CREATE BRIDGES

Module 4: Business Retention and Expansion

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TABLE OF CONTENTS

MODULE 4: BUSINESS RETENTION & EXPANSION

OUTLINE & OVERVIEW

Background & Overview

Business Retention & Expansion (BR&E) is a time-tested process that examines the business climate in a community or region. At its core, BR&E is an outreach effort to better understand the needs, concerns, and aspirations of existing businesses. BR&E is designed to strengthen the connection between businesses and the community as it provides an opportunity to engage and broaden community involvement in economic development. This chapter will walk you through the steps of hosting a BR&E program in your community. Feedback from the BR&E survey will provide vital information that can be used during the CREATE BRIDGES strategic planning process.

Timeline: From preparation to completion of strategy development, this step will take about 3 months.

Purpose:

- Assists existing businesses in their survival and expansion
- Driven by feedback from business owners and managers to gain business insight
- Turns "business intelligence" into value-added services and programs that address shared business challenges and opportunities
- BR&E is proactive in maintaining a vibrant local economy and assisting existing businesses in their growth
- BR&E data will accompany other data sets to inform strategies that strengthen the CREATE sector businesses in the region

Preparation and Notes:

- Pre-determining boundaries
- Time considerations
- Questions to ask

Promotion:

- Regional Steering Committee
- Extension networks
- Chambers of Commerce
- Community Colleges/Career Techs
- Libraries
- Press Releases

- Local radio ads/interviews
- Social media

Process and Format Description:

- Step 1: Research and Launch
    - **Inform** community/businesses about BR&E
    - **Organize** the leadership team
        - Optional Adaptations (such as for hybrid, virtual, or online completion)
        - Goal setting:
            - Determine the target number of qualified surveys needed per county
            - Track sector representation
            - Track county representation
    - Recruit and **train** volunteers
    - Visit businesses to conduct **interview** (~1 hour)
    - Tabulate interview data
- Step 2: Prioritize
    - Review immediate concerns
    - **Analyze** interview data
    - **Identify** data themes
    - Prioritize projects
    - Draft a summary to share survey results and priority projects
    - Host a regional event to announce projects and plans to implement
- Step 3: Implement
    - **Develop** project teams and commence work on projects.
    - **Sustain** leadership.
    - **Provide** updates on projects to the region
    - **Evaluate** projects.
    - **Sustain** or **conclude** the BR&E program.

Presentation Session:

- Session Agenda
- Estimated Time to Complete Session: 2 hours
- Introduction to BR&E for Communities Power Point Slides
- Materials Needed:
    - BR&E Survey example
    - Plan of Action Template

Resources:

- BR&E Interview Survey

- BR&E Interview Survey: Arkansas IRB Example
- Volunteer Visitor Training Power Point
    - BR&E Volunteer Interview Guide
    - BR&E Volunteer Recruitment Letter
    - BR&E Training Details and Marketing Letter
    - Mock Interview Scenario
- BR&E Roundtable Workshop Power Point
    - Roundtable Workshop Agenda
    - Roundtable Moderator Tips
    - Roundtable Feedback Form
- Presentation for Civic Groups
- BR&E Summary Sandstone Hills
- Kentucky BR&E Survey Summary
- Key Findings BR&E Survey Responses in Oklahoma
- Templates
    - University of Arkansas Mock Interview Scenario Video
    - University of Minnesota Training Video
    - Volunteer Training Feedback Form
    - BR&E Letter to Business Owners
    - BR&E Press Release
    - BR&E Survey Data
    - Plan of Action Template
- Additional Resources
    - Business Retention & Expansion International (BREI), organization
    - BR&E Extension Journal

Next Steps:

- Assemble a BR&E task committee
- Meet with the BR&E task committee and local leaders to determine which style of BR&E process your towns will conduct.
- Begin promoting and conducting interviews
    - Address Immediate Actions and "easy wins" (if necessary)
- Summarize BR&E interviews once all are conducted
- If Employee Perspective surveys are not underway, begin conducting survey efforts with employees.

Sources:

Appendix:

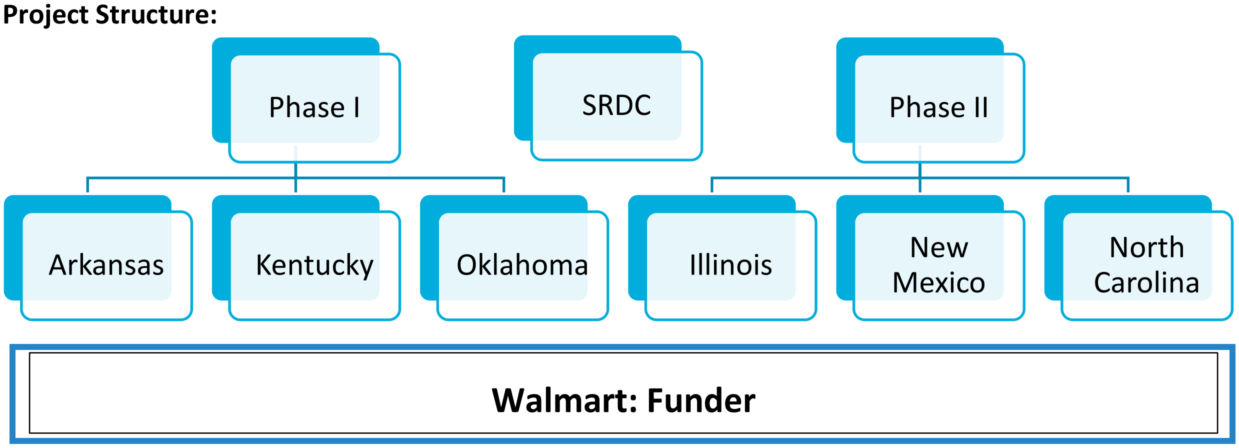
BACKGROUND & OVERVIEW

Communities and local leadership may have varying knowledge of what a Business Retention and Expansion program is, what it aims to accomplish, and how it can be used to establish a strategic plan for growth and retention of local businesses. CREATE BRIDGES uses the Business Retention and Expansion (BR&E) program to systematically collect data that represents the businesses within the identified regions and sectors. Using the University of Minnesota interview design model, regions have been able to gather comprehensive data on labor participation, community engagement, topical obstacles, and regional needs.

The best way to introduce BR&E to a community is to meet with local leadership, Chambers of Commerce, Main Street organizations and civic groups to assess their experience with the program. These groups will also be key in identifying businesses to participate in the process and helping to recruit volunteers to assist with survey efforts. The most vital resource for the BR&E process is people. BR&E requires leadership, volunteers, analytical capacity, as well as community and business buy-in.

Comparing and contrasting the data between BR&E and the Employee Perspectives survey allows for a more comprehensive view of the regional work environment and allows the leadership team to create strategic next steps that serve the entire community.

Project Structure:



Pilot Project Partner Institutions:

<u>Project Coordinator</u>

Phase I

Phase II

Special thanks to our funder

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TIMELINE

The BR&E component of CREATE BRIDGES is a very valuable data collection opportunity with the participating communities. From initial planning, until survey results are presented back to the communities, it can take 6-7 months. This includes initially meeting with the regional steering committee, following up with a BR&E task team, recruiting participants, providing volunteer training and orientation, interviewing business owners, processing survey results, delivering the survey summaries, and following up with any immediate actions or “easy wins”. A sample timeline is included in the Appendix section of this module.

PURPOSE

- Assists existing businesses in their survival and expansion
- Driven by feedback from business owners and managers to gain business insight
- Turns “business intelligence” into value-added services and programs that address shared business challenges and opportunities
- BR&E is proactive in maintaining a vibrant local economy and assisting existing businesses in their growth
- BR&E data will accompany other data sets to inform strategies that strengthen the CREATE sector businesses in the region

PREPARATION & NOTES

In preparation to launch a business retention and expansion (BR&E) process, it is important to examine a few key factors that will impact the BR&E and could be fleshed out before bringing in the leadership team for further development. Sketching an outline of the following will help focus the leadership team towards the end goals.

- **Why?** Before even considering implementing a BR&E program, it is important to set the purpose. This is outlined in the activity below but it should be the motivating factor behind all activities in this process.
- **Where?** Setting the boundaries of the process will allow the leadership team to identify the best business owners and managers to connect with. This could mean geographical boundaries or industry specific boundaries.
- **What?** Identify the BR&E style adaption that fits the purpose and boundaries of the program. Adaptions range from individual interviews to focus groups to online surveys. Assessing the community on their interest and access should factor into the adaption choice.

Notes:

If the community has never undergone a BR&E, it will initially be difficult to convince business owners and managers to commit to the time needed for a conversation. It is a foreign concept for most communities to ask business owners and managers about their experiences and their needs prior to a crisis. They are most used to being asked for their time and sponsorship to “give back” to the community. However, most business owners and managers relish the opportunity to share once they get started. As the process continues, promotion of the process and the owners’ experience will lead to additional scheduling.

Additionally, the most successful interviews occur wherever the business owners or managers are. This could include the back of house during food prep, sitting on a fishing guide dock, meeting in their office, or taking advantage of the few minutes in between a customer interaction at the POS. Wear comfortable shoes, bring a clipboard, and be prepared for the unconventional spaces where these interviews may happen.

Confidentiality is key. In the training, there is an emphasis on the confidentiality of the interview data but confidentiality also includes information shared during the interview. Inevitably, the business owner/manager will share experiences or grievances with people outside the interview. It is tempting to share or commiserate during the interview, but it is not helpful towards the end goal.

