

# The Ohio Business Retention & Expansion Initiative

## Program Overview



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# Welcome and Introductions

- A little about Joe and me
- Your name, your position, professional background
- Role in Economic Development
- What do you hope to accomplish this week
- What can we do to help you?
  - Parking lot issues
- Basic ground rules for the sessions
- Teaching vs. conversations vs. doing
- Evaluation of our teaching
- The agenda



## THE SITUATION - Ohio

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



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## What is the Economic Situation in Florida

- Yesterday
- Today's Trends
- Future Trends
- What do you see as your role in Florida as it pertains to Economic Development?



## 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

From *The Retention and Expansion of Existing Businesses: Theory and Practice in Business Visitation Programs*, ed. George W. Morse (Iowa: Iowa State University Press, 1990)



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# BR&E IN OHIO

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

- **Proposal between community and OSUE**
- **BR&E training workshops**
- **Program support**
- **Data entry & analysis software (<http://surveygold.com>)**
- **Pre-tested questions for multiple economic sectors**
  - **Agriculture**
    - Industrial
    - Retail and Professional Services
    - Health Care
    - Travel & Tourism
    - Cross sector
- **“Build-your-own” Question Bank**



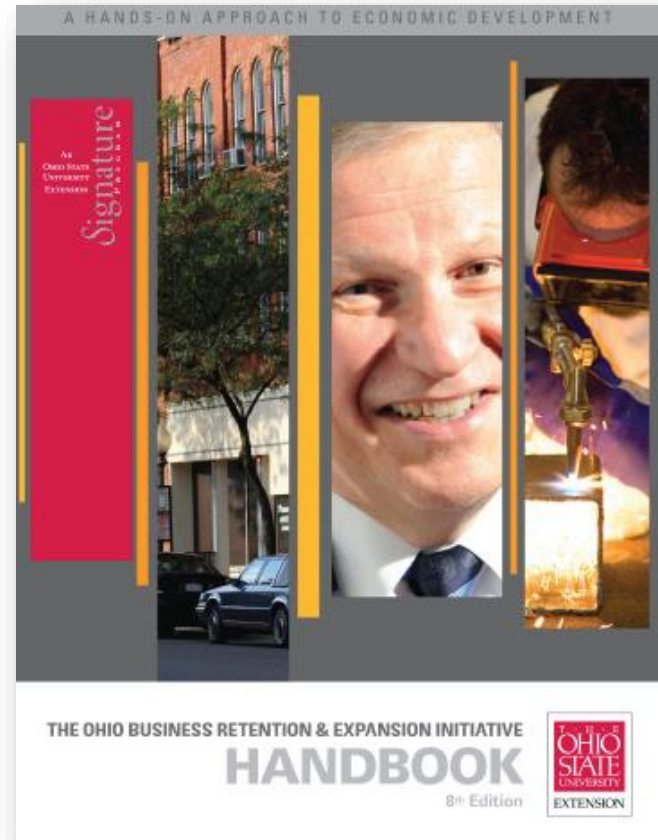
# PROGRAM COMPONENTS

- **Comprehensive BR&E handbook**
- **Forms, worksheets, & report templates**
- **OSUE provides access to web-based materials**
  - Questionnaires, question bank, forms, reports, handbook, workshop registration, useful links, etc.



# HANDBOOK

- 8th Edition
- Revised Winter 2009
- Step-by-step guide



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# HANDBOOK

## **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**



# Who we are

OSU.EDU Help BuckeyeLink Map Find People Webmail Search Ohio State

## Community Development

Ohio State University Extension

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### BUSINESS RETENTION AND EXPANSION PROGRAM

Home » Programs » Economic Development Programs

Economic Development Programs

**Business Retention and Expansion**

Scope of Services & Cost  
Program Tools  
BR&E News  
FAQs  
Success Stories  
Useful Links  
Targeted BR&E Program  
Economic Impact Analysis  
Energy  
First Impressions  
Ohio Tourism Toolbox  
Retail Market Analysis  
Leadership Development Programs  
Organizational Capacity Building  
Community Planning

Search

SOCIAL MEDIA

Blog  
Facebook

Research shows EXISTING businesses create 60% to 80% of all new jobs.

Communities that actively implement an on-going BR&E program focusing on the retention and expansion of local businesses will:

- Improve the business climate of the community
- Help to make local businesses remain competitive
- Increase employment
- Stabilize the local economy

The Ohio Business Retention & Expansion (BR&E) Program provides the resources, training, and tools to develop the capacity of the community to better understand its economy. In addition to enhanced community capacity to address critical community issues, other outcomes of such community engagement include a streamlined BR&E process that enables local leaders to focus on planning, action and results; a database of local information; and a more robust local economy. Nearly nine out of ten members have rated the program as 'HIGH VALUE.'

