

Welcome to the CEDAS Academy Economic Development Strategy Tapas Webinar Series



ED Strategy Series is a web-based educational learning series developed by UConn Extension in collaboration with the Connecticut Economic Development Association and the Connecticut Economic Resource Center.



Advancing the
Practice of
Economic
Development in
Connecticut



Connecticut Economic Development Association, is a not-for-profit organization committed to advancing the practice of economic development within the state of Connecticut. CEDAS encourages communication among its members by providing a forum for discussion and information exchange.

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Community Based Business Retention and Expansion

A CEDAS Academy Webinar
June 1 | 11:00 a.m. - 12:00 p.m. ET

Hosted by Laura Brown, UConn-Extension Program in Community & Economic Development, and Rebecca Nolan President, CEDAS. This webinar is free and offered as a cooperative program of CEDAS and the University of Connecticut-Extension Program in Community & Economic Development.



Today's Presentation

This webinar is part of our TAPAS Series and we hope this presentation gives you a "taste" of:

- **Key elements & methods of effective Community-Driven BRE programs**
- **Strategies for small rural, urban, suburban communities to support existing businesses**
- **Resources and courses to learn more about BRE**

Our Presenters



Michael Darger, Community & Economic Development Specialist

Michael Darger, community economics specialist, has served as director of the University of Minnesota Extension's Business Retention and Expansion Strategies Program since 1999. He served as Community Economics Program Leader for U.M. Extension, 2003-2010. Previously he served in economic development positions in the Phillips Community Development Corporation in Minneapolis, University UNITED along University Avenue in St. Paul and in Sherburne County, Minnesota. Michael has helped lead business outreach programs in many places including award-winning programs in Minnesota and Saskatchewan. He also teaches an online course on Business Retention and Expansion.



Steve Roe, General Manager, Roe Motors, Grants Pass, Oregon

Steve Roe is the general manager of Roe Motors - a Cadillac, Buick, and GMC family owned dealership in Grants Pass, OR. His motto is "a car dealer working to make a positive difference in the community." Steve has been working with the Grants Pass Business Retention program for many years. Steve has an Automotive Marketing and Accounting degree from Northwood University and a Masters in Management degree from Southern Oregon University. He lives in Grants Pass, Oregon with his wife Kristi, a 1st grade teacher at Allen Dale Elementary, and Bonnie, Abby and Mollie, their Pet Partners registered therapy dogs. His two daughters (24 and 21) are grown and have three grandchildren. Steve enjoys Diamond Lake, reading, computer technology and giving back to others.



Garrett Sheehan, CEcD, Community Relations Specialist for Eversource Energy

In his role with Eversource Energy, Garrett Sheehan serves as a liaison between municipalities and the company. Garrett also supports economic development initiatives across the Eversource service territory. Garret has experience as a television news reporter, researcher for the Huntsville / Madison County Chamber of Commerce in Huntsville, AL and a project manager for the North Alabama Industrial Development Association. Garrett is a licensed attorney in Connecticut and Texas. He holds a master's degree in business administration and is a Certified Economic Developer. Garrett lives in West Hartford with his wife and two children.



Community Based Business Retention and Expansion (BRE) Programs

MICHAEL DARGER

U.M. EXTENSION CENTER FOR COMMUNITY VITALITY

A couple of clarifications

BRE vs. BRE Visitation or Outreach



WHAT EXPERIENCE DO YOU HAVE IN BRE VISITATION OR OUTREACH ?

1. No experience or knowledge
2. Some experience or knowledge
3. A lot of experience and knowledge
4. Expert on BRE (let me teach this)

Send the correct answer (1, 2, 3 or 4) number to the meeting host via chat

BRE = JOB #1 FOR ECONOMIC DEVELOPERS

Why Do It?

- Up to 86% of new jobs
- Other impacts
- Data about local economy, early warning
- Asset-based

Who Does It?

- Cities & Counties*
 - 50% do biz surveys
 - 85% do at least one “BRE strategy”
- ED certification requires BRE training
- There’s even an int’l. association. BREI

*ICMA 2014 data – Zhang & Warner

Three Approaches to BRE Visitation Programs



BRE visitation is an intentional process in which communities organize individuals to visit local businesses to demonstrate appreciation and to survey them about their concerns and needs. The data are analyzed in order to respond both to individual business concerns as well as to address systemic issues affecting the community's prospects for keeping and developing the businesses already existing in their community.



