CFAES
OHIO STATE UNIVERSITY EXTENSION

Business Retention and Expansion Program

building community capacity for BRE

3rd edition - 2021

A hands-on approach to economic development

The Ohio State University
COLLEGE OF FOOD, AGRICULTURAL, AND ENVIRONMENTAL SCIENCES

go.osu.edu/bre

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abstract

A healthy and vibrant local economy depends on the well-being of local businesses. Local business health can be fostered via a community-led Business Retention and Expansion (BRE) Program.

A BRE program involves a dialogue with local businesses to better understand their issues and concerns. Such efforts can show the community's appreciation for business contributions and enable local leadership to identify economic development strategies informed by local business as well as inform the community at large about individual and community-wide business concerns.

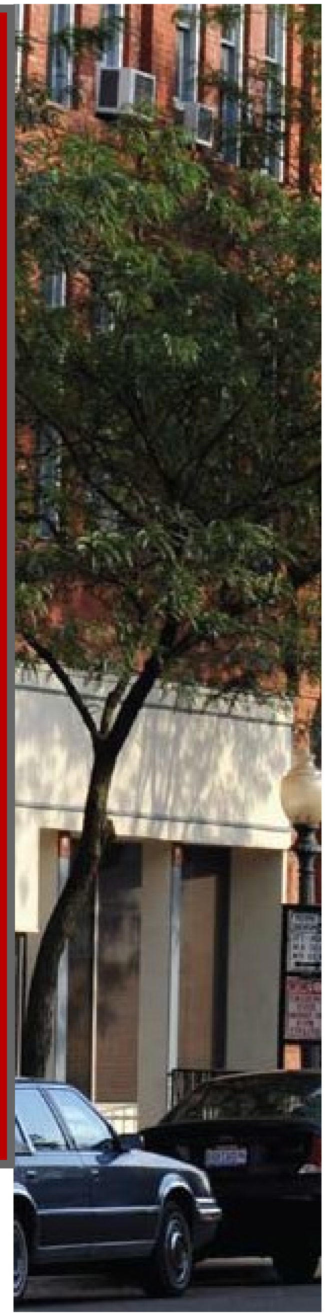
Perhaps most importantly, however, a BRE program facilitates improved relationships among local development organizations and business leaders. This collaboration can lead to more effective communications and long-term working partnerships resulting in more cooperative community policy and decision-making.

section 1: introduction

A declining sense of social connectedness, a community's lack of understanding of its economic resources, and an ill-informed economic development plan are confronting many struggling communities in today's rapid societal and economic change. Many local governments are left with decreasing revenue streams, vacant buildings, and high unemployment rates.

To address these issues and to identify strategies more clearly for community economic development, many Ohio communities have engaged in a formal community-based, ongoing Business Retention and Expansion Program.

This bulletin outlines the general format that many Ohio communities have utilized over the past twenty years to help them better understand the community, its businesses, and ways in which both can be strengthened.



section 2: what is business retention and expansion (BRE)?

BRE includes all ongoing local economic development programs that focus on retaining and growing the existing businesses in a community.

A formal BRE program is a structured effort usually 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 (Morse, 1990).

Engaging in dialogue with existing businesses to better understand their needs and concerns can provide economic development officials with the breadth and depth of data that enable them to develop a focused and deliberate plan of work that will strengthen the local economy. Open dialogue between the business community and local leaders as a result of an ongoing BRE program can:

- Create a respectful, caring, and cooperative relationship between a community and its business employers. Such dialogue may focus on community amenities and services that impact quality of life.

- Provide communities with an "early warning" system. Communities suffer financially and in other ways when existing employers announce mass layoffs or worse yet, a pending closure. An open, ongoing dialogue provides an opportunity for business and community leaders to share such information early and often, so that the effects of such announcements can be minimized or avoided altogether.

- Generate improved self-awareness, or a better understanding of community. Ongoing data collection provides local leaders with a clearer sense of key socio-economic characteristics such as: in-commuting/out-commuting patterns and locally owned and operated businesses vs. branch locations of a larger corporation. Such information can also create a depository of local information valuable for grant applications, providing policy direction, and charting the community's key economic characteristics over time (Harmon, 1990, 51).

- Identify issues critical to existing businesses, that when addressed, can help to increase productivity. Oftentimes, communities can aid in local business development through referral programs, creation of business networks, reduction of regulatory issues and/or removal of actual physical barriers to business expansion such as utility or roadway easements.

- Build a database that is useful in the aggregate to influence local and state policies, procedures, or legislation. One by one and voice by voice, an aggregated BRE database of responses will clearly inform policies for legislative consideration.

section 3: BRE program overview

Many communities have a long-term goal to enhance the local economy. BRE programs help the community achieve this goal by developing and implementing a strategy to build a database of information that identifies the strengths and weaknesses of the local economy. Key elements to the program are goals, objectives, and key players.

program goal

A local BRE program is typically part of a broader economic development effort that encompasses the retention and expansion of existing enterprises, as well as the attraction of new businesses (Morse, 1990). A key element of the program is a survey designed to provide valuable information for and about existing businesses within one or more industry sectors (Harmon, 1990).

