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. Garrett 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

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

Extension • Joint • Community
FLOW CHART

RESEARCH
Step 1

PRIORITIZE
Step 2

IMPLEMENT
Step 3

Inform community about
**RESEARCH Step 1**

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**Business Retention & Expansion Strategies (BR&E) Program**

**FLOW CHART**

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Legend:
- Extension
- Joint
- Community
Caution: Not intended to be actually readable

The terms 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 BR&E - Barnesville Economic Development Authority - Barnesville EDA and Barnesville Mainstreet Program - sponsors of report.

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

- Barnesville Eye Clinic change to Lake Region
- Pharmacy changed over to new owner
- Successful transition and transition to new owners at nursing home
- Barnesville Eye Clinic change Dr. Van der Strate starts on

- Doctor recruitment project started
- Barnesville Area Clinic change to Lake Region
- Pharmacy changed over to new owner
- Successful transition and transition to new owners at nursing home
- Barnesville Eye Clinic change Dr. Van der Strate starts on

- Medical professional group: 3-4 meetings
- 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 grocer and gas station
- New addition: More networking events needed
- Need a way for businesses to stay in touch with each other

- Business holiday social (new annual event)
- More networking events needed
- Ideas for way to stay in touch with individuals after events
- Periodically survey businesses on educational topics they would like

- New businesses
- Staying in touch with existing businesses
- Getting new businesses into Barnesville

- Created rental housing listing
  - One business was helpful to find rental
  - Assessed list of recent housing
  - Used list of recent housing
  - Posted rental inventory
  - Cts of members asked home owners about potential to rent

- More networking events needed
- Need a way for businesses to stay in touch with each other
- Local businesses needed to help provide services in facility rather than outside the community (healthcare provider)
- Businesses fell accredited through process

- Karen connected with Donna (Michael Banker, Donna now on Barnesville Community Fund board)
- Barnesville as new operator got quickly connected to business community
- Good energy due to connections in networking
- The interview was a great way to other people's perspective
- After sales with business owners, they realized all staff and employee information to share with each other
- Local businesses needed to help provide services in facility rather than outside the community (healthcare provider)
- Businesses fell accredited through process

- Challenges: State Auto-business owner, feasibility study done on hotel
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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.

Our BR & E survey is held every three years.
Grants Pass BR & E Resources

• Our Past BR & E reports
  • [www.grantspasschamber.org/bre](http://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
Steve Roe

Grants Pass, Oregon

Phone (541) 471-9352 direct work phone
(541) 218-4402 cell phone
201 NE 7th St, Grants Pass, Oregon 97526
sroe@roemotors.com
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

- BREI
  - In person and online courses
  - brei.org

- IEDC Training Courses
  - In person
  - iedconline.org
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
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
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?
Register at: www.cedas.org

Thursday August 10, 2017  11am - 12 pm
Entrepreneurship: Creating a Culture of Innovation
Thank you!
When you close the webinar window please take a moment to complete the program evaluation.
You may access the PDF of this presentation as well as the recording (CEDAS members only) at

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