Steps in a Broad Based Community Business Retention and Expansion Model

Task force is formed



Conduct 30-100 business visits and think about what they've learned



Respond to key issues and strengthen connections

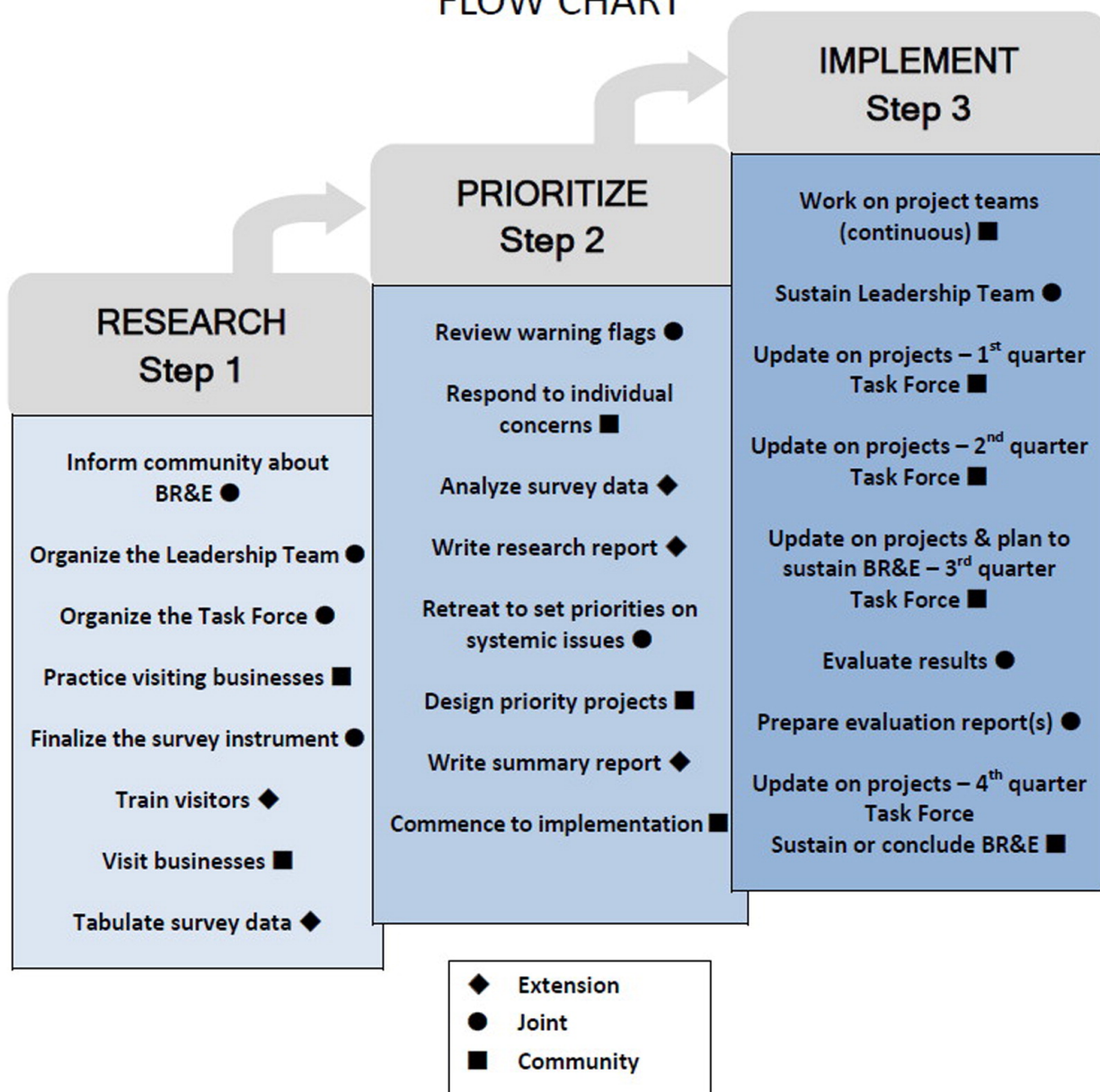


Community works on systematic issues

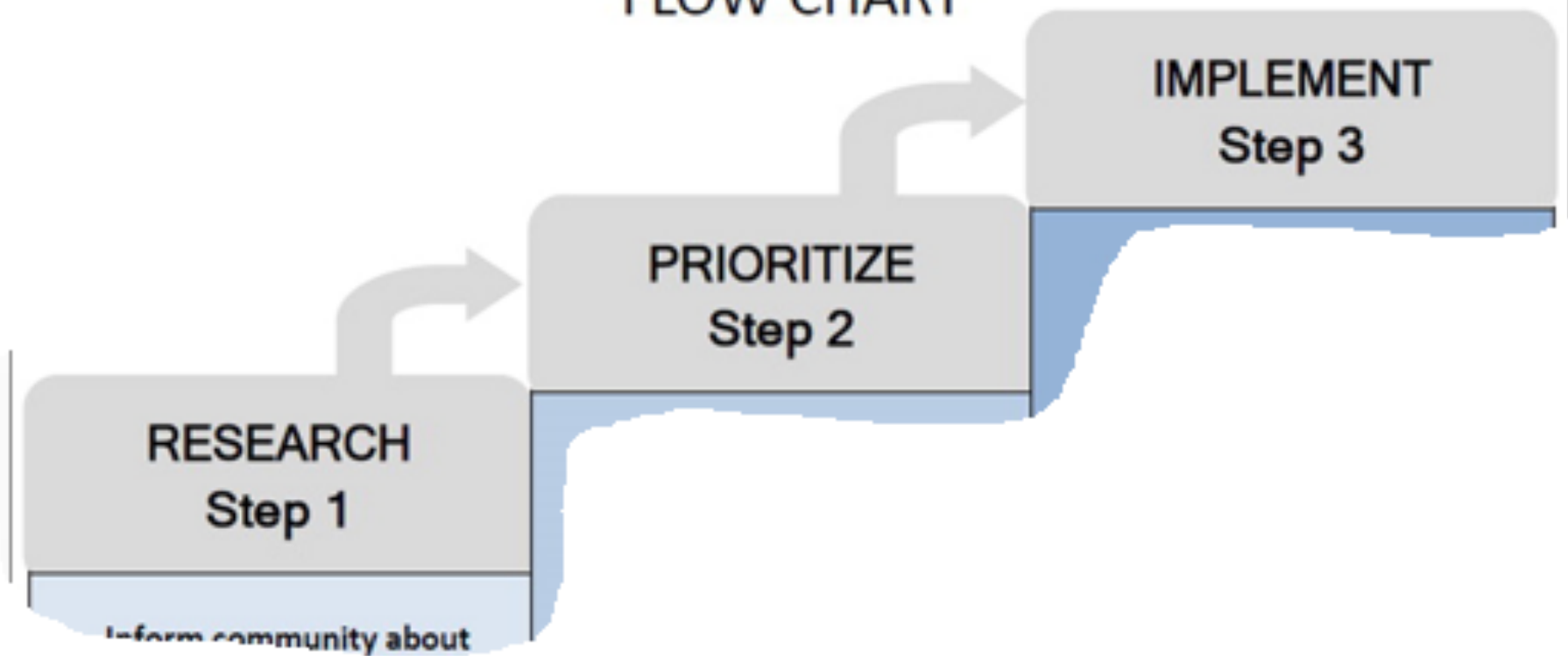


Business Retention & Expansion Strategies (BR&E) Program

FLOW CHART



FLOW CHART



RESEARCH Step 1

- Inform community about BR&E ●
- Organize the Leadership Team ●
- Organize the Task Force ●
- Practice visiting businesses ■
- Finalize the survey instrument ●
- Train visitors ◆
- Visit businesses ■
- Tabulate survey data ◆

PRIORITIZE Step 2

- Review warning flags ●
- Respond to individual concerns ■
- Analyze survey data ◆
- Write research report ◆
- Retreat to set priorities on systemic issues ●
- Design priority projects ■
- Write summary report ◆
- Commence to implementation ■