STEP 1: RESEARCH AND LAUNCH

Preparation: 1-2 months

Implementation: 2-3 months – Completing the process in a defined time is important. Much longer than 2 months and the community will start to lose interest in the process and the results. It can be a challenge to keep to the time boundary as each interview may lead to more interviews and it may be difficult to stop collecting data.

Promotion: 1 month before launch, then continuously during implementation to share the participant experience (with permission), and then at the end, share the analysis to get people excited to collaborate at the CREATE Academy meeting.

Process:

NOTE: THIS PROCESS IS BASED ON THE UNIVERSITY OF MINNESOTA EXTENSION'S COURSE *BUSINESS RETENTION AND EXPANSION IN YOUR COMMUNITY*. OUR TEAM HAS MADE SOME ADAPTATIONS FOR OUR PROGRAM, BUT THE STEPS AND OVERALL PROCESS ARE BASED OFF THE CURRICULUM AND TRAINING PROVIDED BY THE UNIVERSITY OF MINNESOTA (UNIVERSITY OF MINNESOTA, EXTENSION, 2018).

1. **Inform** the community/businesses about Business Retention and Expansion (BR&E).
   Meet with local leadership, key community players, Chambers of Commerce, Main Street organizations, or any other group or organization that supports businesses in your community. This could also include tribal and minority organizations. An **Introduction to Business Retention and Expansion** Power Point is included to help inform communities of the BR&E process. This presentation is intended to be shared with the groups mentioned above as an orientation to BR&E and to illustrate how the program is used to collect local and timely information for the CREATE BRIDGES strategic planning process. A **BR&E Letter to Business Owners** is also included to help inform businesses.

2. **Organize** the leadership team.
   Assembling a leadership team to help implement the BR&E program will be essential to its success. Consider having team members who oversee the various key components in the process, such as program promotion, business recruitment, volunteer recruitment, business visitation, and data summary.

3. **Recruit** and **train** volunteers.
   In a traditional BR&E program volunteers visit individual businesses to conduct the confidential survey. Typically, two volunteers are needed to conduct each interview. One volunteer will focus on asking the survey questions and engaging the business owner/manager, while the second

volunteer will record responses and take notes. On average, each business visit takes about 1 – 1.5 hours. The number of volunteers needed will vary based upon community size and the number of businesses participating. A **BR&E Volunteer Visitor Training** Power Point**, BR&E Volunteer Interview Guide and CREATE BRIDGES BR&E Interview Example Video** are included in the resources for this chapter. NOTE: ADAPTATIONS OF THE TRADITIONAL VISITOR MODEL CAN BE USED FOR THE CREATE BRIDGES PROGRAM. THESE VARIATIONS ARE OUTLINED AT THE CONCLUSION OF STEP 3.

4. Visit businesses to conduct **interview** (~1-1.5 hours)

5. **Tabulate** interview data

6. **Next steps**: The summarized BR&E data will be used along with the Employee Perspectives survey data as part of the CREATE Academy presentation to identify major themes and begin the strategic planning process.

Presentations Resources (these will be included in the appendix):

- Introduction to BR&E Power Point
- BR&E Letter to Business Owners
- BR&E Volunteer Visitor Training Power Point
- BR&E Volunteer Interview Guide
- CREATE BRIDGES BR&E Interview Example, video: https://youtu.be/8zKMVv9Jk6E?si=htPPzWIWiwbiSd3E

BR&E SURVEYING AND ADAPTATIONS

Traditional BR&E

In a traditional BR&E format, two individuals (these individuals can be program staff, local volunteers, steering committee members, or anyone who has participated in the BR&E volunteer visitor training) will conduct a BR&E interview with the business owner or manager, at a predetermined time and place. Ideally the interview will be conducted on site at the business and at a time when the owner or manager can give their full attention to the interviewers (i.e. uninterrupted by customers or staff). One interviewer will ask the survey questions and carry the conversation while the second interviewer will act as a note taker, recording the responses. A video showing how a typical BR&E interview is conducted is included in the Appendix.

Roundtable BR&E

The Roundtable BR&E is a workshop-style event that invites business owners to share information and discuss survey questions in a group format. In this format, business owners are seated in small groups with a moderator at each table. A facilitator leads the group through the survey process. Each business owner has their own survey to fill out. Some questions they will respond to on their own. Other questions are discussed, and responses are shared with the group. The role of the table moderator is to keep the discussion on topic, help manage time allotted for the discussion portion, and take notes to capture the conversation. Participants will be asked to use discretion and keep information they learn from other participants confidential.

Resources included:

BR&E Roundtable Workshop PowerPoint

- The template contains pre-set discussion questions as a guide; however, the facilitator can amend as they see fit.

BR&E Roundtable Agenda (to assist facilitator)

BR&E Roundtable Moderator Tips

BR&E Roundtable Feedback Form

Virtual

This format mimics the in-person interview, but in a virtual format. Virtual interviews can be convenient and used for a variety of reasons, but keep in mind that this format does not come without challenges. For businesses in remote areas, access to reliable broadband can cause technical difficulties and participation may not be as robust if the interviewee feels disconnected or intimidated by using a virtual platform.

