



2024

BUSINESS RETENTION &
EXPANSION INTERNATIONAL

**ANNUAL
CONFERENCE**

JUNE 11-13 | VIRTUAL

Agenda

Day One

Tuesday, June 11th

Workforce Improvements and Opportunities

Noon

Welcome

Dennis Williamson, Fort Smith, Arkansas

12:15PM

Aligning Skills to What is Needed in Industry

Sarah Lewis

This session will discuss ways that educational organizations, industry and government can align to best prepare students and professionals to the changing world with the skillsets needed to match present and future industry demands.

1:15PM

BREI Networking / Q&A

This session will present conference attendees with an opportunity for facilitated networking and a question / answer session. This will be a peer-to-peer opportunity for group collaboration and idea sharing so that all members may grow in their understanding and application of business retention and expansion efforts.

2:15PM

Strengthening Roots: Enhancing Business Longevity and Workforce Growth through BR&E

Diane Lupke, CEcD

This interactive session is designed for business leaders, policymakers, and economic development professionals focused on harnessing the power of Business Retention and Expansion (BR&E) to foster economic resilience. Attendees will explore cutting-edge strategies for sustaining business growth and developing a robust workforce. Through case studies, group discussions, and expert panels, this session will offer insights into creating synergies between business health and workforce development, ensuring a thriving local economy.

3:15PM

Building Workforce with Re-Entry Populations

Wes Jurey

A large number of individuals in the active workforce have been incarcerated at some point in their past. The uncertainty and difficulty in hiring this population often places a burden on both the business and the employee. Re-entry programs are able to help the workforce and support businesses with available positions. This session will discuss re-entry programs and how they are able to support local businesses as well as the workforce at-large.

4:15PM

Adjourn Day 1



Agenda

Day Two

Wednesday, June 12th
Workforce Improvements and Opportunities

12:15PM

Revitalize to Thrive: Fostering Sustainable Business Improvement Districts and Downtown Revival

Alia Abbas, Ramona Gallagher, and Patty Hayes

Aimed at BR&E professionals, urban planners, and community leaders, this workshop delves into the art and science of revitalizing Business Improvement Districts (BIDs) and downtown cores. Participants will learn about successful revitalization strategies, from stakeholder engagement and community partnership building to innovative economic and environmental sustainability practices. The session promises to be a blend of theory and practice, providing participants with the tools and inspiration needed to transform their downtown areas into vibrant economic and cultural centers.

1:15PM

Business Succession and Transition

Michael Darger

American business owners over 55 continue to be the majority and they are growing as a percentage of all business owners. While the ages of owners and businesses are changing every year in small businesses, the combination of those two factors is worth studying because it represents an important BRE issue. Therefore, the University of Minnesota conducted a survey of Minnesota employer businesses in 2023. We received 286 valid responses and this has created a valuable dataset (which is likely relevant to other states as well) about owner awareness, attitudes, aspirations, and preparedness for transitioning the ownership to new owners. This presentation will cover our Business Succession and Transition research as well as our online Extension resources for businesses, economic developers, and business advisers.

2:15PM

Business Continuity and Resiliency

Tarek Habib

This session will explore strategies around helping business owners to find opportunities for continuity of their businesses as well as to overcome obstacles that they face.

3:15PM

Economic Mobility Through Entrepreneurship

Kamesha "Kay" West

This session will feature a 'fireside chat' discussing economic opportunities for entrepreneurship and how individuals can improve their lives and communities.

4:15PM

Adjourn Day 2



Agenda

Day Three

Thursday, June 13th

Innovative Concepts

12:15PM

Annual Meeting / Awards Session

The BREI Annual Meeting will present business for the association. Following this meeting, the organization will present its Awards of Excellence to deserving applicants for business retention and expansion projects in their local areas. Attendees will have the opportunity to learn about these projects.

1:15PM

Survey Design and Analysis

Simon Webb

This session will review the tips and strategies behind designing surveys for community businesses, analyzing the results of those surveys, and carrying these results into practical follow-up and community improvement.