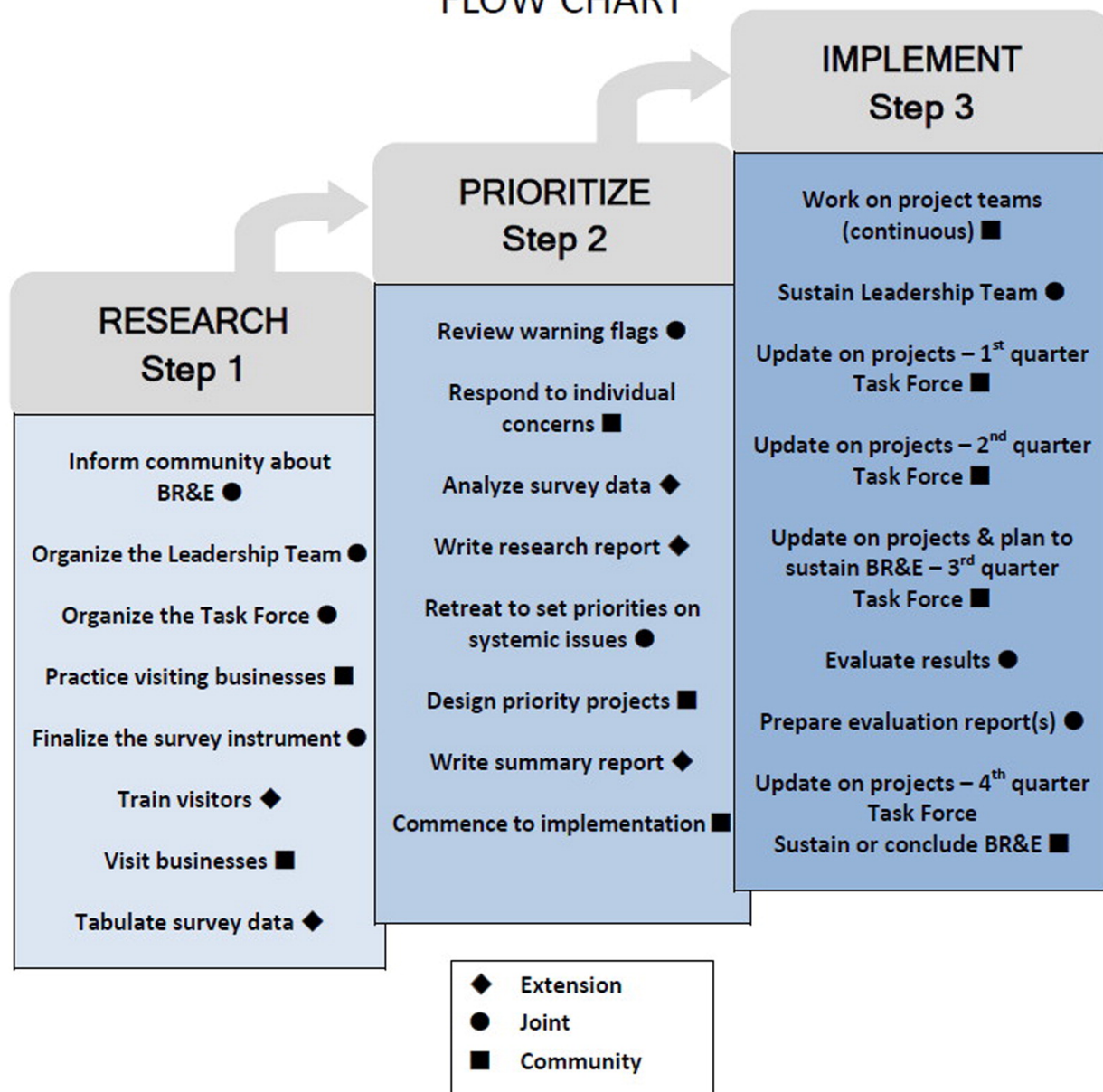
IMPLEMENT Step 3

- Work on project teams (continuous) ■
- Sustain Leadership Team ●
- Update on projects – 1st quarter Task Force ■
- Update on projects – 2nd quarter Task Force ■
- Update on projects & plan to sustain BR&E – 3rd quarter Task Force ■
- Evaluate results ●
- Prepare evaluation report(s) ●
- Update on projects – 4th quarter Task Force
- Sustain or conclude BR&E ■



Business Retention & Expansion Strategies (BR&E) Program

FLOW CHART





Caution: Not intended to be actually readable

The items shown here are attributable to the BR&E task force planning sessions and/or the BR&E research report. Items in red were mentioned but the connection to BR&E is not completely clear. Some of these items are largely attributable to the BR&E while others are only partially attributable to the BR&E.