Depending on program objectives, the focus of the survey may include company profile, business health, business climate, existing and projected workforce needs, workforce development issues, customer needs, municipal services, or residential concerns. However, most Ohio BRE survey programs share similar long-term goals:

1. to implement a plan for action for retention and expansion of existing businesses and the workforce
2. to increase the competitiveness of local businesses
3. to create a narration of the local economy
4. to use the strengthened local businesses as a tool for recruitment and/or business incubation

Together, these goals enable local economic development and community leaders to identify and address issues and opportunities that impact their local economy and the competitiveness of existing businesses.

program objectives

Prior to launching a BRE study, the local Coordinator and Task Force members need to answer a few key questions to guide the local program:

1. What are the goals of the BRE program?
2. How is “community” defined for the purpose of BRE? It may be a community of place, identity, or interest, or a combination thereof.
3. Who will we include in our BRE programming efforts?
4. How will the information be used?
5. What business sector(s) and/or issue(s) will be targeted?
6. What survey format will be used? Mailed surveys, business visits (personal interviews), both? Monthly or quarterly surveys, or once per year?
7. How will the results be communicated and to whom?
8. How will the local program be funded and coordinated?

BRE program objectives vary from community to community, and most programs have more than one. The community should establish short-term and long-term objectives that can be easily measured in the early stages of the BRE program. They may include:

Short-term Objectives:

1. Assist businesses by addressing immediate issues and concerns through an assessment and referral process.
2. Identify and respond to businesses that may be planning to close, sell, move, or expand.
3. Identify and work toward implementing improvements to community services.
4. Collect business and market data as part of a planning process.

Long-Term Objectives:

1. Foster and enhance the environment for business development.
2. Collect and analyze existing business data and local workforce data to develop a better understanding of the local in comparison to the statewide economy.
3. Survey residents for an analysis of the work skills, concerns, and future plans of the local labor force.

key players

While narrating the local economy and gathering data to better inform economic development strategies can be effectively undertaken by one or two local development professionals, the development of community capacity to better understand the local economy is best achieved by involving a variety of community stakeholders. To develop community capacity and distribute the workload, the local community should consider creating a BRE Task Force to assist the program coordinator. The key players in a local BRE program typically include the:

- Coordinator: responsible for managing all aspects of the program

- BRE Task Force: typically consists of eight to ten community leaders. Ideally, it will include broad representation from agencies involved in community and economic development, educational institutions, local government, nonprofits, and private enterprises to strengthen the ability of the Task Force to address the myriad of issues that are often identified via the dialogue with business

- Referral Team: entities, individuals, and agencies who provide the resources and services that are indicated after an assessment of the business

- Participating Employers: the most important participants in the BRE program

Brown County BRE Program 2019

section 4: coordinator and task force responsibilities

Your community's BRE Coordinator is typically responsible for the overall organization and management of the local program. Local Chamber of Commerce, economic development officials, and OSU Extension professionals are all ideally suited to serve in this capacity.

BRE coordinator

The following is a list of tasks typically handled by the BRE Coordinator:

1. Introduce the BRE program to the community: Informing the community about the BRE program can be accomplished through the local media (e.g., press releases, social media, and newspaper articles) or by contacting residents and business owners through the community's informal communication network. Formal and informal methods used together would get through to the most people in a multi-channel world.
2. Organize and conduct meetings: A volunteer-driven program will require meetings to coordinate individual efforts. The Coordinator schedules and leads these meetings:
    a. Task Force orientation
    b. Volunteer Business Visitor training (if applicable)
    c. Task Force meetings to review surveys
    d. Action planning meetings
    e. Meetings to communicate the results of the program
    f. Annual program "Kick-Off" meeting

3. Prepare the list for selection of businesses.
4. Coordinate data collection and manage access to the data.
5. Collect the contact information for the targeted employers, print the surveys and cover letters, mail or email the materials.
6. Coordinate activities associated with business visits.

7. Collect and review completed surveys.
8. Coordinate responses to immediate business concerns.
9. Manage the data entry and analysis process.
10. Coordinate action planning, program assessment and reporting.

To assist the Coordinator with these responsibilities, you may want to assign sub-committees or individual Task Force members to be responsible for major tasks.

BRE Task Force

The Task Force provides solutions to local business issues, participates in critical economic development policy decision-making, and is responsible for using the survey information to develop and communicate the ongoing story of the local economy. The Coordinator should recruit community leaders who are able to commit to a minimum of a two-year term.

A Task Force of any size can work, but a group consisting of eight to ten community members is recommended. Broad representation from agencies involved in community and economic development, educational institutions, local government, and private enterprises strengthens the ability of the Task Force to address the various issues that are often raised in the completed surveys.

Led by the Coordinator, the BRE Task Force typically:

- Sets clear, attainable, and manageable objectives for the program.
- Assists in securing endorsements from local supporting organizations.
- Serves on a variety of program sub-committees if necessary.
- Participates in the development of the local survey.
- Conducts business visits (if applicable).
- Addresses local concerns and problems cited in the surveys or survey reports.
- Participates in action planning and program assessment.
- Participates in the preparation of a BRE New Year Kick-Off Task Force Meeting.

