

# Ohio Business Retention and Expansion Program

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## Business Retention & Expansion Program (BR&E)

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**Situation:** Local communities in Ohio frequently lack an understanding of issues related to their economy. Local officials lack knowledge of existing business needs and resulting expansion and growth strategies. Relations among community stakeholders (businesses, residents, local leaders/officials) are often fragmented, challenging communities even more.

**Description of the Activity (Program Response):** The role of the Ohio Business Retention and Expansion program is to engage community stakeholders in a formal dialogue to empower local officials and the community at large to act on community and economic development issues of strategic importance. Extension BR&E program Educators have an important role by participating in helping local communities learn how to systematically gather and interpret information that is critical to understanding local development needs.

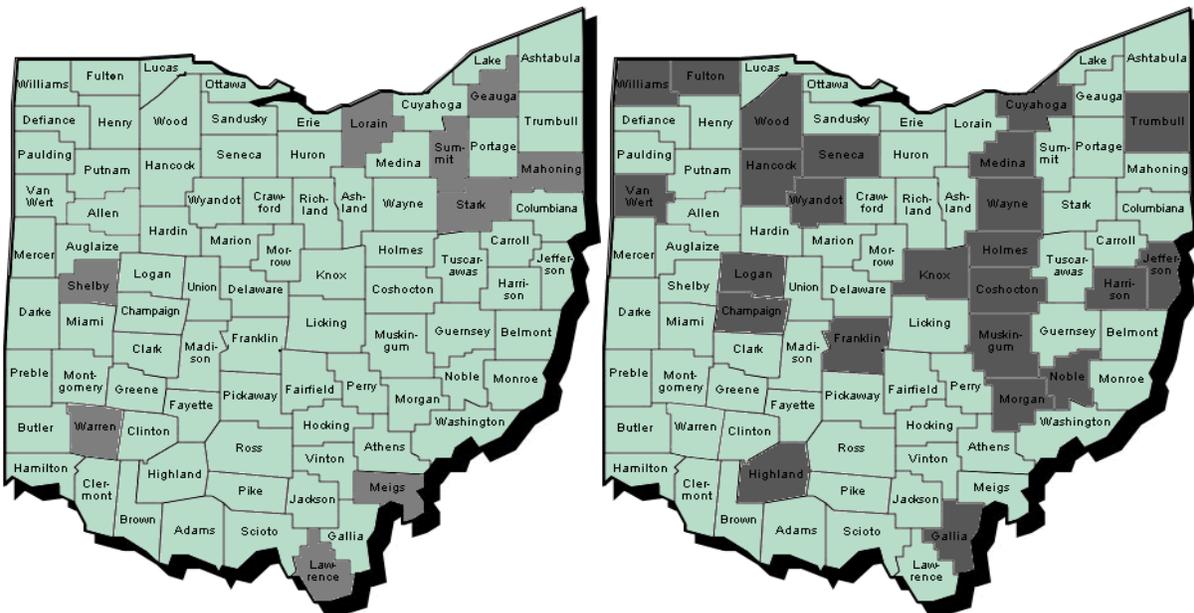
**Assumptions:** Participants in the BR&E program are desirous of cultivating relationships and value research-based information to assist in growing strong local economies.

**Description of the Target Audience:** local development officials, community volunteers, Extension professionals (direct); community stakeholders (indirect)

### **Current BR&E programs (started in 2013/2014):**

1. Point Place(Lucas County)
2. Fayette County
3. Wyandot County
4. Van Wert County
5. Weinland Park (Franklin County)

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NO BR&E

BR&E SINCE 2003

## INPUTS

Typical BR&E Program Inputs include: **time** of Extension professional staff and community volunteers; **expenses** associated with mailings, meeting refreshments, required program software, Extension professional time, travel, and program maintenance; **equipment** such as projectors, computers, and software, and; **program research base** including creative and scholarly work presented and consumed by Extension professionals and practitioners.

## OUTPUTS

Typical BR&E Program Outputs include: BR&E training, on-site workshops and one-on-one consultation, volunteer organizational efforts, establishing collaborative partnerships, continuous updating of BR&E hard copy and web-based materials such as questionnaires, reports, and presentations in cooperation with development officials, elected officials, businesses, and community stakeholders including Extension professionals.

