



Year End Report

December 2020

+

Accountability Plan

2021



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www.gatewayinitiative.com

Endurance: How We Worked Together for a Better Baldwin in 2020

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Project Manager + Advocacy Specialist

2020. We're all too familiar with the light-hearted banter and phrases used over the last 9-10 months to describe what this year has brought to the world. Those of us in South Baldwin are even more cognizant of these woes, once you factor in hurricane season. We, the *individuals*, know personally the impacts and stress caused by one dramatic blow after another: pandemic, hurricane, job loss, election drama. You get it, so we'll spare you the jokes and we'll spare you the negativity.

What we'll do instead is BRAG HARD about the positive and professional things our organization and partners achieved in spite of all of the obstacles. We worked hard this year – for YOU. For our community. We knew you were working hard too, so we dedicated ourselves to working just as hard to ease *some* aspects of your lives. Namely, your ability to 'do business' – to keep your doors open, your employees earning wages, and our community utilizing your services. We were able to do this, to pivot our program focus and realign our priorities, because of the nature of our initiative: your investment in us allowed us to run full steam ahead at whatever 2020 threw our way.

This year, we facilitated over 60 calls and meetings to align local leaders with the needs of the business community in the wake of the shut

down and after hurricane Sally. Our team developed over 100 communications (emails, social media posts, and more) to spread the word about our programs and our partner's offerings. Nearly 200 local professionals have participated in this year's professional development training opportunities (Gateway to Great Customer Service, AIDT Leadership Skills, and Auburn's Organizational Management Series). We've also co-developed almost 60 videos of local entrepreneurs, helping tell their stories and rep their businesses.

We've done a lot, and if you know us well, you know we could talk about it for hours, because we truly love what we do. Instead of gabbing like we always do, we'll let you see for yourself in the following reports. Our [Evergreen List \(pages 3-6\)](#) shows every major activity carried out by our team. The [Accountability Plan \(pages 7-10\)](#) is essentially a list of our strategic objectives (ongoing, and revised quarterly).

We'll end here with the most important message, from us to you, one of *gratitude*: we are sincerely grateful for your investment: financially as well as your energy. Yes, we've been working hard, but only because of your dedication to our community. Thank you. We look forward to and are well prepared for what comes in 2021.

2020 Evergreen List

Program tasks, meetings, accomplishments, and day-to-day activities

#	Acct Plan #	Program of Work	Item	Date	Humans
1	10		Meeting w/ YES Committee to establish new opportunities for youth from Mobile County interested in work in Baldwin County	1/15/2020	EB
2	5		Conference Call with TransfrVR re: progress on VR project	2/12/2020	EB
3	20		Vulcan - Apprenticeship Discussion Plant #2	2/20/2020	EB
4	18		Meeting w/ Kendall Moudy to discuss CTE program offerings at SBCT	3/3/2020	EB
5	3		Discuss structuring multiple levels of Gateway to Great Customer Service to include certification credit for each level of training completed	3/12/2020	EB/SW
6	16		Fairhope HS Info Night	3/12/2020	TO
7	18		Foley HS Business Advisory Meeting	3/13/2020	TO/EB
8	20		Spectrum Apprenticeship Meeting	3/16/2020	EB
9	20		Innisfree Apprenticeship Opp Meeting	5/5/2020	EB
10	11		Virtual Hiring Fair in partnership with SAWDC	5/5/2020	ALL
11	11	Workforce	h&t Virtual Hiring Fair in partnership with SAWDC	5/18/2020	ALL
12	18	Development	Meeting with CACC and Plasmine to discuss new opportunities for related instruction for apprentices.	6/2/2020	EB
13	13	+	State Farm Insurance Apprenticeship Initiation Meeting	6/4/2020	EB
14	2	Recruitment	Logistics planning for Upcoming Training (AIDT)	6/5/2020	SW
15	na		EDA Economic Injury Grant Meeting - Lee Lawson / Sherry Sullivan	6/9/2020	EB/SW
16	18		Chamber Alliance / CACC Apprenticeship Overview	6/15/2020	EB/DW
17	2		AIDT Leadership III Training (11 attendees) - VIRTUAL	6/16/2020	SW
18	13		Plasmine, Inc. Apprenticeship Planning Meeting	6/18/2020	EB
19	3		ATN / Auburn Customer Service Certification Program Planning Meeting	6/22/2020	EB/SW
20	na		Gateway Apprenticeship/Education Knowledge Share with CABC Team	6/23/2020	EB/TV/PH
21	na		Meeting with CACC Staff who will be housed at the BCFBD	6/23/2020	EB/DW
22	3		Gateway / ATN Auburn Meeting – Customer Service Survey Development	6/26/2020	SW/EB
23	5		Gateway Meeting with TransfrVR – re: FHS VR Pilot	6/29/2020	EB
24	3		Mindy Hanan (ARHA) and Dr. Martin O'Neill (Chair – HM – AU) – COVID 19 Training Program for Hospitality Businesses	7/7/2020	EB
25	20		Meeting with Sophia Guan Alabama Office of Apprenticeship – Housekeeping Management apprenticeship brainstorm	7/9/2020	EB