The Ohio State University was involved in the original development and became an early adopter of BR&E principles and methodology. Since 1986, the Ohio Business Retention & Expansion Program has developed the capacity of community leaders via more than 140 BR&E programs in 77 Ohio counties.

For more information, contact co-leaders **Nancy Bowen** (Associate Professor & Extension Field Specialist in Community Economics) or **David Civittolo** (Associate Professor & Extension Field Specialist in Community Economics). Additional team members include:

- Godwin Apaliyah, County Extension Educator (Fayette County)
- Joe Lucente, Assistant Professor & Extension Educator (Ohio Sea Grant College Program - Lake Erie Watershed)

<https://comdev.osu.edu/programs/economic-development/business-retention-expansion>

## Who We Are

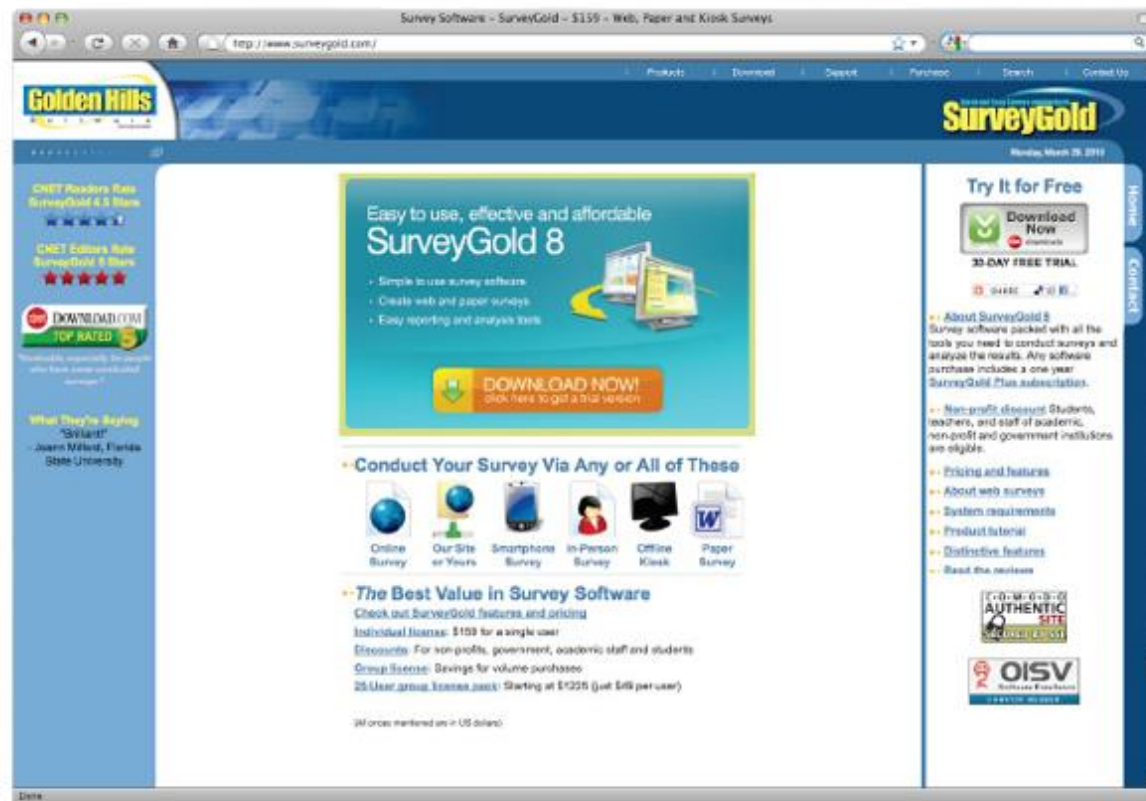
- What is BR&E
- What We Provide
- Success Stories
- Contact us
- Useful Links

– FAQs

–Our Promotional video:

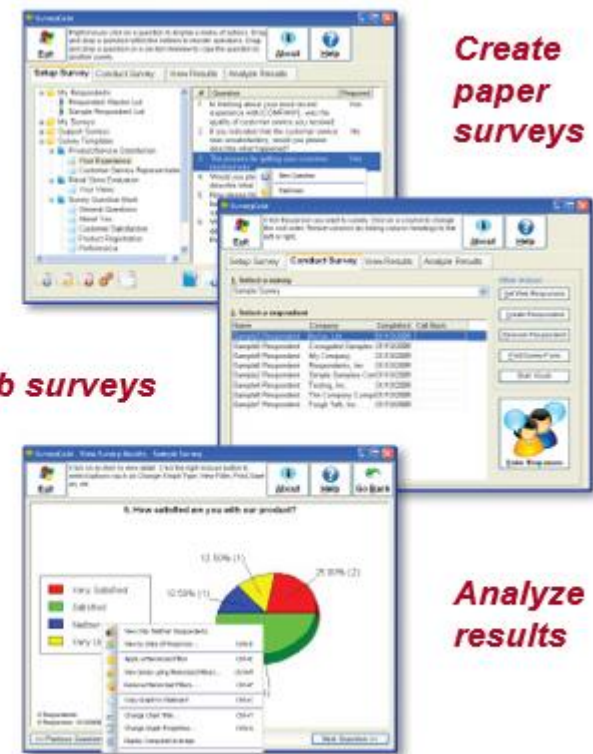
[http://www.youtube.com/watch?feature=player\\_embedded&v=sgPeot4szk4#t=10s](http://www.youtube.com/watch?feature=player_embedded&v=sgPeot4szk4#t=10s)

# SURVEY GOLD SOFTWARE



# DATA COLLECTION AND MANAGEMENT

- **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

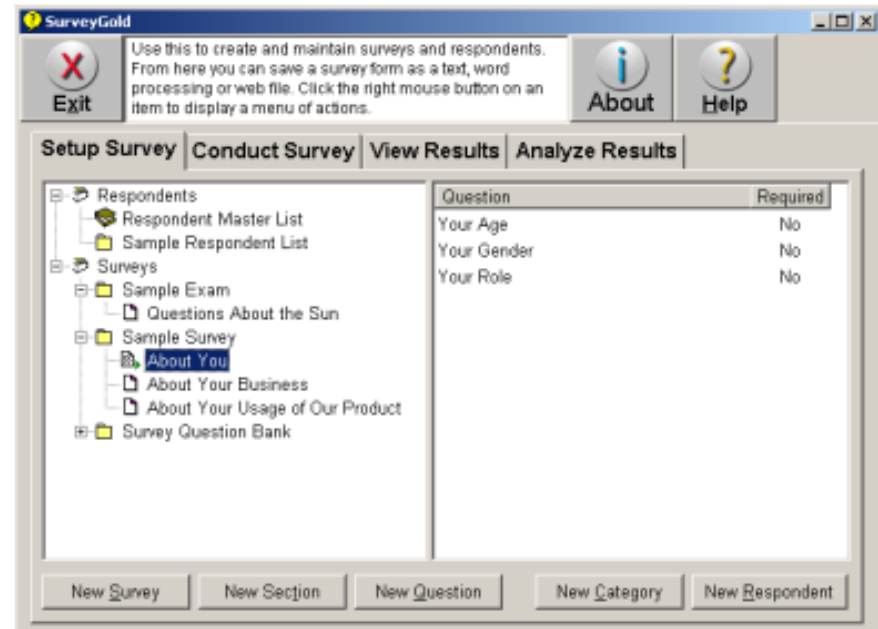


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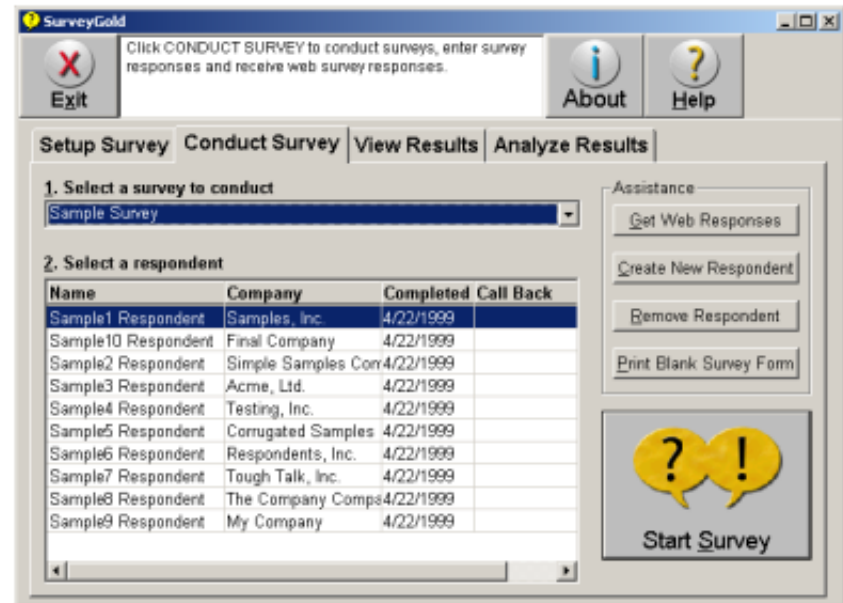
# CREATING QUESTIONNAIRES