Hybrid

This is the “divide and conquer” BR&E method. It uses a combination of in-person one-on-one interviews, along with the Roundtable BR&E format, and can also include virtual interviews to collect survey feedback.

Student Involvement in BR&E

When assembling the BR&E team, consider engaging college students who are studying in the CREATE sector areas: retail, accommodations (hotel management and hospitality), tourism, and entertainment. Students can play a crucial role on your BR&E team in terms of volunteer visitors, roundtable moderators, and/or analyzing the BR&E data. It is also an opportunity to introduce students to business owners and professionals who are already working in their area of study. Helping to facilitate these connections can be beneficial for both the students and the businesses.

GOAL SETTING

Establishing goals together as a leadership team will be invaluable through the process. It sets clear boundaries for the work and can be referenced whenever inevitable obstacles and adjustments pop up.

With regard to the BR&E process, goal setting should include target number of participating businesses per county and sector representation that reflects business demographics in the region.

For Phase I of the pilot, teams set a goal of 5-7 business per county. In many places this goal was exceeded due to teams utilizing various collection methods simultaneously throughout the survey collection period. For example, volunteer visitors were conducting one-on-one interviews in addition to Roundtable workshops being held, one per county. In some places, virtual interviews also supplemented the in-person interviews. The important thing is to be cognizant of business owners' time and commitments. Offering various interview opportunities at various times will help your team collect a sufficient number of responses for summary purposes.

A useful tool to determine if the goal is actionable is the SMARTER model.

- Specific – What is the specific goal you want to achieve? The more detail, the better
- Measurable – How will you measure the goal? How will you track progress and know once you have achieved it?
- Achievable – Can you achieve the goal? What skills do you have and which ones will you need to obtain?
- Relevant -How important is the goal to you? Is it relevant to your values and get you towards your purpose?
- Timebound – When does this need to happen? What is the end date? Why does it need to be timebound?
- Evaluate – How did you perform? What can you learn? Evaluate your progress to get better results?
- Reward – When and how will you celebrate? Rewards help to build sustainable results.

2: PRIORITIZE

Preparation: Share tabulated results in an accessible format

Promotion: Since this step may not be as visible to the general public, make sure to promote the Regional Event and share examples of the tabulated data to maintain public awareness.

Process:

1. **Review** immediate concerns.
   While rare, it is possible that during a BR&E interview you will learn information from a business that is considered an "immediate concern". This is a situation that may limit the business in a detrimental way or lead to its relocation or closure. Included on the last page of the BR&E survey is an *Immediate Action* page. This page allows the interviewer to write out the immediate concern(s) and obtain consent from the business owner to share this information with individuals or groups who can respond to the concern in a beneficial way.

2. **Analyze** interview data and **identify** data themes.
   Once all the surveys are collected, they will need to be reviewed and summarized to identify themes, trends, and project focus areas. For quantitative data, such as number of employees, support provided to workers (yes or no questions), or gross sales estimates, Excel can be used to tabulate the data. For qualitative data, such as how they see their businesses changing in the future or what particular jobs they find hard to fill, review the responses for frequent themes or words which will emphasize topics to be addressed. Analyzing the data will highlight themes and trends among the business community.

3. **Prioritize** projects.
   As trends emerge, projects can be identified to address business issues and opportunities. While projects may be unique and specific to a community or region, it can be helpful to prioritize them based upon the ability to implement. In other words, which projects are adopted may be determined by local capacity and resources to take action in addressing the proposed plan. Some projects may take months or years to fully address, while others can be addressed in weeks or even days. Consider implementing some "low hanging fruit" or "early action" projects in a timely manner (see the **Best Practices** module for more information on early wins). This will demonstrate to the community that action is being taken and will help sustain momentum for longer-term projects. Longer term projects will be addressed during the Strategy and Implementation phase of the program.

- **Draft a summary** to share survey results and priority projects.
  Using the summarized survey data and corresponding proposed projects, organize the results in

a report that can be shared back with the community or region. Let the data tell a story that will inspire action on proposed projects. Use visuals, such as graphs and charts to communicate findings. Qualitative data from the surveys can provide depth to the narrative.

- **Host a regional event** to share survey summary and plans to implement.
    - Note: for the purposes of BR&E as a component of CREATE BRIDGES, the BR&E survey summaries will be included in the data and information shared back with communities during the Strategic Development meetings. Any "Immediate Action" needs or opportunities to address "small wins" (noted above) can take place at anytime throughout the BR&E process or after, leading up to the Strategic Development phase. The BR&E process requires buy-in and participation from a wide sector of the community and region. Sharing the findings back with stakeholders in a compelling and meaningful way, along with proposed projects to address issues and opportunities, will help to sustain momentum as the project transitions to the implementation phase. The regional event is an opportunity for diverse stakeholders to come together and collectively review the data, provide their interpretations of what the data mean, and share additional ideas for action. This process can improve the quality of interpretation by bringing additional insight to the findings. Engage the audience when sharing back key findings and ask them: based upon these actions, who should be included in the discussion as the process moves into the implementation phase?