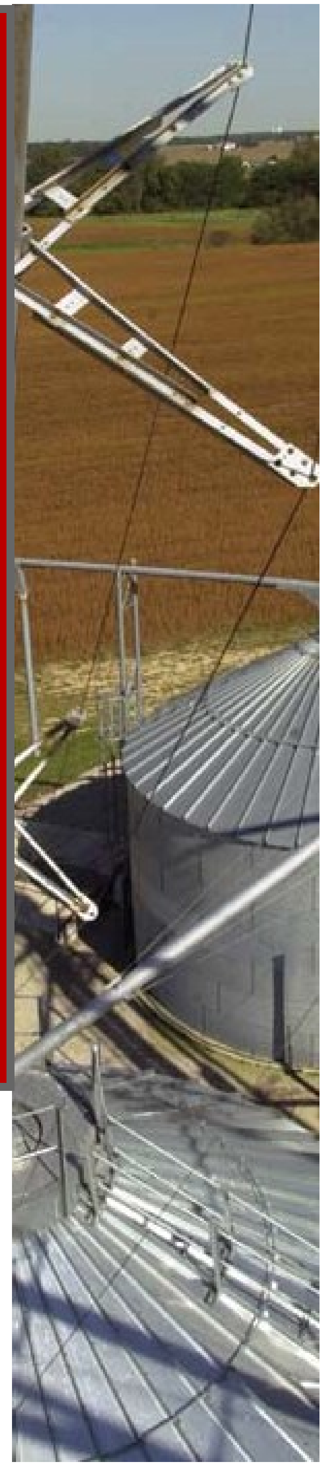
"By addressing the needs of our industrial partners, we were able to work with them individually, which has resulted in a better relationship. The end result has been the expansion of our existing businesses and through the partnerships that have resulted with them, new businesses have located in Strongsville."

- Mike Daymut, Strongsville City Council

section 5: the BRE process and timeline

A typical BRE program consists of volunteers visiting businesses and interviewing senior level management, surveys, action planning, and public relations and communications. Such activities can be conducted in a continuous format where the community cycles through all the stages and starts over annually or on a single method approach.

Of course, there are advantages and disadvantages to each approach. A continuous approach can enable BRE to become a part of the community's everyday economic development work, but it also requires resources sufficient to ensure its success. A single method approach can mobilize limited resources to bring about anticipated impact, but the long-term impact of those efforts may be limited considering that attention to and focus on BRE will shift away to other community economic development efforts.



The 'Nine Steps to the BRE Process' outlined on page 11 is useful regardless of the approach the community intends to take. Many communities lean toward the one-time approach to get started. Expect the nine steps below to involve at least four to six months from start to finish.

nine steps to the BRE process

1. Form BRE Task Force
2. Schedule and Hold Initial Task Force Meeting
3. Announce Local BRE Program
4. Distribute Surveys
5. Conduct Business Visits
6. Enter and Tabulate Response Data
7. Address Issues Identified in Response Data
8. Analyze and Report "Big Picture" Response Data
9. Communicate Results — Share Success Stories

Step One: Form BRE Task Force

1. Coordinator identifies and recruits Task Force members

Step Two: Schedule and Hold Initial Task Force Meeting

1. Coordinator provides program overview and discusses goals with Task Force
2. Coordinator addresses concerns and questions
3. Coordinator discusses data collection methods and introduces timeline

Step Three: Announce Local BRE Program

1. Task Force and Coordinator develop marketing material for media distribution

Step Four: Distribute Surveys

1. Task Force and Coordinator finalize business list
2. Coordinator and/or Task Force create (or import) the local survey, create and test the digital form (if applicable)
3. Coordinator and/or Task Force send advance notice letter or make advance calls to survey participants
4. Coordinator and/or Task Force e-mail link and/or mail hard copies of surveys
5. Coordinator and/or Task Force e-mail and/or mail reminder postcard and/or make reminder calls; mail and/or e-mail thank you notes

Step Five: Conduct Business Visits

1. Task Force and Coordinator select businesses to visit
2. Coordinator assigns business visitors
3. Coordinator and/or Task Force make business visits

Step Six: Enter and Tabulate Response Data

1. Coordinator and/or Task Force enter response data from surveys and produce survey reports

Step Seven: Address Issues Identified in Response Data

1. Coordinator and/or Task Force review surveys as they come in
2. Coordinator and/or Task Force subcommittee engage other Task Force members
3. The interviewers return to the business owner and share referrals made by the Task Force
4. As authorized by the business, the interviewer contacts the referral on behalf of the business owner
5. The referral resource assists the business as requested and enters service provided in the database, detailing if the referral was successful completed, unable to close, or pending

Step Eight: Analyze and Report “Big Picture” Response Data

1. Coordinator and/or Task Force subcommittee review aggregated responses with Task Force
2. Coordinator and/or Task Force subcommittee identify action items Coordinator and/or Task Force implement action items
3. Coordinator and/or Task Force evaluate action implementation

Step Nine: Communicate Results — Share Success Stories

1. Coordinator and/or Task Force subcommittee identify internal and external audiences
2. Coordinator and/or Task Force subcommittee develop key messages
3. Coordinator and/or Task Force subcommittee create/hold appropriate media/events, showcasing business success stories

“Perrysburg’s strength is based upon the diversity of our businesses, and the COVID-19 survey prepared by Joe Lucente helped us better understand the disparity of the impact and how to frame our response strategy.”

-Bridgette Kabat, Municipal Administrator
City of Perrysburg

Downtown Perrysburg, Ohio

section 6: conducting surveys

Recall that goals and objectives were discussed in section 3. These items play a key role in how you actually conduct the BRE program.

