes; and
- Identifying and prioritizing other improvements to OFMS service delivery.

Goal 4: Use Data and Evidence to Strengthen the Impact of EDA Programs

Objective 1: Strengthen EDA's data and analytics infrastructure **Outcome: EDA will improve the infrastructure for gathering, analyzing, and disseminating high-quality data. By 2025, an external data maturity evaluation for EDA results in a score of # out of 5 in the Data Governance Dimension (agency level collaboration, data ownership and stewardship) and a score of # out of 5 in Systems/Technology Dimension (core common data systems, key data can be programmatically accessed; common tools are in use across agency).**	

Strategies: **A.** Ensure quality of EDA's data assets **B.** Improve access to EDA's data assets and tools for data analysis	Key Milestones in FY21 and FY22: • Integrated Data Environment and MicroStrategy Projects rolled out • Data governance model developed • Employees trained on data management KPIs and Targets: • **Outcome Measure:** Data maturity evaluation is # out of 5 in the Data Governance Dimension • **Outcome Measure:** Data maturity evaluation is # out of 5 in the Systems/Technology Dimension • Initiative team will develop appropriate metrics and targets
Strategic Initiatives in FY21 and FY22	**Initiative Lead, Organization**
Enhanced Data and Analytics Infrastructure	Jason Goodwin, PRNTA and Hillary Sherman, ATRO

In FY21, EDA will launch the **Enhanced Data and Analytics Infrastructure** initiative. This initiative will enhance EDA's data maturity and support modernization of EDA's data infrastructure to strengthen its data management, analysis, and dissemination. EDA will use the Federal Data Strategy and Department of Commerce Data Strategy as guides for efforts to enhance its data maturity. As a critical component of this initiative, EDA will accelerate the roll out of an updated data and analytics infrastructure through the coordinated implementation of the ongoing **Integrated Data Environment (IDE)** and **MicroStrategy** projects. These projects will make it easier for employees to access, analyze, visualize, use, and report on the most up-to-date data in a timely manner and with minimal burden. The IDE will consolidate storage of data into a single system to support accessibility for all employees. EDA's data will be accessible through data analysis and visualization tools, including MicroStrategy, which will provide a platform for employees to easily visualize and report on data from a single source.

In addition, EDA will work to establish a culture of accountability for data as a strategic asset through effective data governance policies that promote staff understanding of how to maintain and

utilize data sources. EDA will work to establish data standards to ensure data quality and enable more effective data use. EDA employees (including both staff and leadership) will be trained on data quality and management techniques to assure high quality of data entered into shared systems.

Objective 2: Strengthen evidence-building capabilities to inform economic development programs Outcome: By 2025, EDA will demonstrate continuous improvement in meeting the requirements of the federal Evidence Act.	
Strategies: **A.** Develop and publish a learning agenda **B.** Strengthen EDA's organizational capacity to gather and synthesize evaluations and analysis	**Key Milestones in FY21 and FY22:** • EDA's Learning Agenda published in future updates to the EDA Strategic Plan • FY21 program evaluation activities launched **KPIs and Targets:** • Initiative team will define appropriate metrics and targets
Strategic Initiatives in FY21 and FY22	**Initiative Lead, Organization**
Strengthening EDA Mission Strategy	Ryan Smith, PRNTA; Robin Bush, CRO and Trent Thompson, DRO

To support this strategic objective, EDA will continue building its internal organizational capacity to evaluate the impact of its programs, consistent with the Evidence Act. EDA will continue to develop its learning agenda for research and program evaluation and will strengthen its use of internal and external sources of data and analysis to better understand the impact of EDA funded work on regional and community level economic development.

EDA's learning agenda currently focuses on evaluating the impact of infrastructure projects, non-infrastructure projects, and CARES Act projects. The Office of Regional Affairs (ORA) will continue the launch and advancement of a new framework for evaluating non-infrastructure projects based on work developed by SRI International. Additionally, EDA will continue a collaboration with the Urban Institute, which will develop an evaluation framework to inform evaluation of infrastructure projects. ORA will also continue work on a newly launched collaboration with Argonne National Labs that will develop an evaluation framework for CARES Act projects as well as a method for identifying community readiness for EDA programs. Additionally, EDA will continue to engage in Departmental- and government-wide data and evaluation task forces and collaborative efforts. EDA will remain integrated with, and when appropriate, lead cross-agency economic development data-gathering activities and approaches.