Best Practices:

- Allow time for discussion and have someone on hand who can capture feedback.
- Ask participants to share their takeaways, perspectives, and any surprises they had while reviewing the summary.
- Create a celebratory atmosphere that congratulates the region for their collaborative efforts during the BR&E process.

Presentations:

- Presentation example is included in the Appendix.

STEP 3: IMPLEMENT

Implementation: 3-6 months to complete initial projects

Promotion: Continuous – share all wins and progress, no matter how small. This may be the leadership team's opportunity to set up a communication channel with the public.

Develop project teams and commence work on projects

Based upon the proposed projects, have the participants identify individuals or groups who would be best suited to lead efforts on a particular project. Once identified, use the *Plan of Action* template to outline a specific strategy, list steps to accomplish that strategy, identify who will be responsible for completing each step (including a key contact), track anticipated completion date, and once the step is accomplished, the actual completion date. Use this document as the foundation for establishing a plan of communication and work.

Sustain leadership

Create a plan of communication and check in with the leadership team on a regular basis. Turnover and leadership changes during a project are usually inevitable. Take this into account when establishing the leadership team and plan of work. If someone is the primary contact for a project or project step, have them identify a "next in command" or who should be contacted should their role change. This will help to develop and maintain continuity through the implementation process.

Provide updates on projects to the region

As mentioned previously, consider first embarking on projects that are deemed to be "low hanging" fruit or "easy wins." These are the projects that will require fewer resources and can be accomplished on a shorter timeline. As projects and project steps are accomplished, communicate that progress, big and small, in a timely manner back to the region.

Evaluate projects

Once projects are implemented, use an evaluation method to identify outcomes. This could be done with a survey or follow-up communication with businesses who have been impacted by the projects. This feedback can provide insight on a project's success or whether iterations should be made to increase effectiveness.

PROMOTION

Promotion will look different for each step of the process.

- Step 1 - Initial promotion should be focused on education of the process and to invite participants for the leadership team and for interview sign-ups. Continuous promotion of the process is important as the community will quickly move on if they are not given information.

- Step 2 – Since most of this step is behind the scenes, it is important to promote some of the tabulated results with the general community. Promoting the regional event should be the bulk of the promotion in this step.

- Step 3 – Promotion in this step focuses tabulated results and the developed strategies. Sharing the small and big wins allows for the process to demonstrate the value of the interviews and the benefits of the strategies.

Best practices of communication

- Social Media Process Page – This could be specifically for the BR&E or it could be focused on the project as a whole. The challenge with any social media is the necessity for frequent postings and engagement.
- Media releases – Sharing a community news release to highlight the process opens the door for engagement. The challenge with news release is that it is a one-off experience. It is difficult to maintain engagement.
    - If possible, setting up a regular posting in the local newspaper or radio station allows for frequent engagement and to questions and concerns.
- Newsletter – Setting up a newsletter that interested parties can receive allows for regular engagement and updates. The challenge is that most people are inconsistent openers of emails where newsletters are sent.
- Presentations at local Chambers of Commerce, Lions Clubs, Rotary Clubs, Kiwanis Club, or business owner gatherings such as Main Street Organizations. This is a one-time presentation however it can lead to deeper engagement with the business community.

PRESENTATION SESSION

Introduction to Business Retention & Expansion Presentation

Slide 1

INSTRUCTIONS

This slide should be up when session participants join the workshop. Specific state or regional information can also be added, such as organizations or university logos.

Before you begin, welcome the participants, and allow time for introductions from participants. Names, which community they live in, their role in their community, etc. are all good details for introductions. If participation numbers are very large, participants can introduce themselves at their respective tables or in small groups.

SLIDE #1

TIME: 1-5 MINUTES OR AS NEEDED

MATERIALS: NONE

HANDOUTS: NONE

Slide 2

INSTRUCTIONS

Share this acknowledgment of the partnerships with CREATE BRIDGES.

SLIDE #2

TIME: 1 MINUTE

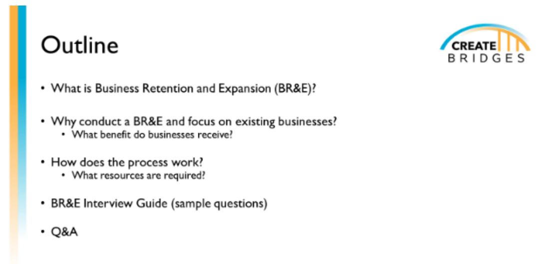
MATERIALS: NONE

HANDOUTS: NONE

Slide 3

INSTRUCTIONS

This slide serves as an outline or agenda for the session's topics.



