Course Description

This course is designed to provide the economic development practitioner the fundamentals needed to develop and implement a viable Business Retention and Expansion Visitation program. The principles imparted by the instructors and through the supplementary materials contained on the course website address the IEDC economic development competencies of business retention and expansion and strategic planning, while touching on the competencies of workforce development, neighborhood development strategies, and managing an economic development organization.

Instructors for the course are professionals who are well-versed in business retention and expansion strategies and have a wide range of experience implementing these programs with both large and small communities. The course is divided into the following 17 sections:

- **Section 1 – Introduction** – This section provides an overview of the course and its requirements. (30 minutes contact time; 1 hour additional study recommended)
- **Section 2 – BR&E Models** – This section provides an overview of the four types of commonly used models of a Business Retention and Expansion Visitation Program. Each type is discussed as part of a continuum range and actual examples of environments in which each type of model is successful are presented. (30 minutes contact time; 2 hours additional study recommended)
- **Section 3 – Introduction to Program Planning** – This section uses a logic model framework to present the basics of program planning. While the logic model is commonly used for program evaluation (see Section 12), it is perhaps more suited as a program planning tool because it forces the practitioner to consider the complete environment in which the program will operate as well as providing a framework to develop the program's infrastructure, including a viable budget. Particular attention is paid to the delineation between the short-, medium-, and long-term outcomes and how these are instrumental in the program's success and sustainability. (30 minutes contact time; 4 hours additional study recommended)
- **Section 4 – Community Assessment** – This section provides an overview of the various methods and strategies that the economic development practitioner can use to assess the local community to determine the environment in which the program is to operate. While the main emphasis is on economic assessments, other types of assessments (political, social, legal, etc.) are also discussed. (45 minutes contact time; 2 hours additional study recommended)
- **Section 5 – Social Capital** – This section discusses the role that social capital can play in establishing and sustaining a BR&E Visitation Program. This section focuses on the

neighborhood development strategies competency and utilizes community capitals concepts to demonstrate the value of involving the community in sustaining and supporting the BR&E Visitation Program. While this topic would seem to be a be topic that would be tailor-made for smaller, especially rural, communities, previous class participants from large cities such as Chicago and Austin have indicated that while they had not thought about trying to implement social capital strategies in their programs, they could utilize these types of strategies to strengthen their programs. (30 minutes contact time; 1 hour additional study recommended)

- **Section 6 – Roles of Local Leaders** – This section provides an overview of the different roles that are necessary to conduct and sustain an economic development program. While many economic development organizations are one- or two-person operations, the delineation of roles among existing personnel is important to understand in order to effectively implement the program. (15 minutes contact time; 2 hours additional study recommended)
- **Section 7 – Survey Design and Implementation** – This section provides an indepth overview of the central operational aspect of a visitation program. Various strategies to procure a survey instrument that will facilitate the gathering of information to identify company-specific and systemic issues that may be occurring in the region being addressed. Examples of surveys are provided both on the course website and through the Members-Only section of the brei.org website. (30 minutes contact time; 4 hours additional study recommended)
- **Section 8 – Firm Visitation Overview** – This section provides an overview of the strategies that can be used to conduct an effective visit with a business' owner or manager. Typically, this is the most interactive of the sessions, mainly due to the fact that most of the class participants have limited experience in their roles and have typically had no experience in the area of discussing pertinent issues with company administration. Special emphasis is placed on the topics of nondisclosure, data use, and informed consent. (45 minutes contact time; 5 hours additional study recommended)
- **Section 9 – Red Flag Review** – The title of this section is a bit of a misnomer since the discussion covers red, yellow, and green flag issues and the various strategies that may be employed for each. This section also discusses how the Response Team of partners external to the organization can be utilized to leverage the organization's efforts and build sustainability for the program. (15 minutes contact time; 2 hours additional study recommended)

- **Section 10 – Survey Analysis and Reports** – This section provides overviews of several different aspects of what is typically the most challenging aspect of the program for the practitioner. The subject of data analysis, particularly for qualitative data, is a new and difficult topic for those practitioners. Basic statistical analysis techniques are presented for quantitative data and a portion of the assignment for this meeting deals with identifying relevant topics that open-ended, qualitative data survey responses address. (30 minutes contact time; 4 hours additional study recommended)
- **Section 11 – Action Team Planning** – This section focuses on issues that are likely more systemic (company-common issues) that may likely take a substantial amount of time to address. This section utilizes strategic planning topics to leverage the efforts of the Action team that is composed of the program's external partners (these partners may or may not be comprised of the same partners that comprise the Response Team discussed in Section 9. (30 minutes contact time; 2 hours additional study recommended)
- **Section 12 – Program Evaluation** – This section refers heavily to Section 3 and uses the logic model framework to evaluate the effectiveness of the BR&E Visitation Program. Evaluation begins with an assessment of the programs inputs and outputs (resources, activities, number of visits, etc.) to achieve short-, medium-, and long-term outcomes. Special emphasis is placed on achieving outcomes in the community rather than counting outputs such as the number of visits as a measure of success for the program. (30 minutes contact time; 4 hours additional study recommended)
- **Section 13 – Community Input and Implementation** – This section is a continuation of the social capital discussion initially held in Section 5. Celebrations, particularly in smaller communities, can be a significant developer of social capital; that is, the program works to bring the community closer together to achieve a common goal. While many community residents may not participate in these types of activities, issuing the invitation to them to learn about the program provides a sense of program transparency for a civic function (economic development) that is often necessarily shrouded in secrecy. While practitioners are cautioned to maintain confidentiality of business discussions when presenting the program's successes to a lay audience, the use of willing clients and other stakeholders (including program champions such as EDO board members and external partners) is encouraged to demonstrate the value of the program to the community. (30 minutes contact time; 1 hour additional study recommended)
- **Section 14 – Special Topics in BR&E** – While not often recognized as such, the BR&E Visitation Program methodology, in any form that it takes, is a community development methodology that can be used to solve many issues. This section presents a discussion of the use of this methodology to address several BR&E topics not typically discovered

through a typical business visit. These topics are identified and discussed in a special edition of *Community Development* and have been incorporated into a resource text available through online sources. (30 minutes contact time; additional study as needed)

- **Section 15 – Managing an Economic Development Organization** – Due to the fact that many of the past participants in this course are administrators of their EDO and that many of these have little experience in managing an EDO (many of these people have less than six months experience and are the sole employee of the organization or may have a relatively small staff), this section was derived from a more intense BREI continuing education course. It provides an overview of issues that seem to cause EDO administrators the largest number of problems including mission drift and mishandling of funds. (30 minutes contact time; 2 hours additional study recommended)
- **Section 16 – BREI Certification Requirements** – This section is an overview of the requirements to certify and recertify as a BR&E Coordinator (the basic level of certification) or BR&E Professional (the advanced level of certification). Participants are encouraged to become an active member of BREI and to participate in the organization's activities.
- **Section 17 – Summary of Good BR&E Practices** – This section provides a summary of the content covered in the course and provides an opportunity to correct any misunderstandings regarding critical program components.

The content of this course requires applicable practice for true mastery over a time frame that exceeds the course parameters. To provide assistance to the participant in developing and implementing a program, the student is urged to develop a network of peers in the program using the Participant List. The instructor)s) for the program will be available by phone, email, or videoconference not only throughout the course, but after the course to provide feedback and to answer any questions that might arise. While this does not mean that the instructor(s) will create the plan, significant feedback and advice can be accessed by the participant even after the class is completed.