In addition, in FY21, EDA will launch the **Strengthening EDA Mission Strategy** initiative, which will focus on defining ways to strengthen the impact of EDA's work to support a stronger, more equitable economic recovery, creating paths for all communities to grow in the modern economy. The initiative will explore multiple aspects including enhancing internal alignment, strengthening external partnerships and identifying new program delivery models. In seeking to shape the

direction of future mission strategies, this initiative will draw upon internal and external research and evidence and will inform EDA's learning agenda.

<table>
<tr><td colspan="2">Objective 3: Expand the use of data and evidence to improve economic development outcomes

Outcome: EDA leadership and staff will use data-based insights to make strategic and operational decisions.</td></tr>
</table>

<table>
<tr><td>Strategies:
A. Define and track actionable performance metrics/targets that promote desired outcomes for grantees and EDA
B. Equip employees to use available data and evidence
C. Incorporate data and evidence usage into EDA processes and establish a culture of data-driven decision making</td><td>Key Milestones in FY21 and FY22:
• Employees trained in data skills and data analytics tools
• EDA Performance Dashboard launched

KPIs and Targets:
• Initiative team will define appropriate metrics and targets</td></tr>
<tr><td>Strategic Initiatives in FY21 and FY22</td><td>Initiative Lead, Organization</td></tr>
<tr><td>Enhanced Data and Analytics Infrastructure</td><td>Jason Goodwin, PRNTA and Hillary Sherman, ATRO</td></tr>
</table>

This objective seeks to ensure that employees are well-equipped to use internal and external sources of data and results of program evaluation activities and research to make evidence-based and data-driven decisions.

In FY21-22, this strategic objective will be supported by the **Enhanced Data and Analytics Infrastructure** initiative. As part of the initiative, EDA will define and deploy training to help employees build skills on data collection, analysis, and management, and equip them to use internal and external sources of data to inform strategic and operational decisions.

The Office of Regional Affairs will work with Regional Offices and HQ grants offices to ensure that data and evidence are incorporated into organizational and employee decision-making, including defining investment priorities, project development, technical assistance, and IRC merit review. Specifically, ORA will ensure that ongoing efforts to collect and analyze data on non-construction project performance metrics are shared and incorporated into Regional Office decision-making.

Supported by EDA's Integrated Data Environment and data analytics tools such as MicroStrategy (to be rolled out as part of the Enhanced Data and Analytics Infrastructure initiative), EDA will deploy agency-wide strategic and operational dashboards. These data visualization tools will present up-to-date data on key performance indicators and operational data to allow EDA staff and leadership to track trends and develop analyses to inform strategic and operational decisions.

Goal 5: Expand the Reach and Impact of EDA's Work to Catalyze Economic Development

<table>
<tr><td colspan="2" style="background-color:#9e3428;color:white">Objective 1: Expand awareness of and access to EDA resources and results

Outcome: EDA will increase the breadth and depth of its engagement with all stakeholder groups (applicants, partners, economic development community, and governmental leadership) to promote equitable access to EDA resources by all eligible recipients. By 2025, EDA will increase the number of high-quality grant applications received from underserved communities by XX% and increase the overall percentage of high-quality applications by XX%.</td></tr>
</table>

Strategies:	Key Milestones in FY21 and FY22:
A. Implement effective outreach and communications strategies incorporating data and technology tools **B.** Promote equity by targeting and increasing access for underserved communities **C.** Expand and build new partnerships with national, regional, and local stakeholders to reach a broad and diverse audience	• Baseline assessment of EDA's national/regional/local partnerships conducted • Additional milestones will be defined based on identified actions and initiatives **KPIs and Targets:** • **Outcome Measure**: Number of high-quality grant applications received from underserved communities • **Outcome Measure**: Overall percentage of high-quality applications to total applications • Initiative team will define appropriate metrics and targets
Strategic Initiatives in FY21 and FY22	**Initiative Lead, Organization**
Equitable Access Initiative	Name, Office (TBD)

To achieve this objective, EDA will collaborate across headquarters and regional offices to strengthen and target the agency's outreach to communities. EDA will deliver targeted messages tailored to stakeholders' unique needs while also aligning on consistent EDA messaging.

In FY21 and FY22, OEAC will continue to collaborate with Regional Offices on increasing awareness of and access to EDA resources and results through marketing and communications activities, with an eye toward identifying communities that could benefit from EDA support but have not had strong engagement with EDA in the past. Through all communications, including sharing success stories, EDA will ensure that messaging is accessible to the targeted audiences, especially underserved communities who have not engaged with EDA substantially in the past. EDA's website redesign project presents another opportunity to creatively promote and amplify EDA's work and map EDA's regional impact. OEAC will use data and technology as appropriate to better identify and target relevant stakeholder groups and inform new engagement approaches, considering also communities that may not have access to modern technology. EDA will explore interagency partnerships as an

opportunity to create further linkages to communities underserved by EDA resources. EDA will engage congressional offices to further expand awareness of EDA's offerings and impact.