2020 Evergreen List

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26	18	Workforce Development Recruitment	Meeting with Donny – Chair of Technical Advisory Committee for Governor's Credentials of Value program for state schools	7/10/2020	EB
27	18		Technical Advisory Committee Meeting for Credentials of Value	7/13/2020	EB
28	8		Meeting with Bradley Byrne seeking advocacy for Career Center move to the BCFBD	7/14/2020	DW/EB/SW
29	10		Career exploration / job board brain storm	7/20/2020	PH/SW/EB
30	8		SAWDC/AIDT lunch meeting	8/4/2020	EB/SW/DW
31	2		AIDT Leadership Skills I (2-day)	8/18/2020	All
32	8		Engage Alabama Virtual Conference	8/26/2020	DW
33	8		Technical Advisory Committee (TAC) Meeting (H&T)	8/31/2020	EB
34	20		Present Vulcan Inc. apprentices (graduates) with Journeymen cards	9/1/2020	DW/EB/SW/LP
35	20		A&R Hospitality Apprenticeship Meeting	9/11/2020	EB/SW
36	21		Develop apprenticeship / gateway investment summary for Greg B. for zoo board meeting	9/25/2020	EB/SW
37	20		Safari Club Apprenticeship Meeting	9/25/2020	EB/SW
38	18		RTI Discussion - Duplantis	10/1/2020	EB
39	11		JOB FAIR!	10/14/2020	All
40	8		SAWDC Quarterly Meeting	10/20/2020	EB
41	8		SAWDC Workforce summit	10/20/2020	EB
42	8		AlabamaWorks! Work-based learning webinar	11/2/2020	EB
43	8		Alabama Office of Apprenticeship sync-up	11/2/2020	EB
44	21		Apprenticeship Week!!!!	11/8/2020	All
45	18		SAWDC / CACC Pathway meeting	11/13/2020	EB
46	18		Gulf Shores Christian Academy	11/16/2020	EB
47	20		Cosmo's Apprenticeship Meeting	11/17/2020	EB/SW
48	18		FHS Fall Advisory Committee Meeting	11/18/2020	EB
49	13		GSHS Meeting - apprenticeship	11/19/2020	PH/EB
50	1		Review upcoming training academy schedule, set reminders and comms plan for sign-ups and last calls	11/24/2020	SW

#	Acct Plan #	Program of Work	Item	Date	Humans
51	33	Needs Assessment + Solutioning	CRC Meeting – Gateway Overview	7/9/2020	EB/DW
52	34		Automotive Consortium Meeting	11/4/2020	DW/EB
53	34		H&T Alliance Committee Meeting	11/4/2020	EB