Barnesville EDA and Barnesville Mainstreet Program - sponsors of BR&E

This ripple effect map was created based on a discussion with 21 people in Barnesville on April 14, 2016

Initiated BR&E in 2013

Barnesville BR&E

Networking

- Medical professional group
 - 3-4 meetings
 - Doctor recruitment project started
 - Barnesville Area Clinic change to Lake Region
 - Pharmacy changed over to new owner
 - Successful Retention and Transition to new owners at nursing home
 - Barnesville eye clinic change Dr. Van den Ende came on
- Business networking
 - Business holiday social (new annual event)
 - Ideas get shared
 - One business got new business clients through networking
 - Ideas shared between businesses about marketing
 - Marketing workshop (new one-time event)
 - Cooperative marketing between grocery and gas station
 - Coffee beans cooperative marketing with other businesses
 - Brought in Extension (Ryan) to teach and facilitate
 - Concerns
 - More networking events needed
 - Need for way to stay in contact with individuals after events
 - Periodically survey businesses on educational topics they would like

Housing

- New subdivision
 - Looking forward to adding or expanding? Not yet
- Townhomes on Third ave through EDA
- Several older homes being renovated
- Fiber to home project
 - This provided incentive to purchase homes
- Rental housing cmte
 - Created inventory of rental and potential
 - Created rental housing listing
 - One mentioned it was helpful to find rental
 - Assembled list of vacant housing with regard to potential as rental
 - Contacted all businesses with possible second-story housing potential
 - Posted inventory of rental on City website
 - Cmte members asked home owners about potential to rent
 - Investigated available property which could be rezoned to build multi-family rental
 - Educated existing apartment owners about programs available to rehab
 - Concerns
 - Need of more daycare for new people moving into Barnesville

Human capital/connections

- Karen connected with Dionne (Midwest Bank banker). Dionne now on Barnesville Community Fund board
- Dionne as new operator got quickly connected to business community
- Good energy due to connections in networking
- The interview was a great way to see other people's perspective
- After visits with business owners, I did realize we all have valuable information to share with each other
- Local businesses reached out to help me provide services in facility rather than outside the community (healthcare provider)
- Businesses felt appreciated through process

Entrepreneur Support

- Spark your Startup
 - Business plan competition first done in 2014 - 5 participants
 - Held second time in 2015 - 3 participants
 - Prosthetics won - \$10k grant awarded
 - Connected to school for potential partnering/learning
 - Got good media exposure for business and Barnesville: KYGO, WDAY, social media
- Succession Planning
 - Hosted 4 seminars on transition issues (legal, SBOC, accounting, WCF) well attended (10-15 in attendance)
 - Deity Queen successfully transitioned (she was involved in training)
 - Buyer also looked at training
 - City Center successfully transitioned
 - Triggered some estate planning besides transition planning
 - Plumbing business learned how to transition since in process
 - EDA loan funds instrumental in helping in transition

Challenges and Unintended Consequences

- Need to maintain lines of communication started in BR&E
- Need to keep Potato Days Festival going strong