2:15PM

Rethinking Community: Senior Housing Transitions

John Bennett

This session will explore innovative ideas around housing for senior citizens in communities, the challenges behind the higher acuity of need of these housing options, and the opportunities that such housing opens for business growth and residential expansion.

3:15PM

AI Session

Stoni Beauchamp

In this presentation, we are taking a deep look into how AI can be practically used by economic developers doing business retention and expansion work. This includes support for business interviews, research and data analysis, text transcription and translation support, and more. The presentation will demonstrate ways that AI may help to augment the human-work and allow BRE practitioners to draw additional insights while saving time.

4:15PM

Adjourn Day 3



Association



Save the Date

2025 BREI Annual Conference
June 2025 | Cheyenne, Wyoming

STAY CONNECTED

Networking with other professionals is key! Connect with our social media accounts to stay up to date on webinars and meetings and to join the conversation!



Speakers

Dennis Williamson



Director of Workforce Development at Western Arkansas Planning and Development District

Dennis Williamson II, PCED, CWDP, BREC, serves as the Director of Workforce Development at the Western Arkansas Planning and Development District. Williamson is an alum of both the University of Arkansas and Liberty University. Drawing upon a rich background in management and contracting, he adeptly leverages these skills in his current capacities as Economic Development Administrator and Director of Workforce Development.

He is known for his strategic vision and commitment to fostering economic growth and workforce readiness.

With a two-year tenure as a board member of the National Association of Workforce Development Professionals (NAWDP) and various leadership roles, Williamson also holds the position of board president at BREI.

Sarah Lewis



Senior Manager, Economic Advisory, Deloitte

Sarah leads workforce development, economic development, and municipal strategic planning with Deloitte as a Senior Manager on the Economic Advisory team, with more than 15 years of leadership experience in economic development and higher education. Sarah has a long history of connecting employers with talent, designing inclusive careers and co-op programming, and designing policy and programming to support industry needs and advance workforce development. Sarah applies experience in project and service development, supporting community organizations, and implementing business development and investment attraction programming, as well as cultivating innovation and commercialization through entrepreneurship. Sarah has a Bachelor of Arts degree in Economics from the University of Waterloo, and a Master of Education degree in Educational Research, where she studied digital skills development and design thinking for innovation. An engaged community member, Sarah is a Board Director for the Northern Ontario Innovation Centre, Thunder Bay Community Economic Development Commission, and the Thunder Bay Public Library.

Diane Lupke, CECd



President, Diane Lupke & Associates, Inc.

Diane Lupke, CECd FM HLM, has more than thirty years of experience, currently as President of Diane Lupke & Associates, Inc., an economic development consultancy, and previous experience in banking, government, and academia. Her work focuses on the identification of unique assets and opportunities on which a community can build, grow, and sustain itself over time and the financial and organizational structures to support them. She has provided technical assistance to more than one hundred cities, states, and non-profit organizations. Ms. Lupke has special expertise in working with communities facing major economic transitions due to rapid technological change, climate-driven energy preferences, or emerging markets, in particular reuse of key natural assets.

Prior to founding Diane Lupke & Associates in 1990, Ms. Lupke held management positions with Trustcorp Bank and the State of Indiana. Earlier, she was a Research Associate at Indiana University where she also served as an Adjunct Professor. Ms. Lupke has been an active member of the International Economic Development Council for many years and received the Chairman's Award for Excellence in Economic Development in 2012. She previously served on its Board of Directors. She is on the Editorial Board of the Journal of Multistate Taxation and Incentives, serves on the Editorial Board for the journal Local Policy based in the United Kingdom, and co-authored the OECD publication Entrepreneurship: A Catalyst for Urban Regeneration.

Wes Jurey



**President & CEO of
RedemptionBridge**

Wes Jurey serves as President & CEO of RedemptionBridge, a non-profit intermediary focused on establishing new models for workforce development. He is also the Founder, President, and CEO of the Agriculture Technology Innovation Partnership (ATIP) Foundation, affiliated with the United States Department of Agriculture; Senior Advisor to the Manufacturing Skill Standards Council.

