THE OHIO BUSINESS RETENTION & EXPANSION INITIATIVE
PROGRAM OVERVIEW
December 1, 2008

$640M budget gap forecast for Ohio

**COLUMBUS, Ohio (AP)** – Gov. Ted Strickland on Monday announced a new $640 million state budget gap, the third deficit this budget cycle already reduced by $1.3 billion, and said the next two-year budget could be as much as $7.3 billion in the red compared to current funding levels.

November 25, 2008

Economy’s tumble even worse than expected in 3Q

**WASHINGTON (AP)**
The economy took a tumble in the summer that was worse than first thought as American consumers throttled back their spending by the most in 28 years.

November 7, 2008

GM Posts $4.2 Billion In Losses; Massive Cuts Coming

Revenue fell to $37.9 billion from $43.7 billion a year earlier.

First Published November 25, 2008

Home prices in record decline

Case-Shiller survey shows a 16.6% decline.

November 7, 2008

240,000 Jobs Slashed in October
WHAT IS BR&E?

A formal BR&E program is a structured effort involving a broad cross-section of community interests, engaged in ongoing dialogue with the business community to help existing businesses remain profitable, competitive, and efficient.

— George Morse, 1990

Since 1986, more than 140 communities have improved their business climate through the Ohio Business Retention & Expansion Initiative.

Counties in red indicate current or past participation in BR&E.
PROGRAM HISTORY

• AED Economics
  – George Morse, Leroy Hushak, Dave Kraybill, John Holden,
    Kathy Black, Dawn Malone

• Then … (1986–2001)
  – Economic developer is an ombudsman and problem solver

• … and Now … (2001–present)
  – Economic developer is a data-gatherer, analyst, communicator,
    narrator, planner, and manager of the local economy
PROGRAM PHILOSOPHY

• Learn by doing

• Technology transfer

• Action/applied research
OBJECTIVES

• Improve of quality of life
• Establish integrated approach to economic development
• Develop community economic decision-making capacity
• Develop of a pro-business orientation
• Improve community leaders’ response to residents’ concerns
• Create factual basis for attraction and community marketing
• Engage community residents in a discussion of their local economy
SHORT-TERM OBJECTIVES

GOAL: Change knowledge, attitudes, skills, & aspirations.

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 BR&E.

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 OBJECTIVES

GOAL: Change behavior, practice, policy, etc.

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 OBJECTIVES

GOAL: Change economic, social, and civic conditions.

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.
HOW IT WORKS

• 12-month “membership”
• BR&E training workshops
• Program support
• Data entry & analysis software ([http://surveygold.com](http://surveygold.com))
• Pre-tested questions for multiple economic sectors
  – Industrial
  – Retail and Professional Services
  – Health Care
  – Travel & Tourism
  – Agriculture
  – Cross sector
• “Build-your-own” Question Bank
PROGRAM COMPONENTS

- Comprehensive BR&E handbook
- Forms, worksheets, & report templates
- Password access to web-based materials
  - Questionnaires, question bank, forms, reports, handbook, workshop registration, useful links, etc.
NEWLY REVISED HANDBOOK

- 8th Edition
- Revised Winter 2009
- Branding formatting by CommTech
- Step-by-step guide
SECTION 1: Introduction

SECTION 2: Program Overview
  • Program Goals
  • Program Benefits & Outcomes
  • Key Players
  • Local Program Objectives

SECTION 3: Coordinator & Task Force Responsibilities

SECTION 4: The BR&E Process & Timeline
  • Nine Steps to the BR&E Process

SECTION 5: Capacity Building Workshops

SECTION 6: Conducting Surveys
  • Business Confidentiality
  • Development of the Questionnaire
  • Types of Surveys

SECTION 7: Selecting Participants

SECTION 8: Survey Review, Data Entry, & Follow-up

SECTION 9: Action Planning & Program Assessment

SECTION 10: Community Communications

SECTION 11: BR&E New Year Task Force Kick-Off Meeting

SECTION 12: Concluding Remarks: Narrating the Local Economy
WEB-BASED RESOURCES

• Public and members-only access

• In process of revision/update
  – Who We Are
  – What is BR&E
  – What We Provide
  – Success Stories
  – For Our Members
  – Contact us
  – Useful Links
  – Site Map
  – FAQs
1. Go to http://localecon.osu.edu/brne