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#	Acct Plan #	Program of Work	Item	Date	Humans
54	38		BCA/CCAA Legislative Call	3/16/2020	SW
55	38		Chamber Coalition meeting with Lee Lawson	3/17/2020	DW
56	COVID		3/17-2020 through 6/3/2020::: Gateway Response to COVID-19 Pandemic Local Impacts: Daily Calls (33), Resources Review, Daily Resource Sharing (email), regular advocacy activities, one-on-one counselling with investors and members to decipher information and assist in business survival activities, etc.	3/17/2020	All
57	38		Coordinate with Foley Mainstreet director to distribute COVID-19 survey (consumer)	5/29/2020	SW/LP
58	38	Advocacy	Baldwin Beach Express Extension Research Meeting	7/16/2020	EB/SW
59	38		Work with Foley Main Street on plan (i.e., letter of support) for historical rehab tax incentive program	7/21/2020	SW
60	COVID	+	PPP Survey Distribution / Data Analysis - Revenue Lost Estimation	7/27/2020	SW/EB
61	38		Daycare project - letter of intent for GRECES	8/1/2020	SW
62	na	Community	HURRICANE SALLY RELIEF AND RESPONSE FOCUS	9/16/2020	All
63	na		EMA Housing call (post hurricane sally - workforce housing)	10/1/2020	EB/SW/DW
64	na	Participation	Employee Housing Survey	10/1/2020	SW/EB
65	39		Meet with SCORE representatives (eastern shore) to determine options for partnership and establishing a chapter in south Baldwin	10/30/2020	TV/PH/EB
66	39		Development of 2021 Chamber coalition survey	11/4/2020	SW
67	38		Meet Riviera Utilities new GA person, Sam	11/10/2020	DW/SW/EB
68	na		Collaborate with Foley YMCA to plan, advertise, and host fundraiser post hurricane Sally	11/13/2020	All
69	38		Keep Alabama Open campaign supported by the chamber coalition - press release and other comms	11/17/2020	SW/DW
70	38		Childcare Meeting - GRECES	11/19/2020	PH/EB/SW

#	Acct Plan #	Program of Work	Item	Date	Humans
71	27		New Building Tour with Container Yard (Stacy Brown)	3/12/2020	EB/DW/SW
72	27	Business	Copper kettle relocation business plan review	6/1/2020	EB
73	27	Acceleration	strategize details for future coworking space/incubation program, including lease / membership costs, benefits, layout, advocacy campaign necessities, etc.	6/12/2020	SW/EB
74	27	+	Meeting with Mike Thompson Soliciting Support for EDA Grant for Baldwin Innovation Zone	6/16/2020	EB/DW/SW
75	26	Incubation	Develop Incubator (BIZ) Proposal	7/16/2020	SW
76	27		Wolf Bay Lodge Acceleration project	10/30/2020	EB