Jurey established the Center for Continuing Education and Workforce Development in 2004, selected as one of 12 sites nationally for the Workforce Innovation Networks Initiative, a project of the Ford Foundation and U.S. Department of Labor. Built in partnership with the University of Texas at Arlington (UTA), the City of Arlington, and the Tarrant County Workforce Investment Board, the facility fostered partnerships with virtually every major education and workforce development stakeholder in Tarrant County.

He was appointed to the 9-member U.S. Department of Labor panel in 2002, charged with the development of the department's five-year strategic research plan; Labor Secretary Elaine Chao appointed him to the Department of Labor's Advisory Committee on Apprenticeships in 2008, and he was reappointed by Labor Secretary Hilda L. Solis in May 2010. In 2009, he was selected as a Ford Foundation Fellow, and was appointed by the Business Roundtable as one of 25 commissioners for the Springboard Project, an independent commission that developed education & workforce policy recommendations for the Obama Administration. In 2010 he was appointed to the Council on Competitiveness' Workforce Advisory Group.

Alia Abbas



**CEO & Founder of Alia
Consulting-Economic
Development Firm**

As the CEO and Founder of Alia Consulting-Economic Development Firm, Alia leverages her extensive background in disaster and emergency management, as well as business continuity, to drive the success of her firm. Alia Consulting specializes in providing crucial support to economic development organizations, particularly in disaster and emergency preparedness, with a strong focus on business continuity. Alia's firm has played a pivotal role in assisting clients with their investment attraction initiatives, supply chain strategies, and disaster recovery planning. Through collaborations with esteemed organizations including the International Economic Development Council, City of Toronto, City of Brampton, and Toronto Global. Additionally, Alia and her firm offer invaluable expertise in developing comprehensive economic development strategies, encompassing areas such as business retention and expansion (BR&E), foreign direct investment (FDI), and strategic community planning. With ten years of project management experience, collaborating with municipalities across Canada and the United States of America, Alia possesses a deep understanding of the diverse needs and challenges faced by different communities. Alia's exceptional work and unwavering dedication in economic development have earned her international recognition and prestigious awards. She was honored with the distinguished 2023 Top 40 Under 40 award by DCI and Jorgenson Consulting at the International Economic Development Council (IEDC) Leadership Summit held in Phoenix, Arizona. Additionally, she received the Bright Ideas award from the Economic Developers Council of Ontario (2020/2021) for her outstanding performance measurement metrics report, which has proven instrumental in assisting economic developers in their recovery efforts from the COVID-19 pandemic. Notably, her accomplishments were acknowledged by the Premier of Ontario through a personal letter of recognition.

Michael Darger



**Extension Specialist in
Community Economics
at University of
Minnesota Extension**

Michael has managed the Extension Department of Community Development's Business Retention and Expansion (BRE) programs for many years. Since 2021, he has led Extension's Business Succession and Transition programming and research. Currently, he is principal investigator for The Minnesota Business Succession and Transition Study of employer businesses with 5-500 employees. Through the Connecting Businesses and Community program (i.e., Extension's BRE model), he provides consulting and applied research for Minnesota communities. He cooperates with Extension educators and U of MN specialists on BRE initiatives and other community economics programs and research. He co-teaches BRE courses (online and in-person) for economic development professionals and stakeholders in the USA and internationally. Michael created a special BRE issue of Community Development, Journal of the Community Development Society 48:2, May 2017. It was published (2019) as a hardcover book, Business Retention and Expansion (BRE): A Practical Approach to Economic Development (ISBN: 978-0-367-17361-6) in the Community Development-Current Issues series. Routledge (Taylor & Francis Group), Oxfordshire, England. Michael was the department's first community economics program leader from 2004-2010, when he served as supervisor, coach, and convener for nine Extension educators. Before joining Extension, Michael spent 10 years in local economic development positions with both urban nonprofit organizations and county governments. He also has experience in commercial banking, corporate finance, and marketing.