- **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



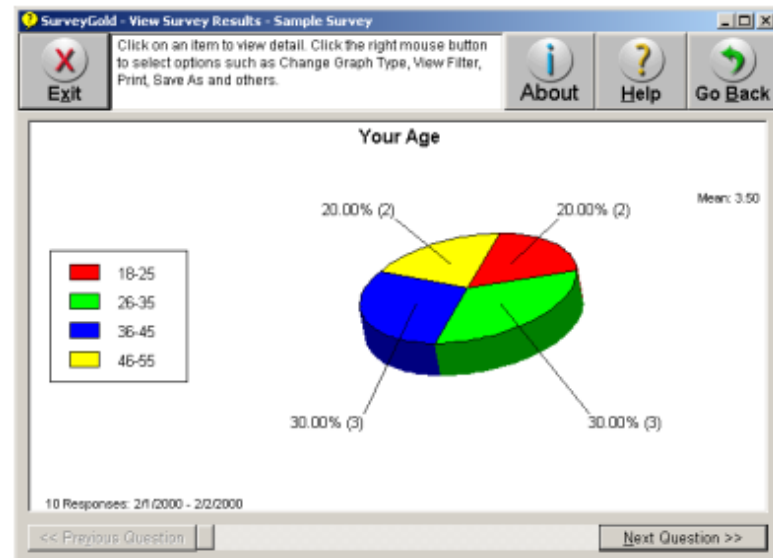
# CONDUCTING SURVEYS

- **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 AND 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



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# 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: Handout of Highland County Proposal**
- **Price Structure**



# PRICE STRUCTURE

## Getting Started

- \$3,000
- Web-based materials
- Unlimited program support/consultation
- Training workshops
- SurveyGold software not included (\$99–159)

## Annual Costs

- \$1,250
- Web-based materials
- 10 hours of program support/consultation
- ½ price training workshops (\$300/person)
- SurveyGold software not included (\$99–159)



# INTRODUCTORY WORKSHOP EVALUATION

*Ohio BR&E Initiative – 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 a 4, 5, or 6.

<b>before</b> the workshop 1 2 3 4 5 6 <input checked="" type="radio"/> 1	<b>EXAMPLE</b> I know how to retain and expand existing businesses.	<b>after</b> the workshop 1 2 3 4 5 6 <input checked="" type="radio"/> 5
<b>before</b> the workshop 1 2 3 4 5 6	<b>Statements</b> I have a good sense for my role in the development of my community's economy. I appreciate the need to better understand existing businesses. I have a good understanding of the concept of economic development. I am familiar with the concept of an ongoing Business Retention & Expansion program. I am willing and able to play an active role in the development of my community.	<b>after</b> the workshop 1 2 3 4 5 6 1 2 3 4 5 6 1 2 3 4 5 6 1 2 3 4 5 6 1 2 3 4 5 6

**What did you learn today?**

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

**What other topics would you like to see addressed in future workshops?**

# TASKFORCE WORKSHOP EVALUATION

*Ohio BR&E Initiative – 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).



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 a 4, 5, or 6.

