

Overview of the BREI Basic Course

From annual business appreciation events to programs involving business visits with extensive follow-up and on-going technical assistance, community business retention and expansion activities are as varied as the communities they serve. Historically communities have established *business visitation* programs based on one of two distinctly different models. As no two communities are exactly alike, it makes little sense to adopt either of these models and assume that it will work in your community without first analyzing the community and assessing its needs, its business base and its unique human and fiscal resources. Based on this analysis a locally tailored program can be developed that “fits” the community.

Based on education and training needs identified by BRE practitioners, the BREI Basic Course introduces participants to the elements of a successful BRE program. The course provides an assessment and planning framework that can be used to evaluate an established business retention program or design a program tailored to the specific needs and capacity of the local community. Upon completion of the course participants will be able to assess a community’s readiness to implement a BRE program design an approach suitable for the community and implement the program.

Throughout the course training is approached in a practical, hands-on way. Participants learn about different approaches though lectures, participant interaction, small group exercises and “face-to-face” conversations with practitioners from a variety of BRE programs.

The objectives of the course are to provide:

- An understanding of BRE as an economic development strategy
- A process for establishing and implementing a locally tailored program
- Basic skills and expertise needed by a BRE Project Coordinator

Upon completion of this training, participants will have gained the knowledge and expertise to develop a workable approach to BRE their community. In recognition of this expertise, participants are awarded the designation of *BREI Certified Project Coordinator*. The training also provides the foundation for advanced training for those who pursue BREI’s highest level of recognition, *Business Retention and Expansion Professional*.

Course Outline

Unit 1 - The Importance of Business Retention and Expansion – With a focus on "Why we do it?" this unit explores why BRE should be a fundamental part of every community economic development effort.

Unit 2 - Establishing an Existing Business Program – Two distinct approaches have developed for BRE visitation programs. Which one is right your community? This unit introduces two different approaches to BRE and outlines a methodology for determining an appropriate approach for your community.

Unit 3 – Measuring Success – Documenting program success is an important part of a BRE program. Developing benchmarks, assessment tools and an assessment plan is one of the first orders of business in program development. This unit focuses on how programs and projects can be tracked, progress measured and success documented. A small group exercise focuses on the identification of goals, benchmarks and measures of success.

Unit 4 – Assessing Your Community – It is essential for BRE practitioners to have a keen understanding of their community. This unit provides information on how to find, interpret, analyze and present primary and secondary data to describe a community. Several models for compiling and organizing profile data are presented. A small group exercise is included to introduce participants to finding, compiling and interpreting community data.

Unit 5 – The Business Survey – The heart of a business visitation program is the business survey. This unit outlines a process for developing a new survey or selecting questions from existing surveys to meet the goals of a BRE survey. Detailed information is given on the setting survey goals, formulating questions and the construction of a survey instrument. A small group exercise allows participants to evaluate a survey instrument and to see how questions are constructed and used in the survey process.

Unit 6 - Conducting Business Visits – Conducting successful business visits is not a matter of luck. Business visits ensure that the right data are collected and that business owner/operators are given an opportunity to be heard. This unit identifies various methods of data collection and discusses the advantages and disadvantages of each approach. Included in the session are a discussion of business visitation techniques and a mock interview.

Unit 7 – Responding to Business Concerns – It is not enough to visit a business. The BRE program must have a plan to respond to what is learned from business owners. This unit outlines the why and how of the follow-up that occurs after a business visit. Examples of "red flags" are presented and participants will have an opportunity to suggest ways to organize and address business concerns. A small group exercise is included that allows participants to review survey instruments for red flag issues and to develop a response to business requests.

Unit 8 – Analyzing Data and Developing Recommendations – After survey responses are collected and compiled someone must review and interpret the information. And, based on that analysis, an action plan to address systemic concerns can be developed. This unit presents approaches to data analysis and a methodology for identifying projects to be implemented based on findings from the data analysis. A small group exercise allows participants an opportunity to analyze and interpret aggregated data and to develop recommended actions based on that analysis.

Unit 9 – Reporting Results and Implementing Projects – Why do project reports often go unread? Why do projects never be implemented? Could it be that the report is written from the writer’s point of view and not that of the reader? This unit outlines an approach to creating readable, and thus usable, reports of survey findings and recommendations. Participants are given a variety of reports to critique.