Beginning a program without first determining what you want to achieve and how you intend to achieve it will result in an inefficient use of resources and less than desirable results. Your goals and objectives will help determine such things as the type of survey, the frequency and timing of survey administration, and how survey distribution and data entry and reporting are handled.

business confidentiality

Before a discussion of survey methodology, it is important to first cover the critical issue of business confidentiality.

The local BRE program may make inquiries of businesses that may reveal confidential information. Because of the nature of items typically included in the survey, it is extremely important that the businesses be made aware and are assured of the confidentiality of the information they share. It is the responsibility of the Coordinator to assure the survey respondent (business owner or operator) that the data and information being collected will, in fact, be held in the strictest of confidence and ensure that confidentiality is protected.

types of surveys

There are a variety of ways the community can engage in dialogue with local businesses to help them be more profitable and to grow. Typically, the dialogue takes the form of a survey process involving business visits (i.e., personal interviews), mailed or e-mailed surveys.

survey development

The Coordinator and the Task Force participate in the development of the local survey. The local Extension office can work with the program committee to obtain a pool of questions to consider.

business visits

Business visitation is a “traditional” approach to BRE that readily demonstrates to business owners that the local community is truly interested in the success of their enterprise. This method also does much to communicate the value the community places in its businesses. Depending upon the objectives of the program, the time frame, and the capacity of the leadership in the community, the Task Force may choose one of several approaches to business visitation:

1. Using volunteers from the community to conduct the interviews — This will involve recruiting volunteers, pairing them with selected businesses, training them on how to conduct an in-person survey, and then sending them out to meet with business owners and managers to record their responses to the survey questions. This method will increase the number of businesses that can be reached and shares knowledge of business concerns to a broader group of community members.
2. Using Task Force members — This option reduces the time and effort required in recruiting and training volunteers.
3. Pairing up resources — This option entails pairing Task Force members or the local Economic Development Director with a local leader who is not a member of the Task Force, but who has an existing relationship with the targeted business.

Recruiting Volunteer Visitors

Identifying volunteers is a critical step in organizing the local BRE visitation program because these volunteers, perhaps more than any other player, are seen as the “face” of the local program. Their performance and the impression they leave on the participating businesses greatly influences the success of the program.

Determining the Number of Volunteers Needed

Depending on level of interest of your volunteers and the number of volunteers you have, you should count on recruiting as many volunteers as you have businesses to visit. This number assumes each volunteer will be paired with another to form a Visiting Team, and together, they will visit two businesses.

Identifying Potential Volunteers

Local influential leaders who are or have been active in the community are usually the best volunteer visitors because they recognize the importance of helping to improve the community's economy. If possible, the visitors should include people from both private and public sectors Another consideration should be given to the diversity of members as it enhances the community learning experience by exposing and challenging individuals to consider, weigh and value the thoughts, experiences and practices of others who may be different from ourselves (Moore, 2020). Also consider including local youth as Task Force members.

Ways to Recruit Volunteers

The entire BRE Task Force should be responsible for recruiting volunteer visitors. The Coordinator may ask Task Force members to personally recruit two or more individuals to serve as volunteer visitors. Task Force members can serve on volunteer visitor teams as well.

Assigning Volunteer Visitor Teams to Businesses

The Coordinator should elicit the input of the entire Task Force in pairing volunteers and assigning volunteer teams to businesses. The goal is to avoid any personality, professional, or personal conflicts between the volunteers and assigned businesses. By drawing on the knowledge of the Task Force, most conflicts can be avoided.

Visitor Training

The importance of training the volunteer visitor cannot be overstated. A well-trained volunteer visiting team will demonstrate an organized and committed business assistance effort. Additionally, the volunteer visitor is collecting the data and information upon which the BRE Action Plan will be formulated. The visitors are responsible for eliciting meaningful, unbiased responses, and maintaining the confidentiality of the businesses.

To provide the Task Force with the opportunity to experience how an actual business interview might take place, you may find value in conducting several practice business visits before getting started.

After selecting businesses to participate in the practice visit, the Coordinator should call them and ask if they would be willing to take part in the practice visit. Usually, interviews last no longer than one hour but may vary depending on the extent to which the business is willing to share.

Conducting the Practice Visit

The actual practice visit should be conducted in the manner in which all business visits take place. While conducting the survey, one visitor should act as the survey taker, asking the questions and responding to the business representative, and the other visitor should act as the survey recorder, writing the answers and responses of the business representative.

survey design

Conducting BRE surveys is typically used when a Task Force needs information quickly. This approach usually takes less time than business visitation, and it has the advantage of reaching busy executives who do not have the time to meet personally with a visitor. Surveys are also effective when responses to the questions require research on the part of the respondent, or if more than one person within the organization is needed to complete the questions. Typically, however, response rates using these methods tend to be lower than the in-person visit.

In addition to planning public communications activities that promote the BRE program, the community should follow a five-step process to help increase the response rate to surveys.

1. Pre-test the questions. To ensure that the survey questions accurately represent the objectives of the program, send your sample survey to three to five targeted businesses.
2. Send a personalized advance-notice letter. Inform the businesses they have been selected for the sample survey and they will be receiving a form.
3. About one week later, send a personalized cover letter or email, a survey, and stamped return envelope or e-mail address. The cover letter should make the case as to why the respondent should complete the survey. The tone of the letter is businesslike, and the style is personalized.
4. Follow up four to eight days later. Send a follow-up postcard, call, or send an e-mail thanking those who have responded and request a response from those who have not.
5. Do not give up. Three weeks after the first survey goes out, send a new personalized cover letter informing people, “We have not yet heard from you,” with a replacement survey and stamped return envelope or e-mail address. Again, a personal phone call from the Coordinator or a Task Force member is a particularly effective alternative.