In FY21 and FY22, EDA staff responsible for community outreach and project development will work together to identify and share best practices for building EDA's pipeline of potential applicants and projects across EDA's entire portfolio of grants programs. In the near-term, regional staff, ORA and OEAC will work together to define and deploy consistent messaging and templates regarding EDA's program offerings to be used in presentations and shared with community partners. Economic Development Integrators will work with federal and philanthropic partners on joint outreach and program coordination to extend EDA capacity to engage with shared customers and promote comprehensive development strategies. Another focus area will be sharing best practices for outreach strategies, including developing stakeholder-specific engagement plans, working with EDA partners, like Economic Development Districts, to scale EDA's efforts, and leveraging grants to improve support for community partner organizations.

The rollout of Salesforce customer relationship management tool (CRM) capabilities will further support outreach efforts by providing technical infrastructure for gathering data, identifying effective outreach strategies, and measuring progress. EDA will also consider the potential applications of using Salesforce as a proactive outreach tool.

In FY21, EDA will launch an **Equitable Access Initiative**, which is anticipated to focus on engaging underserved communities through effective outreach and assistance. The scope of the initiative, to be further detailed and refined through the Phase 1 Initiative, Strengthening EDA's Mission Strategy, will start by mapping the communities across the country where EDA has and has not worked in the past and identifying barriers to accessing EDA's resources. The initiative will propose and implement strategies to raise awareness of and promote equitable access to EDA grant funding opportunities and other resources, to inform outreach by both OEAC and Regional Office/HQ grants office representatives.

> **Objective 2: Elevate EDA's role as a resource and knowledge integrator for economic development**
>
> **Outcome: EDA will be a sought-after resource for economic development knowledge and best practices and will play a leading role in coordinating the federal government's response to economic development needs.**

Strategies:	Key Milestones in FY21 and FY22:
A. Deploy EDA's leading-edge insights along with external research to integrate and share knowledge with the economic development community and EDA stakeholders **B.** Strengthen EDA's capacity to convene other federal agencies for collaborative planning and program coordination to maximize assistance for local and regional economic development	• Specific milestones to be proposed by initiative team. **KPIs and Targets:** • Initiative team will define appropriate metrics and targets

Strategic Initiatives in FY21 and FY22	Initiative Lead, Organization
Initiative: Strengthen Mission Strategy	Ryan Smith, PRNTA; Robin Bush, CRO and Trent Thompson, DRO

Elevating EDA's role as an integrator will require coordinated, collaborative efforts from various stakeholders across EDA, including OEAC, Regional Offices and the Office of Regional Affairs, and potentially new organizational functions, to continue building EDA's reputation as an economic development leader and strengthening its overall impact.

In FY21, EDA will launch the **Strengthen Mission Strategy** initiative, which seeks to explore ways for EDA to strengthen how it delivers its mission to lead the federal economic development agenda by promoting innovation and competitiveness. As part of this initiative, EDA will examine its focus on inter-governmental partnerships and determine its desired positioning as a leader for planning and coordination of federal economic development activities. EDA will consider how to strengthen the agency's role as a resource integrator throughout the grants process and beyond, potentially reexamining roles and responsibilities to support this objective (considering, for example: strengthening the existing EDI role, or potentially creating a new role focused on interagency planning).

EDA will also determine how best to integrate and share economic development knowledge across the federal government and throughout the broader stakeholder community, including potential grantees and community partners. As a practitioner of economic development, EDA has access to unique lessons learned and best practices for other economic development actors to consider and learn from. In FY21-22, EDA will examine how to incorporate external research with internal findings to share economic development knowledge across the federal government and beyond. EDA's breadth of programming (e.g., EDA's flexible economic adjustment assistance funding, EDA's focus on innovation and entrepreneurship as a driver of economic growth) can serve as a model for other organizations looking to spur economic growth. Likewise, EDA program lessons learned and best practices can be adopted by potential grantees and communities looking to increase economic activity in their regions. EDA will examine how best to aggregate and disseminate this knowledge, exploring several avenues to best reach its desired audiences (e.g., exploring the creation of an internal or EDA-funded Center of Excellence, or an online knowledge sharing platform).