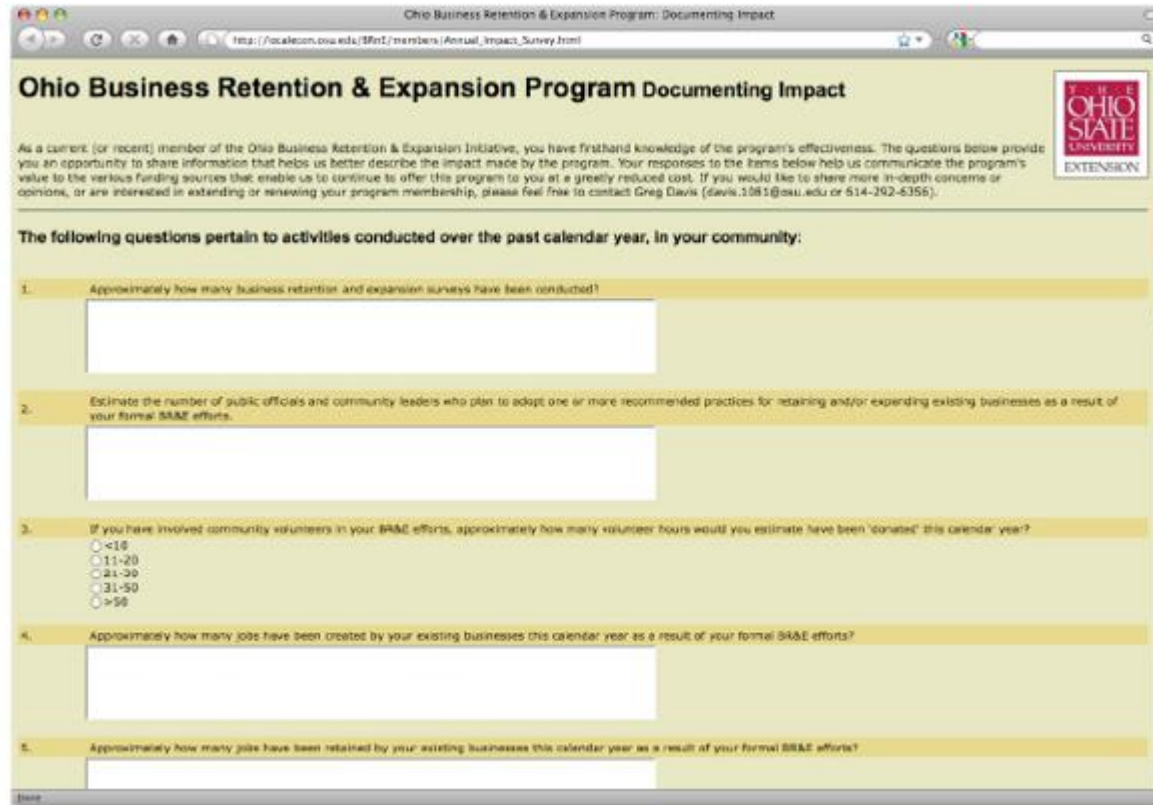
<p><u>before</u> the workshop</p> <p>1 2 3 4 5 6</p> <p>① 2 3 4 5 6</p>	<p><b>EXAMPLE</b></p> <p>I know how to retain and expand existing businesses.</p>	<p><u>after</u> the workshop</p> <p>1 2 3 4 5 6</p> <p>1 2 3 4 ⑤ 6</p>
<p><u>before</u> the workshop</p> <p>1 2 3 4 5 6</p> <p>1 2 3 4 5 6</p> <p>1 2 3 4 5 6</p> <p>1 2 3 4 5 6</p>	<p><b>Statements</b></p> <p>I am familiar with different ways of engaging in dialogue with existing businesses in my community.</p> <p>I am willing to meet with existing businesses in my community to learn more about their concerns.</p> <p>I am willing to devote time necessary to develop a working relationship with existing businesses in my region.</p> <p>I am capable playing a part in the development of my community's economy.</p>	<p><u>after</u> the workshop</p> <p>1 2 3 4 5 6</p> <p>1 2 3 4 5 6</p> <p>1 2 3 4 5 6</p> <p>1 2 3 4 5 6</p>

**What did you learn today?**

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

**What other topics would you like to see addressed in future workshops?**

# BR&E ANNUAL IMPACT SURVEY



Ohio Business Retention & Expansion Program Documenting Impact

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 concerns or opinions, or are interested in extending or renewing your program membership, please feel free to contact Greg Davis (davis.1081@osu.edu or 614-292-6356).

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

1. Approximately how many business retention and expansion surveys have been conducted?
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&E efforts.
3. If you have involved community volunteers in your BR&E efforts, approximately how many volunteer hours would you estimate have been "donated" this calendar year?  
 <10  
 11-20  
 21-30  
 31-50  
 >50
4. Approximately how many jobs have been created by your existing businesses this calendar year as a result of your formal BR&E efforts?
5. Approximately how many jobs have been retained by your existing businesses this calendar year as a result of your formal BR&E efforts?

[http://localecon.osu.edu/BRnE/members/Annual\\_Impact\\_Survey.html](http://localecon.osu.edu/BRnE/members/Annual_Impact_Survey.html)

## RESULTS EXAMPLE

- 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.



## A few more things

- Keep an open mind
- Ask questions and engage with colleagues and guests
- Stay focused
- Make fieldwork “real world”
- Draw linkages to your community



Retain, expand, and attract businesses; improve infrastructure; develop partnerships; and strategically lead for your community's future. Call the Ohio Business Retention & Expansion Program today.

**David Civittolo and Nancy Bowen**

[civittolo.1@osu.edu](mailto:civittolo.1@osu.edu)

[nbowen@cfaes.osu.edu](mailto:nbowen@cfaes.osu.edu)

<http://comdev.osu.edu/programs/economic-development/business-retention-expansion>



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