Because the mailed survey stands on its own, it should be designed to motivate the respondents to complete the survey. When designing the survey, the following four components should be considered:

1. Title should be clear and to the point. It should convey what the survey is about.
2. Design attracts interest in the survey and can also set it apart from other surveys.
3. Format and Layout If printed, the survey design should convey a sense of flow with open space using a booklet format with questions printed on both sides of each inside page. If digital, design for ease of reading and completion on a traditional computer or handheld device will be important.
4. Back Cover Design if printed, the survey should provide enough blank space for the respondent to make additional comments. At the bottom of the page, include a thank-you for completing and returning the survey.

Frequency of Business Surveys

How often should you conduct surveys? How often you collect key community data with surveys depends on the objectives of your local program and on the resources available to you. You can conduct continuous surveys (monthly, quarterly, etc.) using a "base" survey. It may be targeted to a specific industry sector or to multiple sectors. The base survey would contain questions that are used for trend analysis, such as business perception of local services or quality of workforce. This information is useful for planning, local business relations, and community marketing.

When the need arises, teams can also conduct an "issue-specific" survey. This is a one-time survey (or set of questions added to the base survey) that focuses on one sector or issue. The issue-specific tools are often used for decision support in designing economic development policy and programs.

"The COVID-19 survey helped our Comprehensive Planning steering committee develop resilient economic development strategies that became part of our new Master Plan inked by Reveille."

-Donna Dettling, Village Administrator
Village of Archbold, Ohio

Village of Archbold, Ohio

section 7: selecting participants

Depending on your program objectives, the community may choose to survey businesses in one industry sector or a combination of sectors. The Task Force will need to identify the target population(s) and most likely will decide to survey a sample of the target population.

It is recommended that a new program begin with businesses most critical for sustaining the local economy, usually the businesses that hire the most employees. In small rural communities, however, small businesses are key, thus the business selection is relative to the community context.

In survey terminology, the “population” refers to all possible respondents that may be selected for a survey. In a BRE program, the survey population typically includes all the businesses in the community for the selected sector (industrial, retail, health care, nonprofit, government, agricultural, etc.).

To determine the population, a detailed list of all businesses fitting the appropriate classification must be generated. Various sources of information may be used to generate this list. The most common sources include Chambers of Commerce or Economic Development leaders, county property tax rolls, municipal income tax rolls, and personal knowledge. Sources that charge a fee for their lists include Harris InfoSource and InfoUSA.com. Realize that no one source is always either timely or perfect; therefore, some errors are possible, and some returns should be expected.

Selecting the Survey Sample from the Population

The survey sample is the list of businesses that you have identified from the larger population about which you would like to learn more. You want to identify a list of businesses to survey in a way that adequately represents the larger population. The following technique allows for three distinct sets of businesses to be targeted.

- First, the largest businesses (in terms of employment) are selected.
- Second, businesses that the Task Force feels “must be surveyed” are selected.
- Finally, a list is created of randomly selected businesses.

Random selection ensures that each business has an equal chance of being selected and creates a survey sample list that is representative of the population of businesses in your community. For some communities, there are not enough businesses within the targeted sector to use the method described above. In that case, survey the entire business population within the sector.

"We had a prospect who was looking into constructing a new building. However, he'd heard mixed reviews about our Planning Process. I showed him our most recent survey findings so he could see how our Planning Process was rated by the business community. He indicated that the information was helpful and at this time it looks like he is going ahead with the project."

-Brent Painter, Economic Development Office
City of Strongsville

section 8: survey review, data entry, and follow-up

Successful BRE programs depend largely on the extent to which the community can effectively follow up on the short-term and long-term business needs and requests. The Coordinator should review each survey when it is returned. In this review, typically the Coordinator identifies the need for short-term follow-up and immediate action items to address as "critical" issues. The Coordinator also keeps the Task Force informed by holding meetings to review the survey results.

local review of surveys

After each survey is returned, the Coordinator should complete three immediate tasks.

1. Send a letter or email thanking the business for participating in the BRE program.
2. Review the completed survey and address simple, short-term, and urgent, "critical" items pertaining to that business.
3. Ensure that an accurate record of the completed survey be made. You may want to:

   a. Check off the targeted business as "survey complete."
   b. Record the names of the volunteer visitors if a site visit was made.
   c. Ensure that the survey ID is recorded on each page of the survey instrument.

responding to issues

During the review of the surveys, conclude if there is a need for immediate action. A business may indicate, for example, that it intends to relocate or close in the next two months. Uncovering such an issue is a key function of the BRE program. It is of critical importance for the Coordinator to have a plan for addressing such issues.

The Coordinator may want to plan an immediate meeting with the business owner. Or it may be prudent to call an emergency Task Force meeting to address the problem. Careful documentation of the actions taken to uncover and address the issue is also recommended.

reporting immediate success stories

Following any immediate successful responses to businesses, the Coordinator may also want to write a news release or social media post describing the follow-up actions taken by the Task Force. Such news should be written in consultation with and with the permission of the assisted business.

task force review of surveys

The Task Force should be informed of the progress and interim results of the survey administration phase of the BRE program. To keep the lines of communication open between the Coordinator and the Task Force, the Coordinator may want to hold periodic Task Force meetings during the business survey administration stage. The method by which the Coordinator involves the Task Force in the review of the survey results is at the discretion of the Coordinator.

