

OHIO SEA GRANT AND STONE LABORATORY

Business Retention and Expansion- Ohio's Lake Erie Marina Industry

Joe Lucente and Sarah Orlando
Ohio State University Extension/
Ohio Sea Grant College Program



What You Will Learn

- **The reason for having a BR&E Program- for ANY sector**
- **Organizing, financing and implementing a BR&E program in your community**
- **Required Resources**
- **Setting Goals and Measuring Success**

What is BR&E?

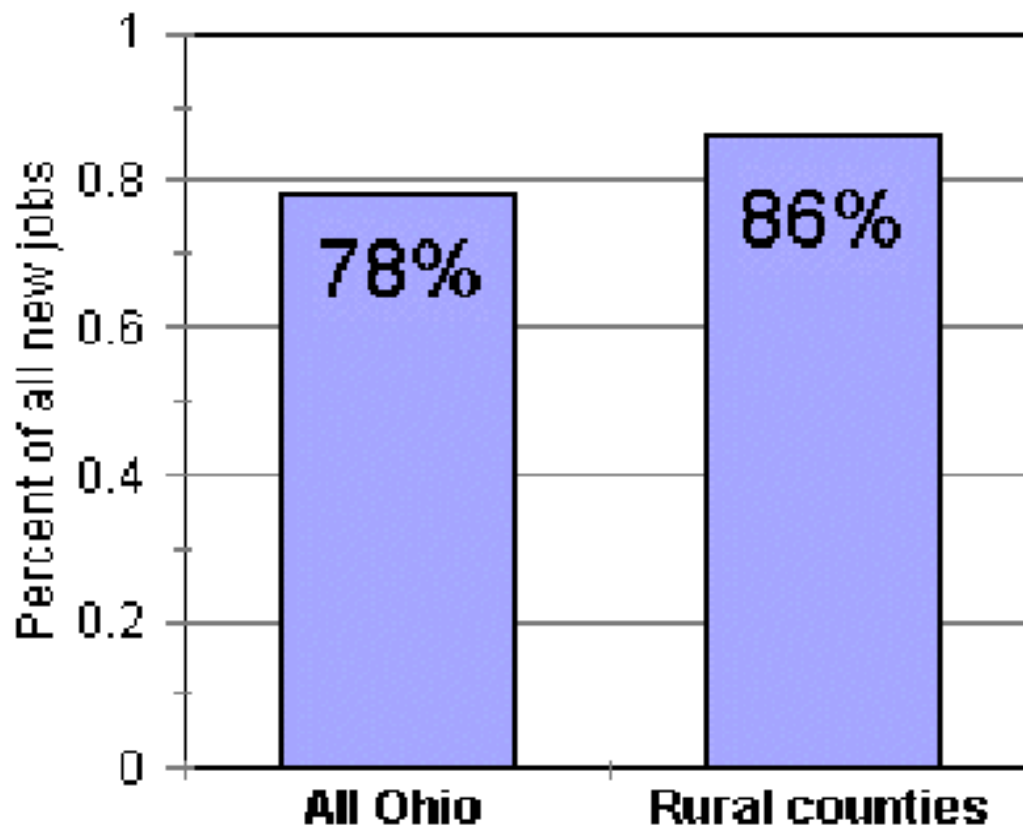
A formal BR&E program is a structured effort involving a broad cross-section of community interests, engaged in ongoing dialogue with the business community to help existing businesses remain profitable, competitive, and efficient.

- 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)