2. Click on the “For Our Members” in the left-hand column.

3. Enter the following username and member passwords (no quotes)
SURVEYGOLD SOFTWARE
• **SurveyGold — Windows software**
  - Easy to install and use
  - Inexpensive to acquire and use

• **Conduct unlimited surveys**
  - Web, paper, or phone

• **View and analyze results**
  - Data analysis tools
  - Publish results via Word or Web

• **Responsive software provider**
  - New features and enhancements
  - Minimal support requirements
CREATING QUESTIONNAIRES

• **Familiar folder view**
  – Reduces learning curve
  – Same process for Web, paper, and phone surveys

• **Easy survey setup**
  – One or more sections
  – Questions in sections
  – Promotes reuse

• **Variety of question types**
  – Fill-in-the-blank, single/multiple choice, ranking, conditional branching
CONDUCTING SURVEYS

• Easy-to-use dialogue
  – Manages all of the surveys you are currently conducting
  – Conduct web, paper, and phone surveys concurrently

• Easy data collection
  – Automatically collect online survey responses with a single mouse click
  – Quickly enter paper and phone responses via a wizard
VIEWING & ANALYZING RESULTS

- Full-color 3-D charts or tabular listings

- Data manipulation
  - Filter respondents
  - Drill down to view a list of respondents

- Publish reports
  - Via Word or Web

- Export results to other tools
  - Via Excel, SPSS, HTML, and text data formats
PLAYERS AND THEIR ROLES

- Sponsoring Organization(s)
- Task Force Coordinator/co-Coordinators
- Task Force/Committee
- Participating Businesses

Generate awareness and “champion” the process
9-STEP PROCESS

- Form Task Force
- Schedule & Conduct Task Force Meeting
- Announce Program
- Distribute Questionnaires
- Conduct Business Visits
- Enter & Tabulate Response Data
- Identify & Address Red Flag Issues
- Analyze & Report Response Data
- Communicate Results

Evaluate!
GETTING STARTED

- Proposals
- Price Structure
- Membership types
## PRICE STRUCTURE

<table>
<thead>
<tr>
<th>Getting Started</th>
<th>Annual Costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>• $3,000</td>
<td>• $1,250</td>
</tr>
<tr>
<td>• Web-based materials</td>
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</tr>
<tr>
<td>• Unlimited program support/consultation</td>
<td>• 10 hours of program support/consultation</td>
</tr>
<tr>
<td>• Training workshops</td>
<td>• ½ price training workshops ($300/person)</td>
</tr>
<tr>
<td>• SurveyGold software not included ($99–159)</td>
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Local communities lack an understanding of community issues related to economic development. Local officials lack knowledge of existing business needs and resulting expansion strategies.

Empower local development officials to act on economic development issues of strategic importance, and help local communities learn how to systematically gather information critical to understanding local economic development needs.
EVALUATION / IMPACT REPORTING

BR&E training, on-site workshops, volunteer organizational efforts, BR&E hard copy and web-based materials, questionnaires, reports, and presentations.

In 2008, program participants estimated that approximately 100 local community officials have adopted one or more recommended practices for retaining jobs or expanding employment in their community as a result of participating in the BR&E program.

The number of businesses surveyed is estimated by participants at between 965 and 1,200 in 2008. Program participants also estimated over 100 local community volunteer hours have been “donated” to BR&E programming efforts in 2008.
INTRODUCTORY WORKSHOP EVALUATION

Measuring Change

Please indicate your level of agreement with the following statements (using a scale of 1-6, with 1 being strongly disagree and 6 being strongly agree).

For example, if you had little knowledge of how to retain and expand existing businesses prior to the workshop, circle 1. If you have gained a great deal of knowledge today about how you might go about retaining and expanding your existing businesses, you might circle 4, 5, or 6.

<table>
<thead>
<tr>
<th>before the workshop</th>
<th>EXAMPLE</th>
<th>after the workshop</th>
</tr>
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<tbody>
<tr>
<td>1 2 3 4 5 6</td>
<td>I know how to retain and expand existing businesses.</td>
<td>1 2 3 4 5 6</td>
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<table>
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<tr>
<th>Statements</th>
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<tr>
<td>1 2 3 4 5 6</td>
<td>I have a good sense for my role in the development of my community’s economy.</td>
</tr>
<tr>
<td>1 2 3 4 5 6</td>
<td>I appreciate the need to better understand existing businesses.</td>
</tr>
<tr>
<td>1 2 3 4 5 6</td>
<td>I have a good understanding of the concept of economic development.</td>
</tr>
<tr>
<td>1 2 3 4 5 6</td>
<td>I am familiar with the concept of an ongoing Business Retention &amp; Expansion program.</td>
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<tr>
<td>1 2 3 4 5 6</td>
<td>I am willing and able to play an active role in the development of my community.</td>
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What did you learn today?