SLIDE #3

TIME: 1 MINUTE

MATERIALS: NONE

HANDOUTS: NONE

Slide 4

INSTRUCTIONS

The method of BR&E used in the CREATE BRIDGES program is based on the University of Minnesota's curriculum and training.

https://extension.umn.edu/retaining-community-businesses/introduction-business-retention-and-expansion-bre

SLIDE #4

TIME: 1 MINUTE

MATERIALS: NONE

HANDOUTS: NONE

Slide 5

INSTRUCTIONS

Participants may have varying levels of knowledge about BR&E, or they may know nothing about it. This section serves as an introduction to the concept and what it aims to accomplish.

BR&E at its core, an intentional effort to understand your local or regional business climate and work to improve it.

- It involves active listening
- It provides businesses with knowledge or connection to resources
- It can be an opportunity to identify and address policies that unnecessarily hinder business growth in the region
- And it's a tool to explore and identify business needs

SLIDE #5

TIME: 2-3 MINUTES

MATERIALS: NONE

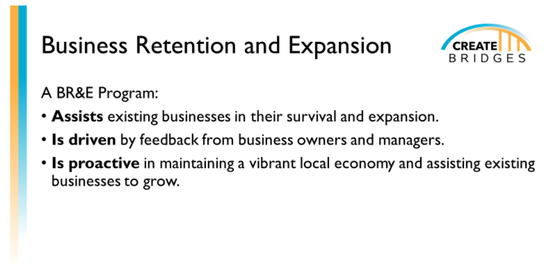
HANDOUTS: NONE

Slide 6

INSTRUCTIONS

This slides outlines what the BR&E program aims to accomplish for a community in general.

It assists existing businesses in their survival and expansion. It is driven by feedback from business owners and managers. And it is proactive, maintaining a vibrant local economy and assisting existing businesses to grow.



SLIDE #6

TIME: 2-3 MINUTES

MATERIALS: NONE

HANDOUTS: NONE

Slide 7

INSTRUCTIONS

The benefits of BR&E for a community are numerous. This slide outlines a handful of ways the process can serve to improve a community's relationship with existing businesses.

SLIDE #7

TIME: 1-2 MINUTES

MATERIALS: NONE

HANDOUTS: NONE

Slide 8

INSTRUCTIONS

This slide serves as a title slide for the following two slides.

SLIDE #8

TIME: 1 MINUTE

MATERIALS: NONE

HANDOUTS: NONE

Slide 9

INSTRUCTIONS

BR&E offers an opportunity to broaden the community involvement in the economic development process.

The visitation component of BR&E is important, not only to capture important feedback to address problems and opportunities, but then also to turn around and demonstrate to the businesses that their contribution to the community is valued.

SLIDE #9

TIME: 2-3 MINUTES

MATERIALS: NONE

HANDOUTS: NONE

Slide 10

INSTRUCTIONS

In addition to what was mentioned on the previous slide, what potential benefits does a business receive from participating in BR&E?

It demonstrates to local businesses that the community appreciates their contribution to the economy.

It helps existing businesses solve problems that they might be facing.

It works to establish and implement a strategic plan for economic development.

SLIDE #10

TIME: 2-3 MINUTES

MATERIALS: NONE

HANDOUTS: NONE

Slide 11

INSTRUCTIONS

This slide serves as the title slide for the following four slides.

SLIDE #11

TIME: 1 MINUTE

MATERIALS: NONE

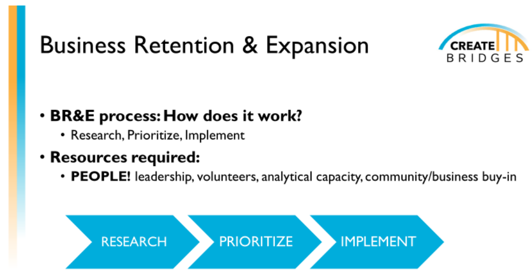
HANDOUTS: NONE

Slide 12

INSTRUCTIONS

A traditional BR&E process can be divided into three segments: Research, Prioritize, and Implement.

The following three slides will outline that process in more detail.



SLIDE #12

TIME: 2 MINUTES

MATERIALS: NONE

HANDOUTS: NONE

Slide 13

INSTRUCTIONS

This slide, and the following two slides, outline the BR&E process as broken down by the three segments mentioned in the previous slide.

Step 1: Research phase

- In this step, the program facilitators will inform the communities and businesses about BR&E, its role in the CREATE BRIDGES process and how it aims benefit existing businesses. This very presentation is a great resource to introduce the concept to communities and can be used as a tool to begin organizing a leadership team.

- A separate presentation is included in the Resources section, designed to recruit and train BR&E volunteers. It is titled: **BR&E Volunteer Visitor Training**.

- The last two steps in the Research phase are to visit the businesses to conduct the actual interviews and then once all the businesses you intend to visit have been interviewed the data will be tabulated into a format that can be used to create the summary, which will be shared back with the communities.