There are two ways to keep abreast of the survey results:

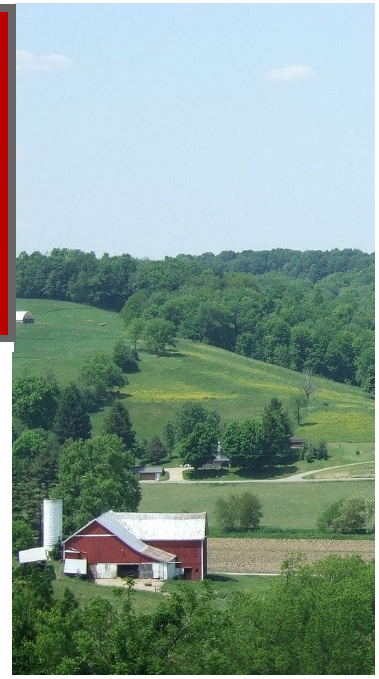
1. **Coordinator Summary Review Method** requires the Coordinator to put a significant amount of time into reviewing each individual survey. After approximately one-fourth of the surveys have been returned, the Coordinator should compile a summary of the key problems and concerns that have been uncovered. The Coordinator schedules a Task Force meeting to review the review. The Task Force is asked to respond to the concerns summarized and suggest short-term and immediate action.
2. **Task Force Survey Review Method** requires the Task Force to review each of the returned surveys individually. This method enables the sharing of Task Force "group expertise" and permits a greater amount of Task Force involvement in the survey review. This method also calls for regular Task Force meetings where approximately ten to twelve surveys are reviewed.

data entry and analysis

Many community BRE programs rely on computer-based software for data entry, analysis, storage, and management. There is a variety of computer-based software that enables communities to conduct surveys online, over the phone, or in person, and then analyze, manage, print, publish, and post the results.

section 9: action planning and program assessment

Perhaps the two most important components of a BRE program are planning for action and assessing program effectiveness. How these tasks are handled varies from community to community.



Action planning refers to addressing individual business issues that can enable the business to become more profitable and expand as well as identifying the larger community issues that when properly addressed, can foster a more business-friendly environment. It can take place in "real time" or be conducted in an annual periodic format.

- **"Real-time" Action Planning** requires the Coordinator to conduct an ongoing or "real-time" review and analysis of the survey data within the context of secondary data analysis and local knowledge. This format requires the Coordinator and/or the Task Force to detect trends and other key business issues and relay such information to the individual or organization that is appropriately equipped to address the issue or use the information.

  When developing the Plan for Action, the Coordinator and/or Task Force members should contact the appropriate local/regional government offices to inform them of the process and confirm their participation. In situations where the actions are in response to specific businesses, the Coordinator should also contact the respondents for their permission to pass on the information to preserve confidentiality.

  It is the responsibility of the designated individuals/organizations to respond to the Coordinator/Task Force, in a timely manner, with their plan of action for each item. This plan identifies the item, what will be done, who will do it, and when and how it will be done. The Coordinator keeps the documentation of each plan. At the end of a designated period, typically 12 months, this record along with the Plan for Action Worksheet can be used to inform program assessment and evaluation purposes.

  You may want to rely on a form like the one on the next page to keep track of the issues.

BRE Plan for Action Tracking Form

Item Number (use this self-assigned number for tracking):

____

Survey Category (identify from which survey or other source the issue originates):

____

Issue Description:

____

____

Level of Urgency:

____RED (immediate) ____YELLOW (3-6 mos.) ______BLUE (more than 6 mos.)

Organization/Person(s) Responsible:

____

____

Date Contacted:

Recommended Action:

____

____

Update/Date of Resolution:

- **Annual Action Planning** is the traditional approach to BRE action and assessment and requires the Task Force and Coordinator to develop action items from the analysis of the survey data and secondary data. From this analysis, an action plan, which they are responsible for implementing, is drafted. The goal is to develop short-term and long-term recommendations and actions to support business retention and expansion and overall community and economic development.

    The Annual Action Planning process can be summarized as including the following three meetings:

    Meeting 1
    1. Review BRE report and data, identify BRE issues, formulate issues and objectives

    Meeting 2
    1. Prioritize BRE objectives
    2. Break into sub-groups to develop detailed action strategies for each priority objective

    Meeting 3
    1. Sub-groups report back to one another and continue to develop strategies

annual BRE task force program assessment and action plan review

To evaluate the effectiveness of the program and review the cumulative data in order to detect trends and issues that may have been missed, conduct an assessment of the program on an annual basis. The assessment should include a summary highlighting the secondary data and survey responses collected throughout the evaluation period. In addition, the assessment should identify all the open and closed Plan for Action items.

section 10: community communications

One of the key functions of a BRE program is to facilitate improved community self-awareness. Cultivating such self-awareness requires sharing your BRE efforts with the community. There are several communication strategies that can help generate interest and awareness.

local BRE marketing

Many local BRE efforts have found it advantageous to develop a customized letterhead, create a BRE program web page, and communicate progress using social media. Using these marketing tools can serve to formalize and communicate to others the BRE organizational structure, important dates, key issues, etc.