How will you do your job differently?

What other topics would you like to see addressed in future workshops?
**TASK FORCE WORKSHOP EVALUATION**

**Measuring Change**

Please indicate your level of agreement with the following statements (using a scale of 1-6, with 1 being strongly disagree and 6 being strongly agree).

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<table>
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<td>I am familiar with different ways of engaging in dialogue with existing businesses in my community.</td>
<td>1 2 3 4 5 6</td>
</tr>
<tr>
<td>I am willing to meet with existing businesses in my community to learn more about their concerns.</td>
<td>1 2 3 4 5 6</td>
</tr>
<tr>
<td>I am willing to devote time necessary to develop a working relationship with existing businesses in my region.</td>
<td>1 2 3 4 5 6</td>
</tr>
<tr>
<td>I am capable playing a part in the development of my community’s economy.</td>
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**What did you learn today?**

**How will you do your job differently?**

**What other topics would you like to see addressed in future workshops?**
### DATA ANALYSIS AND REPORTING STRATEGIES WORKSHOP EVALUATION

**Measuring Change**

Please indicate your level of agreement with the following statements (using a scale of 1-6, with 1 being strongly disagree and 6 being strongly agree).

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<tr>
<td>1 2 3 4 5 6</td>
<td>I am familiar with different ways of analyzing data.</td>
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<td>I will use BRAE data and other secondary data available to me to make better-informed community decisions.</td>
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<td>1 2 3 4 5 6</td>
<td>I am capable of interpreting data needed to make important community decisions.</td>
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<td>1 2 3 4 5 6</td>
<td>I am interested in tracking key indicators specific to my community.</td>
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### What did you learn today?

### How will you do your job differently?

### What other topics would you like to see addressed in future workshops?
As a current (or recent) member of the Ohio Business Retention & Expansion Initiative, you have firsthand knowledge of the program’s effectiveness. The questions below provide you an opportunity to share information that helps us better describe the impact made by the program. Your responses to the items below help us communicate the program’s value to the various funding sources that enable us to continue to offer this program to you at a greatly reduced cost. If you would like to share more in-depth comments or opinions, or are interested in expanding or increasing your program membership, please feel free to contact Greg Davis (dvig3@osu.edu or 614-292-8350).

The following questions pertain to activities conducted over the past calendar year, in your community:

<table>
<thead>
<tr>
<th>Question</th>
<th>Response Options</th>
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<tr>
<td>1. Approximately how many business retention and expansion surveys have been conducted?</td>
<td></td>
</tr>
<tr>
<td>2. Estimate the number of public officials and community leaders who plan to adopt one or more recommended practices for retaining and/or expanding existing businesses as a result of your formal BR&amp;E efforts.</td>
<td></td>
</tr>
<tr>
<td>3. If you have involved community volunteers in your BR&amp;E efforts, approximately how many volunteer hours would you estimate have been “saved” this calendar year?</td>
<td>0-10, 11-20, 21-30, 31-40, 41-50</td>
</tr>
<tr>
<td>4. Approximately how many jobs have been created by your existing businesses this calendar year as a result of your formal BR&amp;E efforts?</td>
<td></td>
</tr>
<tr>
<td>5. Approximately how many jobs have been retained by your existing businesses this calendar year as a result of your formal BR&amp;E efforts?</td>
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[Ohio Business Retention & Expansion Program: Documenting Impact](http://localecon.osu.edu/BRnE/members/Annual_Impact_Survey.html)
Wayne County conducted a BR&E program in 2003–2004 that led to the creation of a full-time ag-development position in the county’s Economic Development Office. In 2008, the program helped retain 145 positions and created 110 new jobs at 5 ag-sector industries.

Wyandot County’s BR&E program identified the need for a full-time county-wide Economic Development official. As a result, in 2008 local businesses came together and committed initial funding for such a position for a three-year period.
Retain, expand, and attract businesses; improve infrastructure; develop partnerships; and strategically lead for your community’s future. Call the Ohio Business Retention & Expansion Initiative today.

Greg Davis  
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