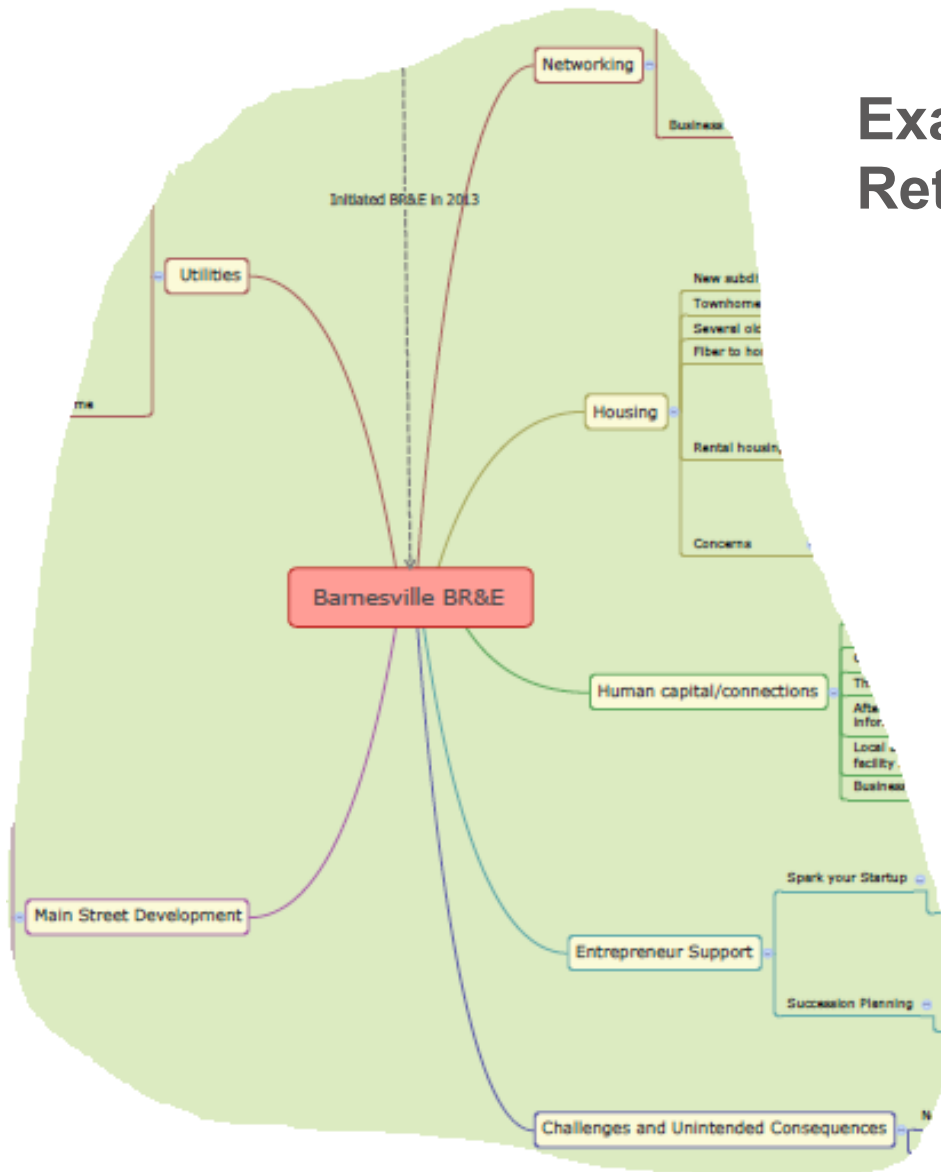
Utilities

- Natural Gas Development
 - Agassiz Valley Grain was very satisfied and this allowed them to be very competitive
 - K and M Tire indicated that change was CRITICAL from an expense perspective
 - Evidence of higher selling price of real estate (from banker perspective)
 - Personal price of heating went down
 - Costs of converting equipment from propane
 - Cost of assessment or service
 - Timing: Cost of propane now down; was a bigger concern two years ago
 - Beneficial to selling lots in new subdivision
 - BR&E showed need to improve utilities
 - BR&E initiated city action on fiber (muni telecom)
- Fiber to the Home
 - Helped bring new residents (fiber part of the selling point)
 - Eliminated hurdle to attract residents, especially from urban area
 - Community marketed as place to work at home with good rural broadband
 - Evidence of some working from home now who were residents and some who are new residents
 - Assisted existing businesses to conduct their operation

Main Street Development

- Downtown Parking
 - Research on parking
 - Semi trucks no longer getting in the way
 - Demo of Cenex Building
 - Freew up space for parking
 - Discussion with business owners to keep prime parking for customers
 - Painted diagonal lines on 2nd Ave
 - More signs about no parking times
- Challenges
 - Closing of bakery because of lack of community support
 - Wells Fargo challenges with staffing
 - Not a lot of willing sellers in Barnesville area: general concern related to expansion and retail gap cmte
 - Vacant spaces downtown
- FIS Retail Gap
 - Work to ID and FIS Gaps
 - Cmte formed and still in action
- Consignment Auto business opened
- Feasibility study done on hotel
- Restaurant - Purple Goose opening in 2016
- Dollar General opened
- Orange Julius added to DQ
- DQ had land for development
- Car wash development
- Surveyed public to find out what businesses they would like to see in community
- Survey
- Monkley survey
- Listing of business types done
- Cmte members studied Extension MAP (Market Area Profile) report and other communities
- Reviewed all answers to the open ended questions on the BR&E survey to document suggested businesses
- EDA financing change - opportunity for filling gaps

Example Outcomes of Business Retention and Expansion Process



- Relationships formed
- Connections and collaborations
- Idea sharing through things like improved business networking
- Improved support for businesses including more targeted training programs and succession planning
- Community action

Grants Pass, Oregon







Peerspectives - Seminar panel of local residents. Discuss finance, marketing, leadership, etc.



