Economic Development Strategic Planning

Monday August 10, 2026

Instructors:

Roger Dale, Managing Principal
The Natelson Dale Group, Inc.

Roger Dale has 35 years' experience in local and regional economic development consulting. His background encompasses the fields of economic development, real estate development, regional economic analysis, environmental and land use policy, financial forecasting, and renewable energy. His project experience with TNDG includes preparation of regional-scale economic development strategic plans, real estate market forecasting, demographic research and modeling, fiscal impact analysis, cost/benefit assessment, redevelopment, business retention/attraction, and workforce development program assessments. In 2018, Roger and his team prepared the original needs assessment and business plan for the ACE program on behalf of CALED and the California Academy for Economic Development. Roger received his B.A. in Economics from Claremont McKenna College in Claremont, California. He also holds a master's degree in Resource and Environmental Economics from the University of California at Riverside.

Alan Levenson, Senior Associate
The Natelson Dale Group, Inc.

Alan Levenson joined The Natelson Dale Group, Inc. in July 2000 after receiving his B.A. with honors in Economics and Political Science from the University of California at Riverside. A significant focus of Mr. Levenson's work at TNDG has been on preparing regional economic impact analyses for a wide range of projects. Among others, these projects have included a major regional health care facility in Riverside, CA, a technology and education park in Tustin, CA, a business park in Victorville, CA, and a highway construction interchange project in Pima County, AZ. Alan has managed the preparation of a number of economic development strategic plans with a particular focus on defining industry "cluster" strategies at the city and county level and also has a significant amount of experience in fiscal impact analyses, retail market analyses, and real estate development feasibility analyses.

Course Description:

This advanced course in economic development strategic planning will explore this topic in theory and practice. Course instruction will include a review of the importance of strategic planning for economic development, technical tools, studies, data collection, and analysis to

assist in developing strategies. How to engage stakeholders to support implementation of desired plans and techniques used to monitor progress of implementation and measurement of plan effectiveness will also be covered in this course.

Course Core Competencies:

- Understand the importance of strategic planning for economic development
- Review of the types of technical studies, data collection, and analysis that may be included in a comprehensive strategic planning processes (e.g. SWOT analysis, target industry/cluster analysis, real estate market projections, employment data, consumer expenditures, retail leakage, business climate and quality of life)
- Stakeholder engagement and consensus building and understanding the importance of maintaining a culture of inclusion
- Defining vision, goals, objectives and measurable action items
- Organizational structure (including external partnerships and alliances) to support effective implementation
- Monitoring implementation, celebrating success, and defining appropriate measurement metrics

Student Outcomes:

After successful completion of this course, students will have:

- An understanding of the importance of the strategic planning process for economic development
- A working knowledge of the tools and techniques to implement a strategic planning process, including community systems building, data collection approaches and developing a culture of inclusion
- Acquired the skills to develop vision, goals and strategic objectives in a plan and understand the approaches used to support the strategic planning process for effective implementation including monitoring and measurement tools to track progress

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