### Output Measures - Activities (2013):

1. 6 formal training workshops
2. 39 one-on-one consultations
3. Countless conversations among community stakeholders
4. 2 out of a state formal training workshops
5. Creation of 3 new survey instruments
6. 8 scholarly publications

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## **Output Measures - Participation (2013):**

1. Program planning and implementation volunteers (213), volunteer hours (1497) at \$19.23/hour (2010 Estimate): \$28,787
2. Persons participating in BR&E programming (2014 RIV): 8,255
3. Multi-state partnerships : 4 (New York, Florida, Indiana, Iowa)

## **Overview**

The Business Retention and Expansion Program (BR&E) is one of the original Signature Programs of Ohio State University Extension. To date, BR&E Programs have been conducted in over 77 counties and 150 communities in Ohio (see above map).

Since being established as a Signature Program, a packaged curriculum has been developed to include three workshops, programmatic templates and turn-key software to support a comprehensive BR&E program on a local or regional level. New marketing materials, including a workbook and brochures have been professionally developed to promote the program. A trained team of professional Extension Educators and Specialists are also prepared to deliver the program throughout Ohio.

In February 2012, Nancy Bowen and David Civittolo were hired as Community Development Field Specialists focusing on Community Economics including an emphasis on Business Retention and Expansion. To re-create, re-define and re-brand the Business Retention and Expansion Program, Bowen and Civittolo applied for and received a grant (\$6,000) from the Assistant Director, Community Development. The title of the grant is: "Elevating and Expanding the Business Retention & Expansion Signature Program".

The purpose of the grant is:

- Create a new web page and developed social media announcements- Completed
- Develop curriculum (Fact Sheets, Bulletins, PowerPoints)- Partially completed – continue to work on (two fact sheets and numerous power point were developed in 2013).
- Develop survey questions for niche economies- Partially completed – continue to work on (new questions related to downtown businesses and agri-business were developed)
- Develop a new marketing brochure and pricing structure for the BRE Program -Completed
- Present BR&E program to JobsOhio and other interested entities- Several Ohio and multi-state presentations (Heritage Ohio, Purdue, Florida, New York, JobsOhio in West region, etc.) – continue to work on.

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### **Extent to which the program is implemented across the state (e.g., who, where, how, how many, how long, etc.)**

When the Co-leaders of the Business Retention and Expansion Team reviewed the data provided by the Program and Development and Evaluation (PDE) office, it becomes apparent that the BR&E program was conducted throughout Ohio and by Extension Educators from two of the four Program Areas (Community Development, and Agriculture and Natural Resources). In 2013, the data indicates that over 50 programs, more than 100 events, at least 200 individuals (1000 plus contact hours), and 213 volunteers participated in Business Retention and Expansion program.

In Van Wert County, the Community Development Educator, Cindy Leis, annually conducts a BR&E survey. The purpose is to assess the strengths and weaknesses of the Van Wert economy while creating a means of communication between local business, community leaders, and public officials. Data is collected through the survey, which was distributed by electronic and physical means. Armed with the data results, trends are examined and new directives and policy created to address local issues. Some of the outcomes include: educating local business leaders on the new state and federal level programs and on pre-existing programs that apply to their current needs. Changes in awareness were identified as some of the program participants utilized available local and state level programs.

Kelly Jo O'Bryant, OSU South Centers, understands the importance of surveying clientele to understand their economic needs. The International Trade Assistance Center (ITAC) at the Ohio State University South Centers in Piketon serves as Appalachian Ohio companies' first point of contact for information, resources, referrals and consultation for the new-to-export, new-to-import, and businesses expanding their current exporting capacity. Helping to connect Ohio entrepreneurs and small businesses with new buyers and new markets abroad is the ITAC's primary focus. In 2013, The OSU South Centers ITAC invested over 709 hours assisting sixty companies to enter or expand their markets internationally. These companies sold over \$5 million in products/services to more than 10 countries worldwide. Eleven companies made first time sales in a new international market.