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#	Acct Plan #	Program of Work	Item	Date	Humans
77	47		Editorial Calendar review	6/3/2020	SW
78	45		Worktime: County Commission 2019-2020 Report out and 2020-2021 request for funding applications/project planning	6/4/2020	SW
79	41		Wharf Restaurant Group Gateway Introduction	6/5/2020	EB
80	All		First all-gateway meeting	6/23/2020	ALL
81	47		Gateway / One Baldwin Story Video Planning Meeting	6/26/2020	ALL
82	42		Gateway Friday email development (weekly)	7/1/2020	SW
83	42		Develop / Distribute Mid-Year Report	7/21/2020	SW/LP
84	42		Develop / Deliver July Board Report	7/22/2020	SW/EB
85	42		SBCC August Newsletter content	7/25/2020	SW/LP
86	43		Ongoing workforce graphics for website and social media (e.g., #workforcewednesday)	8/1/2020	SW/RM/LP
87	NA	Governance	Apply for Chamber non-profit grant thru State of AL	8/3/2020	EB/SW
88	42	Comms	Develop one-pager for new building	8/4/2020	SW
89	43		Workshop for website organization	8/10/2020	All
90	43	Admin	Website reorganization/redesign meeting	8/11/2020	SW/LP
91	44		County Commission Presentation (for investment)	8/21/2020	DW/SW/EB
92	42	Investor	August Board Report	8/21/2020	SW
93	41		Document new Investment Communications process	8/24/2020	SW
94	NA	Relations	Design sign for new building	8/25/2020	KR/SW
95	43		Team website design workshop	8/27/2020	All
96	41		Investor Relations communications (monthly - Aug)	8/28/2020	SW
97	41		Investor Relations communications (monthly - Sept)	9/3/2020	SW
98	43		Ongoing website building / redesign	9/6/2020	SW
99	42		Gateway oversight council	9/8/2020	DW/GA/EB/SW
100	na		Auburn Technical Assistance Center (ATAC) Strategy Deployment Project INITIATION	9/9/2020	EB/SW
101	44		Foley Rotary Club presentation	10/2/2020	DW/SW
102	43		Chamber of Commerce Week - collaborate with City of Foley for mayoral proclamation	10/13/2020	SW
103	42		October board report	10/15/2020	SW
104	42		Gateway Leadership Sync-up Meeting	11/5/2020	DW/GA/EB/SW
105	41		First Friday Forum (CABC)	11/6/2020	DW/SW
106	42		Gateway oversight council	11/10/2020	All
107	42		November board report	11/16/2020	SW
108	41		Investor Relations communications and review (Oct/Nov)	11/19/2020	TV/SW
109	42		CABC Board Meeting	11/19/2020	EB/SW
110	41		Gateway cover letter for invoices	11/20/2020	SW

Accountability Plan

2020 - 2021

Introduction

Since the initiative grew to include investors from the Coastal Alabama Business Chamber, during the collaboration efforts that kicked-off in 2019, the Gateway Initiative has been guided by a set of strategic objectives called our *Accountability Plan*.

These items derive from the original Case Statement, which was developed by South Baldwin Chamber leadership with guidance from *Funding Solutions* in 2017.

The *Accountability Plan* is revised bi-annually by the internal team and then approved by the Oversight Council (four investor representatives from each chamber). Internally, every item is filed

within a larger project plan, a spreadsheet we use to track every aspect of our work. This spreadsheet includes each variation of the Accountability Plan and links back, by number, to the original Case Statement.

Each item within the Accountability Plan is also connected to our *Evergreen List*, so we are able to calculate how much of our efforts were put into each sub initiative and project and which members of the team were involved.

Our team will review the 2020-2021 Plan in January 2021 to remove items that are 'complete' and update items that may no longer be relevant (according to direct business investor feedback).

Gateway Initiative Accountability Plan 2021



Workforce Development + Recruitment

- PD** 2. Facilitate leadership, customer service and supervisory development training to 100 individuals, annually - 4th Quarter, 2021
- ★ PD** 3. Explore options to contract services in order to facilitate and build curriculum for multiple levels of Customer Service training including business certification, and including funding and revenue opportunities - 3rd Quarter, 2021
- PD** 5. Enhance Soft Skills VR training program and implement into Baldwin County Hospitality and Culinary curriculum - 3rd Quarter, 2021
- A** 8. Regular meetings and advocacy efforts with/for regional training and workforce partners (i.e., ATN, SAWDC, CACC, AIDT, SBLC) - 4th Quarter, 2021 and ongoing
- ★ R** 10. Explore timeline and work plan for developing a recruiting, hiring, and job sharing platform for local businesses and workforce - 4th Quarter, 2021
- R** 11. Co-host job/career fairs (virtual and in person) in collaboration with Baldwin County Career Centers and SAWDC - 4th Quarter, 2021
- CST** 13. Determine Pre Apprenticeship and Apprenticeship options and career pathways in local business roles or connect employers with industry expert sponsors (e.g., CACC or AOA) - 4th Quarter, 2021 and ongoing
- ★ R CST** 14. In order to promote local job opportunities for Baldwin County's youth, support and participate in SAWDC Worlds of Opportunity (WOO; and senior event) and other similar events (in GS/OB), including promotion of pre apprenticeship and apprenticeship - 1st Quarter, 2021
- A CST** 18. Continued partnership with educational institutions and local business leaders to create and promote apprenticeship credentialing opportunities - 4th Quarter, 2021 and ongoing
- ★ CST** 20. Sponsor 100 Apprentices in key industry clusters in Baldwin County (including marketing, set up / administration, and tracking of apprentice progress) - 4th Quarter, 2021 and ongoing
- ★ A CST** 49. Continue to foster relationships with local educational institutions and employers in order to influence curriculum opportunities that align with local business needs (including regular meetings with career coaches and guidance counselors and promoting career tech opportunities to students and caregivers) - 4th Quarter, 2021 and ongoing