Media Coverage

Media coverage of the BRE program can help generate community interest, develop an awareness of the program, and inform businesses and residents of key findings and results.

Working with the local media during BRE programming demonstrates that the program is action-oriented and is a sincere attempt to improve the local business climate. It also can provide tangible news regarding the local economy. Media representatives can interview the parties involved in the program.

Remember to rely on all sources of publicity for your BRE program. Newspapers, radio interviews, television coverage (including cable access TV), social media tools (LinkedIn, Twitter, Facebook, or Instagram), Chamber of Commerce and trade organization newsletters and information bulletins, providing speakers to update local civic clubs are all excellent methods of informing the community and state about the community's pro-business attitude and efforts to promote economic development.

Publicity and the Response Rate

Realize that the survey response rate is directly impacted by publicity of the program prior to its official launch and while it is being conducted. Whether the local media is the primary communications channel, or informal personal networking, working to inform the public of the purpose of the program and its intended outcomes will likely lead to greater interest and participation among the business community.

BRE Community Meeting

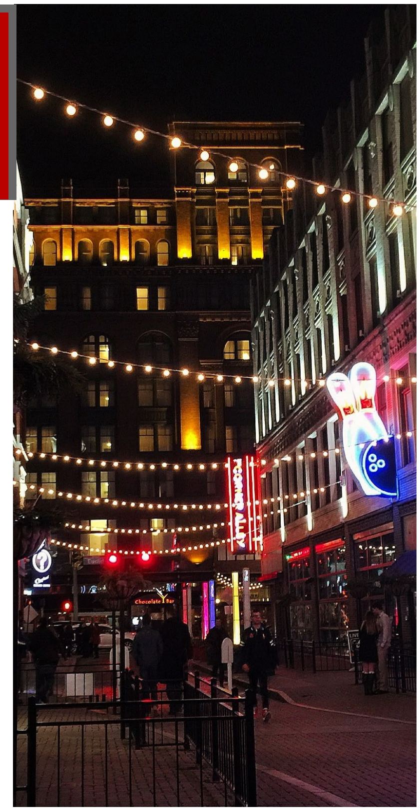
Community meetings are ideal vehicles for recognizing the participants in the program and sharing the results with the public. Typically, a community meeting is held after the Action Plan has been completed so that the Annual BRE Report may be presented to the public and business community. It is also an opportunity to review the previous year's Action Plan, thank all the participants, and challenge the community to rally around and support the BRE Action Plan.

In a visit coordinated by Ohio State University Extension, Community Development – Noble County, Tom Poorman (left) of Ohio Southeast, the regional JobsOhio economic partner, visited with RC Moore and Door to learn more about their business model and equipment needs. Tom is shown with company Vice President Ty Moore, a third-generation business leader for the Caldwell, Ohio, family-owned operation, established in 1937.

In a visit coordinated by Ohio State University Extension, Community Development educator for Noble County, Gwynn Stewart (second from left), met with AMES True Temper Dexter City, Ohio, handle manufacturing plant manager Jeff Sanford (far left) and Craig Albright (third from left) and Patrick Bolton (far right), both leaders from the regional Wood Products Team.

section 11: sustaining efforts with new year kick-off meeting

The New Year Kick-Off serves a key function in the community BRE program.



The New Year Kick-Off enables the community to recognize departing Task Force members, welcome the incoming Task Force members, and introduce them and other community members to the BRE program.

It provides the community an opportunity to celebrate past successes and envision new ones. It provides a forum for enhancing community self-awareness via sharing an annual “state of the economy” report with participants.

" We moved to Van Wert in 2001, built a new facility, and expanded in 2006. Our involvement in selecting Van Wert was because of Nancy and the group of community leaders that was together. They made a pretty big impression on us when we moved in, and we have seen that continue through the nine years that we’ve been a part of Van Wert. They come in on a routine, continuous basis touching base with us . . . what’s going on with leadership, changes, expansions, how you are working through the economic downturn. I’ll tell you they’ve got a pretty good pulse on how our business is operating and how the rest of the businesses in the community are as well.”

-Kim Elick, President, Braun Industries
Van Wert, Ohio

section 12: success stories

Since its initial creation and inception at The Ohio State University in 1986, the BRE Program has been delivered in a variety of county and community-based settings with a multitude of partners and stakeholders.

Following are a few of the most notable success stories. A variety of others are available online at the OSU Extension Community Development program site.

Fayette County

- Resulting in a 31.1 percent increase in manufacturing employment in the county, BRE involvement laid the groundwork for attracting over $80 million in investment and savings and creating 764 jobs.

Gallia County

- BRE findings were instrumental in the award of a $61 million highway project to complete a four-lane, limited access highway through Gallia County.

Van Wert County

- A participant of the BRE program since 2000, Van Wert County sees that the program has opened lines of communication between community agencies, organizations, committees, and businesses. New partnerships have also been created as a result. These new partnerships have enabled existing businesses in the area to create 690 jobs and retain 900 jobs since inception.

"Some of Wood County's largest employers are located in Northwood, and making sure we understood how to best allocate our attention to them during the pandemic was very important. The economic impact survey that they prepared helped provide very timely and pointed data that we could proactively react to."