First Impressions – group of people from another community to give their impression of our downtown.



Chris Hunsicker – talks on leadership, hiring, and community.

Grants Pass &
Josephine County



BUSINESS
RETENTION & EXPANSION

2017 Visitation Survey





We believe our existing firms are our best prospects for future growth.
The purpose of this program is to see how we can help them grow.

*This Project is staffed and supported in part with staff and funding from Josephine County's Oregon State Lottery funds, the City of Grants Pass, the Grants Pass and Josephine County Chamber of Commerce.

A PROJECT ORGANIZED BY:
 THE GRANTS PASS/ JOSEPHINE COUNTY CHAMBER OF COMMERCE BUSINESS RETENTION & EXPANSION (BR&E) COMMITTEE.

Test Interview

Our BR & E survey is held every three years

Grants Pass BR & E Resources

- Our Past BR & E reports
 - www.grantspasschamber.org/bre
 - 1999 BR & E Final Report
 - 2002 BR & E Final Report
 - 2005 BR & E Final Report
 - 2008 BR & E Final Report
 - 2011 BR & E Final Report
 - 2014 BR & E Final Report

Proud Member of the



Grants Pass & Josephine County
CHAMBER OF COMMERCE





Steve Roe

Grants Pass, Oregon

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Resources For BRE

- Take an educational course
- Websites & conferences
- Research
- BRE database systems

Courses Available

- University of Minnesota Extension

- Online (starts September 27th)
- broad based community approach
- BRE research
- Can send a small team
- bre.umn.edu



doug-johnson.squarespace.com

- BREI

- In person and online courses
- brei.org

- IEDC Training Courses

- In person
- iedconline.org



<http://www.pediatricasadaenpruebas.com/2015/12/metodos-de-consenso-no-todos-iguales.html>

BRE Information

Websites & Conferences

- Business Retention & Expansion International
- University of Minnesota Extension
- International Economic Development Council

Research

- Special BRE Issue of the *Community Development Journal* (May, 2017)
 - bre.umn.edu (see the New Research tab)
- UME researching “continuous BRE” this year

BRE Database Systems

- The big two:
 - ExecutivePulse
 - Synchronist
- Other CRMs:
 - Salesforce is IT for Minnesota
- SurveyGold
 - Used by Ohio State



Good luck keeping and expanding your local business

MICHAEL DARGER

Introduction to Executive Pulse CEDAS Academy Community Based Business Retention and Expansion

Garrett Sheehan

Eversource

June, 2017

Free Tool for Economic Development

- For 8 years Eversource has maintained a license for the use of Executive Pulse
- This tool is free to any of our Connecticut communities – YES, FREE!
- Despite being available few communities have used it

Easy To Use Interface

The screenshot displays the ExecutivePulse CRM 2017 web interface. The browser's address bar shows the URL <https://www.executivepulse.net/reports.aspx>. The page features a prominent Eversource logo at the top center. Below the logo is a navigation bar with the following links: My Portfolio, Add, Calendar, Email, Reports, and a Search bar. A green bar is positioned above the navigation bar. The main content area is titled 'Reports' and contains two featured sections: 'Custom Reports' with the subtitle 'Custom reports' and 'Power Search' with the subtitle 'User defined, multi-click searches'. The footer section includes contact information, related sites, and social media links.

My Portfolio Add Calendar Email Reports Search

Need help? Just ask. | Account | Log Out

Reports

Custom Reports
Custom reports

Power Search
User defined, multi-click searches

Contact Us
Email Address: support@e-pulse.net
General Inquiries: (866) 397 8573
Technical Support: (866) 832 5465

Related Sites
ExecutivePulse.com
BRE.guru
CivicPulse.biz

Follow Us
f t in

Why Use This Program

- Maintain information about your businesses in one location
- Aggregate your business data into easy to read reports
- Assign follow-up tasks to other users and track whether they are completed

Next Steps

- Contact Garrett Sheehan (garrett.sheehan@eversource.com) or John O' Toole (john.otoole@eversource.com) to sign-up
- You will receive a user name and sign-in information
- We will conduct a follow-on webinar on how to use the program
- Begin entering your business visits!

Questions for our presenters?

**What sparked your interest in
today's presentation?**

**What resources or innovations
would you like to share?**



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Thank you!

When you close the webinar window please take a moment to complete the program evaluation.

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