Gateway Initiative Accountability Plan 2021

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NEW

Business Engagement + Incubation

- I ★ BE 27. Continue to provide engagement services and solutions or provide referral services to start-up entrepreneurs or existing businesses, including exploration of coworking space options (e.g., ATAC Strategy Deployment project with SBCC) - 4th Quarter, 2021
- I M 28. Partner with existing local SCORE representatives to recruit SCORE mentors in order to aid local entrepreneurs - 2nd Quarter, 2021

Business-Driven Needs Assessment + Solutioning

- A 33. Facilitate the formation of industry cluster consortiums to better understand local workforce and educational needs as well as increase advocacy efforts on a variety of other regional topics - 4th Quarter, 2021
- A ★ 34. Design and administer a bi-annual industry salary survey to better understand regional wage trends - 2nd Quarter, 2021

Pro-Business Advocacy

- A ★ 35. Participate in local, regional, and state-wide Advisory Committees in order to advocate for South Baldwin businesses - 4th Quarter, 2021
- A ★ 36. Play a lead role in facilitating local communication and info sharing forums for members and investors to include participation from local leaders and representatives during critical times - 4th Quarter, 2021 and ongoing
- A 38. Engage Baldwin Chamber Coalition in relevant pro-business advocacy efforts, including legislative communications, and community education opportunities - 4th Quarter, 2021 and ongoing
- A 39. Develop and share 2021 Baldwin County Legislative Agenda for local elected officials, including distribution of Baldwin Legislative Survey - 1st Quarter, 2021
- A ★ 50. Continue facilitating connection between local businesses and regional early childhood education experts to develop programs and establish facilities for daycare to meet the needs of our local workforce - 4th Quarter, 2021

A = Advocacy BE = Business Engagement
I = Incubation M = Mentorship



Gateway Initiative Accountability Plan 2021

Governance + Administration

- PM IR** 41. Track and plan interactions with and financial pledges for individual investors, including communication and billing preferences - ongoing
- PM IR** 42. Work with entire project team (viz., communications and project management) to use marketing materials for investor communications, including email campaigns and investor events - ongoing
- C** 43. Manage Gateway website and other customized online content, including social media and email marketing campaigns - ongoing
- C** 44. Co-develop deliverables for all programs and sub initiatives (e.g., training e-blasts, etc.) - ongoing
- C** 45. Design and deliver reports for investors and other key stakeholders (e.g., annual reports, status updates, etc.) - ongoing
- PM C** 46. Track program progress using 'Evergreen List' (or similar); deliver to investors at annual meetings - ongoing
- C** 47. Coordinate with media consultants to organize and produce content for website and social media (One Baldwin Project; including relevant updates, news, and stories) - ongoing
- PM C** 48. Facilitate and participate in a minimum of 4 Oversight Council meetings; discuss progress and programming updates - ongoing

C = Communications IR = Investor Relations PM = Project Management





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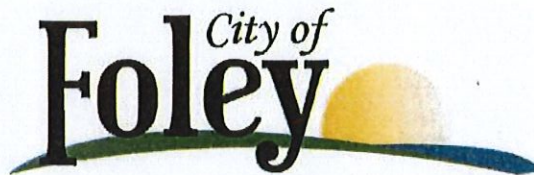
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