-Edward Schimmel, Mayor
City of Northwood, Ohio

section 13: summary

A BRE program requires time and effort to listen and respond quickly to the issues, concerns, and suggestions of local businesses and the workforce. These efforts can promote a pro-business climate in the community and develop the capacity of the Coordinator and members of the Task Force to engage in meaningful community and economic development efforts. Exercising this capacity enhances the local BRE efforts, enables better informed community and economic development strategies, and helps to inform Task Force members and the community at large about individual and community-wide business concerns.

Perhaps most importantly, however, it fosters improved relationships among local development organizations and individuals. This coordination may lead to more effective communications and long-term working partnerships resulting in more cooperative policy and decision-making.

Consider a partnership with the state Community Development and/or local OSU Extension offices. Viewed as a tremendous resource, many communities want an engaged university to help address local as well as global issues. Often serving as the “front door,” Extension serves as the portal for communities to initiate engagement and collaboration with the academic enterprise (Gee, 2019).

Extension offices may be a link to professional staff as well as community volunteers. In the community setting, Extension provides services and a bilateral community engagement to the university (Gee, 2019). Extension Community Development is pursuing proven and innovative science-based strategies to expand the diversity of people and organizations having an active role in tackling the challenges that are affecting the well-being of communities (Beaulieu & Cordes, 2014).

references and photo credits

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Tim Poorman, Ohio Southeast. AMES True Temper, page 26.

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appendix: BRE program plan checklist

Use of this checklist will help identify BRE program participants, focus program objectives and measurable outcomes, and identify data collection and management strategies. Working through the items on this checklist will help communicate the overall program approach to BRE Task Force members.

A. BRE Stakeholders

Identify and categorize program stakeholders.

____1. Public

______a. City

______b. Regional

______c. State

______d. Other ____________________

____2. Private

______a. Chamber of Commerce

______b. Local businesses

______c. Trade unions

______d. Non-governmental organizations

______e. Other ____________________

____3. Residents

____4. Other __________________________

____5. Other __________________________

B. Program Measurement

Determine how you intend to measure impact of your BRE efforts.

____1. Increased tax revenue

____2. Vacancy rate

____3. Jobs retained

____4. Jobs created

____5. Promotional materials created

____6. Press mentions

____7. Other ___________________________

C. Use(s) of Information

Identify ways in which BRE data can be used.

____1. Increase/retain jobs

____2. Develop/improve relations with businesses

______a. Identify top businesses for relationship development and maintenance

____3. Develop programs for business

______a. Address needs of existing businesses

______b. Promote entrepreneurship

______c. Attract new business

____4. Improve/change community image (internal and/or external)

____5. Improve/preserve quality of life

____6. Program assessment

____7. Community planning

____8. Other ________________________

____9. Other ________________________

D. Type(s) of Information — Areas of Focus

What do you need to know in order to address items mentioned in "C" above?

____1. Business investment forecast (BIF): businesses planning to downsize, sell, move, or expand

____2. Perceptions of:

______a. Education

______b. Health care

______c. Infrastructure *(water, wastewater, roads)*

______d. Government services

______e. Recreation

______f. Labor force

______g. Retail/services

______h. Housing

______i. Quality of life

______j. Broadband

______k. Other ________________________

____3. Business linkages

______a. Inputs

______b. Outputs

______c. Customers

______d. Suppliers

____4. Operations

______a. Change in product mix

______b. Change in sales/number of employees

______c. Marketing

______d. Business hours

______e. Succession plans

______f. Financial

______g. Other ___________________________

____5. Business conditions

______a. Legislation

______b. Technology changes

______c. Competition

______d. Economy

______e. Customers

_______f. Other ___________________________

_______g. Other ___________________________

____6. Workforce

_______a. Training

_______b. Quantity/quality/availability

_______c. Recruiting

_______d. Housing

_______e. Transportation

_______f. Other ___________________________

____7. Other _________________________________

____8. Other _________________________________

____9. Other _________________________________

E. Source(s) of Information

Where can data listed in "D" above be acquired?

____1. Secondary

_______a. Publicly available

_______1. Location

_______b. Purchased reports

_______c. Other___________________________

____2. Primary

______a. Existing businesses

______b. Residents

______c. Workforce

______d. Employees

______e. Customers

______f. Consumers

______g. Other __________________________

____3. Existing businesses

_______a. Targeted economic sectors

_______1. Agriculture

_______2. Industrial

_______3. Retail

_______4. Services

_______5. Travel and tourism

_______6. Other ___________________________

_______7. Other ___________________________

_______b. Business type

______1. Size (revenue, number of employees, facilities SF)

______2. Ownership (single prop, branch, franchise, corporate HQ)

______3. Length of time in business

______4. Other ___________________________

______5. Other ___________________________

_______c. Geography

_______1. Multi-county

_______2. County ___________________________

_______3. Subcounty ___________________________

_______4. Other ___________________________

_______5. Other___________________________

F. Methodology

In what way(s) would you like to go about collecting and making use of data?

____1. Survey type

_______a. Visitation

_______b. Mailed

_______c. Web-based

_______d. Combination ___________________________

____2. Frequency of survey

_______a. One-time

_______b. Every month

_______c. Once per quarter

_______d. Twice per year

____3. Data management

	Person(s) responsible
a. Data entry	
b. Data tabulation	
c. Data analysis	
d. Data storage	

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Business Retention and Expansion Program
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