Community Field Specialists also collaborated to develop a new BR&E program: On-Site Distributed Energy as a BR&E Strategy, a workshop which was delivered in West Central Ohio (Findlay) in March 2013. The workshop is also being planned in two other counties in the state in 2014 (Allen and Auglaize) and has been presented as a model program at numerous venues nationwide, including annual conferences for NACDEP, IEDC and CDS. The program is described in marketing materials including a brochure, flyer, case studies, workshop agenda, and other outputs. Three fact sheets have also been developed for this initiative. The purpose of the program is to introduce companies to on-site distributed energy systems as a means of creating

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efficiencies, improving the bottom line and increasing energy reliability, while investing in local communities and assuring retention and growth.

Above are just three of the BR&E programs that were offered by Ohio State University Community Development Extension in 2013. It should be noted that a BR&E program often takes more than 12 months to complete so some of the data for programs started in 2013 have not been incorporated because the project will be completed (final report to the community) in 2014.

## **Extent to which the program achieves the anticipated short-term, mid-term, and/or long-term changes in knowledge, attitudes, skills, practices, or conditions**

The Business Retention and Expansion Program is guided by the following outcomes:

### SHORT TERM - Local leaders and community residents will:

1. Improve their understanding of the concept of economic development and appreciate the need to better understand existing businesses.
2. Be more familiar with the concept of an ongoing Business Retention & Expansion program.
3. Be more willing and able to play an active role in the development of their community and be more aware of the roles they can play in the development of their community's economy.
4. Devote time necessary to develop a working relationship with existing businesses in their region.
5. Be more familiar with different ways of analyzing data and more capable of interpreting data needed to make important community decisions.
6. Track key indicators specific to their community.

### MEDIUM TERM - Local leaders and community residents will:

1. Use BR&E data and other secondary data available to make better-informed community decisions.
2. Adopt one or more recommended practices for retaining and/or expanding existing businesses as a result of formal BR&E efforts.
3. 'Donate' volunteer hours in undertaking the BR&E program in their community.

### LONG TERM

1. Jobs will be retained and created by existing businesses.
2. New businesses will be created.
3. Community leaders, residents, and businesses will engage in ongoing, meaningful dialogue.

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When one reviews the data from Research in View (RIV), some of the short term examples include:

1. Wyandot County. Through local BR&E visits, Extension Educator Moon educated local business leaders on the new state and federal level programs available that are applicable to their business, and on preexisting programs that would apply to their current needs. Changes in awareness were seen as some of the program participant's utilized local and state level programs available.
2. Fayette County. Through local company visits, Extension Educator Apaliyah learned of specific needs of local companies and offered assistance to meet their needs.

Medium Term examples include:

1. Wyandot County. Many local employers become aware of various resources available to their business. Once these businesses successfully take advantage of those resources and programs, their view of the value that OSU Extension provides is strengthened.
2. Van Wert County. BR&E fostered improved relationships among local development organizations, individuals and businesses. Coordination leads to more effective communications and working partnerships resulting in more cooperative policy and decision-making.
3. At Point Place in Lucas County, 9 of the 41 businesses who responded to the BR&E survey reported that they plan to expand, modernize or renovate their businesses with 8 of these firms planning to add jobs within the next 12 months. The number of new employees expected to be added is estimated to represent between 35-44 new jobs.

Some Long Term examples:

1. Over 200 jobs were retained by local businesses
2. 5 multi-state partnerships were created or expanded
3. Over 30 jobs were created by existing businesses

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## **Extent to which the program elevates the public's knowledge of OSUE**

As indicated earlier, report data indicate that two of the four Extension program areas use the Business Retention and Expansion Program to foster community economics in their respective county/region/era. Data indicates that:

- Over 4400 individuals have been contacted via regular mail
- 1860 BRE materials have been distributed
- 1000 media appearances by Extension personnel
- 600 telephone contacts

Based on the above numbers along with the geographic coverage of the BR&E program, it becomes apparent that the public is quite aware of the impact of OSUE on their county and on the entire state of Ohio. The BR&E program is focused on using trained educators to conduct a community economics program, BR&E specifically, in communities throughout Ohio. The team engages the local Extension Educator (or Extension Office if there are no Extension Educators), a local community volunteer to serve as a coordinator, and local committee members to conduct the program. The team then assists with survey development and survey analysis.

## **Extent to which proposed program marketing, communication, implementation and evaluation methods and strategies are followed**

As indicated throughout this report, BR&E program has continued in its current state to produce traditional programs with Extension Educators throughout Ohio. As we move into 2014, it is imperative that we continue to brand our product and create additional opportunities to further enhance the Community Economics Program.