SLIDE #13

TIME: 3 MINUTES

MATERIALS: NONE

HANDOUTS: NONE

Slide 14

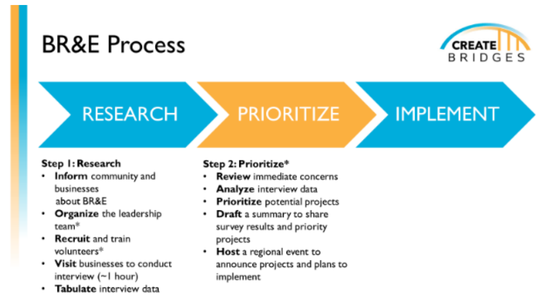
INSTRUCTIONS

Step 2: Prioritize

- Review immediate concerns- a BR&E "immediate concern" is information shared during an interview that is cause for concern. Examples include an impending closure, move, or workforce concerns that will severely limit their ability to do business in the community. With the owner's permission, you can offer to follow up on this specific concern with the specific business to address the issue.

- During this phase the BR&E team will analyze the summarized data and look for emerging themes. This data will then be used to draft a summary to share results with the communities. An example of the summarized results is included in the Appendix titled: **Key Findings from CREATE BRIDGES Survey Responses in Oklahoma**.

- Once the results are summarized and priority projects are identified, the region will host an event to share the results and proposed projects. At this event, regional steering committee members, community leaders, and businesses will work together to plan project implementation.



SLIDE #14

TIME: 3 MINUTES

MATERIALS: NONE

HANDOUTS: NONE

Slide 15

INSTRUCTIONS

Step 3: Implement

- Once priority projects are reviewed and decided upon, develop project teams to begin working on each project. Consider how “low hanging fruit” or “easy win” projects can be accomplished quickly. Accomplishing low-effort, low-resource projects quickly will help to sustain momentum for longer term projects.
- Continue to provide leadership and encouragement to the project teams throughout the process.
- Provide regular updates to the region on the status of selected projects.
- Develop a method (such as a survey) for evaluating the chosen projects.

SLIDE #15

TIME: 3 MINUTES

MATERIALS: NONE

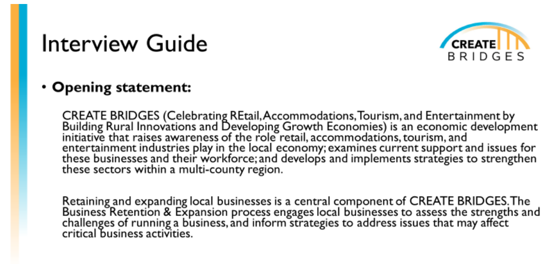
HANDOUTS: NONE

Slide 16

INSTRUCTIONS

This slide, along with the next five slides will provide insight into the actual survey. Consider having full copies of the survey for participants to review as well.

The survey begins with a short explanation of what CREATE BRIDGES is, what it aims to accomplish and how the BR&E process fits within the larger project.



Slide #16

Time: 1 Minute

Materials: None

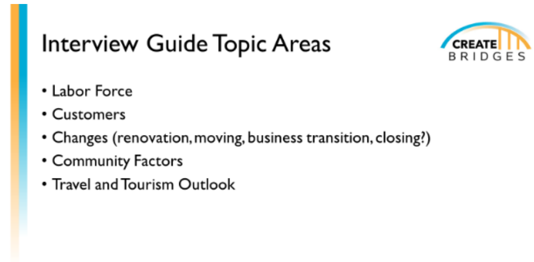
Handouts: Full BR&E Survey For Participants To Review

Slide 17

INSTRUCTIONS

The BR&E survey developed for CREATE BRIDGES covers topic areas that are most relevant to the CREATE sectors- Retail, Accommodations, Tourism, and Entertainment.

The survey was adapted to gain insight into these specific areas while also serving to identify themes that can be addressed to support these sectors.



SLIDE #17

TIME: 1 MINUTE

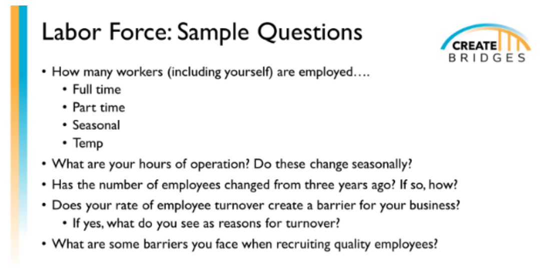
MATERIALS: NONE

HANDOUTS: NONE

Slide 18

INSTRUCTIONS

This slide, along with the next two slides pull questions directly from the survey to show as examples. The facilitator can add additional topic questions as needed.