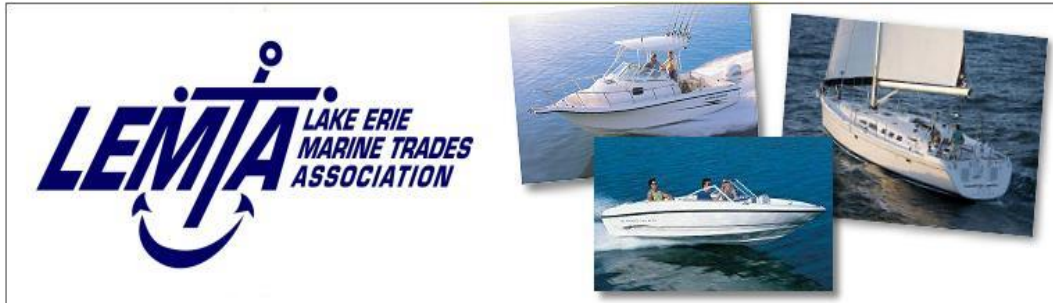
Importance of Existing Businesses



**Jobs Created by Existing
Businesses in Ohio**

**Dr. Dave Kraybill- OSU Dept.
of Ag. Econ. & Dev. Sciences**

Partnerships

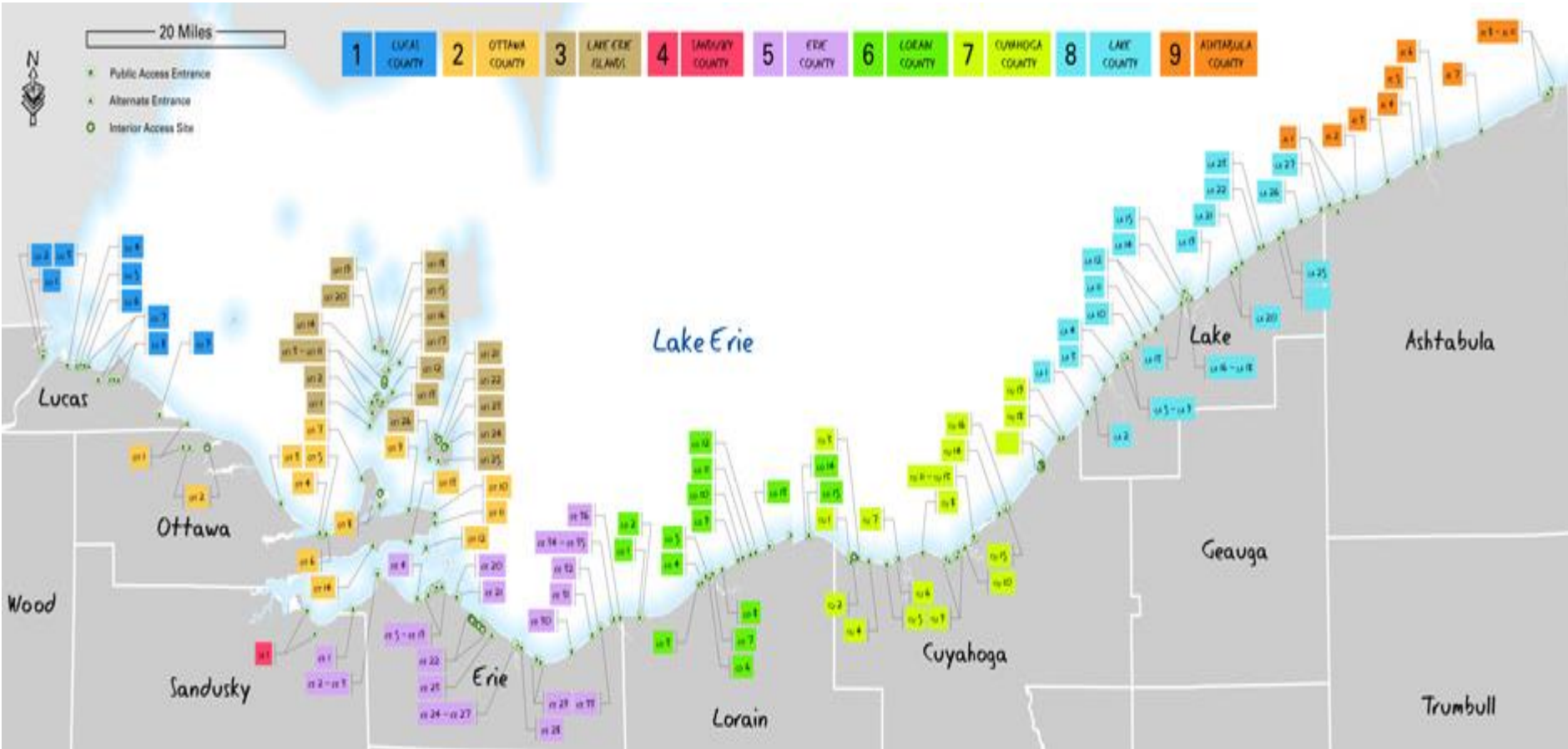


**THE OHIO STATE
UNIVERSITY**

COLLEGE OF FOOD, AGRICULTURAL,
AND ENVIRONMENTAL SCIENCES



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Ohio's Lake Erie Marina Industry Business Retention & Expansion Program 2015 Final Report