The BR&E team has developed and followed specific objectives for the program. The data provided indicates that BR&E survey is following specific implementation and evaluation methods originally designed by the program leaders. That is, pre-post evaluation tools as well as follow up end of the year surveys indicated specific outputs and outcomes are being met on a yearly basis.

To that end, The BR&E team has introduced the program into new venues. For example, the team has worked with officials from Indiana, Florida, Iowa and New York to develop a survey specifically designed for agribusinesses that are currently developing in today's economy. Also in Florida, a three day workshop was conducted in June, 2013 educating Florida Extension educators on how to conduct BR&E in their State. Tentative plans are in place to replicate the program in other southern states. In May 2013, two Extension Field Specialists met with over 40 Purdue Extension Educators to train them on implementing BR&E in their plan of work.

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## **2014 and beyond**

The BR&E team has recently been awarded a grant (October 2013-September 2014 \$18,500) from the North Central Regional Center for Rural Development (NCRCRD). The goal of this project is to build a multi-state (partners include Iowa, Indiana, Minnesota, and North Dakota) effort that will modernize the BR&E program and approach to positively impact rural economies by targeting agribusiness growth. At the conclusion of the grant, new curriculum focused on the agribusiness economy will be developed along with a mobile application that will be created for use by economic development directors and other practitioners working in the field. The project core team includes Scott Hutchinson (Purdue), Nora Ladjahasen (Iowa), and Nancy Bowen and David Civittolo. The project outputs, outcomes and intended impacts are listed below:

### **A. Project Outputs**

Following is a list of tasks/activities to be conducted by members of the project team to accomplish the objectives of the project:

1. Submit presentation proposal for Galaxy Conference on “Evolution of BR&E Program and regional plans.” Initial meeting during conference with core team to lay out meeting schedule and plans.
2. Conduct initial WebEx meeting with core/tech teams to outline plans, decide which technology/curriculum tools to incorporate with program builder and surveys application, and determine next steps.
3. Facilitate team work in individual states with tech partners to outline the scope and prepare initial curriculum tools, surveys and methods.
4. Conduct two-day curriculum development session with team/tech partners.
5. Schedule four WebEx meetings to track progress of continued work on curriculum, tools and mobile application.
6. Rollout and testing of new interactive survey application and tools. Roundtable meeting with BR&E teams in partner states will be conducted.
7. Finalize work on curriculum with final two WebEx meetings.
8. Submit presentation workshop on evolution of BR&E for NACDEP to include a test “user roundtable” of mobile application and curriculum.
9. Evaluate results from test workshop and roundtables and incorporate into final curriculum development.
10. Launch program and share program in NCRCRD webinar.
11. Market and demonstrate program throughout the NCRCRD region.

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## **B. Project Outcomes**

Following is a listing and description of curricular materials that will be developed as a result of this project:

1. New mobile application for BR&E that blends tools and surveys using the 'Program Builder' model for easy use by practitioners throughout the region.
2. Web page and social media announcements on community development web sites throughout the NCRCD region.
3. Curriculum tools tied to BR&E mobile application (IMPLAN, GIS, market research analytics, database of NAICS codes, labor force data and demographics).
4. Redeveloped survey and survey questions to expand upon traditional BR&E Surveys (Commercial and Industrial) and include emerging issues and niche economies.
5. New marketing brochure and pricing structure for the BR&E Program.
6. Powerpoint presentations and workshop materials for regional and national meetings and conferences including NCRCD and NACDEP to enable the team to promote the program throughout the NCRCD region.
7. Evaluation results from test roundtables and workshop.

## **C. Project Intended Impacts**

Short term:

- Establish relationships with neighboring NCRCD states on common focus program
- Provide information for public leaders to tell the local "story"
- Demonstrate support for local businesses
- Address immediate business needs

The Business Retention and Expansion Program continues to be a viable program for Ohio State University Extension. The program is evolving as a regional collaborative model with program elements being added or revised to retain relevancy and to address the current needs of communities and practitioners. Through grants, multi-state projects and new partnerships, the BR&E Leadership is prepared to move this signature program into the next generation of community economics.