Slide #18

Time: 1-2 Minutes

Materials: None

Handouts: None

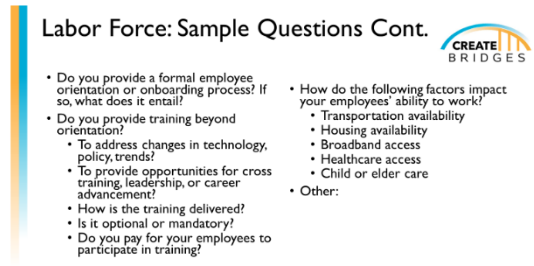
Slide 19

INSTRUCTIONS

This slide shows additional questions that are included in the Labor Force section of the survey.

Review these questions with the participants.

If needed, discuss how issues like onboarding, transportation, housing, or one of the other factors listed here, affects an employee's ability to work.



SLIDE #19

TIME: 2-3 MINUTES

MATERIALS: NONE

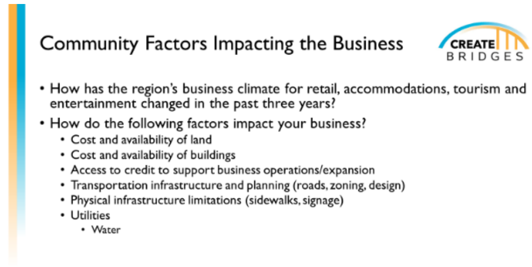
HANDOUTS: NONE

Slide 20

INSTRUCTIONS

This slide shows questions that are included in the Community Factors section of the survey.

If needed, discuss how community factors can impact businesses in the region. If you do, help steer the conversation in a constructive way so that it does not only become a session where participants complain about local barriers to businesses.



SLIDE #20

TIME: 2-3 MINUTES

MATERIALS: NONE

HANDOUTS: NONE

Slide 21

INSTRUCTIONS

Facilitating a BR&E program requires dedication from a variety of community leaders. But as the saying goes "many hands make light work". Most of the resources needed for BR&E will be in the form of personnel and their volunteer time.

SLIDE #21

TIME: 3-4 MINUTES

MATERIALS: NONE

HANDOUTS: NONE

This includes:

- Local organizations such as Chambers of Commerce and Main Street organizations that can advertise the opportunity with local businesses and help connect the BR&E team to owners and managers.

- Presenting about CREATE BRIDGES and the BR&E component at local civic club meetings is a great way to network and promote the program.

- Depending on which format(s) your region selects, volunteers will be needed to visit businesses to conduct interviews or serve as round table discussion moderators if your region.

- Once all the survey data is collected, you will need someone (or a small group) with analytical capacity who can summarize the qualitative and quantitative data into a format that can be used to identify themes and draft the summary report. For this task, consider connecting with a local college or university to see if any students would like to take this component on as a project.

- A successful BR&E program also requires support from local governments, community leadership and the businesses themselves.

Slide 22

INSTRUCTIONS

At the conclusion of the presentation, allow time for Q&A and discussion.

SLIDE #22

TIME: REMAINING

MATERIALS: NONE

HANDOUTS: NONE

RESOURCES

Resources:

- BR&E Interview Survey
- BR&E Interview Survey: Arkansas IRB Example
- Volunteer Visitor Training Power Point
  - BR&E Volunteer Interview Guide
  - BR&E Volunteer Recruitment Letter
  - BR&E Training Details and Marketing Letter
  - Mock Interview Scenario
- BR&E Roundtable Workshop Power Point
  - Roundtable Workshop Agenda
  - Roundtable Moderator Tips
  - Roundtable Feedback Form
- Presentation for Civic Groups
- BR&E Summary Sandstone Hills
- Kentucky BR&E Survey Summary
- Key Findings BR&E Survey Responses in Oklahoma
- Templates
  - University of Arkansas Mock Interview Scenario Video
  - University of Minnesota Training Video
  - Volunteer Training Feedback Form
  - BR&E Letter to Business Owners
  - BR&E Press Release
  - BR&E Survey Data
  - Plan of Action Template
- Additional Resources
  - Business Retention & Expansion International (BREI), organization
  - BR&E Extension Journal

NEXT STEPS

Once the BR&E Introduction workshop has been held with the steering committee and local leadership, consider assembling a BR&E task team. This team should involve a sub-set of the steering committee who are interested in dedicating time specifically to the BR&E efforts, as well as any local leadership who can help mobilize volunteers and the business community to participate. Along with the BR&E committee, decide which BR&E survey method your towns will conduct. You can choose the traditional volunteer model, the Roundtable Workshop model, conduct virtual interviews, or use any combination of the three. During Phase I of the pilot program, several regions chose to conduct various methods simultaneously in order to capture the most number of interviews in a more condensed time frame.

Employee Surveys: If employee surveys are not already under way, they should be addressed next.

SOURCES

University of Minnesota, Extension (2018). *Business retention and expansion in your community: BRE Course*. St. Paul, Minnesota, October 2018. University of Minnesota: Regents of the University of Minnesota.

APPENDIX