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Objectives of BR&E

- **Improve quality of life**
- **Establish integrated approach to economic development**
- **Develop community economic decision-making capacity**
- **Develop 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**

Lake Erie Marinas BRE Outcomes

- **261 businesses surveyed- 51 respondents= 20% response rate**
- **26-41 new FTE positions to be added in 12 months**
- **Creates up to \$52,250 in additional income tax revenue,**
- **Creates up to \$1,247,015 in personal income to Ohio's Lake Erie county economies**
- **51 businesses plan to retain up to 1,011 jobs and create up to 41 new FTE jobs in retail and services business sectors**

Organizing a BR&E Program

- Select a **Coordinator**- this is the key point person in charge. There may be co-coordinators as well.
- Assemble the **Task Force**

BR&E Coordinator

- **A strong coordinator results in a quality process with positive results; a weak coordinator will not get the desired effect of the program. In fact it may actually damage community relationships**
- **In the eyes of everyone involved, the coordinator is viewed as a full time position while others are viewed as volunteers**

Suggested Coordinator Checklist

Major Milestones	Target Date
Constitute BR&E Taskforce	
Orient Task Force Members, discuss objectives, and methodology	
Identify targeted economic sectors and areas of focus to study	
Draft Questionnaire	
Provide draft questionnaire to Task Force for input	
Finalize Questionnaire	
Draft Communication Plan	

Checklist Continued

Major Milestones	Target Date
Publish Survey	
Launch Program	
Begin Data Collection	
Finalize Data Collection	
Analyze and Interpret Data collected	
Address Red Flag Issues	
Communicate Results to appropriate agencies, committees	
Coordinate comprehensive Action Plan	

Other Responsibilities

- **Coordinate responses to immediate business concerns - The Coordinator organizes a response to immediate business needs or “red flag” issues**
- **Manage the data entry and analysis process**
- **Coordinate action planning, program assessment and reporting**

BRE Committee/Task Force

- **Extremely important to overall success of the program**
- **Contributes by providing solutions to local business issues**
- **Participates in critical economic development policy and decision making**

BR&E Task Force

- The Task Force **AND** the Coordinator are ultimately responsible for using the information collected through the BR&E process to develop and communicate the story of the local economy to the public.

BR&E Task Force

- Committee Makeup:
- Should consist of 8-15 leaders from throughout the community.
- Need broad representation from: CED, educational institutions, local government and private enterprise.

Suggested Task Force

- Local Leaders with **USEFUL SKILLS:**
- Media Relations
- Data analysis experience
- Report Writing
- Computer Skills
- Organizational Skills

Task Force Responsibilities

- **Set clear, attainable and manageable objectives for the program**
- **Assist in securing endorsements from local supporting organizations**
- **Serve on committees; media relations, data entry, analysis and reporting, etc.**

Task Force Responsibilities

- Participate in the development of the business questionnaire
- Conduct business visits as appropriate
- Address local concerns and problems cited in the business surveys

Financing Your Program

•3 Most likely Sources

- Utility companies
- Possibly RLF or CDBG
- Business and private donations

Setting Goals and Measuring Success of Your Business Retention and Expansion Program

Annual Task Force Action Plan Development

- **Developing the annual action plan is the traditional approach to BR&E action and assessment.**
- **Task Force and Coordinator develop action items for analysis of the survey data and secondary data.**

Action Plan Development

- **Purpose of the Action Plan is to develop short and long term recommendations and actions to support BR&E and overall community and economic development efforts in the community.**

Action Plan Development

- Each objective of the plan includes an action strategy that specifies tasks needed to meet the objective, who will implement the action, when the actions will be undertaken, and what resources are available to assist in the implementation.

Resources

- Full Lake Erie BR&E Report available at:
- http://comdev.osu.edu/sites/comdev/files/imce/FINAL_APRIL%2015_LAKE_ERIE_MARINA_FINAL_BRE_REPORT.pdf
- Ohio Business Retention and Expansion Program:
- <http://comdev.osu.edu/programs/economic-development/business-retention-expansion>

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