Tarek Habib



**Senior Manager KPMG
Cybersecurity &
Resilience**

Tarek is a Senior Manager in KPMG's Cybersecurity practice and specializes in business resilience and information security. Tarek's experience includes helping clients design and implement end-to-end business resilience programs in various sectors, including government, financial services, natural resources, and manufacturing/industrial. Tarek is an active speaker on the topics of cybersecurity and business resilience, providing insights into current trends and practical approaches for businesses of various sizes and non-profits to protect themselves against cyber-attacks and significant business disruptions.

Kamesha "Kay" West



**Principal Consultant -
People in Place
Economics Consulting**

As a principal consultant at People In Place Economics Consulting, Kamesha provides high-quality and customized services to clients across various sectors and regions. In her current role, Kamesha consults economic development organizations on development projects, business retention and expansion efforts, and capital acquisition. She also provides research and recommendations to support economic mobility, entrepreneurship, and community and economic development. Managing projects and providing strategic planning recommendations for grants and diverse funding resource allocations while interacting with various local, state, and federal agencies are among her key responsibilities. Kamesha's skill set includes analytical skills, marketing communications, and process improvement.

Simon Webb



Manager at Deloitte

Working with Deloitte's Economic and Policy Advisory, Simon has managed over 50 business-related market research projects in communities across Canada. He contributed to the development of some advanced analytics used in Triage BR&E survey instruments such as the Community Business Health Index and a machine learning algorithm used in the calculations of derived importance. Simon joined Deloitte from MDB Insight with a vision to put data insights to work for clients and support the economic, social, and environmental wealth of Canadians. He previously worked for the Offord Centre for Child Studies at McMaster University and was an Economist for Environment Canada's Economic Analysis Directorate. He has over 10 years of experience designing and implementing quantitative and qualitative research methodologies and has been published in multiple scientific journals. Simon holds an MA in Economic Policy from McMaster University. He also earned a certificate in Big Data Analytics from McMaster, and a Combined Honours degree in Economics and ESS (Environment, Sustainability and Society) from Dalhousie University.

Cuevas Peacock



**Advisor, Inclusive
Economic
Development at New
Growth Innovation
Network**

Cuevas Peacock is an Advisor, Inclusive Economic Development at NGIN, supporting local economic development practitioners to advance equity in their cities, counties, and regions. With a background in community development, community organizing, economic development, entrepreneurial support, higher education, K-12 education, and place-based development, Cuevas brings a unique perspective to the team. Cuevas holds a B.S. in Public Affairs from Texas Southern University, a Master's of Social Impact from Claremont Lincoln University, and is certified as a Professional Community and Economic Developer through the Community Development Institute.

Armando Moritz-Chapelliquen



**Senior Program
Officer, Economic
Development at LISC**

Armando is a formally and informally trained organizer, facilitator, and capacity builder. He is energized by empowering communities and building transformative relationships with his peers. Having established and led industrial land use and commercial tenant advocacy campaigns while working with the Association for Neighborhood & Housing Development in New York, he is passionate about coalition building, economic justice, and creating robust policy foundations for equitable economic development. As an alum of the Center for Community Leadership and the Forefront Fellow of the Urban Design Forum, Armando is most comfortable when blending the complexities of program and policy design with the immediate needs of marginalized populations.

John Bennett



**Community Economics
Extension Educator with
the University of Minnesota
Extension Department of
Community Development.**

John Bennett is a Community Economics Extension Educator with the University of Minnesota Extension Department of Community Development. John has a BA in Geography and Urban and Regional Studies from the University of Minnesota Duluth and an MA in Public Policy and Administration from Northwestern University. He has a background in public finance, community development, food access, and city and regional economics. John was the President of Business Retention and Expansion International (www.brei.org) and was on the board for the Iron Range Economic Alliance.

